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Executive Summary

The Arizona Governor's Commission on Service and Volunteerism (GCSV) is pleased to submit this proposal as the lead applicant for the Southwest Region Conference for the Corporation for National and Community Service (CNCS) and its geographically aligned states from the Southwest Cluster to facilitate the planning, implementation, and financial oversight of the 2016 - 17 Southwest Cluster National Service Conference (SWNSC). GCSV, in collaboration with America's Service Commissions (ASC), proposes a multi-day regional conference for AmeriCorps State/National, Senior Corps and state service commission program staff and leadership. The SWNSC structure will include tracks specific to the stakeholders comprised of collaborative sessions to facilitate cross stream training and dialogue. Training will focus on CNCS competencies and performance measurement, evaluation, and compliance, program and financial management and other topics deemed important by CNCS, Commissions, and National Service programs.

ASC, the Washington DC - based 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 GCSV to ensure all of the deliverables are met and that the conference aligns with the other regions.

The amount of funding requested is \$115,000. Additional cost for the conference will be covered by registration fees and event sponsorships.

Current projected dates are Tuesday, June 26 through Thursday, June 29, 2017.

Program Design

GCSV in Phoenix, Arizona, will serve as the lead applicant for the 2017 SWNSC. States included in the consortium will be those from the CNCS Southwest Cluster along with the states geographically aligned with the Pacific Cluster, which does not have a lead applicant for the 2017 regional conference. Consortium states include: Colorado, New Mexico, Oklahoma, Texas, Alaska, American Samoa, California, Hawaii, Guam, Idaho, Montana, Northern Mariana Islands, Nevada, Oregon, Utah, Washington, and Wyoming. The consortium also includes ASC and is further comprised of stakeholders representing AmeriCorps State/National and Senior Corps programs in the region, CNCS State Offices and representation from the full CNCS Program Network (VGF, Social Innovation Fund,

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and AmeriCorps National Direct, Indian Tribes, VISTA, and NCCC).

The proposed conference location is Phoenix, Arizona. Phoenix is served by Sky Harbor Airport which is a major hub for airlines and is located just minutes from downtown. The airport is connected to the downtown area by a relatively new and very affordable light rail system, at \$4 round trip to downtown from airport (http://routes.valleymetro.org/timetables/695/transit_route?type=1). Current thinking for the scheduling of the SWNSC is to take full advantage of off-season rates for hotels and convention space in downtown Phoenix, which would mean that the conference would be scheduled for late June 2017, where the average temperatures range from the 70's, in the evenings to the low 100's during the day. Inquiries have already been made with the Hyatt Regency-Downtown Phoenix (<http://phoenix.regency.hyatt.com/en/hotel/home.html>) for availability and pricing. The location will provide for ample meeting rooms and sleeping rooms (within government per diem) to accommodate 600 conference attendees or more. The location is situated in a district that offers a variety of affordable restaurants. In addition, the proposed conference location is a couple of blocks from the CNCS State Office, and is just minutes away from the state capitol, where the office of the GCSV is located.

Based on 2016 enrollment information of approximately 60% representing AmeriCorps programs and 40% representing Senior Corps programs, enrollment targets will be as follows: 1) Senior Corps (to include Foster Grandparent Programs, Senior Companion Programs, RSVP project directors - 240 participants; and 2) AmeriCorps (including State, National, VISTA, and Tribal programs) -360 participants.

With respect to the design of the conference experience, it would be very helpful to review past conference evaluation information to inform planning for 2017. In addition, it will be important to be clear on the specifics relating to CNCS required workshops and/or topics of interest. Taking this information into account, it would be advantageous to seek input from the involved area managers, CNCS State Offices and State Commissions to glean any additional potential topics to address. Following these initial steps for gathering input, a strategy would be devised that would include surveys, interviews, and focus groups for National Service programs that will participate in the conference.

