

January 30, 2013

Thomas Lauth
President
Public Financial Publications, Inc.
106 University Drive
Athens, Georgia 30602

Re: **“Connecting Budget and Program Professionals”**

Dear Public Financial Publications, Inc.,

AABPA is pleased to present this proposal for your review. We look forward to partnering with you to enhance the educational training and career development capabilities of the organization. For over thirty-five years, AABPA has served as the professional organization for budget and program analysts. AABPA's mission is to assist professionals in the continual development of their skills through educational and other professional opportunities. The primary goal of this proposal is to enhance our mission by providing opportunities for individuals who do not have direct access to AABPA monthly programs offered in the Washington D.C. area, while improving knowledge sharing and collaboration among its members.

Since 2006, AABPA has hosted over 73 Monthly Programs featuring experts in public budgeting and program analysis. These programs are designed to impart specialized and highly practical knowledge on complex budget/policy issues. Through this, AABPA members are provided a chance for direct and informal contact with colleagues and authorities in the field. Continuing Professional Education (CPE) credits are provided through the monthly programs, two annual symposiums, and AABPA sponsored education events. Recent participation demands in our monthly programs have required AABPA to seek additional technology resources to support and grow our educational outreach. This proposal will review the web conferencing technology AABPA needs to acquire to further education on budget and policy issues for members, federal, state and local government agencies, non-profits, students, universities, private corporations and the general public.

We are highly appreciative of Public Financial Publications, Inc. taking an interest in helping AABPA acquire the technology to extend budget and program analysis education across these organizations. Please give us a call at (703) 941-4300 if you require any further information or have any questions concerning this proposal.

Thank you,

AABPA Board Members

“Connecting Budget & Program Professionals”

Submitted to: Public Financial Publications, Inc. (PFP)

Date: January 30, 2013

Thomas Lauth
President
Public Financial Publications, Inc.
106 University Drive
Athens, Georgia 30602

Project Abstract

The American Association for Budget and Program Analysis is seeking a grant to expand the web conferencing technologies, educational training, and career development capabilities of the organization. This proposal requests for seed funds for the initial acquisition of the web conferencing technology, and further investment to begin the revamped monthly webinars.

PFP’s support for the initial technology investment will be the initial capital investment for the purchase of the web conferencing technology and monthly programming. Once the initial investment has been made AABPA will begin to follow established timeline and goals in implementation of the new webinar technology. The webinar technology will ultimately be a complete overhaul of the current test systems AABPA has been trying with TCG and other partner organizations.

This grant proposal will overview the issues AABPA has faced as a nonprofit with geographically dispersed members, programs and outreach trainings. The problems will be overviewed in detail from a lack of being able to provide members and the public with the resources they need to succeed in budget and policy. It will then detail the programs features that would help integrate the members and organizational culture of AABPA as a whole and with the public; providing webinars, trainings, resources and member information at the verge of their fingertips.

The proposal will end with a presentation of goals, a timeline, a budget and ultimately a contract to partner with PFP to begin an effective transition for AABPA and PFP to become Budget and Program education, training and resource key stakeholders.

Statement of Need

For AABPA to overcome the challenges of training, communicating, building community and membership and controlling costs, we must further develop a versatile and scalable tool. Web conferencing software is a communication tool; it allows AABPA to build community and disseminate information. Web conferencing employs a myriad of functionality to achieve its versatility. Document sharing, call recording, chat transcripts, support of multiple presenters and platform support are all features of software packages. AABPA's organization is comprised of budget and analyst experts in varying geographical locations; web conferencing software allows every individual to connect seamlessly.

