

A stylized graphic of a sunset with a bright yellow sun partially obscured by dark blue mountain silhouettes. The sky is filled with wavy bands of orange and yellow, with diagonal lines radiating from the sun.

# **SOUTHWEST NATIONAL SERVICE CONFERENCE**



**ARIZONA  
ARKANSAS  
COLORADO**



**KANSAS  
LOUISIANA  
MISSOURI**



**NEW MEXICO  
OKLAHOMA  
TEXAS**

**FORT WORTH, TX • JUNE 8-10, 2015 • #SWNSC**



**STATE OF TEXAS  
OFFICE OF THE GOVERNOR**

**Greetings:**

As Governor of Texas, I am pleased to welcome you to the Southwest National Service Conference.

This conference will provide you with exceptional professional development and training on innovative strategies to advance volunteerism across the Southwest. As you gather to network, share your success stories and prepare for the challenges of the future, I commend you for your continued dedication to strengthening the nonprofit sector and promoting community service in your states.

To those from out of town, welcome to Texas! The Fort Worth area is renowned for its many attractions, from fine dining to historic buildings and an array of cultural attractions. This vibrant area has something for everyone, and I encourage you all to explore and enjoy.

First Lady Cecilia Abbott joins me in sending best wishes for a productive and memorable conference.

Sincerely,

A handwritten signature in black ink, reading "Greg Abbott".

Greg Abbott  
Governor





It is my pleasure to welcome the 2015 Southwest National Service Conference on June 8-10, 2015. We hope that you will savor your stay in Fort Worth and enjoy the unique mix of cultural activities found only "Where the West Begins."

As Mayor, it is with great pride that I would like to tell you about our city, a city of cowboys, culture and community. In one visit you can enjoy an enormous range of experiences – from art to animals, from fashion to family fun. We offer lessons in western history with a tour of the Historic Stockyards, auto racing at the Texas Motor Speedway or a relaxing night of shopping and dining in downtown's historic Sundance Square. The choice is yours!

While you are in Fort Worth, we hope you get a chance to visit:

- Our downtown area ... a nationally noted model of successful urban renaissance filled with restaurants, museums, art galleries, theaters and an abundance of retail shopping. The Sundance Square area of downtown is a "must-see" for everyone visiting the city.
- The Cultural District ... recognized as the "museum capital of the Southwest," is home to world-class museums. We are proud to be home to the Texas Cowgirl Hall of Fame, and we have an outstanding Equestrian Center, one of the country's top-ranked zoos, and a multitude of beautiful parks and gardens.
- Northside's historic Stockyards area ... a delightful journey into the city's western heritage. You are sure to enjoy the area's many shops and restaurants while finding a real-life cowboy or two outfitted with horses and even the cattle drive of the Fort Worth Herd of longhorns!

One of the most valuable assets is our people. Visitors often cite the "Fort Worth Friendly" spirit of our citizens and businesses as the top reason they plan a return visit. We hope you enjoy your time in Cowtown.

Sincerely,

Betsy Price  
Mayor





We are happy to partner with the following groups for the 2015 Southwest National Service Conference



The 2015 Southwest National Service Conference is proud to support **Tragedy Assistance Program for Survivors (TAPS)**. TAPS offers compassionate care to all those grieving the death of a loved one serving in our Armed Forces. Since 1994, TAPS has provided comfort and hope 24 hours a day, seven days a week through a national peer support network and connection to grief resources, all at no cost to surviving families and loved ones.

Through **Hotels for Hope's RoomFunding™ platform**, every room night booked through the contracted room block generates a \$2 donation to the TAPS project. This project will fund the training of 200 Good Grief Camp volunteers to be one-on-one mentors with children that attend the Good Grief Camp.



BOOK ROOMS. CHANGE LIVES.

To learn more about this project and how you can support TAPS, visit: [bit.ly/TAPSRoomFunding](http://bit.ly/TAPSRoomFunding).



# AGENDA

## AT-A-GLANCE

### Monday, June 8

- 7:30** Registration and Exhibit Hall Opens
- 8:30–12:30** Pre-Conference Meetings\*
- 12:30–1:30** Lunch (On Your Own)
- 1:30–2:00** Opening Plenary
- 2:00–2:15** Break
- 2:15–3:45** Workshop Session 1
- 3:45–4:00** Break
- 4:00–5:30** Workshop Session 2
- 5:30–7:30** Welcome Reception (Optional)
- 6:30–8:30** Special Sessions (Invitation Only)\*\*

### Tuesday, June 9

- 7:30–8:30** Light Breakfast & Morning Wake-Up Call
- 8:30–10:00** Breakfast Plenary
- 10:00–10:15** Break
- 10:15–11:45** Workshop Session 3
- 11:45–12:00** Break
- 12:00–1:30** Lunch Plenary
- 1:30–1:45** Break
- 1:45–3:15** Workshop Session 4
- 3:15–3:30** Break
- 3:30–5:00** Workshop Session 5
- 6:30–11:00** Optional Night Out at Fort Worth Stockyards

### Wednesday, June 10

- 7:30–8:30** Light Breakfast & Morning Wake-Up Call
- 8:30–10:00** Workshop Session 6
- 10:00–10:15** Break
- 10:15–11:45** Workshop Session 7
- 11:45–12:00** Break
- 12:00–1:30** Lunch Plenary
- 1:30–1:45** Break
- 1:45–3:15** Workshop Session 8
- 3:15–3:30** Break
- 3:30–5:00** Workshop Session 9
- 5:00** Adjourn

\* Required for OneStar AmeriCorps Texas Grantees and Texas Senior Corps Association Board members.

\*\* Special Sessions offered include: Texas Senior Corps Association Meeting, Oklahoma Community Service Commission Grantee Gathering, Arizona Governor's Service Commission Grantee Gathering, and Serve Colorado Grantee Gathering.

Thank you to our sponsors!



