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Executive Summary

Serve Indiana, Division of the Indiana Department of Workforce Development, the State Service Commission for Serve Indiana, requests \$75,000 in CNCS funding to lead the North Central Region in a Training and Technical Assistance (TTA) Regional Conference. Serve Indiana will plan, facilitate, implement the event as well as act as the financial oversight for the event. Serve Indiana will partner with State Service Commissions in the Region, the America Service Commission (ASC), National Programs, AmeriCorps NCCC, AmeriCorps VISTA, the Corporation for National and Community Service federal and state offices, Social Innovation Fund programs, Tribal grantees and Senior Corps programs to create this multi-day conference for commission and program staff.

This conference will focus on CNCS' performance measures and compliance requirements as well as grant management, evaluation, financial management and other topics vital to a successful AmeriCorps/Senior Corps program. Session topics will be finalized using a collaborative model with a conference planning committee comprised of stakeholders, ASC staff, program staff, tribal grantees, commission staff and Senior Corps representatives.

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 Elspeth O'Neil, Serve Indiana Program Officer, to ensure all of the deliverables are met and that the conference aligns with the other regions.

Program Design

PROGRAM DESIGN

Serve Indiana will be the lead commission on this conference and will work directly with the commissions located in the region as well as ASC and CNCS. In order to include commissions from regions without such training, we will also include Missouri and Kansas state commissions at our event. Kentucky is included to rebalance the potential attendees at events and due to Kentucky being a neighboring state. This means that we will cover the following states: Iowa, Illinois, Indiana, Michigan Minnesota, North Dakota, Nebraska, Ohio, South Dakota, Wisconsin plus Missouri, Kansas and Kentucky. These states were included because the southwest cluster does not have an applicant organization applying, so state commissions coordinated a re-distribution of those states to balance the quantity of CNCS AC/SC programs across the states applying. It will also be extended to all Senior Corps, AmeriCorps VISTA, AmeriCorps NCCC, Tribal Grantees Social Innovation Fund and

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AmeriCorps National Programs in this region.

To help design this event, we will work hand in hand with ASC. We have already discussed duties and responsibilities of each organization. ASC will take the lead on overall logistics and we will work with local partners and stakeholders. Together we will create a regional planning committee that will comprise of CNCS staff, state commission representatives, ASC staff, and staff from our office, Senior Corps staff, tribal grantees, National staff, AmeriCorps program directors and other stakeholders. Serve Indiana will also utilize internal marketing and financial staff in order to ensure state policies and procurement are effectively implemented. In addition, Visit Indy will provide technical assistance on coordinating this event and sharing helpful visitor information to Indianapolis. This type of collaboration will ensure that we are meeting the needs of our programs and thus improve our management of AmeriCorps and Senior Corps members. In turn, the communities where our members serve will be better equipped to create effective change.

Outreach and organization will be important in reaching our maximum capacity of 500 participants. We will use the evaluation and knowledge from previous conference planners as a starting point for this event. Our event will likely take place in April or May pending implementing our procurement process to bid out the opportunity to local venues in Indianapolis. Serve Indiana has been in communication with Visit Indy which has advised us of several dates that are available at potential venues. . As this will be a fair amount of planning, once the grant funding is awarded, we will work quickly to create the committee and establish a timeline. We plan to have bi-monthly conference calls with the committee and assign subcommittee tasks that will cover presenters, content, keynote speakers and event logistics.

If a commission, tribal grantee or National Service partner is not represented on the committee we will personally reach out to them in order to make sure they are engaged so they can involve their local networks. The committee will work together to create an organizational, marketing and outreach timeline that is appropriate for the event. Items such as "save the dates", reminder emails, and more will be created and shared with potential attendees. The committee will be expected to engage their networks on social media, websites and traditional media in order to ensure their programs are aware of this quality training opportunity. ASC and Indiana's Department of Workforce Development will also help with such marketing. As in the past, ASC will create a conference specific webpage to hold all event information and registration. Serve Indiana will promote this event to their programs and the local area with the help of their internal marketing team. More importantly, we

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want to create an inclusive environment where people feel comfortable in Indianapolis. We will outreach to local venues, restaurants and cultural centers to help share in the Hoosier hospitality. Following in the footsteps of our conference planning predecessors, we will create learning tracks to organize the event. These tracks will include: AmeriCorps State and National, Senior Corps, commission, tribal grantees and volunteer engagement. We will also use a tool created by the commission of Michigan and Iowa to assess program staff core competency. This tool assesses program risk, intensity of monitoring required and learning need. It also includes professional competencies that national service program staff must have in order to be successful. While this tool has been used in the past for AmeriCorps programs, it was used in the planning of the Michigan event and can easily transfer to Senior Corps programs.

We also value the input of the participants and committee. Early in the planning, we will send out a survey to all potential attendees through their commissions and National Service partners. This will help us gather information on what type of sessions, vendors and presenters attendees would like to see. We will also work heavily with CNCS and ASC to ensure CNCS appropriate trainings are included in the event. We anticipate the design of the day including:

Day 1: Event set-up; Travel day for attendees with registration check-in available in late afternoon/evening; Pre conference event in p.m.

