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Executive Summary

Serve Wisconsin proposes the utilization of Volunteer Generation Fund (VGF) support to implement and expand the Service Enterprise Initiative (SEI) in the state of Wisconsin. The SEI has been developed using year 1-4 Volunteer Generation funding through California Volunteers in partnership with Points of Light, and it is a comprehensive, research-based assessment, training, coaching, and certification model rooted in organizational change that increases the effectiveness and impact of organizations through the strategic engagement of volunteers. To date, 68 non-profit organizations have been certified as Service Enterprises and another 118 have completed the training and consulting program and are working towards certification.

In 2013, the Nonprofit Center of Milwaukee (NPCM) and Serve WI were selected to be a SE pilot site during the national expansion of the initiative. Since then, NPCM has certified one non-profit organization as a Service Enterprise and six more have completed the training and are working towards certification.

We wish to continue this important and impactful model and incrementally expand the initiative to the rest of the state. This will support seven non-profit organizations in the Milwaukee-area in Year 1, and will incrementally increase the number of participating organizations in Years 2 and 3 as we expand. Our key partners in this effort are the Points of Light and Nonprofit Center of Milwaukee.

The program will focus on the CNCS focus area of capacity building, and the CNCS investment of \$17,330 will be matched with \$17,350 (50%) which will come from cash match from participating nonprofit organizations, and cash and in-kind match from the SE Hub.

Program Design

The purpose of the Serve Wisconsin Volunteer Generation Fund (VGF) project is to support the development of organizational capacity of non-profit organizations through research-based training, consulting, and organizational change so that they may more effectively engage, support, and retain volunteers to meet community needs. Nonprofit organizations are often a community's social safety net, especially in rural communities. Although the economy is recovering from the recession, nonprofit organizations are still challenged to raise the necessary financial resources to support their efforts to address community needs. Between 2003 and 2013, the total number of all non-profit

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organizations in Wisconsin has stayed virtually the same; however, they have seen an increase in demand for services as the Wisconsin economy lags behind other Midwestern states. (National Center for Charitable Statistics, 2013 State Profile) On average, 58% of WI nonprofit organizations experienced an increase in expenses in 2012, while only about a quarter of nonprofits surveyed are financially healthy. (Forward Community Investments, Outlook Impact, 2012) This is critical as nonprofit organizations are vital to the economy of local communities, the state, and the country.

As nonprofit organizations struggle to meet the needs of their community, many turn to increased volunteer engagement as a solution to fill the gap between needs and resources. GivingUSA estimates that the time volunteers serve was valued at \$283.84 billion, which is nearly as much as donations (\$290.89 billion). (GivingUSA, 2011) Volunteerism is strong in the state of Wisconsin, as we have been ranked in the top 10 states in the country for our rate of volunteerism for many years. According to the Volunteering and Civic Life in America Report, 35.6% of Wisconsinites volunteered 165.3 million hours to help meet the needs of the state in 2013.

According to the National Conference on Citizenship, it is found that states that have more civic engagement have a lower unemployment rate, as well as an increase in other community benefits. Milwaukee, specifically, was one of the cities with the highest rates of volunteerism as well as one of the smallest unemployment increases between 2006-2010. While this report is not definitive research, it is presented to guide public discussion on several observations about how civic health can promote economic resiliency. (www.ncoc.net/unemployment-release) These findings are consistent with CNCS' 2013 Volunteering as a Pathway to Employment Report.

An increase in the number of volunteers is not the sole solution, as organizations that do not have the proper practices and systems in place to manage and retain volunteers often view them as a burden rather than an asset. Only 17% of nonprofit organizations felt that they have strong volunteer engagement practices according to a TCC Group study. The Stanford Social Innovation Review (The New Volunteer Workforce, Winter 2009) reports that most nonprofit leaders are not developing or supporting volunteer talent adequately. Successful results are achieved only when an organization is able to support, mobilize, and manage its volunteer resources for the greatest possible impact on a problem or need. (Volunteering Reinvented, CNCS, 2007)

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When a nonprofit organization is able to engage volunteers effectively, they outperform their peer organizations on all measures of effectiveness and organizational capacity. In December 2009, the TCC Group analyzed the data of 1,500 organizations which had completed the Core Capacity Assessment Tool (CCAT) nationwide. The CCAT, developed by TCC Group, measures a nonprofit's effectiveness in relation to four core competencies: leadership, adaptability, management, and technical capabilities, as well as organizational culture. The findings that emerged from this analysis far exceeded initial expectations. From this data, TCC Group found that:

1. Nonprofits that engage volunteers well are significantly better led and managed;
2. Nonprofits that engage 50+ volunteers via a strong volunteer management model have increased organizational capacity;
3. Such organizations are more adaptable, sustainable, and capable of going to scale; and,
4. Nonprofit organizations that engage at least 10 volunteers are as effective as their peers without volunteers, but have almost half the median budget. Specifically, organizations with between 10 and 50 volunteers have a median budget size of \$615,000, while organizations with no volunteers have a median budget size of \$1.1 million.

This data implies that organizations that break the barrier of 10 volunteers have as much capacity as peer organizations that do not engage volunteers; however, they do not require the same level of financial resources to deliver the same level of services. This is crucial at a time when resources are scarce for many nonprofit organizations while the demand for the critical services they provide continues to be high.

Additionally, Deloitte Consulting identified 8 characteristics that were consistent and critical practices of exemplary nonprofit organizations through a series of interview.

1. Demonstrate Executive Support for Volunteer Engagement -- the strategic plan for the nonprofit clearly documents service initiatives, resource and funding needs, volunteer integration and future direction, and executive support.
2. Resources Allocated to Priority Initiatives -- there is a strategic allocation of funds and resources.
3. Effective Training for Paid Staff and Volunteers -- standardized training equips volunteers to handle tasks regardless of education or background, and paid staff working with volunteers have the training necessary to succeed.
4. Tracking System to Manage Volunteer Resources -- this provides quantitative data on evaluation,

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retention, annual and lifetime hours.

5. Technology Leveraged to Enhance Volunteer Engagement -- technology allows nonprofits to stay in continuous contact with volunteers.
6. Clear On-Boarding and Expectation Setting with Volunteers -- Nonprofits are more successful when they utilize a standardized and consistent process to help new volunteers become productive members of the organization.
7. Ongoing Funding Outreach to Support Volunteers -- regardless of the use of volunteers, nonprofits still require funding to support their programs.
8. External Partnerships to Extend Reach into the Community -- cross-sector collaboration allows an extended reach into the community.

Despite this compelling evidence that supports the link between effective volunteer engagement and organizational capacity, the TCC Group research found that less than 15% of nonprofits nationwide are operating at this high level of engaging volunteers, known as a Service Enterprise. A Service Enterprise is defined as an organization that fundamentally leverages volunteers and their skills as a core strategic function to achieve the social mission of the organization. Service Enterprises go beyond engaging volunteers to provide basic administrative support or to deliver one programmatic function for the organization. Instead, they view volunteers as an integral part of their overall strategy and seek ways to engage volunteers in a variety of ways and roles to increase their capacity, including programmatic delivery, skills-based engagements, administrative support, and much more.

The Service Enterprise Initiative (SEI) is much more than a training program; it is a comprehensive organizational change model that empowers the nonprofit to more effectively engage volunteers and address community needs. It is based on Dr. John Kotter's 8 Step Change Model, which is an easy to follow, step-by-step model that focuses on the acceptance and preparedness for change, rather than the change itself. This change management takes time and continuous effort throughout the organization, but the benefits are undeniable. Deloitte Consulting shows that SE organizations deliver up to a 600% return on their investment in volunteer capacity.

Current Structure of Program and Deliverables to Date:

Points of Light has served as a partner and technical assistance lead for the SEI since May 2012. POL has refined the program model to equip participating SE Hubs (the organizations implementing the

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model) with the tools and resources necessary to effectively deliver the program model in their local communities. Currently, the SE program model includes: template outreach and marketing materials; electronic application that collects baseline data; a rigorous research-based assessment tool (the Service Enterprise Diagnostic--SED) which was developed collaboratively by researchers from the TCC Group and the RGK Center for Philanthropy and Community Service at the University of Texas--Austin; a four-module, 16-hour curriculum designed to assist nonprofits in how to apply the SEI in their organization, including strategies for effectively engaging skills-based volunteers; case studies of nonprofit organizations operating as Service Enterprises to reinforce curriculum concepts; up to 10 hours of individualized coaching provided by the SE Hub in areas such as re-engineering organizational processes with volunteers as well as recruiting and effectively engaging skills-based volunteers; and a certification program for organizations that demonstrate mastery of the SE concept.