**VOLUNTEER**  **NOW** <sup>SM</sup>

*Corporation for*  
**NATIONAL &  
COMMUNITY  
SERVICE** 



**Cigna**



**Texas  
Senior  
Corps**

**SERVICE • YEAR** <sup>SM</sup>

**AMERICA  
LEARNS**



# Monday, June 8

## REGISTRATION/EXHIBIT HALL OPENS • 7:30 AM

Magnolia Pre-Function Foyer (2nd Floor) | All

Stop by the Registration Booth to pick up your name badge, conference program, and information about Fort Worth before we kick off at 1:30pm. And don't forget to check out our fantastic sponsors and partners in the Exhibit Hall!

## PRE-CONFERENCE MEETINGS • 8:30 AM-12:30 PM

Cypress II (OneStar) & Oak III (TSCA) | Pre-Conference Groups Only: OneStar Grantees, Texas Senior Corps Association Board Members

AmeriCorps Texas All-Grantee Meeting (Required for OneStar Grantees); Texas Senior Corps Association Board Meeting

## OPENING PLENARY • 1:30-2:00 PM

**Opening Session & Welcome to Fort Worth!** Magnolia Ballroom | All

**Councilmember Jungus Jordan**, Fort Worth City Council

**The Honorable Glen Whitley**, Tarrant County Judge

**Elizabeth Darling**, OneStar Foundation President & CEO

**Daphne Brookins**, OneStar Foundation Commissioner and AmeriCorps Alum

**Michael Laverty**, CNCS Southwest Cluster Area Manager; and special guests

## AMERICA LEARNS

### SPECIAL OPPORTUNITY: Free Performance Measurement Bootcamps (Three Available)

Spend 90 minutes with an AmeriCorps data collection and performance measurement expert to think through and strengthen your performance measurement and data collection strategies.

These one-on-one sessions are being led by Conference sponsor America Learns, an 11 year veteran of helping AmeriCorps programs to measure, monitor, and advance their impact. These boot camps normally cost several hundred dollars.

To reserve a time, please visit the America Learns exhibit table.

**WE'RE SOCIAL!  
FOLLOW THE CONVERSATION:  
TWEET WITH US!**

**#SWNSC**

# Monday, June 8

Session 1 • 2:15-3:45 PM

## **National Service Criminal History Checks** Magnolia II | All

**Brian Cognato**, Grants Management Specialist–Corporation for National and Community Service

Establishing timely and correctly conducted National Service Criminal History Checks is a crucial compliance requirement. This session will help participants gain a clear understanding to whom these requirements apply, the procedures that must be followed, typical compliance challenges, Alternate Search Procedures (ASPs), and the resources available for guidance.

## **Impact and Outreach: Telling the National Service Story** Magnolia Ballroom | All

**Ted Miller**, Chief of External Affairs–Corporation for National and Community Service

This workshop will cover:

- The “Fours R of Branding”: Reasons, Requirements, Resources, and Recommendations
- Examples of best practices when engaging with key audiences (media, corporate supporters, elected officials) – grantee/project sponsor participation
- Tying performance measures to outreach (translating the technical to compelling narrative)
- Overview of the engagement calendar for the year (opportunity to get feedback from the field)

## **OMB Super Circulars: What Are the Key Changes?** Cypress II | Fiscal/Grant Management

**Jerry Bertrand**, Independent Consultant

This session will explain the background behind the changes for federal grants implemented in 2 CFR, what the most important changes are, and how they relate to OMB Cost Principles and CNCS-awarded grants. Attendees will walk away with a strategy for integrating these changes into the operation of their organizations.

## **Managing AmeriCorps Fixed Amount Grants** Oak I | Fiscal/Grant Management (AmeriCorps only)

**Tracey Seabolt**, Grants Management Specialist–Corporation for National and Community Service

Fixed-amount awards require less financial reporting, are exempt from OMB Cost Principles, are not required to submit a budget or track expenditures – but they still bear their share of requirements and performance expectations. Participants in this session will analyze the challenges and benefits of these awards and valuable strategies for Fixed Amount grants management.

## **Performance Measurement: Healthy Futures Focus Area for SCP/RSVP** Magnolia I | Senior Corps

**Jill Sears**, Program Officer–Corporation for National and Community Service

This session reviews Healthy Futures Focus performance measures requirements appropriate for SCP/RSVP, with an emphasis on the Independent Living objectives, and highlights the role of understanding quality data, data collection, and reporting. Participants will practice key learnings through an interactive exercise and discussion.

## **America’s Service Commissions (ASC) Convening: Opening Session** Cedar | State Commission Executive Directors, Commissioners, and Staff

**Kaira Esgate**, CEO–America’s Service Commissions; **Rachel Manuel Bruns**, Deputy Director–America’s Service Commissions

State commission staff and members of ASC will convene on a variety of discussion topics. The State Commission Opening Session will include: Welcome and Introductions, Update from America’s Service Commissions (ASC), and Peer Group Discussions for both executive directors/commissioners and other commission staff members.



# Monday, June 8

## Session 1 • 2:15-3:45 PM *continued*

### **Research & Evaluation: Basic Steps in Conducting an Evaluation** Oak II-III | All

**Diana Epstein**, Senior Research Analyst–Corporation for National and Community Service

Program evaluation is a critical component of building the evidence base for national service and demonstrating that programs are making a difference in communities. This session will provide an overview of the basic steps involved in conducting an evaluation. Participants will learn how to plan for an evaluation, identify the key components of an evaluation plan, identify approaches for collecting and analyzing data, and understand how to communicate and apply findings for program improvements.

### **AmeriCorps Performance Measures–Session 1: Theory of Change and Evidence** Cypress I | AmeriCorps State/National/VISTA

**Carla Ganiel**, Senior Program and Project Specialist–Corporation for National and Community Service

This session introduces key concepts from CNCS's Performance Measurement Core Curriculum. Participants will explore how a theory of change strengthens program design and how evidence is used to support a theory of change. This interactive session will include case studies and other activities to practice evaluating theories of change and evidence.

