

# Narratives

## Executive Summary

OneStar Foundation (OSF), the Texas state service commission, offers this proposal as the lead applicant of the Southwest Region, a consortium of members of State Service Commissions to facilitate the planning, implementation, and financial oversight of the 2014-15 Southwest Region's National Service Conference (SWNSC). OneStar, in collaboration with America Service Commissions (ASC), the national association of the 53 state service commissions, proposes a multi-day regional conference for AmeriCorps State/National, VISTA, NCCC, Senior Corps, and commission program staff and leadership based in the Southwest Region (AR, AZ, CO, KS, LA, MO, NM, OK and TX). The SWNSC's structure will include tracks specific to these stakeholders, collaborative sessions to facilitate cross-stream training, and a virtual component to accommodate participants unable to travel. Trainings will focus on the Corporation for National and Community Service's (CNCS) competencies in performance measures/evaluation, compliance for grants administration, program/financial management and other topics vital to effective program impact. In addition to the commissions listed above, this proposal has strong support from the Texas CNCS State Office and Texas Senior Corps Association (TSCA), as well as several prominent national training and technical assistance providers. The amount of funding requested is \$50,000.

## Program Design

REGION PROPOSED: The proposed service region aligns with CNCS' recommendation for the SW Region listed in the NOFO and include 9 State Service Commissions--hereafter referred to as "commissions"-- including Arkansas (AR), Arizona (AZ), Colorado (CO), Kansas (KS), Louisiana (LA), Missouri (MO), New Mexico (NM), Oklahoma (OK), and Texas (TX). The consortium also includes ASC and will further be comprised of stakeholders representing AmeriCorps State/National, NCCC, VISTA, Senior Corps, Social Innovation Fund, and Volunteer Generation Fund programs from the 9 SW states. Commission consortium leaders communicated prior to development of this proposal and provided input and support for OneStar to serve as the lead applicant for this opportunity, and agreed to encourage their programs to attend the Southwest National Service Conference (SWNSC).

RATIONALE FOR APPROACH / KEY FACTORS FOR SUCCESS: OneStar and our SW consortium partners believe strongly in the importance and effectiveness of regional training delivery to ensure national service program compliance, continuous improvement, best practice sharing, and increased impact. While intimate enough to provide the opportunity for valuable, concrete, hands-on learning

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sessions, regional trainings are simultaneously large enough in scope to remind national service program staff and leaders that they are part of a bigger movement with shared goals and the potential for enormous impact. Our rationale for approach for the 2014-15 SWNSC training event is based on the following key success factors:

~~ 1) PAST PERFORMANCE: OSF will replicate successful aspects of previous years' regional training conferences, including the SWNSC held in Denver, CO from July 23-25, 2013, for which OSF staff served in leadership roles as part of the planning committee. OSF also previously hosted and served as lead organizer of the 2010 SW Cluster Conference held in Dallas, TX, which was highly attended and received strong reviews. In 2013, the SWNSC event brought together a total of 253 national service stakeholders (218 in-person and 35 virtual attendees) representing 20 states from within and outside the SW Region. (See attached 2013 conference agenda and attendee summary). A planning committee representing 8 states determined the focus of the learning opportunities. Five concurrent workshop tracks were offered, including AmeriCorps-Beginner, AmeriCorps-Advanced, Senior Corps, Financial/Grants Management, and State Commissions. Evaluations from the 2013 SWNSC indicated that a total of 94.7% of survey respondents (71 of 75) gained new knowledge and skills as the result of the 2013 conference and 97.3% (73 of 75) planned to apply what they learned. On a scale of 1 to 5 (with 5 being highest), survey respondents rated overall presenter effectiveness an average of 4.0. Feedback collected from the survey included the following positive comments:

- "The information gained was definitely practical and very relevant to my position as program manager. Thank you for working so hard to create such a valuable experience for all participants. It was very worthwhile."
- "Great conference. Informative sessions and great networking opportunities, even for veteran staff."
- "Regional meetings/conferences are really important as we are able to build relationships outside state borders. Also, we can combine resources for more effective training. It would be my recommendation that CNCS continues to support this types of training whenever possible."
- "It is wonderful having CNCS on-site, in smaller workshops which allows for more interactivity and ability to ask questions."

