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Executive Summary

LEAD ORGANIZATION: Utah Commission on Service & Volunteerism

CONSORTIUM MEMBERS: Washington Commission for National and Community Service, Serve Alaska, California Volunteers, Hawaii Commission for National and Community Service, Serve Idaho, Serve Montana, Nevada Volunteers, Oregon Volunteers, Commission for Voluntary Action and Service and Serve Wyoming. The consortium also includes ASC and is further comprised of stakeholders representing AmeriCorps State/National and Senior Corps programs.

PROPOSED ACTIVITIES: UServeUtah, the Utah Commission on Service & Volunteerism (UCSV) requests \$50,000 in CNCS Training and Technical Assistance funds for regional training conferences to facilitate the planning, implementation and fiscal oversight of the 2014 Pacific Cluster National Service Conference (PCNSC). UCSV proposes a 3-day regional conference in Salt Lake City, Utah in the Spring 2014 (late March or early April) for AmeriCorps State/National, Senior Corps, Social Innovation Fund and commission program staff. The PCC will use a collaborative planning process to develop content specific to each participating national service stream as well as collaborative sessions to facilitate cross-stream training. Workshops will focus on CNCS competencies in performance measures and grant compliance as well as other topics to address critical program needs, support continuous program improvement and maximize program impact. The conference design will also feature a virtual component to ensure staff that is unable to travel can also benefit from this valuable content.

Program Design

RATIONALE FOR REGION PROPOSED:

On behalf of the commissions in the CNCS Pacific Cluster, UServeUtah, the Utah Commission on Service & Volunteerism (UCSV) proposes to host the Pacific Cluster National Service Conference. This event will be held in the Spring 2014 (late March or early April) in Salt Lake City, Utah and will be open to all of the national service programs operating in the cluster, including AK, American Samoa, CA, Guam, HI, ID, MT, NV, Northern Mariana Islands, OR, UT, WA and WY. Commission from the cluster have participated in conference calls or provided other feedback to ensure their commitment to the Salt Lake City location and to UCSV serving as the official applicant for the cluster event. Commissions have also committed to staff participation in the Pacific Cluster conference.

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The vast geography of the west makes travel difficult for those states and territories that are located off the continent, and can be financially challenging for some of those located on the continent. The location in Utah is fairly central to many of the states and can be accessed by car within a reasonable amount of time from Nevada, Idaho, Montana and Wyoming. The airport in Salt Lake City is a hub for a major airline and has non-stop flights to/from all cluster states with the exception of Guam and the Northern Mariana Islands. In addition, Salt Lake City is very close geographically to Arizona and Colorado and UCSV is willing and able to expand the capacity of the conference to accommodate participants from areas outside of the Pacific Cluster geographic region as needed.

FACILITIES, LODGING, MEALS AND LOGISTICS SUPPORT:

UCSV/ASC staff will research facilities used for past conferences and contact local Convention & Visitors Bureaus to review other options. Facilities will be assessed on their capacity to host a multiday conference for a minimum of 200 and maximum of 300 persons, disbursed among four-six breakout sessions at any given time, as well as their capacity to be fully accessible for persons with disabilities.

Facilities must be capable of providing lodging and meals at the government per diem rate.

Based on last year's event in Portland, OR there were approximately 200 attendees. UCSV will implement a survey for state commissions and Senior Corps program directors to obtain estimates on the potential number of attendees from each state for this event.

To ensure that as many programs benefit from this training opportunity as possible, a virtual component will also be offered for commission and program staff who are unable to attend the conference in person. This will consist of live streaming of plenary sessions and CNCS required content in performance measures and compliance. In addition, we plan to record breakout sessions for AmeriCorps and Senior Corps that can be accessed on demand during and after the event. All other content will be made available in document format to all participants via a PCNSC website to enable both remote and in-person participants to take advantage of all training content.

USCV will work with the Utah Education Network (UEN) which coordinates telecommunications technology for Utah public and higher education, to provide audio visual support and logistics for the virtual component of the conference. We plan to charge \$35 per person for those unable to travel to participate in the virtual training and estimate that 50 staff will select the virtual option.

