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Executive Summary

Serve Alabama, the Governor's Office of Faith-Based and Volunteer Service, the Alabama State Service Commission, welcomes the opportunity to serve as the lead applicant for the Corporation for National and Community Service's (CNCS) 2016 Southern Region Training Conference. As the lead applicant, Serve Alabama, along with the Association of State Service Commissions (ASC), will be responsible for planning, implementation, and fiscal oversight of the conference. The southern region will include: Alabama, Arkansas, Florida, Georgia, South Carolina, North Carolina, Virginia, West Virginia, Kentucky, Tennessee, Mississippi, Louisiana, and Texas. Serve Alabama would like the conference to be held the week of April 4th in the beautiful and historic Montgomery, Alabama.

Serve Alabama, in collaboration with ASC, proposes a multi-day regional conference for AmeriCorps State and National, Senior Corps, and Commission staff. The training will include a plenary format with break-out sessions spanning several days. The training, as a critical part of the 2015-16 CNCS training and technical assistance strategy, will contain at a minimum eight hours of the CNCS required competencies.

The amount of grant funding requested is \$75,000. Additional cost for the conference, will be covered by the 600 participants registration fees of \$150 totaling \$90,000. Serve Alabama will seek sponsors in the fall to offset some costs and those savings would be passed onto participants in a reduced registration fee.

Program Design

Regional Design - Serve Alabama, Montgomery, Alabama will serve as the lead applicant for the South Region for the Corporation for National and Community Service (CNCS) 2016 Regional Training Conference. America's Service Commissions (ASC), Washington D.C., the national association of state service commissions, will provide significant support through a contractual agreement for the planning, development, and implementation of the conference. ASC will work closely with Serve Alabama to ensure all of the deliverables are met and that the conference aligns with the other regions in the U.S. The proposed region includes: Alabama, Arkansas, Florida, Georgia, South Carolina, North Carolina, Virginia, West Virginia, Tennessee, Kentucky, Mississippi, Louisiana, and Texas. This proposal adds Texas, Arkansas, and Louisiana to the Southern region. The consortium will be made up of State Commission representation from all states listed, representatives from Senior

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Corps, CNCS State Offices, State Commissioners, and representation from all CNCS programs. Building upon the successful models utilized by Tennessee and Florida in our region, Serve Alabama, along with ASC, will hold regular conference calls for stakeholders to gather information related to attendance, workshops that will be offered in addition to the CNCS core competencies, plenary speakers, and special guests. Serve Alabama has a highly qualified staff who has extensive experience planning and implementing large events.

Outreach - Outreach will be conducted through a series of conference calls, state commissions, AmeriCorps programs, State Service Commissioners, CNCS State Offices, Senior Corps, and other national service partners. A save-the-date will be sent via email to all stakeholders once the dates are confirmed. A proposed agenda, trainers' credentials, and registration information will be widely disseminated through email, web sites, and social media. Senior Corps outreach will be coordinated in partnership with the CNCS State Offices. Betty Ruth, a long serving Alabama State Service Commissioner, is active nationally in RSVP leadership and will serve as the primary point of contact on the planning committee to assist with Senior Corps outreach. The needs of Senior Corps programs will be considered in all phases of planning, assessing training needs, outreach, and training delivery. Serve Alabama's Public Information Officer (PIO), working with ASC, will be a key person in coordinating outreach. Serve Alabama is projecting 600 attendees based on last year's attendance. There were 395 participants at the Southern Region Training Conference in Orlando. Many attendees were unable to attend due to the event reaching capacity prior to the registration closing date. Texas had 149 participants, Louisiana had 19 participants, and Arkansas had 28 participants attend CNCS Regional Training Conferences. Serve Alabama is including these states in our region and for many Louisiana participants the drive time to Montgomery is under 6 hours. That was a total participation of 591 for our targeted states.

