

Narratives

Executive Summary

ServeMinnesota (ServeMN), in partnership with Minnesota Association for Volunteer Administration (MAVA), HandsOn Twin Cities (HOTC), and volunteer centers across the state, proposes to expand the Service Enterprise Initiative (SEI) across Minnesota (MN) and prepare a pipeline of organizations for SEI training. This research-based practice expands volunteerism and the use of skill-based volunteers who increase organization's effectiveness to address chronic community problems. The partners also seek to strengthen the capacity of the state's volunteer connector organizations to create and connect volunteers with high-quality assignments, increase the number of skill-based volunteers generated and retained, and address the loss of aging volunteers affecting the Healthy Futures focus area. Each year, 30 organizations will be SEI-trained and working toward certification; 150 nonprofits will be trained in best practices to improve their management capacity and effectiveness, thus creating an SEI pipeline; and organizations statewide will increase their capacity to recruit, connect, and retain at least 34,950 volunteers who will contribute 244,650 hours of service or more each year. The value of these volunteer hours to our state, to be performed by 104,000 volunteers over 3 years, approaches \$18 million (Independent Sector, 2013).

Program Design

ServeMN proposes to leverage our infrastructure and partner with MAVA and HOTC, our Service Enterprise Hub, to build the capacity of volunteer connector organizations and nonprofits across the state. This capacity-building is urgently needed in MN which, since 2000, has seen half of its volunteer centers closed, merged, or reduce services for lack of funding. This disinvestment in volunteerism has left many connection gaps, especially in western and northern MN. In turn, this has led to declines in volunteering and retention that are painful in MN, which has long been top-ranked for volunteerism. We are eager to reverse these trends. Resourceful leaders have tried to bridge the gap with technology, but the lack of alignment and interconnectivity between the platforms is confusing to volunteers. Further, feedback from a task force of volunteers assembled by MAVA earlier this year indicates that existing systems are not meeting the needs of potential skill-based volunteers, who report difficulty in finding assignments that match their skills, interests and time.

The proposed project is designed to address these needs on multiple levels of engagement, to prepare organizations at all stages of readiness to improve their outreach and retention of volunteers - especially skill-based volunteers -- and to introduce innovations expected to significantly expand the

Narratives

number, type, and community impact of volunteers in the state.

As such, our expected outcomes (O) are as follows:

O1: Expand SEI across MN by training 30 organizations each project year, to be measured by the number of SEI certifications in progress or issued. Created by California Volunteers, California Volunteer Centers, and Points of Light (POL), SEI is a research-based assessment, training, coaching, and certification model rooted in organizational change and proven to expand volunteering. It is designed to increase organizational effectiveness and community impact through the strategic engagement of skill-based volunteers performing high-value work. The SEI process begins with a rigorous assessment tool developed by researchers from TCC Group and the RGK Center for Philanthropy and Community Service at the University of Texas at Austin. The assessment leads to the creation of an action plan to build capacity, which is addressed by training and coaching. SEI training consists of a 4-module, 16-hour curriculum and up to 10 hours of coaching in areas such as re-engineering organizational processes and effectively engaging skill-based volunteers. Organizations that demonstrate mastery of the concept are certified as Service Enterprises.

SEI is an effective approach. Nationwide, 68 nonprofits have been certified as Service Enterprises and another 118 have completed the training and are working towards certification. Connector organizations introducing the initiative to nonprofits in their community are witnessing increased volunteer recruitment exceeding 50%, more skill-based volunteers, and greater planning for strategic volunteer engagement (POL, 2013).

In October 2013, MAVA and HOTC were selected to be one of 11 Service Enterprise Hubs nationwide to scale the framework. They identified 6 MN nonprofits through a competitive bid by December 2013 and completed the SEI assessment, training, and coaching by June 2014. MAVA and HOTC trained 48 staff that in turn impacted 7,661 volunteers. Over 90% of participants surveyed post-training said they "gained new knowledge," "training was worth time and resources," and they would "recommend to others." These organizations have until December 2014 to earn their SEI certification; one of the six already has earned certification.