Day 2: Pre conference event(s) as applicable in a.m.; Kick-off at Lunch w/workshops in afternoon; Networking reception in evening

Day 3: Full Day Workshops; free night to explore area

Day 4: Morning workshops & close with lunch keynote. PM post conference event(s) as applicable. Event tears down.

Each day will include a plenary session and several tailored breakout sessions. Our office values the importance of reflection and networking time so these types of options will be included as well.

Finally, we hope to have stakeholder specific breakout time. For example, there may be times for each commission to meet with their state programs, AmeriCorps Alumni networking and Senior Corps events.

Initial ideas for break out session include CNCS approved topics and program suggested topics. It is important that National service programs understand the programmatic and fiscal management of such programs. CNCS will provide the designated number of hours of training on topics and presenter of their selection and the committee will organize the remainder of the sessions. National performance measure outputs and outcomes as well as evaluation completion will be covered. In

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Indianapolis there are several universities who have partnered with Serve Indiana and AmeriCorps programs in the past to help with such topics. If CNCS does not cover these topics then Serve Indiana and committee partners have these partnerships on which to rely. Similarly, breakout sessions will also cover theory of change, logic model and evidence based programming. Programs will come out of this conference with a stronger understanding of data collection and the importance of strong program evidence but they will also grow as individuals and program leaders. Running an AmeriCorps and Senior Corps program takes strong leadership and management skills. Therefore, we will also have breakout sessions on leadership, critical program/fiscal training, CNCS/federal requirements, program development, capacity building and the development of underserved populations, disabled individuals and disconnect youth. We will also ask strong program's to showcase their best practices to help lead other national service programs in sessions. In addition to break out sessions we will have plenary and town hall likes events. Initial ideas for plenary sessions include leadership and growth of National Service in our region. Town Hall sessions will allow time for AmeriCorps and Senior Corps staff to ask questions of CNCS officials to help strengthen service. Lastly, we anticipate including a pre or post training opportunity that would include individuals becoming certified as a facilitator through Technology of Participation offered by the Institute of Cultural Affairs. This opportunity would increase the skills of attendees by learning how to build consensus, increase ability to gain public input/feedback on program from supervisors and members, creates an increased Spirit de Corps by learning facilitated conversation skills, and learn to analyze and evaluate your program effectively. Additional pre-conference events the committee will consider are: New Senior Corps program director training; New AmeriCorps program director training; commission staff networking.

It is important to us that our event is inclusive and accessible to all. When securing a venue, we will ensure the space is accessible to everyone regardless of their ability. When people register for the event, we will also ask what reasonable accommodations are needed. Registration will be in an open area that is easily accessible when entering the conference area. Serve Indiana plans to have maps and signs available throughout the event center to help attendee's access break out and plenary sessions. Serve Indiana values inclusivity for our events and want everyone to feel comfortable sharing their thoughts and ideas and will promote this idea through the training. Also, to create an inclusive environment for those who cannot attend nor need more time to digest the information, we hope to video tape and/or live stream portions of the event (likely plenary sessions). All materials will

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be available to attendees after the event including PowerPoint's, handouts and best practices.

Serve Indiana wants to continue to improve this event. As noted, we will have a survey before the event to assess the needs of attendees. During the event we will have volunteers at each break out who will be available to answer questions or concerns for attendees. At the end of each session, these volunteers will pass out evaluations and collect responses. These responses will be compiled and included in our total conference feedback. After the event is over, we will send out online evaluations to all who planned and attended the event. All results will be compiled and evaluated. We will also share the results with the next commission who plans to lead the conference in the future. All of this planning and evaluation will align with CNCS' performance measures and required reporting. Serve Indiana will work with CNCS and ASC to adopt the necessary assessment for the event.

The ASC Deputy Director, Rachel Bruns, will coordinate or support the following aspects of conference planning with the support of Elspeth O'Neil, Serve Indiana: 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 applicable reports; 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 trainer/presenter/keynotes; coordination of event on-site staffing including volunteers and state service commission's staff; and customer service support for event attendees.

Organizational Capability

ORGANIZATIONAL CAPABILITY

Serve Indiana has been in operation as a Division of the Department of Workforce Development (DWD) in Indiana since 2014. However, the Indiana commission has been in existence since 1994. Serve Indiana was previously known as the Office of Faith Based and Community Initiatives (OFBCI) with a focus on service, volunteerism, faith engagement and nonprofit capacity building. Now Serve Indiana's mission is to advance service and volunteerism by informing, connecting, and

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promoting opportunities and resources that enrich the lives of Hoosiers. We do so with several programs. Our main focus is our AmeriCorps State program which offers over 600 member opportunities through 17 programs throughout the state. In addition we oversee a Volunteer Roundtable initiative and Indiana Kids program. The roundtable is a partnership with the Indiana Association of United Ways to engage Volunteer Centers in capacity growth. While the Indiana Kids is a partnership with the Indiana Alliance of Boys and Girls Clubs This program provides support, resources, guidance, and tutoring services to help students succeed in school and participate in career exploration. Its goal is to prevent children from using governmental assistance later in life by supporting their growth at an early age, thus it is funded through the Temporary Assistance for Needy Families (TANF) program. Each of these programs brings together a variety of stakeholders, backgrounds, regulations and funding specification. This knowledge, our role within the Department of Workforce Development and Serve Indiana's staff experience make our organization an ideal candidate to be awarded funding.