## Session 2 • 4:00-5:30 PM

### **Senior Corps Town Hall** Magnolia Ballroom | Senior Corps

**Katharine Gregg**, Program Officer–Corporation for National and Community Service

CNCS Leadership will provide updates to and take questions from the field.

### **Developing and Managing Your Budget for AmeriCorps** Oak II-III | Fiscal/Grant Management (AmeriCorps Only)

**Tracey Seabolt**, Grants Management Specialist–Corporation for National and Community Service

A well-developed budget can be a roadmap to help an organization achieve its programmatic and financial objectives. This session will provide participants with techniques, tools, and tips to effectively review, monitor, and manage a good program budget. Participants will also review and discuss CNCS regulations and award provisions, written policies and procedures, member management, document management and retention, reporting requirements, and unallowable activities.

### **Ensuring Allowable Costs** Magnolia II | Fiscal/Grant Management

**Jerry Bertrand**, Independent Consultant

Want to spend your grant dollars the right way and avoid unallowable costs? The OMB Supercircular (located at 2 CFR 200) gives clear guidance on 10 criteria that must be met for federal grant costs to be allowable. In this session, attendees will learn the criteria, see what they look like in various scenarios, and discuss strategies to ensure these are met.

**DID YOU KNOW...**

**FORT WORTH IS THE 17TH  
LARGEST CITY IN THE U.S.**

# Monday, June 8

## Session 2 • 4:00-5:30 PM *continued*

### **AmeriCorps Performance Measures–Session 2: High Quality Performance Measures** Cypress I | AmeriCorps State/National/VISTA

**Carla Ganiel**, Senior Program & Project Specialist, AmeriCorps State/National – Corporation for National and Community Service

This session introduces key concepts from CNCS's Performance Measurement Core Curriculum and builds on concepts introduced in the previous Theory of Change and Evidence session. Participants will learn how to develop high quality performance measures. This interactive session includes opportunities to practice critiquing performance measures.

### **Getting Off to a Strong Start** Cypress II | AmeriCorps State/National/VISTA

**Jennifer Jefts**, AmeriCorps Director–Communities In Schools of Central Texas

Policies and procedures make or break AmeriCorps programs as far as retention and quality. Don't expect what you don't inspect. Members are ambassadors of your program in everything they do. Participants will discuss Stages of Group Development, Tried and True Ideas for member orientation and training, and Building and Sustaining the Corps.

### **Becoming a disABILITY Advocate** Oak I | All

**Emily Shryock**, Assistant Director, Office for Students with Disabilities–The University of Texas at Austin

The disABILITY Advocate training program provides participants with knowledge and skills to work more effectively and confidently with people with disabilities. Come learn about people-first language, inclusive best practices, and become a disABILITY Advocate for your program, members, and volunteers!

### **Connection and Commitment: An Introduction to Civic Reflection** Magnolia I | All

**Amy Salinas**, Managing Partner–On3Learn

This session will introduce AmeriCorps, Senior Corps, state commission, and national service program staff to civic reflection: a member, staff, and stakeholder development practice of reflective discussion for organizations that are using service and volunteerism to make change. The session will include a brief "taste" of a civic reflection discussion; describe the elements of a civic reflection discussion; talk about how it can be used as a critical tool to build individual, organization and community capacity; identify the growing number of programs and organizations that have implemented civic reflection; point to the demonstrated impacts of civic reflection; and lay out ways in which new organizations can take advantage of it.

### **America's Service Commissions Convening: Developing Partnerships to Support National Service** Cedar | State Commission Executive Directors, Commissioners, and Staff

**Rosa Moreno**, Senior Advisor for Partnerships and Advancement–Corporation for National and Community Service; **Kaira Esgate**, CEO–America's Service Commissions; **Rachel Manuel Bruns**, Deputy Director–America's Service Commissions

State commission staff and members of ASC will convene on a variety of discussion topics. In Session 2, attendees will hear from CNCS on the topic of "Developing Partnerships to Support National Service," including an overview of the Task Force for Expanding National Service and CNCS partnership development with other federal agencies.

# Monday, June 8

## WELCOME RECEPTION (Optional) • 5:30-7:30 PM

**Come network with colleagues from all 9 states across the Southwest Region!** Magnolia Foyer and Ballroom | All

Come meet your Texas hosts, check out the Exhibit Hall, and network with colleagues from all 9 states across the Southwest Region! Free appetizers, beverages, entertainment, and national service spirit provided. Wear your national service gear and come ready to strut your stuff! Sponsored by the Sheraton Fort Worth and our generous conference sponsors.

## Special Sessions • 6:30-8:30 PM

**Texas Senior Corps Association Meeting** Cypress II | TSCA members

**Oklahoma Community Service Commission Grantee Gathering** Oak III | Oklahoma Commission grantees

**Arizona Governor's Commission on Service and Volunteerism Grantee Gathering** Oak I | Arizona Commission grantees

**Serve Colorado Grantee Gathering** Cypress I | Serve Colorado grantees

# Tuesday, June 9

## Light Breakfast & Morning Wake-Up Call! • 7:30-8:30 AM

Magnolia Ballroom | All

Attendees are encouraged to join their peers in the Ballroom for breakfast, morning calisthenics, table topic discussions, and national service videos!

## BREAKFAST PLENARY • 8:30-10:00 AM

**Creating a Culture of Accountability** Magnolia Ballroom | All

**Barbara Reynolds** (Panel Moderator), AmeriCorps State/National Training Specialist–Corporation for National & Community Service

**Veronica Alarcon**, Senior Program Manager of AmeriCorps–National Council of La Raza

**Stuart G. Axenfeld**, Assistant Inspector General for Audit–Office of Inspector General

**Bill Basl**, Director of AmeriCorps – Corporation for National & Community Service

**Brian Cognato**, Grants Management Specialist–Corporation for National and Community Service

**Cyprian O. Ejiasa**, Chief Financial Officer–Corporation for National & Community Service

**Carla Ganiel**, Senior Program and Project Specialist–Corporation for National & Community Service

**Kathryn Gillis**, Director, Office of Accountability and Oversight–Corporation for National & Community Service

**Emily Steinberg**, Director of National Service Programs–OneStar Foundation

CNCS, OIG, and grantee staff will engage in a crucial conversation about key aspects of the federal focus on accountability and integrity – from criminal history checks to IPERA, performance measurement and evaluation to audits. Panelists will provide insights and practical ideas about operationalizing and improving internal controls in the field and making accountability a team effort.

