

# Narratives

## Executive Summary

The Massachusetts Service Alliance (MSA) proposes to host the 2016 Atlantic Cluster Regional Training Conference (ACRTC) in May 2016. MSA will work with the other states and territories in the cluster to make sure the training meets the needs of all national service participants. MSA has extensive experience providing high quality trainings and conferences for the national service and volunteerism sector in Massachusetts including hosting a bi-annual statewide conference on service and volunteerism since 2001 attended by 350-400 participants from across the region. America's Service Commissions (ASC), 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 MSA to ensure all of the deliverables are met and that the conference aligns with the other cluster conferences. MSA is requesting \$75,000 to support the costs associated with a high-quality 2-3 day training for 450 national service program participants.

## Program Design

### PROGRAM DESIGN

There is a growing demand for high quality, accountable, performance and evidence-based National Service programs. The State Commissions and State Offices with support from CNCS are responsible for providing support to our National Service programs to ensure they can meet the rigors of running a high quality national service program. This can only be achieved with efficient, effective and affordable trainings offered by and to State Commissions and national service programs and key stakeholders. Each state's service delivery mechanism must have clear performance measures, meticulous compliance, and guaranteed fiscal and administrative management. The Massachusetts Service Alliance (MSA), in collaboration with America's Service Commissions (ASC), the national association of state service commissions, proposes a multi-day regional conference for AmeriCorps State and National programs, Senior Corps projects and other key CNCS national service programs in the Atlantic cluster. The 2016 ACRTC will plan a regional training conference that ensures all participants are better able to engage more Americans in results driven service, share improved impact data, and build an enriched knowledge of compliance competencies. The training conference will include tracks specific to the stakeholders and collaborative sessions to facilitate cross-stream dialogue.

### LEAD APPLICANT

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MSA proposes to host the Atlantic Cluster Regional Training in the spring of 2016. MSA will work with the other states and territories in the Atlantic Cluster Region to ensure the training meets the needs of all participants. The cluster includes the State Service Commissions of Connecticut, Delaware, the District of Columbia, Maine, Maryland, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Puerto Rico, Rhode Island, the U.S. Virgin Islands and Vermont. ASC will provide significant support through a contractual agreement for the planning, development, and implementation of the conference. ASC will work closely with MSA to ensure all of the deliverables are met and that the conference aligns with the other regions. We will work closely with the Massachusetts State Office under State Program Director Sherry McClintock's leadership and with Mal Coles, Atlantic Area Manager, to ensure the participation of all national service programs in the cluster including Senior Corps, AmeriCorps State and National, Volunteer Generation Fund, and Social Innovation Fund grantees. The Atlantic Region has a wealth of expertise already at the table and we will build off of the successful regional trainings in New Jersey and Connecticut. ASC will provide continuity and assistance in adapting specificity as needed by each region.

### **REGION PROPOSED**

The proposed service region aligns with CNCS' geographic allocation for the Atlantic Cluster as listed in the Announcement of Federal Funding Availability. These 14 states, district and territories include CT, DC, DE, MA, ME, MD, NH, NJ, NY, PA, PR, RI, USVI and VT.

### **SELECTION OF HOST CITY AND FACILITY**

MSA proposes to host the conference at a location in Springfield, Massachusetts. Springfield has easy access to direct ground transportation (train, bus or highway) and affordable airfare into Bradley International Airport (BDL) in Hartford, CT, which is approximately a 20-30 minute drive from Springfield. Preliminary findings indicate there is a Sheraton and a Marriott that can each have approximately 300 hotel rooms and that the Sheraton can accommodate a multi-day conference for maximum 600 attendees with upwards of 15 breakout rooms for workshops. The hotel room rates in Springfield are under \$150 a night, which is very reasonable for this region. The facility selected will be fully accessible for persons with disabilities.

### **APPLICANT EXPERIENCE**

The Massachusetts Service Alliance has a 25 year history of supporting high quality national service

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programs in Massachusetts. We have extensive experience with trainings and conferences. We have hosted a bi-annual, statewide conference on service and volunteering since 2001. The conference is cross-stream and we always have strong participation from both Senior Corps and AmeriCorps programs as well as Higher Education and Volunteer Connectors. MSA is responsible for all aspects of conference implementation including: managing a workshop selection committee, working with the trainers to ensure they are supported and that their sessions are engaging and have clear learning objectives, handling conference registration, collecting and analyzing evaluations, and supporting the Keynote Speaker and other special guests. We will employ the same proven strategies used to manage our bi-annual conference when managing the cluster conference.