Logistics - Serve Alabama is also excited at the prospect of bringing hundreds of national service partners to one of the most historic cities in America. Well known for the role Montgomery played in the Civil Rights movement, the city is also host to a variety of cultural attractions, a vibrant entertainment district, and a beautiful Riverwalk. Participants will be within walking distance to historic Dexter Avenue, the Alabama State Capitol, Martin Luther King's Dexter Avenue Baptist Church, and the Rosa Parks Museum. Last year, Montgomery was voted number one in the Best Historic City category in the 10 Best Reader's Choice travel award beating out Boston, Philadelphia,

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and New Orleans. Montgomery has a large regional airport which is serviced by multiple carriers, and Birmingham International Airport is 1 ½ hours from Montgomery. Due to the centralized location within the state and the region, Serve Alabama anticipates that many participants will choose to drive. Montgomery sits at the intersection of Interstate 65 and 85 which are 2 major routes through the southern U.S. Serve Alabama has met with the Renaissance Hotel and Conference Center located in Montgomery, the only luxury hotel in the country that offers a convention center, performing arts center, and flexible meeting space under one roof. Serve Alabama has determined their availability and cost for Spring 2016, and they have been identified as the sole venue capable of hosting 600 participants, speakers, and support staff. They have an abundance of quality meeting space, audio/visual support, food and beverage, and can block 225 sleeping rooms per night at a rate of \$149. The proposed conference venue can also offer up to 15 rooms per night at the federal rate in Montgomery, AL of \$83 plus tax for CNCS staff. Embassy Suites, Hampton Inn, and Doubletree are within a short walking distance and can serve as the overflow hotels. Serve Alabama will work with these hotels to secure a reasonable conference rate. Montgomery offers a safe, vibrant downtown area, which includes numerous restaurant options within walking distance from the hotel(s). Last year, Florida had to cut off registration (due to reaching capacity) leaving many prospective attendees having to travel to other conferences in order to receive the training. With this in mind and with the addition of Texas, Arkansas, and Louisiana, Serve Alabama is confident that the 600 participant mark will be easily reached. Serve Alabama also proposes keeping the registration cost at \$150 per participant. Serve Alabama is located just one block from the hotel and conference center thus reducing time and cost during the planning and implementation phases of the event. Serve Alabama will also keep state and local officials and the Chamber of Commerce informed during the planning process.

Curriculum Design - Serve Alabama and ASC will utilize an inclusive planning process to ensure that all pertinent topics for national service program and member management are included, in addition to the CNCS core competencies. Stakeholders will be polled and prior event evaluations reviewed in addition to the core competencies to help determine what topics are needed to help states and programs more effectively manage national service. Serve Alabama would like to propose a conference which begins with an opening plenary at 1pm followed by concurrent workshops on Tuesday (registration 8-1pm), networking reception on Tuesday, a full day Wednesday with concurrent workshops (am and pm) and a plenary luncheon, and concludes with concurrent

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workshops and a closing plenary lunch on Thursday. This design allows for both pre and post-conference options for various stakeholders to maximize the time in Montgomery. Workshops will be practical but will also offer opportunities for new and creative learning. Multiple opportunities will be given for networking as this is traditionally what participants indicate can be most helpful to them in their work. Both pre and post-conference, Serve Alabama, working with ASC, will have a system in place to measure learning outcomes from individual workshops, plenaries, and from the conference as a whole. Tools will be developed and administered throughout the conference. All data collected will be analyzed and provided in any required format following the event. Serve Alabama will utilize any CNCS approved survey instruments to measure customer satisfaction, basic conference outputs, and the measurement of knowledge gained by participants. Serve Alabama will explore virtual learning options including live streaming and recording sessions for playback.

If successfully awarded, the proposed timeline for planning and implementation is as follows:

October 2015: Planning committee convened, secure facility contract (Serve Alabama has already met with the facility to determine availability and dates are being held with no commitment pending the grant announcement); Save-the-Date released, marketing materials developed

Nov-Dec 2015: Planning Committee Calls continue

January 2016: Planning Calls continue, Open registration

February 2016: Planning Calls continue, Finalize Agenda

March 2016: Planning Calls continue, 2nd week of March early registration closes (late registration \$175)

Week of April 4th: South Region Training Conference, Montgomery, Alabama

Two weeks post-event: Materials supplied to CNCS to post on the Knowledge Network

30 days post-event: Outputs, evaluation, and knowledge gains returned to CNCS

90 days post-event: Financials reconciled and reported to CNCS

Six months post-event: Follow-up evaluation sent, data collected and analyzed

Organizational Capability

Serve Alabama has supported national service efforts in Alabama for more than twenty years. In the past fifteen years, Serve Alabama, as the State Service Commission, has hosted numerous large events including state/regional conferences with up to 500 participants. Serve Alabama regularly hosts smaller trainings, workshops, and public outreach events. These include the Governor's Volunteer Leadership Conference (2007, 2009 and 2010), The Governor's Faith-Based and Community