# Tuesday, June 9

## Session 3 • 10:15-11:45 AM

### **Leveraging Social Media to Cultivate Champions for National Service** Magnolia Ballroom | All

**Nate Treffeisen**, National Mobilization Manager–Voices for National Service

By investing a small amount of time, and for little to no cost, social media can help transform your program's brand and cultivate support for national service at the local, state, and national level. This session will provide examples of successful social media campaigns, share best practices for using social media to engage community stakeholders, provide ways to ensure corps members are within regulation, and include a Q&A session on anything from social media basics to strategy and implementation.

### **National Service Criminal History Checks** Cypress II | All

**Brian Cognato**, Grants Management Specialist–Corporation for National and Community Service

Establishing timely and correctly conducted National Service Criminal History Checks is a crucial compliance requirement. This session will help participants gain a clear understanding to whom these requirements apply, the procedures that must be followed, typical compliance challenges, Alternate Search Procedures (ASPs), and the resources available for guidance.

### **Disability Reasonable Accommodations & Tips for Running an Inclusive Service Program** Oak I | All

**Stephanie Enyart**, Disability & Inclusion Advisor–Corporation for National and Community Service

Understand the changing disability definition, how to identify when reasonable accommodations should be in place and how to implement the most effective (and cost effective) supports that members and volunteers need to fully participate in national service. Learn about a myriad of free resources, trainings, and how programs can become more inclusive of service members and volunteers with disabilities (regardless of limited resources).

### **Keys to Effective Financial Grants Management** Cypress I | Fiscal/Grant Management

**Tracey Seabolt & Ben Stoltenberg**, Grants Management Specialists–Corporation for National and Community Service

This session will assist fiscal and program staff in understanding the basic concepts and responsibilities of managing CNCS grants. Review and discussion will cover Office of Management and Budget (OMB) circulars related to cost principles, CNCS regulations and award provisions, key accounting system requirements, written policies and procedures, internal controls, budgets, match, timesheets, budget controls, financial reporting, documentation, audits, and other related financial requirements.

### **OMB Super Circulars: What Are the Key Changes?** Magnolia I | Fiscal/Grant Management

**Jerry Bertrand**, Independent Consultant

This session will explain the background behind the changes for federal grants implemented in 2 CFR, what the most important changes are, and how they relate to OMB Cost Principles and CNCS-awarded grants. Attendees will walk away with a strategy for integrating these changes into the operation of their organizations.

### **America's Service Commissions Convening: Nuts and Bolts–Grantmaking & Monitoring Best Practices** Cedar | State Commission Executive Directors, Commissioners, and Staff

**Kaira Esgate**, CEO–America's Service Commissions; **Rachel Manuel Bruns**, Deputy Director, Programming and Operations–America's Service Commissions; State Commission Peer Leaders

State commission staff and members of ASC will participate in group, peer-led conversations on the following topics: grantmaking, grants management, and monitoring.



# Tuesday, June 9

## Session 3 • 10:15-11:45 AM *continued*

### **Navigating Complaints, Grievances, and Investigations** Magnolia II | All

**Robert J. Walters**, Assistant Inspector General for Investigations–Office of Inspector General;  
**Tasha Stewart**, Director, Office of Civil Rights and Inclusiveness–Corporation for National and Community Service

This session will assist grantees in developing an understanding of how to handle potential complaints or grievances that may arise during the course of a grant, and how to know when to escalate or deescalate the issue to various entities, including the Office of Inspector General, CNCS Office of Civil Rights and Inclusiveness, State Commissions, or other relevant parties. Participants will learn best practices in interviewing complainants, developing and implementing a Grievance Procedure, and will use real life case studies to further their understanding. The session will also include discussion of the Whistleblower Protection Act and how it applies to national service programs.

### **Research and Evaluation: Budgeting for Evaluation** Oak II-III | All

**Diana Epstein**, Senior Research Analyst–Corporation for National and Community Service

AmeriCorps grantees are responsible for conducting evaluations of their programs, and it is critical that grantees budget appropriately so that evaluations are high quality and useful. While budgeting for an evaluation can be challenging, evaluations can provide valuable insights for program improvement and should be viewed as a strategic investment. This session will provide an overview of how to effectively budget for an evaluation. The session will help participants understand why evaluation is important, recognize how evaluation costs vary by type of evaluation, explain the key components of an evaluation budget, and identify approaches for creating an evaluation budget.

## LUNCH PLENARY • 12:00-1:30 PM

### **Lunch Plenary With Wendy Spencer** Magnolia Ballroom | All

**Wendy Spencer**, Chief Executive Officer–Corporation for National and Community Service

CEO Wendy Spencer will discuss the current landscape of national service and highlight recent successes. She will also share exciting new announcements.

## Session 4 • 1:45-3:15 PM

### **Impact and Outreach: Telling the National Service Story** Magnolia Ballroom | All

**Ted Miller**, Chief of External Affairs–Corporation for National and Community Service

This workshop will cover:

- The “Fours R of Branding”: Reasons, Requirements, Resources, and Recommendations
- Examples of best practices when engaging with key audiences (media, corporate supporters, elected officials) – grantee/project sponsor participation
- Tying performance measures to outreach (translating the technical to compelling narrative)
- Overview of the engagement calendar for the year (opportunity to get additional feedback from the field)

**“When in doubt, let your horse do the thinkin’.”  
#CowboyWisdom**

# Tuesday, June 9

## Session 4 • 1:45-3:15 PM *continued*

### **Detecting and Preventing Fraud, Waste and Abuse on Federal Grants** Magnolia II | Fiscal/Grant Management

**Stuart G. Axenfeld**, Assistant Inspector General for Audit & **Jeffrey Morales**, Deputy Assistant Inspector General for Investigations–Office of Inspector General

This session will assist grantees in identifying fraud indicators; common audit findings; audit resolution; investigation and processes, findings and resolutions; recent common audit and investigative findings; how grantee can deter fraud, waste and abuse; how to report fraud, waste and abuse; and understanding the Whistleblower Protection Act for grantees.