At our most recent statewide conference on June 1, 2015, MSA convened over 350 attendees. MSA received a record number of workshop proposals from our Call for Presenters issued in January 2015. Out of the 78 proposals, MSA offered 38 workshops to attendees; with 10 sessions in the Youth Development Track, 7 sessions for the Skills-based Volunteerism/ Corporate Track, and 14 sessions comprising the Volunteer Management Best Practices Track. Workshops were evaluated on a scale of 1 through 4, with 4 being the highest. The average ranking of all workshops provided at the conference was an impressive 3.60 which was calculated from participant feedback and evaluations at each individual session. The opening plenary session, which featured Keynote Speaker Michael Smith, Special Advisor to President Obama on My Brother's Keeper Initiatives, received excellent reviews. Over 80% of attendees rated the opening plenary a 3 or 4 based on a scale of 1 through 4 ("Good" and "Excellent"). The conference overall was given a final score of 3.31 which fell between "Good" and "Excellent" on the scale of 1 through 4.

In addition to the bi-annual conference, we host standalone trainings in the fall and spring each year for nonprofits on best practices in volunteer management. These trainings have been supported by our Volunteer Generation Grant which we have received for the past five years.

MSA's Program Team attended the cluster conferences in NJ and CT and helped design and facilitate one of the sessions at the 2013 conference. Their experience supporting our portfolio of 23 AmeriCorps programs in MA, as well as their knowledge of what was successful at the past two Regional Trainings will help us craft a regional conference that will well meet the needs of programs across the region. In addition, we can tap into the wealth of knowledge and experience in Massachusetts related to national service, which is the home to many well-known national service programs and SIF recipients, for

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local speakers and outreach.

ASC will play a critical role in the delivery of this multi-day training. The ASC Deputy Director, Rachel Bruns, will coordinate or support the following aspects of conference planning: coordinate and lead an inclusive conference planning committee; agenda development; sponsorship solicitation from national organizations with interest in supporting multiple regional conferences; event promotion including save the dates, registration invitations, promotion on ASC website and social media; pre/post event email(s) to attendees and post-event attendee survey; development and maintenance of central website for regional conferences; support in identification and solicitation of keynotes; support of set-up, tear down, and registration check-in for event; purchase, launch, and management of online registration system including providing reports required by CNCS; presenter solicitation/outreach for workshops; presenter communication; collection and posting of presenter materials to central website; and presenter contracting, as applicable; collection of registration fees via check and credit card; facilitation of lead state planning calls; participation in CNCS regional training hosted calls; coordination with CNCS on CNCS trainers/presenters/keynotes; coordination of event on-site staffing; and customer service support for event attendees.

Finally, together with the other states in the cluster, there is considerable background in providing training, technical assistance, outreach and monitoring for national service programs. Leveraging the vast experience of each commission, MSA is well-poised to successfully deliver a 2016 ACRTC that will meet the training needs of participants and provide a valuable conference experience.

### OUTREACH, MARKETING AND ENGAGEMENT

The 2016 ACRTC will be promoted to CNCS Area Managers, State Offices, Senior Corps Associations, and Commissions across the region. By January 2016, a proposed agenda, trainer credentials, and registration information will be published. Marketing materials will be posted on ASC's, MSA's, and cluster conference web sites, social media (Facebook, Twitter), and e-news subscriptions. We will work with ASC and CNCS to develop branding for the conference to be used on all materials. Each commission in the cluster will be responsible for forwarding marketing materials to their key stakeholders, such as their AmeriCorps program directors. We will rely on the State Office to encourage their Senior Corps grantees to participate; however, we will also seek to market this opportunity to them directly, along with AmeriCorps National Direct programs, VGF recipients, and

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SIF grantees in the cluster. The target enrollment for the 2016 ARCTC is 450 participants made up of 150 AmeriCorps State and National program staff; 200 RSVP, Foster Grandparent, and Senior Companion program staff; 50 Commission staff; and 50 other key stakeholders such as Social Innovation Fund grantees, Volunteer Generation Fund grantees, CNCS staff, and presenters. This number is based on the attendance and interest level of the prior Atlantic Cluster Regional Trainings. If interest in attending this conference exceeds 450 we will be able to accommodate up to 600 attendees based on the venue sizes in Springfield.

### CONFERENCE DESIGN

ASC will assist MSA in forming a committee that represents the 14 states, Washington, D.C., and the territories in the region and includes delegates from AmeriCorps State/National, Senior Corps, CNCS State Offices, and commission staff. The committee will meet regularly upon CNCS' notice of intent to award these resources to MSA. The committee will determine the theme, agenda design, and learning modules of the 2016 ACRTC beyond those sessions required by CNCS that make up the core curriculum. It will be 2-3 days in length. Each day will include a general plenary session, followed by a series of tailored breakout sessions, and will conclude with a networking activity/service project. Opportunities for specific stakeholder groups to host independent meetings, orientations, and trainings may be offered pre or post conference upon request.