The partners propose to offer SEI training 3-4 times each project year, to include at least one training in the Twin Cities and at least one training in Greater MN. 30 organizations will be trained annually,

Narratives

reaching at least 100 staff persons who recruit and manage a minimum of 21,000 volunteers. Organizations will be selected in a competitive bid and trained in cohorts of 6-10 organizations each. MAVA and HOTC will organize, enroll, and deliver the training, while local volunteer connector organizations (i.e., volunteer centers) will market, make logistical arrangements, and provide follow-up support. Participating nonprofits will have 12 months to complete SEI certification, and will be surveyed at 6 months post-training about their success in generating new volunteers, and the types and amounts of activities carried out by volunteers.

Uniquely, MAVA and HOTC are proposing an innovation to ensure that SEI training leads to expanded skill-based volunteering. They will recruit, train, and manage 20 skill-based volunteers who are experts in organizational development, human relations, and change management. Each volunteer-coach will provide up to 10 hours of additional coaching per organization to support the implementation of their SEI action plan over 6 months. Skill-based volunteers will attend training sessions, participate in the organization's action planning, and then assist in determining timelines, tactics, and talent required to effectively execute the plan. This use of skill-based volunteers to support SEI implementation has not been tried before; the partners will work with POL to evaluate whether and how this approach is helpful, and will use this to inform planning in Years 2 and 3. Results will be shared with CNCS.

O2: Create a pipeline for SEI training of 150 organizations each year, as measured by their earning a certificate of completion for best practices training. Scaling best practices will improve the management capacity and effectiveness of MN organizations and take volunteerism in the state to the next level. The Urban Institute (2004) found that, nationwide, only 47% of charities match volunteers with appropriate assignments, just 39% recognize volunteer contributions, and only 25% provide volunteers with professional development. Adopting these practices, it found, significantly increases volunteerism and retention.

Organizations that self-assess as not ready for SEI will be offered two preparatory trainings: (1) MAVA's two-day, 12-hour Volunteer Impact Leadership Training teaches best practices in volunteer recruitment, management and support, leading to a MAVA Certificate in Volunteer Leadership. MAVA has trained 1,470 nonprofits across MN in this curriculum to date: 96% of participants reported post-training that they felt more prepared to effectively engage volunteers, and 86% reported after six

Narratives

months that they implemented volunteer recruitment and retention strategies learned at the training. The curriculum will be updated in Project Year 1 to intentionally build readiness for SEI. (2) Also in Project Year 1, MAVA and HOTC will develop a half-day training on best practices in skill-based volunteerism, i.e., identifying, recruiting, engaging, managing, and supporting skill-based volunteers, leading to a Certificate in the Engagement of Skill-Based Volunteers.

Each of these two trainings will be offered 4 times a year, and are expected to reach 180 staff persons who in turn impact at least 13,500 volunteers annually. In Project Years 2 and 3, curricula may be modified to reflect lessons learned during the implementation of both SEI and pipeline trainings. MAVA and HOTC will organize and deliver trainings with local volunteer connector organizations that will market and handle logistics. Participants will be evaluated post-training and at 6 months about their progress in generating volunteers, implementing strategies for recruitment and retention, and reviewing the types and amounts of activities carried out by volunteers.

O3: Strengthen the state's volunteer recruitment and management system through the creation of an action plan and incentives for innovations. Finally, the partners seek to strengthen the capacity of volunteer connector organizations statewide to create and connect volunteers with high-quality assignments, and to increase the number of skill-based volunteers and other volunteers generated and retained. To do so, we will (1) create a statewide action plan in Project Year 1. MAVA will work with 6 volunteer centers to create a three-year road map to address gaps and leverage opportunities. MAVA also will involve other connector organizations who are stakeholders in the process: Greater MN United Ways, which maintain online volunteer databases; the MN Board on Aging, which expanded the Senior Linkage Line in 2011 to include connecting older adults with volunteering; and the Invisible Force collaborative, which focuses on civic engagement of older adults.