As noted, Serve Indiana is a division of the Department of Workforce Development through the State of Indiana. This large agency facilitates many trainings and conferences throughout the year for their programs. They have strong partnerships in and around Indianapolis that will help create a meaningful event. In addition, they have a marketing team that we can use to help with outreach. In previous events, they have assisted our office with graphic design, registration, conference logistics and state guidelines. We will rely on them during this event as well to help with such items.

At the division level, Serve Indiana facilitates our own trainings and conferences throughout the year. For the past four years, Serve Indiana has run a state wide Non Profit Summit which reached around 200 participants each year. This event was either 1-2 days in length and included courses on capacity building, service and volunteerism. Our office coordinated with local hotels, food vendors and presenters to make this a success. We have also trained AmeriCorps programs in smaller trainings on topics such as evaluations, orientation and creating meaningful service terms. Our office has a strong relationship with the local community and our program partners. This will help us at our Regional conference to guide what is needed and available from those around us.

Serve Indiana maintains partnerships with the Corporation for National and Community Service Indiana office, the Iowa NCCC office, local National programs and Senior Corps programs in the state. We have frequent staff meetings with the CNCS Indiana office and the State Director sits on our Governor appointed commission. When NCCC and National programs are stationed in Indiana we regularly visit the teams and discuss the importance of service for our state. Finally, we have

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recently begun strengthening our partnerships with Senior Corps programs here. We have attended the state Senior Corps meetings and invited Senior Corps directors to attend our orientation to create a cross service experience. This commitment to national service will guide our conference planning and will help create a meaningful event for all in attendance because we understand the unique needs of each program.

The staff at Serve Indiana also has individual experience with AmeriCorps and in conference planning and facilitation. The Executive Director of Serve Indiana has been with the organization for over 8 years. She has built strong relationships with other state commissions and Indiana national service programs. She has a deep knowledge of National Service history and future goals. Using these partnerships, we will draw from previous conference evaluation and experience to create a great event. Our Executive Director has been involved in planning for the Michigan conference in 2014 and has attended multiple regional trainings previously. Serve Indiana used both the Iowa and Michigan conference as AmeriCorps Program Director trainings, requiring all programs to attend. Serve Indiana intends to contract with ASC to maximize the capacity to design and achieve an excellent conference. Qualifications of the key staff from Serve Indiana staff and ASC assigned to the training are as follows:

The point person for this event, Elspeth O'Neil attended the Iowa conference as a Program Director. She recently came to Serve Indiana from a state wide nonprofit. In her role there she was the Director of the organization's AmeriCorps State program and coordinated their trainings for almost 6 years after completing two terms of AmeriCorps. Each year she organized their state wide conference. This event anticipated around 150 attendees each year. She worked with the hotel, vendors, caterers and presenters. She also led the registration and day of event coordination. These and her training facilitation skills will lend well to a regional service event. Two additional Program Officer's will also play a role in assisting with the training coordination. One of these staff members has eight years of experience in nonprofit management, training and volunteers. This experience will help support our efforts in the conference because of her relationships in the city and state. She can help us find appropriate local presenters and partners for the event. The other Program Officer is also two term AmeriCorps alum and has a passion for service and advancing programs. As our communications Program Officer, she will also assist with outreach and marketing.

Rachel Manuel Bruns is the deputy director for ASC. Other leadership roles have included the director of Volunteer Wisconsin and Iowa Campus Compact. Rachel has played a lead role in the coordination

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of the 2013 and 2015 regional training events.

Lastly, the location of the conference will be an ideal setting. Indianapolis is a city that is well equipped for an event of this kind. In 2008 the city hosted the Super Bowl and has many conferences and conventions throughout the year. In 2014, USA TODAY named Indianapolis the #1 city to host a convention beating out Boston, Nashville, Salt Lake City, and Atlanta. 2014 was a record year for hotel occupancy and new convention bookings. We anticipate the event would be located in the downtown area of the city with many cultural and service opportunities for the conference. Moreover, there are several hotels and restaurants in walking distance that will be affordable for attendees and the Indianapolis airport is a fairly easy and affordable hub to travel. To enhance this experience, Serve Indiana plans to partner with Visit Indy, the local visitors center to create a welcoming and inclusive environment for all.

Cost Effectiveness and Budget Adequacy

Budget and Program Design: The included budget follows a budget used in previous years for a regional conference. This budget is based on the goals of the project listed above. All detail for each line item is included in the proposed budget with equations for total cost.

The CNCS amount of \$74,999 will encompass 40% of the total project. Serve Indiana will provide 60% of the funds for this event which equates to \$111,000 in match. The source of match will include registration cost for attendees. It is estimated that the fee will be set between \$150-200, current figures based off of \$185.

Clarification Summary

N/A