Nationally, nonprofits have responded favorably to the curriculum, with 90% of training participants stating that they "gained new knowledge", that "training was worth their time and resources" and that they "recommended it to others". Organizations participating in this initiative are seeing over 50% growth in volunteer engagement, including skills-based volunteers, and an increase in number of hours served by volunteers.

Once the SEI was established in Calif., POL, along with Reimagining Service, worked to expand the Initiative nationally by selecting state commissions and organizations to partner together in the nationwide pilot. In 2013, Serve WI applied to become a pilot site with the Nonprofit Center of Milwaukee and United Way of Dane County. Supporting volunteer engagement through the development of organizational capacity, cross-sector collaboration, and the identification of exemplary practices is central to the WI State Service Plan. Additionally, in the 2014 Commission Support Grant, Serve WI identifies investing in sustainable service solutions to increase the number and quality of volunteers recruited, managed, and retained, as well an increase in the number of organizations implementing three or more effective volunteer management practices as top priorities. The SEI was an innovative way to build the capacity of nonprofit organizations in the state, and we were fortunate to have strong partners who believed in the impact it could have.

After being selected as one of the 10 states to participate in the SEI pilot, Serve WI and NPCM staff attended comprehensive training provided by POL to prepare organizations, commissions, and

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volunteer centers to become the trainers of the SE model in their state. The United Way of Dane County decided not to continue with the SEI pilot after many delays in contracting from POL and due to increased time demands at the organization. NPCM became the SE trainer for the Greater Milwaukee area. Milwaukee was a natural choice to begin the pilot as it has the highest concentration of nonprofit organizations in the state--over 6,000 currently. Most of these nonprofit organizations engage volunteers to help achieve their mission; however, with increased demand for services by the community, these nonprofit organizations could greatly benefit by building their capacity and utilizing volunteers more effectively.

Seven Milwaukee nonprofit organizations were selected to participate in the pilot in Wisconsin. Bonnie Andrews, Volunteer Center Manager, led these nonprofits through the entire SEI model. Bonnie is known nationally as a trainer and expert consultant on volunteerism. Each nonprofit that participated received individualized technical assistance and consulting based on the needs identified in the Service Enterprise Diagnostic (SED) tool. By utilizing the comprehensive materials provided by POL, the entire process went smoothly, and all organizations completed all portions of the process, from application to training and consulting follow-up, within 7 months.

In WI, all participants in the Service Enterprise Pilot reported that they were "Satisfied" or "Very Satisfied" with the SEI training presented. As a result of the training and planning process, one organization is adding volunteer management staff, another is training ALL of their staff to work with volunteers, while another is involving their board and has intentionally added volunteer engagement to their strategic plan. One of the participants in the Service Enterprise Initiative Pilot in Wisconsin from 2013-14 reports that "SEI is the way of the future for volunteer engagement. Any nonprofit, no matter what their size, can benefit from this training!"

As POL and local partners promote this model and the SEI is expanded locally, there will be an increased awareness by volunteers, funders, and corporate partners. They will see the value of being engaged with an organization that is certified, or working toward becoming certified, as these are the organizations that most effectively utilize volunteers in order to achieve their mission with more efficiency in both time and resources.

If awarded Volunteer Generation funds, Serve WI will subgrant the program to a Hands-On-Network

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affiliate that has applied to be or has been approved as a Service Enterprise Hub. At this time, we only know of one organization that has interest and is planning to apply to POL to become a SE Hub--the Nonprofit Center of Milwaukee. They have the capacity and knowledge to begin work on the SEI immediately.

The timeline for implementation is as follows:

July -- Orgs interested in becoming a SE Hub apply to POL

August -- SE Hubs to be selected, with MOU and License Agreement signed with Points of Light (POL)

September 2014 -- June 2015 -- Monthly TA calls with POL

October 2014 -- SE Hub Train-the-Trainer (3-4 days, location TBD)

October 2014 -- January 2015 -- Subgrantee to recruit at least 7 organizations to participate in SEI

January -- March 2015 -- Subgrantee to deliver the 4-part; 16-hour SEI training

April -- June 2015 -- Participating orgs implement the model and work toward certification, as appropriate

June 2015 -- Serve WI and SEI Hub staff to attend the Annual Service Enterprise debrief meeting (following the National Conference on Volunteering and Service)

The organizations that participate in the SEI will pay a nominal fee to cover the application and Service Enterprise Diagnostic fees (a cost of \$300), as well as some of the logistical costs such as space, materials, and trainer time. While organizations should have some "skin in the game" by contributing towards their capacity building, we do not want to discourage organizations that may not have the budget to participate in a costly, yet incredibly valuable, training and consultation series.