The action plan will build on volunteer capacity building planning that MAVA and the Volunteer Centers of MN performed in 2010-2012, and on MAVA's current work with a task force of volunteers, most of them skill-based, who are sharing their motivations for volunteerism, how they approach finding a suitable opportunity, and what they consider meaningful and impactful volunteering.

Among the issues identified in previous planning were:

The lack of volunteer centers in over half of the state.

Misalignment and lack of connectivity among different volunteer databases.

Narratives

Expectation of today's skilled volunteers that online volunteer connection systems will ask more about the skills they want to offer before matching with volunteer opportunities, and the need for online tools to help volunteers formulate how want to be engaged.

An idea that is incubating for a "reverse" database where skilled volunteers can list what they want to do for organizations to find them.

The need to innovate to minimize resource needs and increase sustainability for volunteer centers and volunteer connector organizations.

The growing interest in skill-based volunteering, which requires a different type of connection.

The three-year plan is expected to define approaches to address these issues. Given MAVA and HOTC's SEI pilot, we anticipate that the action plan may also include creating online tools, aligning protocols, and introducing innovative recruitment practices.

In each project year, the partners will look to the community of volunteer connector organizations for innovative ways to implement these approaches and address gaps and challenges. This will be achieved through the (2) award of innovation grants. ServeMN will award three \$10,000 grants annually to connector organizations that develop innovations that expand the number of volunteers connected, especially skill-based volunteers, and to implement practices to recruit volunteers for solving the state's most critical issues. These organizations are expected to impact some 450 volunteers annually.

The result of CNCS's three-year investment in this project will be the increasingly effective engagement of 104,000 volunteers - including skill-based volunteers - working to address MN's most pressing needs. Over three years, 90 organizations will set the pace of advanced-level engagement of skill-based volunteers to impact critical issues, and 450 organizations will adopt best practices that will expand recruitment and retention of volunteers. Additionally, improvements in the statewide system for connecting volunteers with opportunities will fix barriers and create new opportunities for increasing numbers of volunteers.

CNCS FOCUS AREAS. The partners seek to expand the capacity of the state's nonprofit sector across all focus areas, and to specifically support improvements in the Healthy Futures focus area. In Year 1, we will enroll one cohort of organizations solely addressing Healthy Futures. Organizations in this

Narratives

focus area face a disproportionate aging-out of volunteers and have some the state's greatest needs for recruitment, management, and support. Focused cohorts of this type have not been attempted in the SEI model; the partners will work with POL to evaluate whether and how this approach is helpful, and will use this to inform planning in Years 2 and 3. Results will be shared with CNCS.

NATIONAL PERFORMANCE MEASURES AND TARGETS. ServeMN will measure our proposed project by the target of 34,950 volunteers managed and 244,650 hours of service contributed by community volunteers who were managed by CNCS-supported organizations and 180 organizations (those receiving SEI and pipeline training) implementing three or more effective management practices (e.g., effective matching of volunteers, volunteer recognition, and volunteer and staff training) as a result of capacity-building services provided by CNCS-supported organizations or national service participants.

COMMUNITY NEEDS. More MN volunteers assist in collecting and distributing emergency food (27.8%) than in any other volunteer activity in the state. But the state's food pantries and food banks are facing a crisis: their operations rely on volunteers whose average age is 75 and who have served, on average, for more than 20 years. Food banks and pantries cannot find replacements because today's volunteers want shorter, more flexible, and higher-impact assignments. Yet the need for emergency food is only increasing: Locally, over 3 million Minnesotans visited food shelves in 2012 vs. under 2 million in 2007, according to Hunger Solutions, an organization working to expand the capacity of food shelves in the state. They estimate that one in five (20%) MN families face food insecurity and hunger.