At a minimum, the following tracks of learning will be offered at the conference: AmeriCorps State and National, Senior Corps, and commissions. We will include specific tracks for SIF and VGF grantees if outreach indicates they would participate. Required trainings for CNCS competencies regarding performance measure data collection, applying evidence-based theories of change, program evaluation, and grants/financial management will be offered and featured prominently on the agenda. Including the topics listed above, the training conference will serve the most common and critical needs of the national service programs in the region. Needs will be identified through analysis of commissions' and CNCS State Offices' needs assessments, a survey of grantee staff in the region, summaries of recent trainings, and/or feedback from prior cluster trainings. Analysis of this information will ensure that learning priorities meet the needs of the programs across the region, and will allow for appropriate design of the agenda's structure, emphasis, and flow to attain maximum educational impact. Wherever possible, the training conference will utilize peer trainers in order to tap into the subject matter expertise available in the field. Peer trainers may be identified by the

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committee, CNCS State Office staff, or programs. We will work closely with ASC and CNCS to identify CNCS staff to provide all of the required CNCS topics of performance measures and grant/financial compliance. CNCS senior leadership will also be invited and requested as potential keynote presenters. Post conference, all learning materials and curricula (slides, handouts, etc.) will be delivered to the National Service Knowledge Network for online cataloging and ongoing reference.

### **OUTPUTS, EVALUATION AND KNOWLEDGE GAIN**

We will administer a post-event assessment that measures participant satisfaction and ability to apply new learning. We will administer on-site assessments of each session and of the overall conference to gauge both participant satisfaction and ability to apply new learning in their professional setting. Based on our experience with hosting statewide conferences, we feel it is essential to get this feedback while conference attendees are on-site as electronic evaluations sent as a follow-up have a much lower response rate. We will share our assessment data with future host states for continuous improvement for future regional trainings.

### **TIMELINE**

We propose holding the Atlantic Cluster Regional Training Conference in the early May or the last week of April 2016. Holding the conference in early May/late April ensures we will not have issues related to winter storms and we will avoid college graduations of the 13 colleges and universities located in the area. The benchmarks for this timeframe are itemized as follows: September 30, 2015: Announcement/negotiation/approval of cooperative agreement; October 31, 2015: Facility contract in place. ACRTC Committee members begin to meet regularly; December 31, 2015: All trainers identified and confirmed; marketing materials developed; February 1, 2016: Online registration opens and logistics coordination continues. General Registration is February 1 thru mid to late April depending upon when in May or April the conference is scheduled. June 30, 2016: Learning materials submitted to CNCS/Knowledge Network. Evaluation data returned; August 2016: 90 days after conference, financials reconciled and reported to CNCS.

### **HUMAN RESOURCE CAPACITY AND ROLES**

The Massachusetts Service Alliance (MSA) along with ASC will serve as the point of contact with CNCS and will submit all required materials. MSA will manage the budget and allowable costs, secure conference facility, and print materials. MSA will co-facilitate the planning committee with ASC. The

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planning committee will guide conference development, secure trainers, and assist with promotion. MSA will respond to all requests for reasonable accommodations and ensure accessibility is fully realized. The conference registration system will contain prominent messaging for persons with disabilities to request reasonable accommodations. ASC will market the conference to the national service network and provide continuous support to the planning committee. All members of the Atlantic Cluster region will assist with keynote speakers, invited guests, presenters and facilitators and will promote the conference to their network of programs.

### **Organizational Capability**

#### **ORGANIZATIONAL CAPACITY**

Founded in 1991, the Massachusetts Service Alliance (MSA) is a nonprofit organization that acts as the state commission on volunteerism and service. With a staff of 12 and an operating budget of \$2.3 million, MSA grants over \$11 million to 60 organizations, provides training and technical assistance (T/T&A) to organizations that rely upon corps members and volunteers to meet their mission, and advocates for and convenes the volunteer and service sector. MSA has been the proud recipient of AmeriCorps grants since 1994 and a Volunteer Generation Fund grant for the past six years. We have consistently managed our grants as per our applications, met all performance measures, provided the necessary matching funds, and met all reporting deadlines. We have extensive experience in providing high quality training and technical assistance. We have run a bi-annual conference on service and volunteerism since 2001. This is a cross-stream conference which includes tracks for Senior Corps, AmeriCorps, and nonprofits that engage volunteers. In addition we provide 5-6 trainings every year in best practices in volunteer management across MA each year. We convene our AmeriCorps Program Directors 4 times a year for training, networking, and sharing of best practices.