Therefore, Serve WI is requesting \$17,330 in Volunteer Generation Funding from CNCS to support this initiative in the state. This request is far less than the \$100,000 VGF grants that the Corporation intends to grant through this NOFO, and less than was proposed in our previous VGF applications; however, this level of funding is appropriate for SEI as it transitions from a pilot into a fully-operational initiative in WI. Once established, the increased share by participants can be revisited, providing a more sustainable model.

Included in this plan is the exploration of the interest and logistics of expanding the SEI to other parts

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of WI. There are nonprofit organizations statewide that can benefit from the training and consulting that the SEI brings. The subgrantee and Serve WI staff will meet with the Volunteer Center Association of WI to gauge interest in a partnership to deliver the initiative to nonprofits in their area.

SEI Information will also be shared with AmeriCorps grantee organizations to determine their interest in this next level of training and certification. SEI goes well beyond the basics of volunteer management by engaging the whole organization in leveraging volunteers at all levels to meet the organization's mission. A training on the research and introduction to SEI could be presented at the WI Volunteer Training Institute, which will be held in May 2015, and in conjunction with Marshfield Clinic's Volunteer WI AmeriCorps program. Information gathered through these efforts will help determine how and where SEI is expanded. Any organization with an AmeriCorps member will be identified in the application process, and the number of volunteers and hours contributed reported by the AmeriCorps member will not be included in the numbers reported for the SEI process.

In Years 2 and 3, once the right partners and interested nonprofits in WI are identified, the SEI will be expanded. The ultimate goal for supporting the establishment and expansion of the SEI in WI is to increase the number of volunteers, the number of hours these volunteers serve, and the number of organizations implementing three or more effective volunteer practices--all of which are central to the WI State Commission Support Grant and State Service Plan.

As a result of participating in the SEI, 25 new volunteers will be recruited by the 7 organizations involved in the process who will contribute 200 hours of service. This will be measured through pre- and post-SEI training surveying. The pre-training survey is the initial application that organizations complete, in which they identify the number and hours of volunteers currently engaged. They will complete a similar questionnaire at the end of the SEI process, asking them to indicate the number of new volunteers recruited as a result of the SEI process. These pre- and post-training surveys will also ask them to identify the number of skills-based volunteers and the number of new volunteer opportunities created. This will help to identify the number of volunteers as well as the organization's ability to implement the SEI process and sustain the changes made.

Additionally, 5 of 7 organizations will implement 3 or more effective volunteer management practices, as identified by the survey administered after the SEI process is complete. These effective volunteer

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management practices include leadership support, resource allocation, training, onboarding of volunteers, tracking volunteers, and others identified as best practices by CNCS. Specific elements will be identified within these categories to determine the organization's success in achieving the goal.

The organizations participating will either: a) complete the SEI training and work on their transformation using the SE model; b) complete the SEI training and become certified as a SE; or c) complete the SED, score above 80% and become certified as a Service Enterprise (aka -- "Blue Ribboned").

These outputs and outcomes may seem conservative for an initiative that will eventually be rolled out statewide; however, the impact of the SEI training and consulting may not be immediately quantifiable. This model relies on across-the-board organizational change which not only takes time, but also resources and leadership buy-in. Additionally, the length of training, consulting and follow-up necessary means organizations will not begin implementing the SE model in their organizations until well into the VGF project. The nonprofit organizations that participate in the process may not see a huge spike in the number of volunteers or hours served right away; however, over time the improved practices implemented by the organizations will result in not only more volunteers and more hours, but a higher retention rate, a higher rate of skills-based volunteers, and new opportunities being created. In Calif., 60% of organizations that participated in the SEI increased the number of volunteers engaged; 50% increased the number of skills-based volunteers engaged; 52% increased the number of hours; and 57% increased the number of hours by skills-based volunteers.

Organizational Capability

The Wisconsin Service Enterprise Initiative will involve three main partners: the Wisconsin State Commission (Serve WI), Points of Light, and a HandsOn Network Affiliate that is certified as a Service Enterprise Hub. Each partner brings expertise in volunteer engagement, training, and grant management.