The intersection of increased need and decreased volunteerism presents an opportunity to rethink volunteerism and engage skill-based volunteers in ways that can model practices for national service. In an article in the Pioneer Press (January 2013), Second Harvest Heartland, the upper Midwest's largest hunger relief organization, reported doubling their volunteer hours in two years by redesigning volunteer engagement. They made it convenient to sign up online, added weekend and evening hours to attract families and working people, and re-created assignments so that people could volunteer in groups. Two of the six organizations in the MN SEI pilot provide emergency food assistance. As a direct result of this training, they have trained staff in working with skill-based volunteers, identified 15 new skill-based roles for volunteers, and created a flexible, online method for signing up for

Narratives

volunteer shifts. Included in their SEI action plans for future implementation are developing ladders to move volunteers into increasingly more skill-based roles in their organization; developing succession planning for leadership volunteers; and adding training for both volunteers and the staff who supervise them.

While Project Year 1 will address the urgent need in the Healthy Futures Focus Area, the project will more broadly build capacity for statewide volunteerism that MN's volunteer organizations have not been able to achieve in any other way. Further, it will help the state's volunteer system to innovate and improve its ability to recruit, match, manage and retain skill-based volunteers with the potential to create significant impact on community needs and issues.

By training organizations in best practices, the partners will help to expand volunteerism and retention and build a pipeline for SEI training. A 2013 MAVVA study on Status of MN Volunteer Projects in a Shifting Environment found close to 50% of organizations reporting an increased reliance on volunteers in 2013 compared to 2014. Yet many do not employ the volunteer best management practices identified by The Urban Institute and others to support increased retention, i.e., effective matching of volunteers, volunteer recognition, and volunteer and staff training. Finally, by bringing together volunteer connector organizations to create a statewide action plan based on the best practices in which these organizations will be trained, the partners seek to create common mission, language, and aligned action to move the state to the next level.

TIMELINE. October 2014: Execution of agreements, confirmation of roles & responsibilities and work plan. Oct. 2014-Sep. 2015: Implementation of SEI model, as specifically detailed below: SEI Training. Four cohorts will be recruited each year (Oct.-May) and will undergo 4 months of SEI training as follows: There will be some overlap in the cohort start-end periods. For each Project Year, Month 1 (Oct., Jan., Mar., May): Organizations accepted through an application process; cohorts formed; assessments conducted and results discussed; first training takes place. Month 2 (Nov., Feb., April, June): Second and Third trainings held; action plans created; begin conversations on what the consultations will include. Month 3 (Jan., Mar., May, July): Fourth training will be held; consulting plan determined. Month 4 (Feb., April, June, Aug.): Consulting from MAVVA and HOTC completed. If organizations are supported by skill-based volunteers, then additional consultation hours will begin in this month. Timeline to certification begins. MAVVA and HOTC will evaluate impact at the end of the

Narratives

4-month trainings and again 6 months later.

Pipeline Training. (Oct.-Dec.): Update MAVAs 2-day Volunteer Impact Leadership Training Series to intentionally build readiness for SEI. Develop skill-based training curriculum and offer first workshop. (Jan.-Feb.): Arrange for local connectors to host workshops. Schedule workshops in Minneapolis-St. Paul and statewide. (Mar-Sept.): Deliver the Volunteer Impact Leadership Training Series and the skill-based curriculum four times each. Evaluate impact at the end of the training, and again 6 months later.

Statewide Capacity Building. (Oct.-Dec. 2014): Form planning group. Set meeting work plan. (Jan.-May 2015): Develop statewide action plan. (June-Sep. 2015): Release recommendations for action and to inform innovation grants for Project Year 2. Innovation Grants for Year 1: (Oct.-Dec. 2014): RFP distributed and grantees selected. (Jan.-Sep.): 9-month grant implementation period. In Project Years 2-3, RFP to be released in July and awarded in Oct.

TARGET POPULATION. The target population will be organizations that address the CNCS focus areas, with an emphasis on those that address the Healthy Futures focus area. In Project Year 1 and in ensuing years if the approach proves successful, one of the SEI training cohorts will be selected solely from that focus area, creating a community of practice to support implementation and improvements in volunteer generation and retention.