### **Finding the Right Volunteers: Targeted Volunteer Recruitment - Part I** Cypress I | All

**Jennifer Weichel**, Volunteer Specialist & **Jodi Schulz**, Extension Educator–Michigan State University Extension

Do you have all the volunteers you need? Most programs struggle to recruit enough volunteers to meet the needs of the program. In this session, we will explore the concept of targeted volunteer recruitment and how you can use it to find volunteers who are likely to stay with your program long term. You will leave this interactive session with ideas to maximize your recruitment efforts and a template for a recruitment plan that can be used by individual staff or a team.

### **Performance Measurement: Education Focus Area for FGP/RSVP** Oak I | Senior Corps

**Jill Sears**, Program Officer–Corporation for National and Community Service

This session reviews Education Focus performance measures requirements appropriate for FGP/RSVP and highlights the role of understanding quality data, data collection, and reporting. Participants will practice key learnings through an interactive exercise and discussion.

### **Getting Things Done: Developing Innovative Management Strategies for Engaging and Retaining National Service Members** Cypress II | AmeriCorps State/National/VISTA

**Amanda Miller**, AmeriCorps Project Coordinator–Travis County 4-H CAPITAL Project & **Lori Warren**, Keep Austin Housed Coordinator–Front Steps

AmeriCorps members get things done, but keeping a high level of energy and investment throughout a service term can be challenging. Join us as we discuss innovative management practices for keeping members engaged from a middle management perspective.

### **Documenting Cash, In-Kind, and Time** Magnolia I | Fiscal/Grant Management

**Tracey Seabolt & Ben Stoltenberg**, Grants Management Specialists–Corporation for National and Community Service

Do you need to track and record cash and in-kind donations? In this session you will learn how to properly calculate and value in-kind donations, record match expenses in the accounting system, avoid match-related findings, and more! Additionally, we will highlight the specific OMB regulations and requirements related to which staff must keep a timesheet, what timesheets must include, the importance of accurate and complete timesheets, and common pitfalls related to timesheets. Participants will discuss and review real life scenarios that reinforce the importance of tracking time.

### **Ensuring Allowable Costs** Oak II-III | Fiscal/Grant Management

**Jerry Bertrand**, Independent Consultant

Want to spend your grant dollars the right way and avoid unallowable costs? The OMB Supercircular (located at 2 CFR 200) gives clear guidance on 10 criteria that must be met for federal grant costs to be allowable. In this session, attendees will learn the criteria, see what they look like in various scenarios, and discuss strategies to ensure these are met.

# Tuesday, June 9

## Session 4 • 1:45-3:15 PM *continued*

**America's Service Commissions Convening: Nuts and Bolts–Potpourri Session** Cedar | State Commission Executive Directors, Commissioners, and Staff

**Kaira Esgate**, CEO–America's Service Commissions; **Rachel Manuel Bruns**, Deputy Director, Programming and Operations–America's Service Commissions; State Commission Peer Leaders  
State commission staff and members of ASC will convene on a “potpourri” of group, peer-led conversations on the following topics: state service plan development, building relationships with your CNCS state office, developing InterCorps Councils, and other topics identified by participants.

## Session 5 • 3:30-5:00 PM

**AmeriCorps Best Practices Café** Magnolia Ballroom | AmeriCorps State/National/VISTA/NCCC

### **Peer leaders from the field**

Peer-to-peer Round Robin sessions on a variety of hot topics (3 rounds of 25 minutes each)

**IPERA: Lessons Learned** Magnolia I | Fiscal/Grant Management

**Kathryn Gillis**, Director of Accountability and Oversight–Corporation for National and Community Service

Come learn about the Improper Payments Elimination and Reduction Act and how it impacts national service programs receiving Corporation funds. Participants will gain an understanding of the IPERA monitoring process, recent findings, lessons learned, and how to be prepared for IPERA sampling in the future.

**Navigating Complaints, Grievances, and Investigations** Magnolia II | All

**Robert J. Walters**, Assistant Inspector General for Investigations–Corporation for National and Community Service Office of Inspector General; **Tasha Stewart**, Director, Office of Civil Rights and Inclusiveness–Corporation for National and Community Service

This session will assist grantees in developing an understanding of how to handle potential complaints or grievances that may arise during the course of a grant, and how to know when to escalate or deescalate the issue to various entities, including the Office of Inspector General, CNCS Office of Civil Rights and Inclusiveness, State Commissions, or other relevant parties. Participants will learn best practices in interviewing complainants, developing and implementing a Grievance Procedure, and will use real life case studies to further their understanding. The session will also include discussion of the Whistleblower Protection Act and how it applies to national service programs.

**Finding the Right Volunteers: Targeted Volunteer Recruitment–Part II** Cypress II | All

**Jennifer Weichel**, Volunteer Specialist & **Jodi Schulz**, Extension Educator–Michigan State University Extension

Do you have all the volunteers you need? Most programs struggle to recruit enough volunteers to meet the needs of the program. In this session, we will explore the concept of targeted volunteer recruitment and how you can use it to find volunteers who are likely to stay with your program long term. You will leave this interactive session with ideas to maximize your recruitment efforts and a template for a recruitment plan that can be used by individual staff or a team.

**“If you climb in the saddle, be ready for the ride.”  
#CowboyWisdom**

# Tuesday, June 9

Session 5 • 3:30-5:00 PM *continued*

## **America's Service Commissions (ASC) Convening: Developing Partnerships to Support National Service in Your State** Cedar | State Commission Executive Directors, Commissioners, and Staff

**Kaira Esgate**, CEO–America's Service Commissions; **Rachel Manuel Bruns**, Deputy Director–America's Service Commissions

State commission staff and members of ASC will convene to discuss "Developing Partnerships to Support National Service in Your State" with key national service partners, including AmeriCorps Alums, Peace Corps, and Service Year Exchange.