AABPA needs a program to improve collaboration, both inside and outside your organization's firewalls. Using the web conferencing program, AABPA will be able to connect for a full range of online meetings, from simple screen-sharing all the way to mission-critical, real-time collaboration, allowing our team to work more efficiently and effectively, increasing productivity, reducing costs and spreading budget and policy education. AABPA needs an all-in-one solution for digital management of webinars. The program has the capability to engage in complete mobile-to-mobile collaboration, with the ability to host, present and collaborate anytime, anywhere on any device: iOS, Android and Blackberry PlayBook. The program helps ensure:

- Easy meeting access for all participants with no desktop client downloads
 - Every meeting can turn into a knowledge asset with interactive, customizable and indexed recordings
- Enable rich, highly collaborative interactions so our team can complete work faster
- The ability to create an AABPA personal digital office in the cloud with a customizable URL that's always on where content and layouts remain in place
- Customized extensions to support virtually any kind of meeting
- Ensures secure communication and compliance

Due to a geographical disperse of AABPA members and community marketing public events has been a struggle. The program helps deliver compelling, immersive events, maximize attendance, and measure results for optimized outcomes. With this program AABPA can:

- Drive registrations with powerful tools to promote and manage events
- Prepare for events in advance with persistent meeting environments to store layouts and pre-recorded content for seamless, live play
- Maximize attendance with easy, password-optional event entry and access via virtually any device
- Deliver experiences that inspire participants to take action with tools that help you communicate your message with the greatest impact
- Identify the most relevant prospects and integrate with enterprise systems to effectively nurture leads
- Optimize events for maximum effectiveness and analytics powered by the Program

- Reach out to thousand in different geographic locations with Webcast options

The program is not only needed to support web conferencing technology, podcast, marketing, and education of members but also the eLearning of AABPA organizational members. The eLearning provides a complete solution for rapid training and mobile learning, enabling rapid deployment of training accessible from anywhere, anything on any type of device. This system would provide AABPA to:

- Rapidly create and deploy engaging courses and content
- Maximize training attendance with powerful on boarding tools and reminders
- Enable mobile learning with instant access to training from virtually any device
- Deliver immersive experiences in live and on-demand classes
- Efficiently manage and track training
- Easily integrate with third-party systems

AABPA is currently partnering with TCG to test out different web contracting services. With over 73 Monthly Programs conducted we have concluded that for our organization to serve the needs of the public, we will need to purchase a substantial upgrade in web contracting services. Over the preceding 5 years, a working group of AABPA board members have researched potential capabilities available to the organization and interviewed multiple respected conferencing vendors that could provide these serves to AABPA. TCG allowed AABPA the technology and tools to examine a multitude of formats and webinar styles to determine the level of conferencing.

AABPA's working group has invested a significant amount of volunteer time to evaluate vendors, clean and reformat member data, identify current web technology for reorganization, and prepare suggestions for future growth. This included developing a partnership with the Association for Budgeting and Financial Management (ABFM). AABPA has included ABFM in bi-weekly teleconferences to plan for crucial budget and policy topics. Upon receiving the grant to fund the purchase of the web conferencing technology AABPA will further meet with ABFM to plan programs, combine membership and share resources to better educate and train the public.

Currently AABPA has monthly programs planned through May 2013, these include:

1. February 2013 – Impact of H.R.8
2. March 2013 – State Budget Crisis
3. April 2013 – Budget Performance Integration
4. May 2013 – Municipal Fiscal Crisis

AABPA's January 2013 Program titled, "Cliff, Sustainability & Beyond: Impact on Federal, State and Local Budgets," focused on the budge tissues and their effect on different levels of governments. Within only 2 days of the event, AABPA had over 160 registrants. With limited web conferencing technology, AABPA was forced to wait-list members and essentially exclude them from the webinar training and engaging conference due to our current system only being able to accommodate approximately 65 registrants.

Based on overwhelming success of our Monthly Programs webinars, AABPA will need to purchase technology to meet the registration and accessibility of at least 160 participants. AABPA has over 2,100 members with programming outreach to universities; federal, state, and local governments; and other not-for-profit organizations. AABPA members consist of government budget and program managers and analysts, academic specialists, and analysts in the private sector. AABPA organizes symposia, free monthly programs, quarterly newsletters, journals, and annual receptions. This allows our members to keep up with the latest developments in their specialized fields, establish and maintain valuable contacts while, sharpening their skills and knowledge needed to enhance their careers.