PROJECT BENEFICIARIES. The nonprofit sector, especially those supported with CNCS funds, will benefit from training and coaching that will build their capacity to recruit and retain skill-based and other volunteers. Volunteer connector organizations will benefit from planning to result in implementation of innovative practices. ServeMN, as grantee, will sub-grant project management and service delivery to MAVAs, which works on a statewide level, and service delivery to HOTC, which works locally; they will act as the Service Enterprise Hub.

SUCCESSFUL, PROMISING APPROACH. The approach will be successful because (1) it builds capacity at multiple levels: volunteer connector organizations, nonprofits, and a key focus area sector. (2) It creates a statewide mission around improving practices to engage skill-based volunteers. (3) It creates an action plan to get there. And (4) it develops a pipeline of organizations committed to and

Narratives

actively working toward this effort. These activities are built on a research-based systems change model, SEI, which is more promising than other alternative approaches. Because of MAVA and HOTC's work to date in piloting SEI and building nonprofit capacity, they estimate there are 300 SEI-ready organizations in the state. Also, their innovation of placing skill-based volunteer-coaches with organizations to implement their SEI action plans will help ensure these organizations improve practice and manage more skill-based volunteers.

CNCS INVESTMENT. MN is uniquely positioned for success with this SEI project. It ranks #2 in the nation in the portion of our population that volunteers, at 37.7%. ServeMN has demonstrated its ability to develop innovative solutions (i.e., MN Reading Corps) that leverage national service and scale what works quickly to every corner of the state. CNCS' investment in the proposed project will result in 180 organizations that will implement three or more effective management practices as a result of capacity-building services provided by CNCS-supported organizations. Each project year, at least 34,950 community volunteers will be managed by CNCS-supported organizations, and 244,650 hours of service or more will be contributed by community volunteers who were managed by CNCS-supported organizations. The value of those volunteer hours, estimated in MN at \$24.31 per hour (Independent Sector, 2013), is nearly \$6 million, providing a substantial return on CNCS's investment in this project.

Organizational Capability

PROJECT OVERSIGHT. ServeMN has the financial stability, organizational capacity, and track record to implement highly successful, nationally recognized programs such as SEI. ServeMN has demonstrated expertise in scaling promising approaches, i.e., replicating evidence-based literacy interventions through the Greater Twin Cities' United Way-Generation Next Social Innovation Fund, and expanding Reading Corps from 4 Head Starts in MN in 2003 to 960 sites and 1,540 members in 8 states in 2014-2015. As grantee, ServeMN will provide programmatic and fiscal grant management as follows:

PROGRAMATIC MANAGEMENT. Two-thirds (68%) of ServeMN's budget comes from federal sources: In 2013-2014, that will represent more than \$18.6 million in grants and contracts, including six (6) grants from CNCS. Our ability to effectively manage and report on federal grants and contracts is a core competency. Our experienced staff delivers grant and contract services and files reports in accordance with all relevant government statutes and regulations, as has been confirmed through

Narratives

multiple A-133 and other financial and external audits. ServeMN has comprehensive monitoring policies and procedures in place. For this project we would complete a pre-award risk assessment of volunteer connector organization grantees to include: (1) A review of the proposed budget for accuracy; an assessment of whether costs appear reasonable for the project and are allowable under OMB regulations; and an assessment of the adequacy of the proposed staffing pattern. (2) Review of the applicant's description of experience with federal grants and a description of financial systems. (3) A Review of A-133 audit, 990, or financial audit for any significant financial management issues. (4) Completion of a financial management survey as a baseline for ongoing technical assistance.

As new sub-grantees, MAVA and HOTC will automatically receive an on-site fiscal monitoring visit in their first 9 months of operations. During the fiscal site visit, the sub-grantee's documentation will be reviewed for compliance and allowability. Documents also will be reviewed to ensure that the sub-grantee's general ledger and back-up documentation tie to and support the expenses reported. Quarterly programmatic review will ensure that the partners are progressing to stated performance measures.