## **Developing and Managing Your Budget for Senior Corps Programs** Oak I | Fiscal/Grant Management Senior Corps Only

**Ben Stoltenberg**, Grants Management Specialist–Corporation for National and Community Service

A well-developed budget can be a roadmap to help an organization achieve its programmatic and financial objectives. This session will provide participants with techniques, tools, and tips to effectively review, monitor, and manage a good program budget. Participants will also review and discuss CNCS regulations and award provisions, written policies and procedures, volunteer management, document management and retention, reporting requirements, and unallowable activities.

## **Performance Measurement: Healthy Futures Focus Area for SCP/RSVP** Oak II-III | Senior Corps

**Jill Sears**, Program Officer–Corporation for National and Community Service

This session reviews Healthy Futures Focus performance measures requirements appropriate for SCP/RSVP, with an emphasis on the Independent Living objectives, and highlights the role of understanding quality data, data collection, and reporting. Participants will practice key learnings through an interactive exercise and discussion.





## Tuesday, June 9

### Night Out at the Fort Worth Stockyards • 6:30-11:00 PM

Come see what Cowtown is all about! Join your national service family for a special trip to the historic Fort Worth Stockyards district just 15 minutes away! Charter buses will shuttle guests to and from the Stockyards continuously between 6:30-11:00pm. Have dinner, do your souvenir shopping, check out some live music, take a two-stepping lesson at Billy Bob's, or ride a mechanical bull - or two! First bus will be available for loading at 6:15pm. Meet at the back entrance of the Sheraton (buses will park along Calhoun Street).



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# Wednesday, June 10

## Session 6 • 8:30-10:00 AM

### **Senior Corps Best Practices Café** Cypress I | Senior Corps

#### **Peer leaders from the field**

Peer-to-peer Round Robin sessions on a variety of hot topics (3 rounds of 25 minutes each)

### **AmeriCorps Town Hall** Magnolia Ballroom | AmeriCorps State/National

**Bill Basl**, Director of AmeriCorps - Corporation for National and Community Service

Q&A with AmeriCorps State and National Leadership

### **Detecting and Preventing Fraud, Waste and Abuse on Federal Grants** Magnolia II | Fiscal/Grant Management

**Stuart G. Axenfeld**, Assistant Inspector General for Audit & **Jeffrey Morales**, Deputy Assistant Inspector General for Investigations–Office of Inspector General

This session will assist grantees in identifying fraud indicators; common audit findings; audit resolution; investigation and processes, findings and resolutions; recent common audit and investigative findings; how grantee can deter fraud, waste and abuse; how to report fraud, waste and abuse; and understanding the Whistleblower Protection Act for grantees.

### **Managing Fixed Amount Grants for Senior Corps** Oak II-III | Fiscal/Grant Management (Senior Corps Only)

**Ben Stoltenberg**, Grants Management Specialist–Corporation for National and Community Service

Fixed-amount awards require less financial reporting, are exempt from OMB Cost Principles, are not required to submit a budget or track expenditures – but they still bear their share of requirements and performance expectations. Participants in this session will analyze the challenges and benefits of these awards and valuable strategies for Fixed Amount grants management.

### **National Service Criminal History Checks** Magnolia I | All

**Brian Cognato**, Grants Management Specialist–Corporation for National and Community Service

Establishing timely and correctly conducted National Service Criminal History Checks is a crucial compliance requirement. This session will help participants gain a clear understanding to whom these requirements apply, the procedures that must be followed, typical compliance challenges, Alternate Search Procedures (ASPs), and the resources available for guidance.

### **Compliance as a Team Effort** Cypress II | Fiscal/Grant Management

**Susan Meche**, Owner–Meche Consulting

This session looks at the importance of program and financial staff collaboration and how their roles, responsibilities, decisions, and actions affect grant compliance, and can improve program success. Specific topics addressed include collaboration on budget development and execution, tracking systems, and various member and participant matters. Participants will discuss real life scenarios allowing them to better understand how program and financial staff can work together as a team to strengthen internal controls and ensure compliance.

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# Wednesday, June 10

## Session 7 • 10:15-11:45 AM

### **Educating Elected Officials and Cultivating Service Champions** Magnolia Ballroom | All

**Jennifer Ney**, Managing Director & **Nate Treffeisen**, National Mobilization Manager–Voices for National Service & **Kimberly Allman**, Director of Government Relations–Corporation for National and Community Service

A successful service site visit with an elected official and community stakeholders is one of the best ways to build support for your program and national service. A high-quality visit can help foster relationships that will benefit your program for years to come. Voices for National Service will lead a workshop that offers strategies for engaging your elected officials and tips for how to make an upcoming service site visit a great success.

### **Bootstrapping Technology–Leveraging Web 2.0 to Increase Impact** Cedar | All

**Damian Morales**, Disaster Services Program Specialist–OneStar Foundation, **Crystal Kelley**, Assistant Program Director–AmeriCorps National Civilian Community Corps (NCCC) & **Jennifer Jefts**, AmeriCorps Director–Communities In Schools of Central Texas

In this session, presenters will be sharing best practices for leveraging free and low cost digital technologies to increase the impact of your organization through more efficient communication, coordination, and collaboration. Participants are encouraged, but not required, to bring a personal tablet or laptop to the session.

### **Understanding the Public Service Student Loan Forgiveness Program** Magnolia II | All

**Sam Wilson**, Assistant Vice President, Customer Assistance–Texas Guaranteed (TG)

This session will provide concrete guidance on how national service programs can help employees and national service members leverage their service years to help tackle their student loan debt.