~~2) EMPHASIS ON TECHNOLOGY FOR INNOVATION/ACCESSIBILITY: OSF will incorporate new technologies for enhanced learning comprehension, collaboration, reduced costs, and increased accessibility for those not able to attend in person due to cost/travel distance.

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~3) COMMITMENT TO LEVERAGING EXISTING RESOURCES TO REDUCE COSTS/BURDEN/DUPLICATION OF SERVICES: OSF is committed to leveraging partnership relationships and existing community resources to keep costs low and prevent duplication of services. For example, both OSF and TX Senior Corps Association have pledged to align/combine our annual conferences with SWNSC this year to maximize participation, collaboration, and staff time/resources.

~4) STRONG FOCUS ON CAPACITY BUILDING: A key part of OneStar's mission is to build stronger nonprofits for a better Texas. We do this through strategic capacity building initiatives and trainings to ensure nonprofit effectiveness and long-term sustainability beyond national service programming. The 2014-15 SWNSC will incorporate sessions on capacity building as well.

PLAN/INFRASTRUCTURE FOR LOGISTICS: With assistance from ASC, OSF will co-facilitate an inclusive planning process to advise development of conference content and logistics. A committee will be formed that represents the 9 states in the region and includes delegates from AmeriCorps State/National, NCCC, VISTA, Senior Corps, Social Innovation Fund, and Volunteer Generation Fund programs, as available and appropriate, as well as CNCS State Offices, commissions, and ASC. The committee will meet regularly upon CNCS' notice of intent to award a cooperative agreement to OSF. The committee will determine the theme, agenda design, and learning modules of the SWNSC.

SELECTION OF HOST CITY/FACILITY: Based on initial survey responses and proposed cost effectiveness due to its central location, OneStar proposes hosting the conference at a location in Austin, TX although alternate options include Dallas, Houston, or San Antonio. Austin is also home to OneStar and the CNCS State Office, a large number of AmeriCorps and Senior Corps programs, and several major universities that may be able to provide student volunteers, in-kind space, and/or logistical support. Lastly, it is located in central Texas, and has access to ground transportation and affordable airfare. OSF/ASC staff will research the facilities 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 persons disbursed among 4-6 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 federal government per diem rate.

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**OUTREACH, MARKETING, AND ENGAGEMENT:** OSF/ASC will promote SWNSC to CNCS area managers, state offices, Senior Corps Associations, and commissions. OSF/ASC will create and publish a proposed agenda, trainer credentials, and registration information by December 2014. Marketing materials will be posted on ASC/OSF websites and social media (Facebook, Twitter, LinkedIn). Materials will contain a statement that alternative formats are available upon request and requests will be honored promptly. Regional branding will be created for use on conference materials in addition to CNCS required branding. Each commission will be responsible for forwarding marketing materials to their state's key stakeholders. Minimum target enrollment for the SWNSC is 200 participants: 80 AmeriCorps program staff; 80 Senior Corps program staff; 20 commission staff; and 20 other invited service stakeholders. We are confident in meeting this target, as we expect 100 attendees from TX alone (55 from TX AmeriCorps programs, 45 from TX Senior Corps).

**TIMELINE:** Based on the results of a survey sent in June 2014, the SW region identified the best months to convene as February or March 2015. Our proposed timeline is as follows: SEPT 2014: Announcement/negotiation/approval of cooperative agreement; OCT 2014: Regional planning committee is formed and begins meeting regularly, venues are explored and discussed to determine best option, outreach to trainers is initiated; NOV 2014 (or later depending on final selected dates): Final dates/venue(s) selected, Facility contract executed, trainers secured, and marketing materials developed; DEC 2014: Registration system opens and logistics coordination continues; Three weeks prior to event: Registration deadline; Two weeks after event: Learning materials submitted; 30 days after: Outputs and evaluation data returned; 90 days after: Financials reconciled/reported to CNCS; Six months after: Mid-year evaluation sent, collected, and analyzed.