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Initiatives Conference (2005, 2008), Alabama Statewide Be Ready Day (2006-2014), and numerous statewide AmeriCorps and Volunteer and Donations trainings and events. Most recently, Serve Alabama planned and implemented the first statewide Disaster Case Management Workshop. Serve Alabama staff are all appointed by the Governor and the Director reports directly to the Governor's Chief of Staff. The Governor, schedule permitting, has always been extremely supportive of Serve Alabama activities and we anticipate that he will come to the opening session to welcome conference attendees to Alabama. Since their founding in 1997, ASC has routinely convened national and regional conferences for state commissions and national service programs. These include Regional NSCs (2013, 2014, 2015), State Service Commission Leadership Summits (2011, 2012, 2013); North Central NSC (with Iowa Commission on Volunteer Service 2012), Volunteer Generation Fund (VGF) Grantee Meeting (2010, 2011, 2012), and Commissioner Institute (2008).

Key Staff

Jon Mason, Director, will provide oversight and guidance to the staff.

Lisa Castaldo, Deputy Director, will serve as the primary point of contact. She has more than 20 years of experience in Public Health, Child Abuse and Neglect Prevention, and has been with Serve Alabama for the past 11 years. She serves as a planner, trainer, and grants manager. She also manages the agency's budgets and general operations

Brooke Mills, the Director of Emergency Preparedness, Response, and Training, will serve as the planning co-lead. She has 8 years of experience with Serve Alabama. She serves as the State lead for Volunteer and Donations Management and as the State Voluntary Agency Liaison. She also holds a certificate in event planning.

They will be supported by several other staff members including: Christine Williams, Senior AmeriCorps Program Officer, past AmeriCorps member, AmeriCorps Program Director, and Serve Alabama PDAT Officer, and has over 13 years with the Commission; Cesily Means, AmeriCorps Program Officer; Ashley Tiedt, Public Information Officer, former television producer and now manages all Serve Alabama electronic and social media, coordinates print and television media, and conducts outreach; and Ronica Faire, the Senior Accountant with over 15 years of experience as a public accountant, the last 9 years with Serve Alabama. Serve Alabama will be responsible for: managing the event budget; designing a logo; determining attendee and presenter registration fees; setting registration rates and deadlines; planning hospitality and related events including but not limited to a networking reception; conducting local keynote and workshop outreach; leading local

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sponsorship solicitation; printing attendee and presenter name badges and attendee/presenter materials, and other event materials, as applicable; assembling of attendee, presenter and/or sponsor packet materials; reporting to CNCS; participating in ASC and CNCS hosted calls; coordinating social media including live tweeting during conference; and meeting all CNCS required deadlines and reporting requirements.

The ASC Deputy Director, Rachel Bruns, will coordinate or support the following aspects of conference planning with the support of Serve Alabama: coordinating and leading an inclusive conference planning committee; agenda development; soliciting sponsorship from national organizations with interest in supporting multiple regional conferences; promoting the event including save the dates, registration invitations, promoting on ASC website and social media; sending pre/post event email(s) to attendees and conducting post-event attendee survey; developing and maintaining of central website for regional conferences; supporting identification and solicitation of keynotes; supporting of set-up, tear down, and registration check-in for event; purchasing, launching, and managing online registration system including providing applicable reports; conducting presenter solicitation/outreach for workshops; presenter communication; collecting and posting of presenter materials to central website; and presenter contracting, as applicable; collecting of registration fees via check and credit card; facilitating lead state planning calls; participating in CNCS regional training hosted calls; coordinating with CNCS on CNCS trainer/presenter/keynotes; coordinating of event on-site staffing including volunteers and state service commission staff; and customer service support for event attendees.

As a state agency, Serve Alabama has well defined systems for procurement, vendor payment, large event management, and evaluation. Serve Alabama brings a strong mix of talents to the table and works efficiently and effectively as a team. Serve Alabama has a strong record of managing federal funds. Serve Alabama manages a 4 million dollar budget comprised of state, CNCS, and US Department of Homeland Security funds. Serve Alabama is regularly reviewed by the Examiner of Public Accounts and underwent a full CNCS Inspector General (IG) audit in 2010. The Alabama Department of Mental Health serves as the fiscal agent for Serve Alabama.