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GCSV and ASC will promote the 2017 SWNSC through CNCS area managers, state offices, Senior Corps associations, and commissions. A draft agenda will be provided, as well as trainer credentials and registration information. These materials will be posted on the ASC, GCVS websites, social media outlets (Facebook, twitter, and LinkedIn) and through e-blast communications. Marketing and outreach material contain a statement that materials can be requested in alternative formats to reach the largest audience possible. Regional branding will be created in addition to CNCS branding required by the cooperative agreement.

Consortium members will forward marketing materials to their key stakeholders. In both the planning and implementation phases of the conference, we will keep state commissions and CNCS state offices up-to-date through regular scheduled conference calls and emails so that state commission staff and CNCS staff can stay up-to-date on the planning progress, contribute to decision-making and share information with programs. The minimum target registration for SWNSC is 600 participants.

GCSV and ASC will invite representatives from the consortium commissions, state offices, Senior Corps, AmeriCorps, and other National Service programs to participate in the SWNSC planning committee. The committee will begin to meet regularly upon CNCS notification that GCSV has been selected as one of the regional leads for a cooperative agreement. The ASC Deputy Director Rachel Manuel-Bruns, will coordinate or support the following aspects of conference planning with the support of an Arizona state contract vendor conference planner, Veer Consulting, with additional support offered by the staff of the GCSV (including the AmeriCorps Director, AmeriCorps State Program Administrator, and the new position created through the Training Investment Fund) additional support through the Governor's Office of Youth, Faith and Family support staff, as needed.

With respect to the plan to integrate the required CNCS curriculum, again it will be important to learn from the CNCS what curriculum will be required, so that a fully integrated conference experience can be developed for participants. To complement this CNCS curriculum, we would incorporate topics and themes identified through surveys, interviews and focus groups. Additionally, we will work toward developing additional, supportive, topical workshop ideas that will supplement the CNCS required curriculum.

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It is proposed that we contract with a company like 2Shoes (<http://www.2shoesapp.com/>), which will enable organizers to moderate presenter questions in real time, allows conference attendees to choose which questions they want addressed through a voting function, allows participants to provide feedback after every presentation (plenary and workshop) and to see how participants felt with the metrics over time, and allows for an electronic conference agenda, all available through a smart phone or other device application.

Timeline for the proposed regional conference would be as follows: 1) Secure conference venue and dates - August 2016; 2) Develop and distribute promotional materials at Symposium and begin gathering stakeholder input - September 2016; 3) Assemble conference organizing committee - October 2016; 4) Create and implement strategy for seeking input from the field that includes surveys, interviews and focus groups; identify and pursue keynote speakers - November 2016; 5) Secure keynote speakers and begin recruitment for workshops - January 2017; 6) Select workshop presenters, notify and confirm, build and publish conference agenda, open conference registration - March 2017; 7) Close conference registration, work on specific logistics and preparations - May 2017; 8) Deliver conference; and 9) Evaluate and reflect on conference.

With respect to SWNSC conference leadership, we propose a well-seasoned team. A key leader of the SWNSC will be Rachel Manuel-Bruns, M.B.A., Deputy Director of ASC, who has been leading and staffing the regional conference for the past several years. In addition GCSV proposes to contract with state vendor Veer Consulting, Dave Ryder, who has 25 years of experience in meeting and event management (<http://veerconsulting.com/about-us/about-founder/>). Additionally, GOYFF AmeriCorps Director, Bob Shogren, M. Ed will serve as overall project manager and has 11 years of experience organizing National Service conferences for Arizona and has been with the chair of the organizing committee for the Arizona Summit on Volunteerism and Civic Engagement for the past six years. Rachel will be point on developing content. Dave will be point on conference logistics including speaker and workshop presenter travel as well as serve as point for the venue. Bob will serve as overall project manager and serve in a supportive role for both the content and logistical leads.

Hyatt Regency as the location for this venue is able to accommodate the size of this proposed conference and can configure to accommodate larger or smaller numbers of participants. The hotel has the meeting and sleeping room space needed. Should the need arise, the hotel is located directly

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across from the Phoenix Convention Center, which could provide it additional meeting space capacity if needed. Within a couple of blocks radius, there are additional hotels that could accommodate overflow if needed.