**STAFF CAPACITY/ROLES:** OSF will serve as the point of contact with CNCS and submit all required materials, manage budget and allowable costs, secure conference facility, print materials, and co-facilitate the planning committee with ASC. The planning committee will advise conference content development, secure trainers, and assist with promotion. OSF will respond to all requests for reasonable accommodations and ensure accessibility. ASC will manage the conference registration system, which will contain prominent messaging for persons with disabilities to request reasonable accommodations. ASC will market the conference to their network and provide continuous support to OSF. ASC/OSF leadership will attempt to secure cash and in-kind sponsorships to increase revenue.

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CONFERENCE DESIGN METHODOLOGY: The SWNSC will be 2-3 days in length, with the potential for half days of conference content on either end to allow for travel flexibility and the possibility of pre/post-conference sessions on more specific topics. 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. At minimum, the following learning tracks will be offered at the conference: AmeriCorps, Senior Corps, State Commissions, and Volunteer Engagement/Capacity Building. Required trainings for CNCS competencies will be offered and featured prominently on the agenda, including in-depth sessions on performance measurement and data collection, applying evidence-based theories of change, program evaluation, and grants/financial management. The SWNSC will help address and meet the most common issues and critical needs of national service programs in the region. Needs will be identified through analysis of commissions' and CNCS State Offices' needs assessments, summaries of recent trainings, and/or survey or similar feedback. Analysis of information will ensure that learning priorities are aligned throughout the region, and allow for appropriate design of the agenda's structure, emphasis, and flow to attain maximum educational impact.

Initial ideas for plenary session topics include: National Conference on Citizenship's Volunteering in America Report and Civic Health Indices, the Franklin Project, strengths-based leadership, managing change in uncertain times, and inspirational stories from national service participants/alums. Potential breakout sessions include Evaluation and Theory of Change development, Performance Measures/Data Quality and Collection, federal grants management 101/201, compliance monitoring, multi-site management, preparing for Commission/CNCS/OIG audits, understanding NSCHC requirements, prohibited activities, member recruitment/engagement/retention strategies, branding and national service identity, disability inclusion, engaging veterans/military families, service as a strategy to support opportunity youth, disaster services and response, and focus area-specific topics (education, health, environment), navigating AmeriCorps health care requirements, civic reflection, social media/marketing, State Commission portfolio development, State Service Planning, preventing staff/member/volunteer burnout, and/or innovative practices in cross-stream collaborations.

OSF/ASC will utilize peer trainers when available in order to tap into subject matter expertise available in the field and leverage existing resources. National TTA providers will be sought as needed

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for specific expertise, particularly for the required CNCS topics of performance measures and grant/financial compliance; OSF/ASC will ensure that preferred national trainers receive a notice of the opportunity. CNCS senior leadership will also be invited and requested as potential keynote presenters. After the conference concludes, learning materials (slides, handouts, recordings, etc.) will be delivered to the National Service Knowledge Network for online cataloging and reference.

**OUTPUTS, EVALUATION, AND KNOWLEDGE GAINS:** OSF/ASC will work with CNCS to adopt the required assessments of gains in competency for performance measures and compliance. The assessment will be administered pre- and post-conference as instructed by CNCS. It is standard practice for OSF to conduct online post-conference evaluations (via FormAssembly technology or similar) to measure participant satisfaction, knowledge gains, and ability to apply new learning. Assessment data, including participant profiles and conference outputs, will be delivered to CNCS within 30 days of the conference conclusion. Evaluation results will be shared in a systematic way among awarded commission lead applicants to provide recommendations for continuous improvement. OSF/ASC also proposes piloting a mid-year evaluation to capture how participants have applied knowledge gains from SWNSC over time in order to improve future trainings.