Cost Effectiveness and Budget Adequacy

Revenue includes: grant funds (up to \$75,000), income generated through registration fees (600 participants at \$150 = \$90,000). Total revenue \$165,000. Serve Alabama will also seek sponsorships

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for the reception and lunches this fall. If successful the savings can be passed onto the participants with a lower registration cost.

Expenses include: Serve Alabama will execute a sub-grant agreement utilizing our state agency's standard sub-grant agreement and Memorandum outlining the deliverables listed earlier in this application, with ASC for \$22,800 to complete the activities listed in the prior section: 10 days x \$750/day x 1 staff (Rachel Bruns) = \$7,500 for planning 5 days x \$750/day x 3 staff (Kaira Esgate, Rachel Bruns, Tom Branen) = \$11,250 for on-site support; \$400 flight x 3 staff = \$1,200; 5 days at \$150/nights x 3 staff = \$2250; and \$200 meals/incidentals x 3 staff = \$600. Total sub-grant for the event: \$22,800.

Serve Alabama total Personnel Expenses \$13,117 (\$9,750 Salary and \$3,367 Benefits) for 15% of Deputy Director's time (salary and benefits) to serve as the primary point of contact. Budgeted time for the Deputy Director during 2016 for this position will not 100% across CNCS grants. The Deputy Director is budgeted in the 2015 Commission Support grant at 40%. The 2016 Commission Support grant budget is being developed and will ensure that the total percentage of time allocated across CNCS grants will not exceed 100%. Responsibilities for the Deputy Director include liaison with ASC, primary point of contact with conference hotel, coordinate Serve Alabama staff assigned to work on the conference, monitor and manage the budget. Additional staff member's time will be tracked but not charged to this grant.

Venue - audio/visual support, stage construction (for main room) plus labor/technical support \$20,000 (main ballroom and five large concurrent workshops); Food and Beverage - 2 continental breakfasts with all day coffee and water break (\$21 per person/plus tax), 2 lunches (\$25 per person/plus tax), and a networking reception/educational session (\$16 per/person) total estimate \$80,196. These costs are considered reasonable and necessary. It would be impossible in downtown Montgomery for 600+ individuals to break during this training for lunch on their own. Also all meals, including the networking reception, will include an educational/informational component. They will include speakers, national service highlights and best practices. Food and beverage cost are estimated to run approximately \$133.66 per person for the entirety of the training. These figures are calculated directly from the hotels catering menu and the least costly plated lunch options were chosen. This is the sole venue in Montgomery capable of hosting such a large event and the food costs are based on

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reasonable market rates for a conference venue. The calculated costs includes a 23% service charge which is not waived for a state agency or non-profit. This would be the case at any large hotel/conference center in Alabama. Sponsorships are being sought to help offset the food and beverage cost. Based on historical data presenter travel and transportation is estimated at \$18,000. Travel will be reimbursed at actual costs (per state policy) and mileage reimbursed at the state rate which is currently 57.5 cents per mile; and presenter fees/honorariums \$5,000. Based on the proposed conference schedule there may be 3-5 trainers/plenary speakers who may receive fees and honorariums. Supplies/printing \$4,387. Serve Alabama will utilize state approved vendors for purchasing and printing; Disability Accommodations - \$1,500.

Per the hotel, there will be no cost for meeting space due to the large food and beverage purchase, and there will be several compensatory sleeping rooms available for trainers. One sleeping room is provided at no cost for every 40 rooms booked (per night). Serve Alabama also plans to work to secure sponsorship for the networking reception and lunches, as these are the most significant expense. Total anticipated expenses: \$165,000.

Lisa Castaldo, with support from Ronica Faire, Senior Accountant, and coordinating with Rachel Bruns, ASC will manage all aspects of the budget. All efforts will be made to contain additional costs. Serve Alabama has a strong history of financial management and has always been good stewards of funds. As a state agency, Serve Alabama utilizes General Accepted Accounting Principles (GAAP), the State of Alabama has a centralized accounting system which is used by Serve Alabama for all financial activities. If funded, this grant would represent approximately 1.4% of the agency's total budget. Serve Alabama complies with all applicable state and federal laws, CNCS standards, and Office of Management and Budget (OMB) regulations.

Clarification Summary

N/A