

Narratives

Executive Summary

The Florida Commission on Community Service (Volunteer Florida) is pleased to offer this proposal for the Corporation for National and Community Services (CNCS) FY 2016 Training and Technical Assistance-Regional Training Conference, to facilitate the planning, implementation, and financial oversight for a Southern Region Training Conference. Volunteer Florida proposes a multi-day regional conference during late Spring 2017 in Central Florida (likely Orlando), for AmeriCorps State & National, Senior Corps, and commission staff. In collaboration with the America's Service Commissions (ASC), Volunteer Florida will conduct an inclusive planning process that delivers an affordable, positive conference experience that utilizes the wealth of established CNCS curriculum to build the capacity for national service to positively impact communities. The training will include tracks specific to these stakeholders, and include collaborative sessions designed to facilitate cross-stream training and dialogue. Training will include at a minimum, 8 hours of the CNCS required competencies, including a focus on competencies in performance measures, evaluation, grant compliance, program and financial management, and other essential topics. While AmeriCorps State and National programs and Senior Corps projects are the primary audiences, other national service programs will also be invited and encouraged to attend. The amount of grant funding requested is \$144,500. The additional estimated costs of \$60,000 will be covered by registration fees for an estimated 400 paying attendees. Volunteer Florida will seek sponsors to offset costs in order to pass savings on to participants via reduced registration fees. Estimates were based on a registration fee of \$150/person but depending on hotel negotiated rates, it is conceivable that registration rates could be reduced to \$100/person.

Program Design

Volunteer Florida will enter into a Memorandum of Understanding with ASC, the national association of state service commissions, to provide significant support in the planning, development, and implementation of the regional conference. The proposed consortium will include Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, South Carolina, Tennessee, and Virginia. Volunteer Florida will also seek significant participation from additional 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, and AmeriCorps National Direct, Indian Tribes, VISTA, and NCCC.)

The conference planning strategy incorporates review of lessons learned and successes from the

Narratives

Southern Regional Conference hosted by Volunteer Florida in 2015 and from the Regional Conferences held in 2016. In hopes of submitting a successful application, Volunteer Florida has already begun collaboration with Serve Alabama, host of the Southern Regional Training in April 2016, to gain valuable planning information. If successful in application, Volunteer Florida will collaborate with the other Regional Conference awardees under the guidance of ASC, to ensure consistent National Service Conferences nationwide and successful completion of all deliverables. Florida proposes to host the conference in the Orlando area as one of the least expensive cities in terms of average airline ticket costs, and the very wide variety of full-service conference hotels options. The conference will be scheduled in early 2017 (between March and May), so it does not conflict with the other regional conferences, allowing ASC and CNCS staff the greatest opportunity to offer support and expertise.

For outreach & marketing, Volunteer Florida and ASC will promote the FY 2016 Southern Regional Training through CNCS area managers, state officers, Senior Corps Associations, and commissions. Volunteer Florida will utilize social media (Facebook, Twitter, LinkedIn) and e-newsletter messaging to promote the training with target audiences. After vetting through CNCS, a proposed agenda, trainer credentials, and registration information will all be posted on the websites of ASC, Volunteer Florida and CNCS. Marketing and outreach materials will contain a statement that the material may be requested in alternative formats to ensure inclusion. Branding will be created in addition to CNCS branding required by the cooperative agreement. Each consortium member will forward marketing materials to their key stakeholders. The target enrollment for the Southern Regional Training is 600 participants to include AmeriCorps State/National participants, Senior Corps participants, VISTA directors, Foster Grandparent program staff, Senior Companion program staff, RSVP program staff, state commission staff and commissioners, and other service stakeholders. The design of our budget will assure that all additional costs will be covered with the additional registration fee revenue if we exceed these number.