### **IPERA: Lessons Learned** Oak I

**Kathryn Gillis**, Director of Accountability and Oversight–Corporation for National and Community Service | All

Come learn about the Improper Payments Elimination and Reduction Act and how it impacts national service programs receiving Corporation funds. Participants will gain an understanding of the IPERA monitoring process, recent findings, lessons learned, and how to be prepared for IPERA sampling in the future.

### **Developing & Managing Your Budget for Senior Corps Programs** Oak II-III | Fiscal/Grant Management (Senior Corps Only)

**Ben Stoltenberg**, Grants Management Specialist–Corporation for National and Community Service

A well-developed budget can be a roadmap to help an organization achieve its programmatic and financial objectives. This session will provide participants with techniques, tools, and tips to effectively review, monitor, and manage a good program budget. Participants will also review and discuss CNCS regulations and award provisions, written policies and procedures, volunteer management, document management and retention, reporting requirements, and unallowable activities.

# Wednesday, June 10

## Session 7 • 10:15-11:45 AM *continued*

### **Tackling Member Recruitment** Cypress I | AmeriCorps State/National/VISTA

**Veronica Alarcon**, Senior Program Manager–National Council of La Raza;  
**Heather Eilers**, Program Coordinator–Schulenburg Weimar In Focus Together;  
**Dr. Mary Ellen Isaacs**, Director–ACE: A Community for Education;  
**Jonathan West**, Senior AmeriCorps Program Manager–St. Bernard Project;  
**Jaclyn Kolar**, Grants Officer–OneStar Foundation

All AmeriCorps programs are faced with the challenge of recruiting a new Corps every year. Come learn how program staff throughout the Southwest region are tackling the challenge of recruitment. The panel will have representation from urban, rural, tenured and new programs.

### **Performance Measurement: Education Focus Area for FGP/RSVP** Magnolia I | Senior Corps

**Jill Sears**, Program Officer–Corporation for National and Community Service

This session reviews Education Focus performance measures requirements appropriate for FGP/RSVP and highlights the role of understanding quality data, data collection, and reporting. Participants will practice key learnings through an interactive exercise and discussion.

### **Compassion Fatigue: Signs and Solutions** Cypress II | All

**Walt McFadden**, Project Director–RSVP of Southeast Texas

Volunteers and service providers tend to be compassionate and selfless people who engage in a number of roles supporting various causes. This places them at high risk of experiencing burn-out, which is detrimental to themselves and those they serve. This session will explore the symptoms of impending burn-out and provide practical tips on how volunteers and service providers can create a simple plan that fosters self-awareness, communication, and self-care, which will help lessen the chances they will fall victim to compassion fatigue.

## LUNCH PLENARY • 12:00-1:30 PM

### **National Service and Disaster: Honoring the 10th Anniversary of Hurricanes Katrina and Rita** Magnolia Ballroom | All

**Kelly DeGraff**, Director of Disaster Services–Corporation for National and Community Service  
**Elizabeth Darling**, President/CEO–OneStar Foundation  
**Jamie Dake**, Voluntary Agency Liaison–FEMA Region VI  
**Judd Jeannsonne**, Executive Director–Volunteer Louisiana  
**Bruce Bailey**, Executive Director–AmeriCorps St. Louis  
**Rita Massey**, RSVP Director–University of Louisiana at Monroe  
**Megan Helton**, Field Coordinator–Texas Conservation Corps  
**Lisa Tatum**, Senior Manager Disaster Preparedness–VolunteerNow

Leaders from the field of disaster services will commemorate the 10 year anniversaries of Hurricanes Katrina and Rita and discuss how the role of national service members in times of disaster has evolved since and led to new innovations in emergency response.

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# Wednesday, June 10

Session 8 • 1:45-3:15 PM

## **Elevating National Service Disaster Engagement in Your Community** Magnolia I | All

**Kelly DeGraff**, Director of Disaster Services–Corporation for National and Community Service

Times of disaster bring out the best possible characteristics of the human spirit. The American people seek a way to systematically channel their civic pride and compassion following disasters. State Service Commissions and national service are well positioned to tap this public mandate and bring a uniquely flexible asset to their state's emergency management infrastructure.

## **Management Boot Camp: 3 Hours to More Effective Interactions at Work–Part 1**

Magnolia Ballroom | All

**Drew Carberry**, Executive Director–Lighthouse, Inc.

In this two-part session, new and experienced managers will increase their abilities to bring out the best in bosses, co-workers, direct reports and volunteers. Participants will build their skills in these essential areas: 1) Inspiration. Learn what makes people love their jobs (or their term of service!). 2) Assessment. Identify what support people need in any situation. 3) Accountability. Know when to hug, when to bug, and how to get people to be their best. 4) Communication. Learn to hear what people mean, and speak so you are understood.

## **Educating Elected Officials and Cultivating Service Champions** Magnolia II | All

**Jennifer Ney**, Managing Director & **Nate Treffeisen**, National Mobilization Manager–Voices for National Service & **Kimberly Allman**, Director of Government Relations–Corporation for National and Community Service

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## **Disability Reasonable Accommodations & Tips for Running an Inclusive Service Program** Cedar | All

**Stephanie Enyart**, Disability & Inclusion Advisor–Corporation for National and Community Service

Understand the changing disability definition, how to identify when reasonable accommodations should be in place and how to implement the most effective (and cost effective) supports that members and volunteers need to fully participate in national service. Learn about a myriad of free resources, trainings, and how programs can become more inclusive of service members and volunteers with disabilities (regardless of limited resources).

## **Leveraging the Alums Network** Oak II-III | AmeriCorps State/National/VISTA/NCCC

**Ana Estrada**, Chair–AmeriCorps Alums National Advisory Council

Workshop style session on using the AmeriCorps Alums network to improve your program. AmeriCorps Alums will present the early findings from a pilot program on intentionally partnering with Alums to support member retention and completion, satisfaction and preparedness to launch Life After AmeriCorps. Be a part of co-creating systems with Alums to provide support year round!