### **Organizational Capability**

**DEMONSTRATED SUCCESS:** OSF is well-positioned to administer SWNSC from an operational, programmatic, and strategic standpoint. With a current budget of \$2.1 million, OSF manages TX's AmeriCorps State program (\$12.3 million in pass through funds in FY13) and has a demonstrated track record of administering a Volunteer Generation Fund project for the past 4 years. Previously known as the TX Commission on Volunteerism and Community Service (TXCVCS), OSF has provided training and technical assistance to federal subgrantees since 1994. Since 2004, OSF has hosted 9 statewide conferences on nonprofit capacity building known as the TX Nonprofit Summit (formerly the Governor's Nonprofit Leadership Conference); partnered with the White House to host 2 conferences in TX on capacity building; managed a Compassion Capital Fund intermediary grant which involved 24 regional trainings and capacity building sub awards to 25 organizations; managed the \$2 million Renewing our Communities Account (ROCA) set up by the State of Texas, including awarding 46 subgrants to nonprofits and local governments; and partnered with TX Workforce Commission and Governor's Criminal Justice Division to administer 9 grant programs on nonprofit capacity building. OSF is a member of Grantmakers for Effective Organizations, Independent Sector, Philanthropy Southwest, and National Grants Management Association to stay current on best

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practices in nonprofit development, effective grant management, and high-impact grant making.

**KEY STAFF AND EXPERTISE:** OneStar's senior leadership team, which consists of the President/CEO, Chief Operating Officer, Controller, Director of National Service Programs, and Director of Research and Texas Connector, possesses decades of experience and expertise in nonprofit management and leadership. With the assistance of a Senior Grants Management Specialist and 4 Grants Officers on staff, this project will benefit from generous in-house expertise and support. Implementation of the SWNSC will fall under OSF's Director of National Service Programs (Emily Steinberg) and AmeriCorps grants team. As project director, Emily will provide overall management and leadership for the project to ensure all project goals and objectives are met on a timely basis. Management of the project will include providing overall direction and vision, development of strategic partnerships, ensuring effective coordination of activities with fidelity to the Regional Training model outlined in the NOFO, serving as the primary program contact to CNCS, and ensuring compliance with all applicable federal grant requirements. She has over 9 years of experience in leading nonprofit capacity-building efforts and 7 years managing federal grants. Emily currently directs OSF's AmeriCorps State grant program, overseeing a team of six (2 Programmatic Grants Officers, 2 Fiscal Grants Officers, 1 Grants Management Specialist, and 1 Graduate Fellow) and a portfolio of 23 subgrantees representing \$12.3 million and over 2,100 AmeriCorps members. A VISTA Alum, Emily also has responsibility for coordinating OSF's new statewide VISTA intermediary project, with 10 VISTAs placed at 4 different partner sites across Texas. In partnership with the CEO, Emily provides strategic direction for OSF's duties and responsibilities as the State Service Commission and also serves on the Public Policy Committee of America's Service Commissions (ASC).

OSF intends to contract with ASC to maximize the capacity to design and achieve an excellent conference. Qualifications of the key staff from ASC assigned to the SWNSC 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 Compact. She also played a lead role in the coordination of the 2012 NCNSC and all 2013 Regional Training Conferences, including the SWNSC.

**FISCAL OVERSIGHT:** Grey McLeod, OSF's Controller, will provide overall budget and financial

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management for the project. A certified public accountant, he has extensive federal grant management and audit experience and will ensure accountability for federal funds used through this grant. OSF utilizes the Sage MIP Fund Accounting software, which specializes in the nonprofit need to track and report on multiple funds across multiple budget periods. OSF has cost policies and procedures for accounting, procurement, and travel in order to ensure appropriate fiscal controls. OSF maintains a comprehensive Accounting Policies and Procedures Manual and a Cost Policy Statement which detail processes and allocation methodologies for charging costs to federal, state and other funding sources. Internal controls are maintained to ensure that no cost is charged both directly and indirectly to federal contracts or grants. The accounting system software provides consistent account coding for all expenses. OSF abides by OMB Circular A-122 regarding support for direct and indirect labor and other categories of costs. Annually, OSF's auditors perform an A-133 audit along with their financial statement audit, which includes a review of internal controls.