Organizational Capability

GCSV has a long history of designing, implementing, and overseeing conferences, and in providing training and technical assistance on client defined training needs that have used an inclusive process to engage stakeholders in determining conference topics and themes. Since the beginning of the Commission, the Arizona CNCS State Office and Commission have collaboratively produced the annual National Service Conference that was held in Flagstaff at Northern Arizona University up to 2011 and was attended annually by approximately 350 National Service members and program staff from across the state. In 2009, the GCSV anchored the development of what has become the Arizona Summit on Volunteerism and Civic Engagement that has had an average attendance of approximately 550 participants over the last four years. In 2015, the Summit was attended by 540 participants, representing 42 communities and 170 organizations.

Summary feedback from the 2015 post-conference evaluation included the following. Of the total of responses to our evaluation survey, 95% of the respondents Strongly Agreed and Agreed that their participation in the Summit will help me to be a more effective volunteer and/or service-learning leader. In addition, 73% of the respondents Strongly Agreed and Agreed that their participation in the Summit has provided the learning necessary to make their organizations more effective. A Sample of general comments include the following: 1) "I learned we are doing a lot of right but we could add some procedures", "I was able to learn a lot"; 2) "Very informative. Inspirational and eye opening. I was able to connect and reconnect with individuals from all areas of volunteering. I also learned a great deal to take my volunteer program to the next level"; 3) "I will take home many new ideas to implement"; 4) "Very well organized and offered a good variety of workshops and information"; 5) "Relevant, engaging, informative"; 6) "Better than I thought it would be. Great sharing of resources and networking"; 7) "The only opportunity in AZ to come together to improve volunteerism and civic participation"; and, 8) "Very useful and helpful and so great to be surrounded with colleagues that experience the same struggles I face alone within my organization". A sample of comment in response to the question, As a result of ideas I have learned at the Summit, our programs will implement the following ideas in the next 30/60/90 days include: 1) "Streamline orientation and training for volunteers"; 2) "Staff training on how to work with volunteers energizes current training -

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up the wow factor."; 3) "Re-evaluating some of the current practices we use. Fine tuning volunteer orientation and on-boarding", 4) "Group interviews, interactive training and onboarding instead of orientation. Better orientation, on target raining, volunteer appreciation."; 5) Recognition strategies to improve staff & volunteer moral and connectedness."; 6) "Revamp orientation and some training materials. Institute a new recognition program. Lobby for more recognition for volunteers in action in my organization. Reorganize, refocus volunteer management team."; and, 7) "Volunteer orientation and training, volunteer recognition, soliciting feedback from volunteers, creating service descriptions, discussing volunteering possibilities with board of directors. Volunteer orientations. Better tracking of volunteer services."

Cost Effectiveness and Budget Adequacy

The GCSV proposes a very cost-effective budget for the administration and operation of the SWNSC. Current budget leverages existing commission resources to support the planning and implementation of the conference. In addition, the proposed budget includes travel and hotel costs associated with bringing in national presenters, costs associated with overall project management, facilities, A/V support, a fund for providing reasonable accommodations on request, and a conference app. Current budget does not include meals of any kind, but does include morning and afternoon break beverages, at the expense of participants. Current configuration of the budget will make the hard costs (A/V support, morning and afternoon break costs, trainer costs and conference material costs) of attendance less than \$150 per participant. Additionally, it is anticipated that we will be able to cobble together sufficient A/V equipment, which will significantly reduce AV costs, and further lower participant costs. In addition, GCSV will continue to explore additional venues that can provide a better price points and/or better dates.

DUNS Number 03-914-9351

Clarification Summary

Clarification Responses 8/01/2016

1. PLEASE DESCRIBE YOUR PLAN TO FULLY REPRESENT SENIOR CORPS IN ALL PHASES OF THE CONFERENCE DELIVERY

Senior Corps programs will have equal opportunity for input into the training planning and

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implementation as AmeriCorps State/National programs through the needs assessment and planning committee.

A training needs survey will be distributed to state offices in the region with the request to share with all their Senior Corps grantees to get a comprehensive understanding of training interests and needs. The survey results will be analyzed by the planning committee to identify training workshop needs.