Serve WI has made a long-term commitment to volunteerism through its State Service Plan by investing in sustainable service solutions that increase the number of volunteers, supporting the development of organizational capacity to engage additional volunteers, connecting volunteers with meaningful opportunities, supporting cross-sector collaboration, expanding recognition and awareness of volunteerism and volunteer leaders, and evaluating the volunteer experience.

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The longevity of Serve WI's staff is validated by the stability of the agency's operational capacity, which is demonstrated by its strong AmeriCorps*State portfolio and the achievement of long-term goals. The staff's combined experience includes long-term training, capacity building, consulting, and grant-making expertise. The existing staffing pattern includes the Executive Director--16 years, and a combined 10 years of experience from the Program Officers. The Department of Administration accounting systems support the Commission, and the assigned accountant has provided service to the Commission for three years.

Program performance and Federal compliance are fundamental to Serve WI's oversight role of the AmeriCorps*State and VGF delivery systems. The grant application process has been transparently connected to priority areas established by the Commission. These serve as the indicators during the application and subgrantee selection process. The indicators are performance-based and aligned with the AmeriCorps goals and objectives. Performance data from subgrantees is collected in OnCorps, which affords Commission staff the opportunity to analyze program performance throughout the program year. This system provides consistent statewide data from subgrantees, partners, and other network organizations, and will serve as the framework for ensuring VGF program performance and Federal requirements compliance.

The use of the State of WI accounting systems in conjunction with the electronic financial reporting systems in OnCorps permits Serve WI to perform desktop reviews of electronic invoices submitted by subgrantees. The approval of subgrantee invoices by Serve WI staff is required prior to payment. DOA accounting staff reconciles grant payments with Serve WI's tracking database on a quarterly basis. Serve WI has effectively administered and managed Corporation funding since 1994, which has included AmeriCorps*State formula, competitive, education award program, PDAT, Disabilities, Commission Support, Learn and Serve, Governor's Initiative, Promise Fellows Grants, and the VGF.

Serve WI has successfully managed the VGF grant from 2011-current by subgranting funds to capable nonprofit organizations committed to effective volunteer engagement and expansion. Currently in its final year of funding, Serve WI's VGF program has exceeded all performance measures and has trained a cohort of partners to not only meet the objectives of the program, but also to start building a cohesive message and delivery system to engage volunteers. In years 1-2 of the

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project, the Nonprofit Center of Milwaukee was selected as the subgrantee to create and launch the statewide Volunteer Connection website (www.volunteerwisconsin.org), which allows volunteers across the state to be connected with an opportunity to serve, especially in areas without a Volunteer Center. They also established a baseline of agencies utilizing the website to post opportunities in order to measure the effectiveness of outreach activities; established a working relationship with Wisconsin Emergency Management in order to use Volunteer Connection to recruit skilled volunteers to respond to disasters; formed a steering committee to guide the direction of volunteer leadership in the state; and awarded mini-grants to support Make a Difference Day projects across the state.

In the third year, Marshfield Clinic Research Foundation has served as the subgrantee and has taken the successes of NPCM even further. MCR has been exceptionally effective in marketing volunteering in Wisconsin through interviews on NPR, participating in and presenting at volunteer conferences, awarding service-day grants to organizations statewide to support service projects in the month of May, and providing assistance to partners through training and technical assistance.

MCR has transformed the Volunteer WI Initiative into a much more sophisticated and coordinated effort. In order to expand to counties that are not represented by a Volunteer Center and to provide the start-up training necessary for organizations to recruit volunteers, there needed to be a much larger investment in the program. While Serve WI initially applied for VGF Year 4 funding to expand this program, the timing of Year 4 was to run concurrently with Year 3, which was not possible. It was also determined that AmeriCorps members could be the most effective in providing this initial training to nonprofit organizations to help build their capacity. This can then help pave the way for the expansion of the Service Enterprise Initiative (SEI) in Wisconsin. They will continue to be a strong partner in volunteer engagement in Wisconsin, and to the NPCM as they are working together to train AmeriCorps members in all the necessary basic tactics of volunteer management.

Serve WI's 2014 budget is \$630,572, and this VGF grant would represent 5.5%; however, the Commission intends on subgranting the SEI project to a qualified and fiscally-sound organization to implement the model in Wisconsin.