OUTREACH PLAN:

UCSV has already begun outreach to Pacific Cluster commissions and AmeriCorps programs. On

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June 9, 2014 a conference call was held to bring together Pacific Cluster state commissions to discuss the PCNSC, and Commissions that participated in the call unanimously supported this application. Letters of support from these commissions are included in the supporting documents.

UCSV staff will invite America's Service Commissions (ASC) to join them in conducting additional outreach to State commissions. ASC's mission is to advance national service, volunteerism, and the national network of state service commissions. UCSV will also work with the Utah Senior Corps Association as well as the National Senior Corps Association to facilitate outreach to the Senior Corps programs operating in the region. UCSV will create and publish a proposed agenda, registration information by December, 2014. Marketing materials will be posted on ASC and the PCNSC websites, social media (Facebook, Twitter, LinkedIn), and e-news subscriptions. UCSV will request PCNSC information be posted on CNCS website. Regional branding will be created for use on conference materials in addition to CNCS branding required by the cooperative agreement. Each commission in the consortium will be responsible for forwarding marketing materials to their key stakeholders. In both the planning and implementation phases of the conference, we will keep state commissions and CNCS State Offices up-to-date through regular conference calls, emails and a planning website where all state commission staff and CNCS State Offices can view planning progress, contribute to decision-making and share information with programs.

The minimum target attendance for the PCNSC is a total of 220 participants, including 80 Senior Corps staff, 100 AmeriCorps State and National staff, 20 state commission staff and 20 other invited service stakeholders. UCSV will work to ensure that the facility is able to accommodate up to 300 participants if needed.

PLAN FOR CONFERENCE DESIGN:

USCV will invite representatives from Pacific Cluster commissions, CNCS State Offices, Senior Corps, AmeriCorps and other national service programs to participate on a PCNSC planning committee. The committee will begin to meet regularly upon CNCS' notice of intent to award a cooperative to UCSV. The agenda and program will be developed by a Content Group composed of a subset of the Planning Committee with extensive experience in designing and implementing national service training. The Content Group will also determine presenters and facilitators for this content based on their vast knowledge of inspirational and effective trainers. USCV will initiate contracts with the selected presenters.

The PCNSC will be three days in length, with the potential for half days of conference content on

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either end to allow for travel flexibility. Each day will begin with a plenary session, followed by a series of tailored breakout sessions, and conclude with a large group reflection, networking activity, or service project. Opportunities for specific stakeholder groups to host independent meetings, orientations, and trainings may be offered pre or post conference upon request.

The following tracks of learning will be offered at the conference: AmeriCorps State and National, Senior Corps, commissions, and volunteer engagement. Required trainings for CNCS competencies regarding performance measure data collection, applying evidence-based theories of change, program evaluation, and grants/financial management will also be offered

Including topics listed above, the conference will also focus on common and critical needs of national service programs in the region. These needs will be identified through a comprehensive needs assessment survey to all national service programs in the cluster. Survey results, combined with subjects required by CNCS, will allow for appropriate design of the agenda's structure, emphasis, and flow to attain maximum educational impact.

UCSV will utilize peer trainers in order to tap into the subject matter expertise available in the field. Peer trainers may be identified by the committee, CNCS State Office staff, and programs.

National training and TA providers will be sought for expertise and facilitation, particularly for the required CNCS topics of performance measures and grant/financial compliance. CNCS senior leadership will also be invited and requested as potential keynote presenters.

OUTPUTS, SATISFACTION, AND KNOWLEDGE GAINS:

UCSV will implement the assessment protocol provided by CNCS to assess knowledge gains related to required CNCS content. In addition, UCSV will develop surveys to be administered at the conclusion of each workshop and an online evaluation will be conducted after the PCNSC to measure participant satisfaction and ability to apply new learning. These surveys will be compiled and the results analyzed within 30 days of the completion of the PCNSC and appropriate information provided to CNCS. An online survey will also be administered for virtual PCLC participants to assess learning outcomes for them as well.