FISCAL OVERSIGHT. ServeMN is a fiscally responsible steward of public and private monies with a track record of timely and accurate reporting and records management. ServeMN currently manages \$18.5 million in CNCS grants. Executive staff, including those with financial oversight, each has at least 11 years of experience managing CNCS grants. Internal controls provide for data being entered daily in management information systems; accounts being reconciled monthly; checks requiring executive's signatures; monthly review of all expenditures and reports; and at least quarterly review of finances at the Board level. Additionally, ServeMN is audited annually. Our Finance Department employs Generally Accepted Accounting Principles (GAAP), and has written policies and procedures governing grant administration, fiscal management, reporting, and records management that it created based on federal contracting law and relevant OMB circulars. CNCS grants are managed using Fund E-Z, which segregates clients; contracts; line-item costs; and direct and indirect spending.

BUDGET. ServeMN's 2013-2014 operating budget is \$27.4 million. The proposed project would represent 1% of this budget.

COMPLIANCE. The Controller will ensure fiscal compliance through regular monitoring and annual

Narratives

audits and desk reviews to ensure project documentation and in-kind documentation is accurately collected, reported, and verifiable and that monies are being disbursed according to the budget. The Director of Programs will lead quarterly project meetings to ensure implementation per the timeline and that programmatic goals are being met. ServeMN will execute signed agreements with sub-grantees that clearly outline rules and regulations. The Project Director provides overall supervision, and will immediately address any risk or noncompliance issues identified during the project.

STAFFING. ServeMN VP of Operations Janet Johnson will serve as ServeMN's Project Director, and will devote 10% of her time to managing the successful implementation of this project. Her expertise includes performance management, staff supervision, volunteer project administration, project management, and policy and procedure compliance. Janet has a BS in Education and more than 17 years of experience in nonprofit management and service delivery. Controller Lynn Lewis has a BS in Accounting and will be assigned at 5% of her time to ensure effective grant management, accounting, reporting, and contract compliance. She has 20+ years of accounting experience, including more than 12 years managing federal grants. Director of Programs Stacey Scherschligt will be assigned at 5% to provide technical assistance and monitoring to ensure the project is effectively delivered, objectives are accomplished, and programmatic requirements are met. She has a BS in Business and 14 years of experience and expertise working in national service.

ServeMN will sub-grant project implementation to two nonprofit organizations with extensive experience in effectively using volunteers to meet MN's unmet needs: MAVA and HOTC. As the Service Enterprise Hub for this project, MAVA and HOTC will lead SEI recruitment, training, assessments, coaching, and best-practice training. MAVA, which operates statewide, and HOTC, which works in the Twin Cities, have a longstanding and successful partnership, and jointly introduced SEI to the state in 2014.

MAVA was founded in 2001 as a 501(c) (3), and is MN's only statewide, multi-sector alliance of volunteer resource leaders, with more than 850 members. MAVA conducts research into critical issues impacting civic engagement; introduces innovations designed to enhance volunteerism; and provides news, resources, and training to support volunteer leadership. MAVA has the programmatic and fiscal expertise and infrastructure to manage grants and scale innovative projects statewide. It holds a biannual conference that earns \$110,000 revenue, and engages nonprofits, volunteer centers, United

Narratives

Ways and other regional leadership networks and community organizations from all over the state. It has demonstrated experience in launching complex projects with impact: In 2005, MAVA was one of two organizations in the nation to receive a \$50,000 inaugural grant from the Washington-based Volunteer Impact Fund to launch the three-year Volunteer Resources Leadership: Capacity Building in MN (VRL). The initiative made a significant impact on building capacity for volunteerism in MN, reaching all regions of the state, training more than 1,000 leaders of volunteers in best practices and educating decision makers on the value of investment in volunteer resources. MAVA received the 2009 Catalyst Award for its work to build organizations' readiness to engage Baby Boomers at the Second Annual Symposium on Civic Engagement and Baby Boomers.

MAVA employs GAAP and files a 990 annually. It has successfully managed a CNCS VISTA grant as well as \$353,000 in foundation grants since 2006, from funders including Otto Bremer, St. Paul, Initiative, and F.R. Bigelow foundations. Additionally, MAVA was recently selected as one of 34 grantees from over 600 proposals for the Bush Foundation Community Innovation Fund for a project to build resources for cities on volunteer engagement.