AABPA held a formal strategic planning session in December 2012. This session further confirmed the organizational need of an improved real-time communications (RTC) and rich presence technology (RPT) platform with greater texting, VoIP (voice over Internet protocol), and full-motion video capabilities. This is needed to better connect budget and program professionals, both inside and outside of the Washington, D.C. metropolitan area. These are the key elements of the long-term strategy of AABPA. Over the next year, AABPA will focus on increasing collaboration between budget and program academics and practitioners as AABPA continues to be the premier professional organization for engagement on budget and program issues.

Program Description

AABPA's mission is to assist budget and program analysts in the continual development of their skills through educational and professional opportunities. In an age of increased dependence upon and interaction with technology, the outmoded means of conducting all programs in person has precluded many current and potential AABPA members from participating in these opportunities. AABPA seeks to expand its reach beyond just those individuals who are able to hop across Washington for a lunch meeting; this technology will allow AAPBA to engage budget and program analysts nationwide in meaningful conversations related to their fields. More sophisticated Internet conferencing technology will allow for the capture and storage of these programs, allowing members and nonmembers alike to benefit from these programs regardless of their ability to attend.

We anticipate this system to increase the quality of our monthly programs, facilitate networking among budget and program professionals, increase collaboration between experts in the field – not just in Washington, D.C. but across the country, and provide a means to involve members in the direct exchange of knowledge.

The webinar conferencing program will enable AABPA to improve their education and training through utilization of a web conferencing service equipped with audio conferencing, online meetings, audience management, large group events, and online course catalogs. This

enhanced web capability will enable AABPA to capture elements of the webinar for members not able to attend and share the program content through podcasts. These features of the next level of web conferencing include:

- Desktop or Application Sharing
- Instantly Change Presenters
- Share Keyboard and Mouse Control
- One-Click Recording
- Drawing Tools
- Includes Audio Conferencing (via telephone and computer)

The Instant Online Meeting features will allow for One-Click Meetings for easy access for our participants. A feature to schedule in advance or join the meeting immediately, as well as the ability to start meetings from MS Office[®], Email and Instant-Messaging Tools during conferences. Digital communication has been a failure with previous web conferencing technologies that AAPBA has used. An overwhelming number of participants utilizing with technology that lacked key characteristics – such as the ability to field participant questions via instant messaging – has caused frustration and hindered conversation among panelists and participants. Participants' questions fuel challenging discourse during the presentation and are key to the success of the webinar. AABPA records all questions from the webinar to follow up with participants after completion of the presentation. Having the capability to allow participants to ask questions during the Live-Feed webinar will bring a true understanding to the topics at hand.

The new technology will allow for audience management, including:

- Customizable Invitation and Registration
- Automated Reminder and Follow-up Emails
- Polls and Surveys
- Dashboard to Monitor Attendee Participation
- Detailed Reports (pre- and post-session)

Customizable invitations and registration will allow AABPA to reach a larger population of participants than merely current AABPA members. A goal of AABPA is to provide education and training to all levels of government – federal, state and local – as well as academic institutions, students, private sector partners, and the general public. With customizable invitations and registrations these groups can be invited and participate on vital issues currently faced regarding policy and budget. With polls, surveys, and detailed reports, AABPA will have the information and tools needed to evaluate participant knowledge, questions, strengths and weaknesses in understanding the presented material.

A serious issue AABPA has faced is having the technological resources to allow large groups to participate in the training and webinars that AABPA hosts. The purchase of new web connectivity technology will allow large groups to:

- Invite Guest Panelists
- Pre-Session Green Room (confer with organizers via audio)
- Monitor Question and Answer in Real-Time
- Practice Sessions (rehearse your presentation)
- Interactive Training

The Online Course Catalog service would provide AABPA with all new features to manage training fees, podcasts, materials, and the content library available to participants. This feature would also allow for AABPA to use social media (Facebook, Twitter, LinkedIn, GovLoop) to provide recorded sessions to the general public free of charge. The Online Course Catalog includes:

- Option to Charge for Training
- Share Recorded Sessions Online
- Configurable Class Size
- Tests and Materials (before, during and after)
- Content Library (store tests and materials)
- Presentation Timer (count-down in minutes)

With the new web connectivity technology, AABPA will be able to educate and train outside of the Washington, D.C. metro area while, bringing together practitioners, academics, and students of budgeting and program analysis. The new system will enable students, academics, and practitioners to maintain connectivity and synergy regardless of where they are located.