The conference training design will incorporate a minimum of 8 hours of CNCS required curriculum and tracks for AmeriCorps, Senior Corps, and state commissions as well as potential sessions specifically for new state commission employees and commissioners. Sessions in these tracks fulfilling the required components for CNCS competencies will be featured prominently on the agenda. Training will include performance measures, data collection, application of evidence-based theories of change, evaluation, grants management, and financial management as well as other critical training needs of the Southern Region as identified through commission and CNCS State Office annual needs

Narratives

assessment, summary of most recent trainings, and feedback from Program Officers. Analysis of regional needs will ensure regionally aligned learning priorities and direct flow of content to maximize educational impact. The planning committee, peer presenters, and Technical Assistance providers will develop conference curricula for CNCS approval. After the conference, learning materials (slides, handouts, etc.) will be posted on the National Service Knowledge Network for cataloging/reference to the field. Volunteer Florida will explore virtual learning options including live streaming and recording sessions for playback.

Volunteer Florida administers a Training Needs Assessment and a Risk Assessment annually to inform the annual plan for Commission technical assistance, training and grant monitoring. The competencies addressed as a result include; program management, performance measures/theory of change, data collection, evaluation, service site management, member retention, member training, financial management, sustainability, professional development, and leadership. Volunteer Florida will include Florida's Training Needs Assessment in planning for the 2016 Southern Regional Conference.

Volunteer Florida and ASC will facilitate an inclusive conference planning process to prepare the curriculum and logistical details. If Volunteer Florida is awarded the grant, a committee representing the Southern Region commissions, AmeriCorps State/National, Senior Corps, CNCS State Office, and ASC staff will meet regularly (likely weekly) upon CNCS notice of intent to award funds. In addition to the required CNCS content, the consortium's initial ideas for common session topics include: AmeriCorps NCCC regional activities, increasing collective impact, service as a strategy to support disconnected youth, innovative cross-stream collaboration, disaster services and response, and area-specific topics (education, environment, etc.). Recognizing that many of our region's best resources are active members of the National Service family, Volunteer Florida and ASC will utilize peer trainers and presenters when possible (from commission and CNCS State office staff as well as National Service program directors). National training and technical assistance providers will likely be sought for their subject matter expertise, particularly for required topics like CNCS performance measures and grant and financial management. The proposed conference will be 2-3 days in length, with the potential for half days on either end to allow for travel flexibility. Pre- and post-conference activities could include local service projects and affinity group meetings, orientations, or trainings.

Volunteer Florida routinely conducts post-conference evaluations to measure participant satisfaction, effectiveness of training, and ability to apply new learning, in order to enhance future training efforts. Regarding outputs, evaluation and knowledge gains for the Southern Regional Conference, Volunteer

Narratives

Florida will work with CNCS on the required assessments of competency gains for performance measures and compliance. The assessment will be administered pre and post-conference or as otherwise instructed by CNCS. Volunteer Florida will work with ASC and CNCS to ensure collection of and reporting on all CNCS designated performance reporting criteria, including evaluation of customer satisfaction with the conference experience, using CNCS approved survey instruments, and basic conference outputs such as numbers of attendees, national service program affiliation, etc. Volunteer Florida will use the CNCS defined assessment questions and prescribed methodology for collecting data. Conference participants will demonstrate knowledge of CNCS performance measurement and evaluation competencies, such as use of theory of change or logic models, understanding of performance measurement and evaluation, application of evidence-based approaches, application of data collection method, as well as how to access resources for continued learning. In addition, conference participants will demonstrate knowledge of CNCS compliance competencies, such as grants administration, criminal history checks, program and financial management, as well as how to access resources for continued learning. Assessment data, including participant profiles and conference outputs, will be delivered to CNCS within 30 days of the conclusion of the conference.