Senior Corps will be an integral part of the planning process by including the AZ state office in the planning committee, as well as at least 1 Senior Corps program representative from each planning committee state. Planning committee members will be identified by asking each state office to nominate or refer a planning committee member to represent Senior Corps by a specific deadline.

The planning committee will be facilitated by ASC staff who has extensive experience working with and understanding the training need of Senior Corps. The ASC staff person formerly worked at an organization hosting RSVP, SCP and FGP programs. In addition, the staff previously served as liaison to the Senior Corps program associations in Iowa. The ASC staff has participated in the planning of the past 3 years of regional trainings, with positive feedback and input from Senior Corps grantees.

2. PLEASE DESCRIBE YOUR PLAN TO PROVIDE NECESSARY FISCAL MONITORING AND OVERSIGHT OF THE REGIONAL CONFERENCE COOPERATIVE AGREEMENT.

As with all federal funding administered by the Governor's Office of Youth, Faith and Family fiscal monitoring and oversight is accomplished in partnership with the Governor's Accounting Office. Once we receive the award letter, the award will receive a new function code and all expenses related to the regional conference will be tracked separately. In matters of expenditures being made by contractors, the Commission Director will first review and sign off and forward to Accounts Payable. Accounts Payable will double check the budget and will then forward to the GAO Grants Auditor who then makes the determination about payment and codes the expense. If any backup documentation is needed, it is most often made at this level of processing. Once the Grants Auditor validates and signs-off on the expenditure, the item is then sent to a GAO Accountant, who then does an additional review to make sure everything is in order and executes the drawdown.

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Additionally, the GOYFF uses an internal database application called Grants Information Management System (GIMS), so the overall project budget can be monitored and documentation can be reviewed in real time.

3. THE NARRATIVE REFERENCES ATTENDEES FEES BUT THERE ARE NOT GRANTEE SHARE COSTS PROVIDED IN THE BUDGET REQUEST.

The grantee share has been updated with overall costs not included in the original budget, including commission staffing, audio visual, projected participant registration fees, and participant sleeping rooms.

I.E - SUPPLIES: PLEASE CORRECT THE CONFERENCE TRAINING MATERIALS LINE, AS THE COST CALCULATION DOES NOT ALIGN WITH THE AMOUNT BUDGETED.

Cost calculation and amount budgeted was double checked and appears to be correct $\$50 + \$400 + \$360 + \$300 = \$1,110$.

I.F - CONTRACTUAL AND CONSULTANT SERVICES: PLEASE PROVIDE THE CALCULATION YOU USED TO DETERMINE THE COST ALLOCATION

Calculation used to determine project management includes the following: event coordination/planning 14 days at \$750 daily rate = \$10,500; Travel to event for ASC staff people 3 x \$350/plane ticket = \$1,050; 3 people x 3 nights x 150/night hotel = \$1,350; 3 x people x 3 days x \$50/day for per diem = \$450; 3 people x \$750/daily rate x 3 days = \$9,600. Total + about \$20,000

I.F - INCLUDE AN ADEQUATE LINE ITEM FOR AV SERVICES.

Line item added for audiovisual, with the cost split between the federal share and the grantee share.

With respect to the commission's ability to gather AV equipment to help reduce the overall cost of audiovisual for the regional conference, it is likely that we will be able to contribute a significant

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amount of projection equipment through the Governor's Office of Youth, Faith and Family, internally we have at least 10 projectors (five of which are brand-new) and working with our IT department we should be able to borrow a couple of additional projectors. All of these projectors would be completely suitable and have the lumens needed to provide good projectors for workshop rooms. In addition, with some advance notice, we should be able to borrow from the Arizona Department of Transportation two projectors that are of sufficient capacity to be used for the plenary session room. By being able to provide this equipment, it is likely that we will be able to cut the projected audiovisual costs in half. Should this be the case, we will also structure the relationship with the audio and visual vendor so that they take full responsibility for all room set up and troubleshooting, so that commission staff will not be encumbered by this additional responsibility.

Required Documents

Document Name

Status

Federally Approved Indirect Cost Rate

Sent