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Executive Summary

ServeOhio, the Ohio Commission on Service and Volunteerism, the State Service Commission for Ohio, is requesting \$144,500 in CNCS funding to lead the 2017 North Central Regional Training Conference. ServeOhio commits to plan, facilitate, implement and provide financial oversight for the event. The conference will serve the identified states in the North Central Region (IA, IL, IN, MI, MN, ND, NE, OH, SD, WI); Kansas, Missouri and West Virginia; and any additional participants outside of our identified region. We will partner with the State Service Commissions within the region; America's Service Commissions (ASC); National AmeriCorps Programs; AmeriCorps NCCC; AmeriCorps VISTA; Senior Corps; Corporation for National and Community Service federal and state offices; Social Innovation Fund; and Tribal grantees to develop and implement a three-day conference with a primary focus on AmeriCorps and Senior Corps program staff.

ServeOhio will work with ASC, CNCS and a representative conference planning committee to develop content that meets the needs of targeted attendees and fills CNCS directives. The conference will feature the core curriculum provided by CNCS, as well as, additional content derived from the results of a constituency needs assessment & all focused on strengthening and building capacity of local AmeriCorps and Senior Corps programs.

ServeOhio will enter into a contractual agreement with ASC which will provide significant support in the planning, development and implementation of the conference. Rebecca Verhoff-Kiss, ServeOhio Outreach and Education Officer, and William Hall, ServeOhio Executive Director, will work closely with CNCS, ASC and the planning committee to ensure all deliverables are met and align with events conducted in other regions.

Program Design

ServeOhio is proposing a regional conference that will include all ten states identified by CNCS within the North Central Region & Iowa, Illinois, Indiana, Michigan, Minnesota, North Dakota, Nebraska, Ohio, South Dakota and Wisconsin. In addition, we are planning for participation from Missouri, Kansas and West Virginia given the anticipated number and geographic coverage of regional conferences in 2017. Constituencies from all thirteen states will be included in the planning process to ensure the development of applicable content.

Through terms established via a Memorandum of Understanding, ServeOhio will work closely with ASC to structure the event. ASC and ServeOhio will work together to establish a planning committee for the event which will be inclusive of CNCS federal and state offices; state commission staff; and

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representation from AmeriCorps and Senior Corps programs. A needs assessment will be developed and circulated to the relevant constituencies with the results being utilized to develop content outside the CNCS core curriculum.

ServeOhio will take the lead in all local elements and logistics related to the conference. This will include securing an event space that can accommodate 600 participants; managing vendor agreements relative to the coordination of meeting space, participant lodging, meals and AV requirements. ServeOhio will also retain primary responsibility for all onsite event logistics, printing and event budgeting. ASC will provide leadership in coordinating the conference committee; distributing the needs assessment and developing the agenda; event promotion and participant registration; presenter solicitation and contracting; and post-event evaluation.

In anticipation of potential funding, ServeOhio has already begun to explore venue options that meet accommodation and date requirements. We will solicit proposals from several properties and review for venue quality, accessibility, availability and cost factors prior to submitting our recommendations to CNCS for approval. Our intention is to host the conference in Columbus, but ServeOhio will examine options in Cleveland and Cincinnati, if needed, to secure the best possible venue and dates. Reviewing the agendas for past events, we are constructing a three-day conference with the option of pre and post sessions on the initial and final days.

Current data indicates there are 772 national service programs operating in the thirteen states we have identified as participating in this regional event ; 209 AmeriCorps National, 240 AmeriCorps State, 318 Senior Corps and 5 Tribal. We anticipate highest participation within AmeriCorps State and Senior Corps programs; our venue will accommodate 600 participants, as required, but for planning purposes we are targeting 450. This number seems aspirational, yet reasonable given the program data available and the participation rate for this event in 2016. ASC will take the lead role in outreach and marketing of the event; we will work closely with State Service Commissions and CNCS State Offices to identify potential attendees and assist in the distribution of marketing materials. In addition, we will work directly with CNCS to target those entities that may not fall under commissions or state offices ; such as national grantees, tribal programs and Social Innovation Fund grantees. All marketing materials, event details and registration information will be housed on a common website maintained by ASC.

As previously noted, the content planning process will begin with a needs assessment that will capture constituency interests and skill levels on strengthening and building program capacity. We anticipate a continued focus on program performance and evaluation, but maintain the flexibility to address

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pressing concerns identified by the field or CNCS. Once the needs assessment results are collected and collated, they will be shared with the planning committee for discussion and agenda development. Since the planning committee will be comprised of representative constituencies, they will be well-positioned to dissect the information and help formulate a responsive request for proposals. The planning committee in conjunction with ServeOhio, ASC and other leadership partners, will disseminate the request for proposals to qualified audiences to garner the most appropriate proposals.

Parallel to the open call for proposals, the planning committee will examine the content included in the CNCS core curriculum to make determinations on how the information would be best presented within the conference and what other content might be selected to compliment. This process will be guided by ASC and ServeOhio to ensure all CNCS requirements and approvals are completed. Engaging the planning committee throughout this process will provide peer insights that will allow us to construct the most beneficial session and plenary content for our core constituencies of AmeriCorps and Senior Corps program staff.

A broad timeline has been constructed in anticipation of this event. Once funding approvals and levels are determined by CNCS, ServeOhio will immediately move to secure a venue and dates for CNCS approval. Next, with the assistance of ASC, a needs assessment will be constructed and distributed and our regional planning committee will be assembled. As a group we will determine the final timeline and deadlines to ensure an orderly process and to meet all CNCS requirements. ServeOhio will also look to the experiences of past lead commissions to glean relevant information on structuring the event timeline. Currently, we hope to hold our event in May 2017; once the dates and venue are secured and approved, we will be able to work backwards to construct an effective event timeline. Post-event evaluation will be completed in partnership with ASC utilizing a survey instrument that will be forwarded to all conference participants.