AABPA has been extremely successful in its outreach to over two dozen university programs for policy and public administration. As a result of this outreach, more than 100 students have participated in AABPA events, including AABPA symposia, the student research competition, and the summer internship program. But outreach from AABPA thus far has been limited to those who are located or can travel to D.C. to participate in AABPA programs.

Recently, AABPA has been able to expand its programming to include regional events, hosted with local university and government partners, offering increased opportunity to foster collaboration between students, academics, practitioners, and policy conversations across the local, state, and federal levels. An overhaul of AABPA's member management system and web interface provided members with online access to member-only content, individual pages, a membership directory, archived symposia sessions, and other instrumental tools.

Archived Program, Videos and Materials

Further, the members-only section will have symposium material, video/audio of the symposium, monthly programs, while creating an on demand databank of continual education opportunities for AABPA members. The archived programs, video and materials provide a significant benefit to AABPA's ability to provide educational and career development. Currently we only have 28 past programs available to our AABPA members due to a technology constraint. The purchase of the new webinar technology will allow for all past and future webinars being posted and available on our website and available to the public 24/7.

The chart below is a comparison chart of the four biggest web conferencing companies and what they deliver. All four offer encryption at a government level security of the services.

Basis of Comparison	Adobe Connect	Fuze Meeting Pro	GoToMeeting	WebEx Meeting Center
VALUE				
Base Price	\$55/mo or \$540/yr	\$69/mo or \$828/yr	\$49/mo or \$468/yr	\$49/mo or \$468/yr
Users	100	10 presenters/100 total	15	25
Multi-User Video Chat	Unlimited	10	6 with HD Faces Beta	6
Upgrade Options	Enterprise pricing with/without hosting	Telepresence Connect	Corpotate (25 users), GoToWebinar, GoToTraining	Event Center, Training Center, Remote Support
GENERAL				
Unique URL	☑	☑	☑	☑
Record Meetings	☑	☑	☑	☑
Leader Synchronization	☑	☒	☑	☑
Online Meeting Scheduler	☑	☑	☑	☑
Outlook Scheduling Plugin	☑	☒	☑	☑
Whiteboarding	☑	☑	☑	☑
Public/Private Chat	☑	☑	☑	☑
Poll Users	☑	☑	☒	☑
Share Desktop	☑	☑	☑	☑
Share Specific Apps	☑	☒	☑	☑
VIDEO CONFERENCE				
Adjustable Resolution	☑	☒	☑	☑
Multiple Monitor Support	☑	☑	☑	☒
Share Video	☑	☑	☒	☑
Annotate Video	☑	☑	☒	☒
Video Chat	☑	☑	☑	☑
AUDIO CONFERENCE				
VoIP	☑	☑	☑	☑
Dial-in, Dial-back	☑	☑	☑	☑
Dial-in Attendees (lasso)	☒	☑	☒	☒
Toll Calls	☒	☑	☒	☑
Toll-free Calls	☒	☑	☑	☒
MOBILE SUPPORT				
iOS	☑	☑	☑	☑
Android	☑	☑	☒	☑
Blackberry	☑	☑	☒	☑

Goals and Objectives:

Upon receiving the grant from PFP, AABPA will complete the following goals in accordance with agreed timeline:

1. Meet with Board to begin implementation process
 - a. Develop timeline of goal accomplishments within organization
2. Complete purchase of web platform and connectivity
 - a. Begin implementation
 - b. Train all board members and volunteers
 - c. Establish system contact for troubleshoot issues
3. Begin controlling cost
 - a. Incorporate domestic toll-free and international toll-free dialing
4. Training new volunteers
 - a. Document and recording sharing
 - b. Training sessions recorded in archives
 - i. Begin transition to avoid duplication of efforts and promotes scalability
5. Build broadcasted community
 - a. Allows shared communication and the ability to perpetuate content through recordings
6. Promote easy access
 - a. Begin using multiple operating systems and platforms to connect easily for members
7. Audit and start new record keeping
 - a. Record both web and audio for records of donations, budget, resource meetings and program data.
8. Provide and market document sharing
 - a. Begin sharing documents without any conflict between systems
9. Take advantage of chat transcripts
 - a. In case of an unrecoverable error, provide chat transcripts to all members
10. Begin marketing of new webinar system with features
 - a. Social media sites
 - i. Twitter
 - ii. Facebook
 - iii. GovLoop
 - iv. LinkedIn
11. Conduct and hold first webinar using new technology
12. Record all aspects of success and failure of webinar session
13. Survey participants on:
 - a. Registration
 - b. Webinar platform and presentation
 - c. Overall effectiveness
14. Hold board meeting to evaluate process and presentation of webinar
 - a. Make changes and prepare for next webinar

Timeline of Key Accomplishments:

Activity	Completed by:
Board Approval of Grant Proposal	January 31, 2013
Submission of Grant Proposal to PFP	February 1, 2013
Grant contract drafted and approved by AABPA/PFP	February 15, 2013
Sign and complete Grant contract with PFP	February 20, 2013
Purchase New Web Connectivity Technology	February 27, 2013
Begin Training of AABPA Program Planning Team	March 1, 2013
Begin Planning of Monthly Program using New Technology	March 15, 2013
Advertise New Technology to Members/AABPA Community	March 20, 2013
Set up April Monthly Program	March 27, 2013
Use New Technology for April Monthly Program	Date TBA
Evaluate Participant/AABPA Program Committee use of Technology	April 30, 2013
Report to AABPA community	May 5, 2013

Evaluation Plan:

AABPA will measure its success in achieving the programs goals of enhancing and increasing the educational training and career development capabilities of the organization by gathering the following data:

- Draft After Action Report
 - Analyze:
 - Attendance Results
 - Actual/Non-attendance/wait-listed
 - Location of Participant
 - Title, Organization, Position Description
 - Private/Public Sector
 - Universities/Students
 - Questions
 - Surveys/Feedback
 - Timing of Program
- The number of online podcast training opportunities accessible to members
- The number of students who apply for AABPA membership

- The number of professionals who apply for AABPA memberships
- The number of new contacts for potential future partnerships with AABPA

The below “After Action Report” is completed after each Monthly Program, for AABPA Program Committee Members to review and report back to the Board immediately following a webinar, for changes to be made. The Action Report below is our most recent Monthly Program, January 17, 2013. The biggest and only issue faced was the web connectivity capability to meet the number of registrants to participate. Due to the almost triple number of attendees capable of participating in the webinar, most had to be waitlisted and were unable to participate in the Live-Feed training.

PROGRAM COMMITTEE: AFTER ACTION REPORT

Program Name: FISCAL CLIFF, SUSTAINABILITY & BEYOND: IMPACT ON FEDERAL, STATE AND LOCAL BUDGETS

Program Date: January 17, 2013

Lead Planner(s) of the Program: Sandra Beattie and Steve Wilson with additional support provided by: Molly, Marianna and Jon

Executive Summary

The webinar received an overwhelming amount of interest with over 160 individuals registering. Based on the number of registrants, AABPA Board Members worked with TCG to determine the adobe connects ability to capacity to accommodate registrants. Based on consultation with TCG, we were advised the adobe connect platform becomes *UNSTABLE* if 80-90 registrants were logged in. At this point, the registration was cut off, individuals were wait listed, and the webinar participants were admitted on a first come, first serve basis (i.e., first to initially register, first to enter the webinar). *[Note: Registration went from approximately 60 to over 100 within a 2 day time period.]*

The presentations were well received, participants asked approximately half a dozen questions, and the live webinar was posted to the AABPA website, disseminated via email to all registrants and tweeted immediately following the conclusion of the webinar.