MSA attracts and retains highly-qualified staff. Emily Haber, CEO, has been with MSA for 7 ½ years and has over 25 years of experience in community development. She is responsible for convening and advocating for the volunteer and service field and will manage the relationship with ASC and the other commissions in the Atlantic Cluster for this training conference. She has been on the board of ASC for 4 years and can easily tap into best practices from colleagues across the other clusters.

Lindsay Rooney, Director of External Relations & Development, has been with MSA for 7 years and has over 14 years of experience in advocacy, community and government relations, and development with volunteer-based organizations. She is responsible for the statewide conference on service and volunteerism and will lend her extensive experience to assisting with the logistics for the regional training including communication broadly as well as explicitly with the venues. MSA's long-time

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Director of Programs, Beth McGuinness will offer her extensive knowledge and experience managing a large portfolio of AmeriCorps programs to assist with developing content for the training. Our AmeriCorps Program Team consists of Suzana Kantardzic, Senior Program Officer, and three Program Officers, Rachel Lieberman, Nancy Luc, and Rebecca Wolfson and they all attended the 2015 regional training in Connecticut and all but Rachel attended the 2013 training in New Jersey as well. They each work closely with our portfolio of 23 AmeriCorps programs and will be able to help us craft a training that will meet the needs of the AmeriCorps State and National. Julio Afable, Manager of Accounting and Finance, has been with MSA for 7 years and has over 24 years of accounting experience managing multi-source grant funding and will be responsible for fiscal management. Lisl Hacker has been a consultant with MSA the past year focused on supporting the workshops for our June 2015 conference and implementing the training curriculum for our Service Enterprise Initiative. Lisl will be joining the MSA team in September as our Manager for Training and Technical Assistance and one of her responsibilities will be to support this regional training. Lisl brings many years of experience in developing training for national service programs, most recently with YouthBuild USA. We will work closely with Sherry McClintock, CNCS MA State Program Director, and Mal Coles, Atlantic Area Manager, to make sure the training best meets the needs of the Senior Corps community.

MSA intends to contract with ASC to maximize the capacity to design and achieve an excellent conference. Rachel Manuel Bruns is the deputy director for ASC and she will take the lead from ASC on all of the regional trainings. Prior to joining ASC full-time, Rachel's leadership roles have included the director of Volunteer Wisconsin and Iowa Campus Compact. Rachel has played a lead role in the coordination of the 2013 and 2015 regional training events.

MSA has an exemplary record in federal grants management. MSA has overseen CNCS funding in the state since 1993 and currently manages over \$11 million in federal and state grants. MSA's total FY16 budget is over \$11 million. As part of routine monitoring, MSA underwent an audit by the IG's Office in 2006 and an Administrative Standards Review by CNCS in 2007. We successfully passed a CNCS Grants Officer fiscal site visit and Program site visit in May 2014. During these visits, auditors and CNCS staff reviewed MSA's internal policies and procedures, systems for overseeing federal funds, and technical assistance and compliance with federal regulations. In both cases, MSA successfully passed. MSA undergoes a yearly A-133 audit and has consistently clean reports. MSA uses QuickBooks for its accounting system to allow the use of a detailed chart of accounts and project structure for all

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financial transactions. This structure facilitates tracking of all transactions by funding sources. Monthly reports show expenditures by grant and compare budgets, expenditures and variances. These reports are reviewed by fiscal staff, department directors and the CEO. MSA is consistently on time with its required grant reporting. The Manager of Accounting prepares financial reports from data in the financial accounting system and obtains the CEO's signature before submitting them to CNCS. These reports reconcile back to the QuickBooks system.

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

#### **COST-EFFECTIVENESS AND BUDGET ADEQUACY**

The registration fee will be between \$165-\$225. The actual fee will be determined once we have selected the venue and determined all the costs associated with the regional conference. We will utilize CNCS funds to cover the hard costs such as meeting room rental, audio/visual costs, trainers' fees and travel as well as some of MSA's staff time and ASC's contractual fees. MSA estimates it will cover approximately \$11,000 of expenses (including MSA staff time and staff travel). The registration fee will cover food and beverage costs for participants. The budget proposed, including the \$75,000 request of CNCS funds, is sufficient to provide the participants with a quality conference and an effective and efficient learning experience.

### **Clarification Summary**

n/a