SYSTEMS, STRUCTURE, AND STAFFING: OSF's AmeriCorps staff are experienced in the grant requirements and developmental needs of AmeriCorps and Senior Corps programs, and many are subject matter experts (i.e. education, disaster services, evaluation, performance measurement, etc.) with the ability to train at SWNSC. Rachel, Emily, and several OSF staff worked together on the 2013 SWNSC Planning Committee, as well as other ASC committees and related national service initiatives and will maintain regular contact throughout the planning process for the 2014-15 SWNSC. Additionally, ASC, in partnership with the Iowa Commission, initiated, developed, and implemented the conference model which inspired the regional training NOFO. OSF, in partnership with ASC, is eager to improve upon the model in the coming months with the support of CNCS. OSF has also been a leader in the national service program development and training field and has proactively sought to address the needs of AmeriCorps/Senior Corps/VGF in all its training and educational opportunities. Some examples in past years include: SW Cluster Conference (Dallas, 2010 -- Lead Organizer), SWNSC (Denver, 2013 -- Active Planning Committee Member), Annual AmeriCorps TX Grantee Conference (50-70 attendees annually), New AmeriCorps Staff Orientations (10-20 attendees, held 3X/year), Disability Inclusion Symposia (20-30 attendees in both 2012 and 2013). These examples demonstrate that both OSF/ASC are accustomed to routinely presenting to large audiences, coordinating multiple tracks of learning, and for multiple days in length. Further, OneStar's ongoing partnership efforts include collaborations with other streams of service and national service networks; OSF is in frequent communication with the CNCS TX State Office staff and has been piloting new

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ways for us to work collaboratively with VISTA and Senior Corps programs. OneStar also takes a proactive approach in consulting with multi-state AmeriCorps National programs proposing member placement in TX and invites all National programs to OSF-sponsored trainings, maintains a web page specifically for resources for National programs, and includes them in OneStar's AmeriCorps newsletter distribution list. Throughout our work, OneStar aims to highlight how national service programs can work collaboratively to strategically address critical social needs.

### **Cost Effectiveness and Budget Adequacy**

OSF proposes a registration fee of up to \$175 with a discounted early bird registration rate of \$125 (an average of \$150/attendee) for a total of \$30,000 in anticipated registration revenue that will be used toward project costs. Registration for virtual conference attendees is not expected to exceed more than \$50/person. Reasonable expenses factored into the fee include meeting room rental, five meals, lodging, live-streaming technology, trainers' fees and travel, and ASC/key planning committee personnel travel. Any revenue beyond local registration fees will be acquired through sponsorships yet to be determined. OSF/ASC leadership will be tasked with the acquisition of cash/in-kind sponsorships. Possible sponsors include Dell, ExxonMobil, HEB, Shell, Southwest Airlines, and Whole Foods in addition to national service vendors such as OnCorps, On3Learn, and others.

The budget proposed is sufficient to provide the participants with an excellent conference and effective learning experience. The cooperative agreement to host SWNSC would represent just over 2% of our total \$2.1 million budget. The \$50,000 requested will allow for enhancements to the SWNSC including live-streamed workshops, lower registration costs or travel scholarships, and increased capacity of the project management team. These enhanced outputs are expected to increase the overall learning outcomes for participants. Expenditures and revenues are tracked and allocated appropriately in the state's financial management system. OSF is efficient in managing funds and allocating resources. OneStar always seeks competitive rates and high-quality services. With years of experience in administering federal subgrants, capacity building programs, and training and technical assistance, OneStar is aware of the costs necessary to support an event of this scope. To make the most of financial resources available, OSF will leverage in-kind support from skill-based volunteers to serve as consultants, advisors, trainers and logistical support whenever possible.

### **Clarification Summary**

N/A