TIMELINE:

September 2014: Announcement/negotiation/approval of cooperative agreement.

October-November 2014: Regional planning committee meets regularly, facility contract executed, trainers secured, and marketing materials developed.

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December 2014: Registration system opens, marketing and logistics coordination continues.

Three weeks prior to event: Registration deadline.

Dates TBD: PCNSC takes place

30 days after: Outputs and evaluation data returned (if aligned with CNCS requirements).

90 days after: Financials reconciled, final report to CNCS.

CAPACITY AND STAFF ROLES:

UCSV will serve as the point of contact with CNCS and submit all required materials. UCSV will manage budget and allowable costs, secure conference facility, and print materials. UCSV will co-facilitate the planning committee with ASC. The planning committee will advise conference development, secure trainers, and assist with promotion. UCSV will respond to all requests for reasonable accommodations and ensure accessibility.

ASC will market the conference to their network and provide continuous support to the lead duties of the UCSV. ASC will communicate successes and cautions of other awarded commission lead applicant's conferences to those that have yet to convene. Executive Directors of ASC and the UCSV will attempt to secure cash and/or in-kind sponsorships to increase revenue.

UCSV will contract an event coordinator to support implementation during the critical planning and preparation period in the month leading up to the event and during the PCNSC.

Staff from Participating Pacific Cluster commissions will be strongly encouraged to volunteer to support various conference-related activities each day. Those responsibilities will include options such as, but not limited to, serving as a break-out session host, staffing the registration or information table, or other logistical support as needed.

RATIONALE FOR APPROACH:

The UCSV's rationale for this approach is based on experience. The intent is to replicate the most successful elements of the 2013 pacific cluster event and enhance the conference by adding workshops related to new CNCS priorities, and increasing overall capacity.

Organizational Capability

DEMONSTRATED SUCCESS AND EXPERIENCE:

ASC, in partnership with the Iowa Commission on Volunteer Service, initiated, developed, and implemented the conference model which inspired the regional training Notice of Funding Opportunity. The UCSV, in partnership with ASC, is eager to improve upon the model in the coming

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months with the support of CNCS.

The UCSV has proactively sought to address the needs of AmeriCorps State/National and Senior Corps in all of its training and educational opportunities. The UCSV has a history of initiating training and conference partnerships. Some examples in past years include: Utah Conference on Service hosted from 2000-2013, which engaged up to 600 participants annually from non-profit organizations, Senior Corps programs and AmeriCorps programs in a 3 day event that focused on volunteering and service as a solution to address critical community needs. The Commission has also hosted a multiple day Youth Summit for several years with over 150 attendees as well as a Civic Engagement Retreat, Citizen Corps Conference and various trainings including; AmeriCorps Program Director Training, Volunteer Management Training, and Spontaneous Volunteer Management Training. All trainings have included outcome measurement with most including pre/post testing to evaluate participant's gain in knowledge.

These examples demonstrate that the UCSV and ASC are accustomed to routinely presenting education opportunities with large audiences, multiple tracks of learning, and often multiple days in length. Further, the UCSV has a wealth of experience in the design and facilitation of personalized and targeted learning interventions for smaller cohorts of AmeriCorps, Senior Corps, and other service programs. The topics of these trainings have included financial management; grant compliance; performance measurement; theory of change, and methods of data collection that empirically demonstrate impact.

The UCSV provides routine technical assistance regarding the selection, systems development, and reporting requirements of CNCS performance measures. The UCSV staff has received regular training from leading experts in CNCS performance measures including Sue Hyatt/Core Thought and JBS International. Performance measures improvement and evaluation are also routine agenda items at UCSV program director trainings. More than 16 national service programs representing all focus areas have received performance measure training and support from UCSV staff in recent years.