# Wednesday, June 10

## Session 8 • 1:45-3:15 PM *continued*

### **Member Healthcare: Examining the Landscape and Trends Since the Affordable Care Act** Oak I | AmeriCorps State/National

**Chris Rooney**, Vice President–Willis of Seattle & **Emily Steinberg**, Director of National Service Programs–OneStar Foundation

The Affordable Care Act (ACA) is changing the landscape for AmeriCorps member healthcare. In this session, you will learn how the Affordable Care Act is impacting AmeriCorps programs and members, important information about being compliant with both AmeriCorps provisions and the ACA in light of the forthcoming July 1, 2015 AmeriCorps Provisions compliance deadline for Minimum Essential Coverage (MEC) compliance, and how trends in the healthcare field and claim data can help you offer high-quality options for members.

### **Avoiding Common Fiscal Issues and Pitfalls** Cypress I | Fiscal/Grant Management

**Tracey Seabolt & Ben Stoltenberg**, Grants Management Specialists–Corporation for National and Community Service

This session provides an overview of the issues and pitfalls commonly found in CNCS-funded programs during Office of Inspector General (OIG) audits, CNCS monitoring and site visits, and other reviews. Participants will examine various issues and learn from others how to establish systems or protocols to avoid or help prevent these types of issues in their organization.

### **Compliance as a Team Effort** Cypress II | Fiscal/Grant Management

**Susan Meche**, Owner–Meche Consulting

This session looks at the importance of program and financial staff collaboration and how their roles, responsibilities, decisions, and actions affect grant compliance, and can improve program success. Specific topics addressed include collaboration on budget development and execution, tracking systems, and various member and participant matters. Participants will discuss real life scenarios allowing them to better understand how program and financial staff can work together as a team to strengthen internal controls and ensure compliance.

## Session 9 • 3:30-5:00 PM

### **Management Boot Camp: 3 Hours to More Effective Interactions at Work - Part 2** Magnolia Ballroom | All

**Drew Carberry**, Executive Director–Lighthouse, Inc.

In this two-part session, new and experienced managers will increase their abilities to bring out the best in bosses, co-workers, direct reports and volunteers. Participants will build their skills in these essential areas: 1) Inspiration. Learn what makes people love their jobs (or their term of service!). 2) Assessment. Identify what support people need in any situation. 3) Accountability. Know when to hug, when to bug, and how to get people to be their best. 4) Communication. Learn to hear what people mean, and speak so you are understood.

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# Wednesday, June 10

## Session 9 • 3:30-5:00 PM *continued*

### **From the Cradle to the Grave: Managing Your AmeriCorps Grant** Magnolia II | AmeriCorps State/National

**Elisa Gleeson**, Senior Grants Management Specialist–OneStar Foundation

Proper management of an AmeriCorps grant starts the day you decide to apply and ends... Participants will come away with a commission's expectations in administering the AmeriCorps program and grant. During this session we will discuss common grant management terminology, distinguish between funding and grant types, program specific requirements, reporting, monitoring, performance expectations and how it all fits within a grant calendar.

### **Building the Right Team** Cypress I | AmeriCorps State/National/VISTA/NCCC

**Jennifer Jefts**, AmeriCorps Director–Communities In Schools of Central Texas

How do you ensure applicants understand what AmeriCorps is and specifically that it is not just a job? Participants will share examples of interview practices, take part in an ideal candidate matching activity, and discuss interview systems. This session will take you from recruitment preparation through selection interview until the first day they start with your program.

### **Financial Monitoring of Sub-Awardees** Magnolia I | Fiscal/Grant Management (AmeriCorps)

**Tracey Seabolt**, Grants Management Specialist–Corporation for National and Community Service

This session is designed to enhance financial monitoring strategies and will be most beneficial to those individuals who have oversight responsibilities for sub grantees or sites. Topics discussed include the purpose of monitoring, grantee responsibilities, keys to effective monitoring, risk-based assessments and other strategies to manage the monitoring process, on-site and desk monitoring tools, basic areas of review, frequently found issues, best practices, and available resources.

### **Connection and Commitment: An Introduction to Civic Reflection** Cypress II | All

**Amy Salinas**, Managing Partner–On3Learn

This session will introduce AmeriCorps, Senior Corps, state commission, and national service program staff to civic reflection: a member, staff, and stakeholder development practice of reflective discussion for organizations that are using service and volunteerism to make change. The session will include a brief "taste" of a civic reflection discussion; describe the elements of a civic reflection discussion; talk about how it can be used as a critical tool to build individual, organization and community capacity; identify the growing number of programs and organizations that have implemented civic reflection; point to the demonstrated impacts of civic reflection; and lay out ways in which new organizations can take advantage of it.



# Muchas gracias!

## **Planning Committee and Subcommittee Members**

Veronica Alarcon – Christy Baker – Tanesha Bell – Leonard Bruce – Rachel Bruns – Curtis Cannon – Cara Cheevers – Mike Doyle – Monica Durham – Kaira Esgate – Gretchen Feinhals – Stephanie Fenniri – Remy Garcia – Melody Gualt – Terry Gunnell – Marilyn Henderson – Judd Jeansonne – Jennifer Jefts – Jerron Johnson – Crystal Kelley – Nathan Kinsman – Michael Laverty – Stephanie McClain – Walt McFadden – Stacey Nicholas – Patrick O’Kane – Colleen Piluso – Amy Porter – Will Roark – Amy Roff – Amy Salinas – Erica Schwartzmann – Deb Seng – Bob Shogren – Annalisa Siegle – Don Stamper – Norma Strabala – Dhriti Stocks – Mark Stump – Lisa Tatum – JoAnn Torrez – Paula Butler Wackenheim – Elizabeth Yocum

## **OneStar Foundation Staff**

Liz Darling, Chris Bugbee, Grey McLeod, Emily Steinberg, Colette Bellville, Glenn Goodrich, Miranda Spiro, Anna Eberhardt, Mary Voorhies, Jaclyn Kolar, Damian Morales, and Elisa Gleeson.

**A special thank you to all of our talented presenters, volunteers, partners, sponsors, and YOU!**