Three ServeOhio staff members will play a prominent role in the development and implementation of the conference. Rebeccah Verhoff-Kiss, ServeOhio Outreach and Education Officer, will be the commission's lead; Rebeccah has been with the commission since January 2014 and previously served as an AmeriCorps program director. She has extensive experience in designing professional development opportunities for a wide variety of constituencies and currently leads all planning efforts relative to the annual Ohio Conference on Service and Volunteerism. William Hall, ServeOhio Executive Director, will provide support and guidance to the planning committee and event leadership; William has been with the commission for 18 years and held multiple positions related to

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program management and development. In addition, William has either led or supported the annual Ohio Conference on Service and Volunteerism during his entire tenure at the commission. Carrie Niino-Koontz, ServeOhio Director of Finance and Operations, will maintain primary oversight of the event budget. Additional support from ServeOhio AmeriCorps Program and Grants Officers is also available to provide content expertise and logistical manpower.

As previously stated, ServeOhio will form a contractual relationship with ASC as a primary partner in the development and implementation of this event. Rachel Manuel Bruns, ASC Deputy Director, will be the lead representing that organization. Rachel has extensive experience with conference planning including supporting the successful implementation of the 2013, 2015 and 2016 national service regional trainings. In addition, Rachel has held staff positions at the Iowa Commission on Volunteer Service, Volunteer Wisconsin and Iowa Campus Compact devoted to expanding the infrastructure and impact of service.

Organizational Capability

As the State Service Commission for Ohio, ServeOhio is responsible for the administration of AmeriCorps programming in Ohio. Our current portfolio includes 20 grantees who support over 800 AmeriCorps members. In addition, ServeOhio provides support to the traditional volunteer sector through our Stewards of Service initiative which includes professional development, recognition and service project funding.

For twenty years, ServeOhio has administered the annual Ohio Conference on Service and Volunteerism. The conference serves three primary constituencies √ AmeriCorps program staff, Senior Corps program staff, volunteer administrators √ and draws 350 √ 500 participants. In many ways our annual conference is reflective of the national service regional conferences in the manner in which it is developed and implemented. ServeOhio serves as the lead partner √ working with a statewide planning committee with representation from all of participating sectors, including the CNCS State Office and local Senior Corps and AmeriCorps staff members. For our state conference, ServeOhio negotiates all venue, food and AV contracts; facilitates the planning committee; develops and distributes requests for proposals; finalizes agenda and content, including plenary sessions; plans and executes conference budget; and oversight of the conference participant evaluations and alignment with conference objectives.

As a state service commission, ServeOhio has considerable experience in developing content to meet the needs of our AmeriCorps programs, other national service programs and the traditional volunteer sector. Our primary training efforts have always been focused on program compliance, impact and

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evaluation. We have staff positions dedicated to professional development and program evaluation; our recent submission for TTA Investment Funds emphasized program evaluation activity and included an event this fall devoted to that topic which will be open AmeriCorps State, AmeriCorps National and Senior Programs operating in Ohio.

Given the extensive experience of ServeOhio staff with our annual conference and knowledge of the regional conference participant constituency, ServeOhio is well-poised to execute an effective, high-quality 2017 North Central Regional Training Conference.

Cost Effectiveness and Budget Adequacy

Our budget submission is based on historical data collected from state service commissions who previously hosted regional conferences and is based on the objectives outlined above. The CNCS amount of \$144,500 represents 65% of the total project. ServeOhio will provide 35% of the funds which equates to \$78,750 in match. The match will be generated from registration fees for attendees; this budget is based on a registration fee of \$175 with 450 attendees.

Clarification Summary

SENIOR CORPS REPRESENTATION

ServeOhio will work closely with ASC to ensure that Senior Corps is well-represented in the planning and implementation of the 2017 North Central Regional Training Conference. First, we will conduct an extensive needs assessment to all Senior Corps programming within the participating states & working closely with partnering CNCS State Offices and State Service Commissions to promote robust participation. Second, CNCS State Office and direct Senior Corps grantees will be part of the regional event planning committee. ServeOhio and ASC will identify Senior Corps program staff with a wide range of experience to help identify and solidify specific content for their constituency. Finally, ServeOhio staff is well-positioned to work with our CNCS State Office and Ohio Senior Corps grantees to gain additional insights in developing content for Senior Corps program staff; we have been doing such for over 20 years as part of the annual Ohio Conference on Service and Volunteerism.

VENUE ACCOMMODATION

ServeOhio has entered into initial negotiations with the Hyatt Regency Columbus as a conference venue for an event that would be held May 8-10, 2017; all contingent on CNCS final approval. The

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Hyatt Regency Columbus has a total of 63,000 square feet of function space; including a 15,800-square-foot ballroom that can accommodate 1,200 individuals. The space has a total of 29 meeting rooms. Currently, ServeOhio is holding the ballroom and 10 meeting rooms for this event. In addition, we have secured 375 overnight rooms for 5/8/17 and 5/9/17 between the Hyatt and an adjoining property. These preliminary numbers are based on the historical data of this event; however, our primary property has the ability to expand their commitment of meeting space and we have options to secure additional overnight room blocks as needed.

Section I. F - Contractual and Consultant Services: Please explain why the ASC Project Management Contract includes meal expenses, when food and beverage services are budgeted for all conference attendees.

The meal expenses for ASC Project Management team have been reduced to account for meals that will be included in the conference. However, not all meals will be included in the conference and the ASC team will be onsite before and after the conference so additional funds for meals are required.

Required Documents

Document Name

Status