EXPERIENCE AND EXPERTISE OF KEY STAFF:

The UCSV intends to contract with ASC to maximize the capacity to design and achieve an excellent conference. Qualifications of the key staff from UCSV and ASC are as follows: Rachel Manuel Bruns is the deputy director of programming and operations for ASC. She is a shared staff member between ASC and the Iowa Commission on Volunteer Service (technical assistance provider to volunteer centers). Other leadership roles have included the director of Volunteer Wisconsin and Iowa Campus

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Compact. She also played a lead role in the coordination of the 2013 PCNSC.

LaDawn Stoddard has served as Executive Director of UServeUtah, the Utah Commission on Service & Volunteerism, since 2012. Prior to this she was the AmeriCorps Program Manager for Utah and was responsible for grants management, compliance monitoring and providing technical assistance to national service programs within the Commission's portfolio. During her 10 year tenure she has facilitated trainings provided by the UCSV including trainings and conferences on volunteerism, civic engagement, and AmeriCorps member skill development hosted by the commission.

Rochelle Runge, project specialist with UCSV and previously with the Maine Commission, has nearly 10 years of event management and conference planning experience. At the Maine Commission for Community Service she managed the annual statewide conference of 300 attendees and was also responsible for volunteer recognition programs with ceremonies that ranged in size from 25 and 300. Her responsibilities included working with vendors, advertising, planning, catering, recruiting sponsors, planning traffic flow, registration, and all other logistics. She was also involved with the planning and implementation of ongoing trainings that the Commission provided

SYSTEMS, STRUCTURE, AND STAFFING:

The UCSV staff has extensive experience in national service program oversight, training and event management. All staff are experienced in AmeriCorps and Senior Corps programming and compliance. Through collaboration with other commissions and the planning committee, as well as their colleagues in the CNCS state offices, UCSV staff will identify best practice leaders and subject matter experts with the ability to provide comprehensive training in topics such as program compliance, performance measures, fiscal sustainability and program evaluation.

FISCAL COMPLIANCE OVERSIGHT:

UCSV has managed and coordinated National Service programs including AmeriCorps*State, AmeriCorps EAP, Promise Fellows and VISTA programs, since 1994. For nearly 20 years, UCSV has worked to establish high quality, competency-based training and technical assistance for these National Service programs. It has also administered 2010-2014 VGF grant and the Citizen Corps program for the State of Utah which is funded through federal sources. The UCSV is an agency within the UT Department of Heritage and Arts (DHA). The UT DHA adheres to the Generally Accepted Accounting Principles, undergoes regular financial reviews, and is audited annually by the

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State Auditor. As a state agency, DHA has sound fiscal, program, and personnel policies that are reviewed and updated on a regular basis. DHA will ensure fiscal oversight and compliance with federal requirements. UCSV will review and approve the cooperative agreement with CNCS and the subsequent contracts with ASC, facility, and trainers. The UCSV will also supervise the execution of each contract's scope of work and financial reconciliation.

PROJECT MANAGERS:

The project management duties of conference coordination and training design will be designated between Rachel Manuel Bruns (ASC) and Rochelle Runge (UCSV).

Cost Effectiveness and Budget Adequacy

COST-EFFECTIVENESS AND REASONABLE COST FACTORS:

The registration fee proposed is up to \$150 for persons residing within 100 miles of the conference location, and up to \$75 for persons residing beyond 100 miles. The rationale for the reduced rate is to offer a built in "scholarship" to offset travel costs and hotel rooms for those with significant distances to travel. Registration for virtual conference attendees is not expected to exceed more than \$35/person. Reasonable expenses factored into the fee include meeting room rental, five meals, lodging, live-streaming technology, trainers' fees and travel.

Any revenue beyond local registration fees will be acquired through sponsorships yet to be determined. The Executive Directors of the UCSV, ASC, and the conference host state will be tasked with the acquisition of cash or in-kind sponsorships.

The budget proposed is sufficient to provide the participants with an excellent conference and effective learning experience. The current UCSV budget is \$3.5 million and the cooperative agreement would represent <1.5% of the total budget. Expenditures and revenues are tracked and allocated appropriately in the state's financial management system.

Clarification Summary

N/A