TIMELINE: Through discussions with ASC, the following timeline is proposed to maximize attendance:

-September 2016: Anticipated CNCS notification of intent to award cooperative agreement

*October - December 2016: Planning Committee convenes regularly, hotel contract executed, trainers secured, marketing materials developed, save-the-date released

*January 2017: Registration system opens; Planning Committee meetings continue

*Three weeks before the conference: Deadline for registration

*Late March to Early May 2017: Southern Regional Training National Service Conference (exact dates will be determined with ASC to coordinate with the timing of the other regional conferences)

*Two weeks after the event: Materials supplied to National Service Knowledge Network

*30 days after the event: Outputs, evaluation, and knowledge gains data returned to CNCS

*90 days after the event: Financials reconciled/reported to CNCS

*6 months after the event: Follow up evaluation sent, collected, and analyzed

Regarding capacity and staff roles, Volunteer Florida's COO will serve as the main point of contact with CNCS, and will oversee submission of required reports, evaluations, and learning materials.

Volunteer Florida will manage the conference budget, collect registration fees, print conference

Narratives

materials and respond to reasonable accommodation requests. The ASC Deputy Director of Programming & Operations will create and manage an online registration system, work with Volunteer Florida to secure meeting space and lodging, support Volunteer Florida in the development and submission of all required reports and evaluations to CNCS, assist with the creation of conference materials, and co-manage the Planning Committee. The executive level staff of Volunteer Florida and ASC (or their designee) will identify and secure sponsors for the conference, and will assist with promotion of the conference. The Planning Committee will assist with the procurement of keynote speakers and promote the conference to their network of programs.

The overall approach for this conference is to provide training and Technical Assistance to improve the programmatic quality and accountability of National Service programs and projects in the Southern Region. The conference will include the CNCS required elements and supplementary elements determined by the Planning Committee. Based on prior conference and training experience, Volunteer Florida is confident that the conference will lead to the desired CNCS outcomes & outcomes defined by the region. Volunteer Florida will replicate the most successful elements of the 2016 Conferences, and enhance the event with new ideas from the Planning Committee in coordination with all regional partners.

Organizational Capability

The Florida Commission on Community Service (Volunteer Florida) was legislatively established in 1994 and is administratively housed in the Governor's office, allowing Volunteer Florida to serve as the state's lead agency for service and volunteerism. From its beginning as a state commission, Volunteer Florida has been responsible for designing and implementing large-scale conferences, training events and meetings. Examples of these events include AmeriCorps Member Statewide Conferences (including Viva AmeriCorps Statewide Conference, AmeriCorps Week Service Projects, Florida AmeriCorps & National Service Conference, and AmeriCorps Statewide Conference ¿ 2012, 2009, 2008, 2006, 2005); AmeriCorps training such as 9/11 Disaster Training/Day of Remembrance, Civic Sense, and AmeriCorps Alumni Leadership Council; AmeriCorps Member Training (including Life After AmeriCorps, Diversity, Conflict Resolution, Civic Sense, and Teambuilding Training); Statewide Service Projects such as MLK, Beach Walk, AmeriCorps Week/I Can, Southern Regional Training Conference (2015), annual Program Director training, annual LeaderCorp training, annual Emergency Management convening, annual VGF trainings, annual Commission and Foundation Board meetings, and various other special projects.

Under the direction of CEO Chester Spellman's exemplary leadership, Volunteer Florida will capitalize

Narratives

on the collective years of experience in project design and implementation, National Service program development, grant management, event planning, and marketing and outreach, to provide a meaningful and positive conference experience for participants. Volunteer Florida has strong systems for procurement, invoice payment, event management and participant evaluation. The Cvents online venue bid system utilized by Volunteer Florida allows for online solicitation of hotel conference/meeting venues & comparison of proposals including analysis of hidden fees, so the most appropriate & affordable conference venue may be selected. Key staff will lead the regional planning team, create media and marketing, coordinate conference logistics including facility/meals/lodging, communicate and contract with selected trainers, and evaluate knowledge gains. Volunteer Florida will also capitalize on the high level skill and expertise ASC staff who will also perform project management duties, event planning and training design. Since its founding in 1997, ASC has routinely convened national & regional conferences for state service commissions & National Service programs. *Rachel Manuel Bruns (ASC) is an advocate for national service and volunteering as deputy director of America's Service Commissions. Rachel has extensive experience with conference planning including supporting the successful implementation of the 2013, 2015 and 2016 national service regional trainings. Rachel's career has focused on expanding infrastructure to use service as a strategy to meet pressing community needs in roles including strategy and development officer for the Iowa Commission on Volunteer Service, director of Volunteer Wisconsin, and executive director of Iowa Campus Compact. Rachel is a graduate of Drake University (MPA, AS, JMC) and actively involved in the Des Moines community.