It has qualified and experienced staff, skilled trainers, and an engaged board. Managing MAVA's participation will be Executive Director Mary Quirk who, since 2006, launched MAVA's SEI pilot, developed MAVA's nationally-recognized train-the-trainer project, wrote 30+ volunteer management workshop curriculum, cultivated statewide partnerships, and published articles in journals including *Nonprofit World* and *e-Volunteerism*. Mary previously directed two volunteer-based nonprofits. She has master's degrees in both Public Affairs and Public Health. She will be assisted by Operations and Services Manager Morgan Weis, who began her career as a VISTA member and now manages MAVA's AmeriCorps VISTA project. She coordinates MAVA trainings, and successfully coordinated logistics for the SEI pilot.

Formed in 1919, HOTC is a legacy POL volunteer center and a member of HandsOn Network since 2005. HOTC is the central source for volunteerism in the Twin Cities, meeting the needs of individuals seeking to volunteer and organizations working with volunteers. HOTC has a history of piloting innovations that exceed goals and expectations. In creating ImpactNow in 2007, HOTC assisted nonprofits that wanted to engage volunteers but lacked the time and resources to do so. ImpactNow provides organizations with volunteer leaders who have the expertise to recruit, train, and manage

Narratives

volunteers for them. In 2012, HOTC piloted the Skill-Based Summit; local companies provided operational expertise and business skills with nonprofits.

With a strong staff and board, HOTC has the expertise and capacity to implement the proposed project. Implementation will be managed by Zeeda Magnuson, Associate Director, who led the SEI pilot and has provided curriculum development and training skills to the organization since 2004. Financial management will be provided by Executive Director Kristin Schurrer, who has been with HOTC for 6 years. She will be supported by a CPA.

Further, HOTC has a successful history in managing federal grants, including a Volunteer Impact, Recruitment and Expansion (VIRE) grant (2010) and AmeriCorps and VISTA grants (2005-2011). Each year the organization completes an audit and 990. HOTC has always received an unqualified audit.

As the SEI technical assistance contractor, POL will provide training to MAVA and HOTC as well as assessments, training materials, marketing support, fundraising support, and evaluation services needed to implement and continuously improve the SEI model in MN. The POL team will be led by VP of Training and Consulting, Tricia Thompson, who has been with POL for over 5 years and has led the SEI work since 2013. Other key POL team members include Director of Training Projects Lori Jean Mantooh, who helped develop the SEI curriculum and supported California Volunteers and nonprofits; Senior Director, Evaluation and Performance Measurement Brandee Menoher, who designed and leads SEI evaluation activities; and POL President of Projects Delores Morton who has 15 years of expertise in nonprofit capacity building, and will support the project with long-term strategy development and business planning.

Budget/Cost Effectiveness

BUDGET TO DESIGN AND GOALS. ServeMN is requesting \$237,715 from CNCS to implement the project in Year 1. This leverages \$65,893 in nonfederal monies, for a total project budget of \$303,608. To implement a high-quality project, ServeMN is specifically requesting:

PERSONNEL expenses of \$19,140 include the Project Director (Johnson-10%), Controller (Lewis-5%), and Director of Programs (Scherschligt-5%), all senior staff who will ensure the effective delivery of service and performance measures. **FRINGE** for these staff is \$4,126, and is calculated individually

Narratives

but averages 21.5%. CONTRACTUAL & CONSULTANT SERVICES totals \$30,000 and includes three innovation grant awards of \$10,000 each to connector organizations statewide. OTHER PROGRAM OPERATING COSTS include \$2,700 for occupancy; \$120 for cell phone usage; \$150 for background checks (for three staff and 7 sub-grantee staff); and two sub-grants:

MAVA will receive \$109,380 to operate the VGF project statewide, and will leverage \$15,900 in nonfederal funds, bringing its allocation to \$125,280. This includes contract expenses of \$97,600 (inclusive of salary, fringe, technology, and related costs) include Project Director Mary Quick and Operations Manager / Trainer Morgan Weis to implement the project. TRAVEL expenses of \$5,225 are for SEI trainings at \$925, pipeline trainings at \$2,200, and coordination with POL at \$2,100. SUPPLIES cost \$1,060 to copy training materials, binders, food, etc. CONTRACTUAL AND CONSULTANT SERVICES total \$13,500 and include a technical assistance contract with POL at \$10,000. Additionally, 5 connector organizations statewide will be offered \$700 each to participate in the creation of a statewide capacity building plan, totaling \$3,500. TRAINING costs of \$7,895 will include supplies and space at \$3,895, and four payments of \$1,000 each for logistics services to be provided by the local host volunteer connector organization re: SEI training.

HOTC will receive \$60,220 to implement the project in the Twin Cities and support MAVA, and will leverage \$42,700 in non federal funds, bringing its allocation to \$102,920.

Contract expenses of \$62,100 (inclusive of salary, fringe, technology, and related costs) include implementation management by Zeeda Magnuson and grant management by Kristin Schurrer. TRAVEL expenses of \$3,725 are for SEI trainings at \$1,425, \$200 for pipeline trainings, and coordination with POL at \$2,100. CONTRACTUAL AND CONSULTANT SERVICES include \$700 to one Twin Cities volunteer connector organization to participate in statewide capacity planning. Training costs of \$1,195, to include \$995 cover supplies for SEI training, and \$200 for supplies for pipeline trainings.

ServeMN requests indirect costs of 5%, or \$11,879, which, added to the total of direct costs, or \$225,836, bring the total request to CNCS to \$237,715. Adding the leveraged funds of \$65,893, the project's overall Year One total is \$303,608. Calculated by project outcome, costs are: O1. SEI training is estimated at \$137,439 in CNCS funding and \$50,200 in nonfederal match. O2. Pipeline training is estimated at \$40,138 in federal CNCS funding and \$8,400 in nonfederal match from

Narratives

workshop fees and grants. O3. Statewide capacity-building is estimated at \$60,138 in CNCS funding and \$7,293 in nonfederal match.

NON-CNCS FUNDING. The project design provides immediate project income from training fees (\$20,400) and skilled volunteer (\$35,200): 30 organizations x \$500 for SEI training = \$15,000, and 60 organizations x \$90 for pipeline training = \$5,400 (the 2-day best practices training will cost nonprofits \$90, while the half-day training on skill-based volunteers will be offered without charge). Skilled volunteer hours are calculated at 20 volunteers x \$80 per hour x 22 hours = \$35,200. Connector organizations will provide (\$7,293) match from volunteer hours: 3 organizations x 100 hours x \$24.31/hour = \$7,293. To a lesser extent in Year 1, the partners will rely on grant funding (\$3,000). The partners have extensive experience and demonstrated success in raising private funds. ServeMN continues to attract significant funding from philanthropic organizations including the Kellogg Foundation, United Way, and Target. In Year 2 and beyond, as the match requirement rises and the value of becoming a certified Service Enterprise becomes better known through the partners' promotional efforts, SEI training fees of \$500 - \$1,000 based on organizational size will be increased to \$600 - \$1,200. Also in Year 2, the partners will leverage first-year results to seek greater support from corporations and foundations, which will be asked to sponsor scholarships to assist nonprofits in maximizing the engagement of skill-based volunteers.

COMMITMENTS. MAVAs has \$3,000 in-hand: a \$1,500 contribution from the Duluth Superior Area Community Foundation to underwrite the cost of bringing pipeline training to that community in Project Year 1, and \$1,500 from the Bush Foundation to underwrite the cost of bringing pipeline training on skill-based volunteers to city volunteer managers. The project is designed so that a significant portion of the resources needed, will be raised in fees from nonprofits and in-kind skill-based volunteer hours. Only 10-20% of the resources needed, will come from grants, for which the partners will start requests to the foundations and corporations that have generously supported them in the past, as listed above, in Project Year 1.

Continuation Narrative Updates

na

Clarification Responses

Clarification response was sent to Program Officer.

Grant Characteristics