As the world's leading volunteer organization, Points of Light is poised to support the objectives of the VGF request. POL has managed almost \$29 million in federal grant funds since 2007, and received a

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clean audit following its latest site visit from CNCS. Through its funding partnerships, POL has created sustainable social capital by training thousands of organizations and volunteer leaders, and by bringing together citizens to tackle problems and revitalize the civic life of their communities. All of these programs successfully demonstrate impact and represent continued organizational capacity and experience to plan and implement the proposed program. The POL team will be led by Vice President of Training and Consulting, Tricia Thompson, who has been with POL for over five years and has been leading the SEI work since January 2013. In addition, POL President of Programs, Delores Morton, will provide support to the initiative, primarily in the form of long-term strategy development and business planning.

Serve WI staff, as well as NPCM staff, attended the first national Train-the-Trainer put on by POL in November 2013. Through this training and follow-up calls, the Serve WI and NPCM are knowledgeable as to what it takes to become a Service Enterprise and the requirements for a SEI Hub to be successful. Because there is only one organization that is certified to be a SEI Hub in WI (NPCM), Serve WI does not need to release an RFP. This allows NPCM to begin work immediately after subcontracting.

To become a SE Hub, an organization must be one of the following: a HandsOn network affiliate in good standing; a State Service Commission or nonprofit association, management service organization or foundation. In addition, applicants must have a demonstrated track record of success with previous POL programs or grants, have an organizational orientation toward innovation, have demonstrated capacity to deliver training to organizations, experience providing coaching/consulting, and a commitment to excellence.

The SEI will be delivered by a Bonnie Andrews, an experienced trainer and consultant who has completed the Train-the-Trainer series and worked with volunteer consultants and coordinators in order to give more specialized training and consulting to participating organizations. NPCM also has dedicated time of their financial management staff to handle the payment of funds from Serve WI.

Budget/Cost Effectiveness

The proposed budget which includes a \$17,330 investment from CNCS and \$17,350 in match is a much smaller award than CNCS was requesting; however, this modest budget will be able to set up a Service Enterprise Hub in the state of WI that will work with several nonprofit organizations in 2014-

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15 to increase their capacity to engage additional volunteers. This project will also begin to lay the groundwork for expanding the SEI across the state. The cost to implement this initiative is low because in the first VGF grant year we plan to continue building the momentum established in the pilot year by offering the SEI program to another group of nonprofits. At the same time, we will explore potential partners, trainers, and an audience to expand the initiative state-wide. At this point, there is not enough information available to make a prudent investment in state-wide expansion.

The expenses detailed in the budget narrative directly support the SEI in WI through staff support, travel to required Points of Light meetings, and the fees associated with maintaining certification as a SE Hub. Cash and in-kind match provided include the value of volunteer time for co-trainers and coordinators, the cost of meeting space and materials, and in-kind promotion of the SEI through local media. The CNCS share of \$17,330 is being matched with \$17,350 (50%). The source of these funds come from in-kind match provided by the organization that will operate as a Service Enterprise Hub, as well as the fees the nonprofit participants pay to participate in the SEI. Required background check fees are also included for two grant-funded staff.

The cash match will be secured once the seven nonprofit organizations are identified and they apply to participate in the initiative. In-kind match will be committed by the subgrantee that agrees to partner with Serve WI in implementing the SEI in the state.

Clarification Response for VGF Application 14VG163623 [Narrative edited for character limit restraints]

A. BUDGET CLARIFICATION ITEMS

1. Serve WI plans to subgrant all of the VGF award to a certified SEI Hub. Because the only organization that is certified is the Nonprofit Center of Milwaukee, we do not need to release an RFP. The budget provided is the proposed budget for NPCM to run the program, and costs are based on figures provided by Points of Light and NPCM for running a Service Enterprise (SE) Hub. We can amend the budget to show that all \$17,330 will be subgranted to an outside organization; however, we thought the detail provided would give a clear picture of how the funds will be used and avoid the need for a budget modification.

2. Personnel Expenses: All costs associated with this grant will be incurred by the subgrantee. Costs

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will be kept separate from any services provided by the organization for any other CNCS-supported program or activity.

3. Personnel Expenses: Personnel in Section A includes a SEI Trainer who will be responsible for the success of the initiative, develop training materials, recruit organizations to participate, and provide the majority of the training and consulting & Financial Support staff who will complete grant reports and other required financial documentation.