*Chester Spellman will provide guiding leadership, oversight, and vision for this project. He was appointed as CEO in April, 2012 by Governor Rick Scott. At Volunteer Florida, CEO Spellman oversees more than \$31 million in federal, state and local funds supporting AmeriCorps and volunteer programs meeting critical needs in Florida's communities, as well as statewide coordination for volunteers & donations during times of disaster or emergency. Mr. Spellman has more than a decade of experience working at the executive level in government & the nonprofit sector.

*Bonnie Hazleton, COO for Volunteer Florida, has a masters in Psychology and 17 years experience in government relations & operations.

*Catherine (Cat) Keen, Director of National Service Programs and formerly with The Able Trust, brings 15 years of experience in nonprofit service delivery & management to Volunteer Florida. She and her National Services Team will assist in the development and implementation of all training, monitoring, and evaluation for the conference.

Narratives

*Erin VanSickle, External Affairs Director for Volunteer Florida has extensive experience & expertise in media, messaging, communications and governmental affairs. Erin will be responsible ensuring robust outreach and marketing to partners and target audiences. She will coordinate with ASC, CNCS, presenters/speakers to ensure high quality & appropriate messaging & branding.

*Erik Steffen, Technology Specialist with Volunteer Florida for the last 5 years has high level expertise in technology as well as photography and graphic design. Erik will direct coordination on all AV and technology matters related to the conference & have a critical role in design & production of graphics for meeting materials and promotion.

Volunteer Florida's team of National Service subject matter experts includes;

*Ericka McKibbin, AmeriCorps Program Manager for Volunteer Florida for over 10 years, has over 19 years of experience in the National Service arena. Her background ranges from serving as a member of the AmeriCorps National Civilian Community Corps to a Peace Corps Volunteer in El Salvador to managing a statewide service learning VISTA initiative.

*Paula DeBoles-Johnson, MPA has been a part of the Volunteer Florida team for over 10 years as a Program Manager. She has more than 25 years of experience with state government and local nonprofit organizations.

*Jamie Cliburn is a public service professional with Volunteer Florida. Prior to joining Volunteer Florida as a Program Manager in September, 2013, Jamie served for 2 years with the Peace Corps in Suriname, South America and 3 years with the Florida Department of Management Services.

* Anitra Thomas, Grants and Training Coordinator for Volunteer Florida, has been with Volunteer Florida 9 years in July 2016. She has expertise in coordination of the AmeriCorps grant review processes, event coordination for the AmeriCorps Program Director and Member trainings, as well as events coordination for Commission meetings and special events. She has expertise in eGrants MicroEdge and Cvents online venue bid system.

*Audrey Kidwell, VGF grants manager and MicroEdge expert has 9+ years experience in recruiting and managing volunteers. She served as a Peace Corps Volunteer in Burkina Faso, West Africa for 3 ½ years working to increase the effectiveness of health promotion and disease prevention activities. Audrey also served as a Florida Campus Compact/AmeriCorps VISTA volunteer at the William R. Butler Center for Volunteer Service and Leadership.

*Volunteer Florida's finance department team consists of 2 financial analysts (with VF 2-4 yrs) and a CPA CFO (to be officially announced June 2016) for a collective experience of over 30 years in financial monitoring, compliance, eligibility determination, accounts payable/receivable, bookkeeping,

Narratives

& other financial activities.