Program Overview

- **Program Name: Fiscal Cliff, Sustainability & Beyond: Impact on Federal, State and Local Budgets**
 - **Duration:** One hour
 - **Program Date:** January 17, 2013
 - **Sponsor:** Technical support provided by TCG
 - **Format of Program:** webinar
 - **Funding:** \$0
- **Presenters: (1)** Susan Irving, Director, Federal Budget Issues, U.S. Government Accountability Office, **(2)** Trinity Tomsic, Deputy Executive Director, Federal Funds

Information for States and **(3)** Stanley J. Czerwinski, Director, Intergovernmental Relations, U.S. Government Accountability Office

- **Moderator:** Sandra L. Beattie, Board Member, Vice President for Programs, AABPA
- **Participant Statistics:**
 - Day-of-Webinar participants: 86
 - Total Registrants: 160
 - Levels of Government: federal, state and local
 - Federal Departments/Agencies: DOJ, DOE, DOD, GAO, DHS, HHS, Education, Labor, SBA, Senate Finance Committee and others
 - Location of registrants: Virginia (23), North Carolina (14), Maryland (12), Illinois (9), DC (41), Colorado (11) and other states
 - Private Sector (Y/N): yes, consulting firm(s)

Additional follow-up action, as needed:

- **AABPA Board of Directors:** Discuss methods of future monthly program delivery, webinars and feasibility of AABPA acquiring its own webinar technology.
- **Program Committee:** Discuss February event, lessons learned, communication plan and impact on future program events.

Budget

Category	Grant funds requested	Description	Total Budget
Personnel – Secretariat	\$12,000	Yearly stipend to pay intern to handle webinar technology	\$51,250
Equipment (Itemize) Initial purchase of technology and necessary equipment	(5) \$225 (2) \$2,000 (3) \$5000 (5) \$250 (5) \$300	5 - Webinar cameras 2 - Projectors 3 - Platforms 5 - Speakers 5 - Microphones	
Recurring Fees	(5) \$575/annually	5 Contracts for disperse office headquarters	
Hardware to support online, mobile access points	(5) \$2,500	Virtual connectivity hardware for 5 contracts	
Other	\$ 1000.00	Administrative/Development Fees	

Budget Justification:

AABPA requests the start up cost only to purchase and begin the webinar technology. Once the technology has been acquired AABPA will resume full responsibility for maintaining active service with provider and all fees. AABPA requests the ability to re-program up to 10 percent of the grant funds between the two large line items as the project evolves. In addition, AABPA will look to fund additional related opportunities with any remaining funds in any line items.



Grant Agreement between Public Financial Publications, Inc. and American Association for Budget and Program Analysis

This agreement documents the terms and conditions of a grant by Public Financial Publications, Inc. (PFP) to the American Association for Budget and Program Analysis (AABPA) for the purpose of increasing technology resources, education and outreach to AABPA members, organization, and both the public and private sector.

Because of the need to expand web conferencing services, AABPA has requested a total one-time grant funding for \$51,250 to begin and completely implement the new webinar technology.

PFP will support and facilitate these activities by making available up to \$51,250 for this project. Funding will be used to:

- Purchase and acquire all necessary technology to implement new webinar conferencing system (\$38,250)
- Establish personnel resources for implementation of web services (\$12,000)
- Maintain webinar technology and support for first webinar outreach (\$1,000)

(AABPA may adjust the funding in these categories by up to +/- 20% with notification to PFP.)

AABPA will not use the grant for ordinary operating expenses of AABPA even if specifically related to web conferencing programs. AABPA will measure its success in achieving program goals and provide this information to PFP. AABPA will need to find other revenue sources to continue these programs after this grant expires.

Funds will be disbursed to AABPA on the following schedule:

- \$(17,083.33) upon initiation of the project by AABPA
- \$(17,083.33) upon completion of approximately half of the project
- Up to \$(17,083.33) upon AABPA's submission of a detailed report of all costs incurred in the project

Thomas Lauth President, PFP, Inc.

Date

Melissa Neuman, President, AABPA

Date