4. Contractual & Consultant Services: This section includes individuals who will not be staff of the subgrantee organization, but rather individuals who will provide training and services as in-kind contributions. This includes: SEI Specialized Trainer [updated to Change Management Trainer]--an individual knowledgeable in organizational development who will assist with this portion of the training; SEI Coordinator--an individual who will assist the subgrantee staff with training room set-up, material preparation, communication with participating NPOs, and coordinating follow-up meetings; and a Return on Volunteer Investment (ROVI) Trainer--an individual from a local Foundation who will share their expertise on ROVI during that portion of the training.

5. Training: The costs for the SEI training have been moved to F. Contractual and Consultant Services. This is the training that these consultants listed above will be providing.

6. Training: Per #5, these items are now under Contractual and Consulting Services. Room costs are based on the value of a training space and equipment use (4 days) and cost of materials. Other costs are fees paid to Points of Light for the SEI application and diagnostic--these are fees paid per participating organization.

B. BUDGET CLARIFICATIONS

1. Staffing: Please see numbers 3 and 4 above.

2. Volunteer Coordinator & ROVI Trainer: Please see number 4 above. The assistance of the Coordinator will be important to the success of the project by handling all of the "behind the scenes" work such as outreach, follow-up communications, setting dates and locations of trainings, and other administrative tasks as needed.

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C. PROGRAMMATIC CLARIFICATIONS

1. Why funds needed: In 2013-14, the SEI training was provided as part of the national Points of Light pilot. During this pilot there were no fees assessed by POL or the TCC Group; however, SEI hubs are now required to pay a hub fee, and fees per organization participating. The pilot year did not generate enough revenue in participant fees to cover the staff costs. It is our goal to establish the SEI and then expand across the state. Without outside support, the SEI in WI will not be able to continue.

2. VGF Performance: Serve WI has subgranted its VGF grant for the past three years (Year 3 ending 8/31/14). There are three performance measures for the program:

(a). Increased number of partner agencies in WI utilizing Volunteer Solutions to recruit volunteers serving on days of service and year-round.

Year 1 Target/Actual: 20/39 - Met

Year 2 Target/Actual: 100/103 - Met

Year 3 Target/Actual: 200/201 - Ongoing

(b). Volunteer Leaders identified to support days of service and ongoing volunteer opportunities.

Year 1 Target/Actual: 25/25 - Met

Year 2 Target/Actual: 50/462 - Met

Year 3 Target/Actual: 75/420 - Ongoing

c. Year 1: Establish baseline for # of volunteers referred through Volunteer Solutions. Years 2&3: Increase number of volunteers referred through Volunteer Solutions above baseline.

Year 1 Target/Actual: no target/58 referrals

Year 2 Target/Actual: 10% increase (64 referrals)/955% increase (612 referrals) - Met

Year 3 Target/Actual: 10% increase (673 referrals)/56.7% increase (959 referrals) -- Ongoing

There are 8 other PMs in the original grant written by Serve WI that were later removed or integrated into the PMs above.

3. Serve WI's Role: Serve WI applied to be a part of the SEI National Pilot in 2013 after learning of the Initiative from Reimagining Service, America's Service Commissions, and others. Staff attended the POL training and participated in part 4 of SEI training by the Nonprofit Center of Milwaukee. The SEI is an innovative way for Serve WI to address the State Service Plan, which is centered around

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volunteer engagement. Serve WI does not have the capacity to become a hub at this time; instead, we are interested in supporting this Initiative through VGF and by encouraging AmeriCorps Program organizations to go through the training and consultation.

4. Volunteer Targets: The goal is to have seven organizations involved and five organizations complete (this allows for attrition which has been seen by pilot organizations). Each organization will move at a different pace. The SEI is based on a model of organizational change, and it prepares nonprofits to find new ways to engage volunteers throughout the organization. This emphasis on organizational structure from the top down takes longer to implement than a process that focuses more on tasks. This is a more strategic view of the organization. In addition, some of the new roles developed for volunteers through the SEI project will be for skills-based volunteers, and it typically takes longer to find the right volunteer for these positions. Organizations engaged in the pilot have cautioned that results are not immediate, and the hub should plan accordingly.

D. PERFORMANCE MEASURE CLARIFICATIONS

Completed in the Performance Measures.

Grant Characteristics