Cost Effectiveness and Budget Adequacy

Reasonable costs to hold a large-scale conference in Florida are estimated using historical MIP accounting system data from the 2015 Southern Regional Training Conference hosted by Volunteer Florida, as well as cost data for Commission meetings and training events in 2016. Estimates were calculated based on 600 conference participants. Revenue for the conference was estimated on 400 paid participants at a \$150 registration fee. The following costs are estimated based on this data: Total food costs of \$99,560 (based on historical accounting data and 600 participant capacity; total staff travel costs of \$13,624 (18 staff for 4 days of per diem, lodging & travel); Complementary lodging costs of \$30,000 (paid for FL AmeriCorps programs and scholarships); AV/Technology costs of \$30,000 (historical data plus significantly more); Trainer costs of \$25,000 (750/day plus travel, lodging, expenses-avg for 2016 NRC's was \$22K); additional cost for 2 speakers of \$500; ASC MOU cost of \$20,000; Printing costs of \$6000; Materials cost of \$8000; and miscellaneous additional costs of \$1,816 for inclusion and ADA accommodations, for an estimated total cost of \$202,684. Volunteer Florida requests grant funding of \$144,500 from CNCS. The remaining \$60,000 would be received from 400 participant registrations of \$150 each.

This budget estimate takes into consideration increased resources for both AV/Technology and Trainer costs. AV/Technology capability, to include access for persons with disabilities, is critical to provide a positive conference experience and optimal learning conditions. High level trainers are also fundamental to maximum learning and positive conference experience.

Financial oversight will be led by Volunteer Florida's finance department including 2 financial analysts and a CPA licensed CFO. Volunteer Florida utilizes Management Information Processes (MIP) accounting software designed specifically for high complexity fund management and a preferred software for nonprofit accounting. MIP will be utilized to track all expenditures and revenues to ensure compliance with federal regulations and General Accepted Accounting Principles (GAAP).

Volunteer Florida will ensure compliance with federal requirements, utilizing the financial management systems currently in use for our proposed grant funding for the FY 2016 Southern Regional Training, and will ensure the highest level of accountability and adherence to federal and state policies. Volunteer Florida's proven program management system continues to meet the CNCS standards and OMB guidelines, rules and regulations.

Narratives

Clarification Summary

7/28/16

1. Volunteer Florida will fully engage Senior Corps program representation in all phases of the conference delivery. Senior Corps will be provided pre training assessment and post training assessment to measure increase of knowledge. Volunteer Florida anticipates providing the pre and post training assessment to all National Service programs as is consistent with Performance Measures related to training associated with the Commission Investment Fund. Volunteer Florida, in partnership with ASC, will facilitate a conference planning process to prepare the curriculum and logistical details. We anticipate that this process will include a Planning Committee which will include Senior Corps programs. The Planning Committee will meet regularly to develop an inclusive Regional Training representing key stakeholders. In 2014, Volunteer Florida supported the Southern Regional Training representing over 400 participants. Volunteer Florida staff (National Service Programs Director and Grants & Training Coordinator) led the biweekly meetings with the local Planning Committee, ASC and participated in the CNCS required biweekly meetings. These staff members will lend leadership and expertise for the 2016 Regional Training planning process. We will rely on this past experience and expertise gained to continue to fully incorporate Senior Corps in all aspects of the training. In 2014, the Planning Committee included Senior Corps representatives who provided specific feedback on training content, plenary sessions and overall implementation. In addition, Volunteer Florida supported a specific Senior Corps evening session and meeting of the National Senior Corps Association. Volunteer Florida received very positive feedback from Senior Corps programs representing the region.

2. Volunteer Florida will plan the event to include infrastructure to secure appropriate meeting facilities, lodging, meals, and logistics support for approximately 600 conference attendees. Participants to include AmeriCorps State/National participants, Senior Corps participants, VISTA directors, Foster Grandparent program staff, Senior Companion program staff, RSVP program staff, state commission staff and commissioners, and other service stakeholders. The design of our budget will assure that all additional costs will be covered with the additional registration fee revenue if we exceed these number. When dates are approved, Volunteer Florida will immediately begin the process to securing a venue for the Regional Training that meets these needs.

Required Documents

Document Name

Status