

# Narratives

## Executive Summary

The Arizona Governor's Commission on Service and Volunteerism proposes to expand their current Arizona Service Enterprise Initiative conducted in partnership with the Points Of Light by engaging community organizations to serve as Service Enterprise Initiative hub partners to deliver the Service Enterprise training and certification program and different geographic regions and/or issue areas in the State of Arizona. In the first year, the Commission will partner with four community organizations to deliver the SEI training and certification program to approximately 70 local organizations.

## Program Design

### Identified Need

With a reported 1,229,997 volunteers, the Volunteering and Civic Life in America Report states that Arizona ranks 38th among the 50 states and Washington DC. Those residents give 174,360,000 million hours of service in contributing \$4.5 billion to Arizona's economy. Since the inception of this annual, national report, Arizona has been slowly climbing the ranks every year, starting from 46th. Interestingly enough, during this same period of time, Arizona's only volunteer connector organizations, the Volunteer Center of Maricopa County and the Volunteer Center of Southern Arizona both closed their doors primarily due to dwindling support.

Other research suggests that Arizonans volunteer engagement falls below that reported in the national volunteering report. The Scope of the Arizona Nonprofit Sector reports that in 2012, 1.17 million Arizonans volunteer, representing 24.2% of the population. The report, however, identifies that 169.4 million of volunteer hours were donated, at an estimated value of 3.4 billion (National Center for Charitable Statistics).

Currently, Arizona communities are served by a total of 19,828 registered nonprofits, with 15,505 identified as 501©3 charitable organizations. Of the 15,505 recognized as charitable, 93% are identified as public charities and the remaining 7% are identified as private foundations.

Currently, the most populous regions of Arizona are served by volunteer manager associations, including the Southern Arizona Volunteer Managers Association in Tucson, and the Central Arizona Volunteer Managers Association in Phoenix. Both organizations are led by volunteer boards and both

## Narratives

struggle with the capability of providing members with monthly meetings. Additionally, there is one Hands on Network affiliate that operates in the Phoenix area that serves primarily as a large, Maricopa County centric AmeriCorps VISTA intermediary. HandsOn also caters to municipal governments and corporations who are looking for and event-based, 'managed volunteer' experiences.

In 2013, more than 1,000 Arizonans participated in person or via an electronic survey to provide their thoughts about the current state of volunteerism in Arizona which helped to drive the development of the Commission's State Service Plan at that time. In partnership with the ASU Lodestar Center for Philanthropy and Nonprofit Innovation, the results of the survey and focus group effort were published in report, "Arizona Volunteerism: Today and in the Future". Key findings of the study include:

- 1) Volunteerism continues to be an active force that addresses a wide range of community issues and needs;
- 2) Helping to ensure a sound economic future for our state and all of its residents as a priority;
- 3) The best chance we have to fully meet needs and effectively address community issues is through collaboration and collective action;
- 4) More awareness is needed to reinforce the value and elevate the status of volunteerism and service;
- 5) The best recognition is public recognition; and
- 6) Better online tools and training to best utilize those tools are needed.

In response, the Commission continued toward working to build our annual conference on volunteerism and civic engagement that consistently pulls about 600 attendees from close to 200 organizations representing about 50 Arizona communities and most counties. The Summit also engages approximately 80 pro bono workshop presenters from higher education, community organizations, and businesses that share what they have learned and their best practices through delivering highly engaging workshops. Additionally, at that time the Commission also identified the work of Reimagining Service and their principles as a cornerstone from which to begin providing trainings to Arizona's volunteer community. Over the span of three years (2013 - 2015) the commission provided approximately 25 face-to-face trainings in 19 different communities across the state. Additionally, the CEO of Reimagining Service was brought to Arizona to keynote and conduct workshops at our annual conference in 2013.

## Narratives

In 2014, the Commission again partnered with the ASU Lodestar Center for Philanthropy and Nonprofit Innovation to survey and to publish a report on Arizona's volunteer administrators, called "Arizona's Volunteer Administrators and Advocates: Perspectives, Practices and Potential." The survey included 185 volunteer administrators and advocates, defined as those whose primary role is coordinating and directing volunteers and/or promoting volunteerism. The research builds on the previous reports conducted to help develop the State Service Plan which identified volunteer administrators and advocates as key players in any efforts to improve our state's ability to serve people and solve problems. Key findings of the study include:

- 1) Locally based trainings and resources are preferred;
- 2) Collaboration is crucial;
- 3) To achieve volunteer program goals, more organizational capacity and internal support are needed;
- 4) community awareness is improving, but more is needed; and
- 5) The education and training of volunteer administrators: variety and diversity.

Additionally, the Commission Director has built a number of strong relationships with volunteer managers across the state. Anecdotally, the themes are consistent with respect to the experience of volunteer managers:

- 1) Organizations do not provide enough resources to fully support volunteer programs;
- 2) Top organizational leadership does not adequately address the needs of volunteer programs, nor do they fully engage with volunteer programs;
- 3) Most often, volunteer programs are considered more as stand-alone programs, providing direct service to the community and the Volunteer Manager often perceives that they are the sole champion of their program (which can be a double-edged sword).

More recently, in preparation for developing the new State Service Plan for Arizona, the Commission again partnered with ASU Lodestar Center for Philanthropy and Nonprofit Innovation to create the report, "Arizona Volunteerism: Today and in the Future", published by ASU in 2016. For this round of survey and focus group, approximately 900 Arizonans participated in person or via electronic survey. The key findings include the key findings include:

- 1) volunteering extends the work of organizations and strengthens communities and more work needs

## Narratives

to be done;

- 2) Boost public awareness of the benefits of volunteering;
- 3) Increase trainings of volunteers and staff can work more comfortably together;
- 4) Communicate results to volunteers;
- 5) Attract millennial volunteers by meeting their needs; and
- 6) Eliminate barriers to spur volunteerism.

After observing the national integration of Reimagining Service into the Points of Light Institute and the launch of the Service Enterprise Initiative (SEI), which was based on the research of Reimagining Service, in the summer of 2016, the Commission applied to become a Service Enterprise Hub for the State of Arizona. After acceptance as a hub, the Commission invited Points of Light to send their training team to Arizona so that a number of Commission and other organizational representatives could participate in the Training of Trainers program. Recognizing the somewhat limited capacity of Commission staff and Commissioners at that time, the Commission conceived a plan to partner with organizations representing different regions/issue areas to serve as SEI Hub Partners, that could then take the program back to their communities and implement the effort as well. Over the course of 2016, the Commission successfully partnered with Northern Arizona University Civic Service Institute and United Way of Tucson and Southern Arizona to provide the first training cohort for the state, which included twelve organizations. At the end of 2016, we were able to guide ten out of the twelve through the process to certify as Service Enterprises. For 2017, in addition to the Commission anchoring a new cohort to provide the Service Enterprise certification program in the Phoenix metropolitan area, United Way of Tucson and Southern Arizona and Northern Arizona University Civic Service Institute will also be offering the certification program in northern and southern Arizona as well, with the intent to certify 25 to 30 new organizations over 2017. Additionally, early this year, the Commission facilitated a SEI Training of Trainers which resulted in the certification of an additional eight trainers.

### Proposed Intervention

For the Arizona Volunteer Generation Fund application, we propose to continue to expand and implement the Arizona Service Enterprise Initiative in partnership with the Points of Light Institute. This expansion of the current Arizona initiative will have three main goals. The first goal will be to build collaborative partnerships with organizations representing different geographic regions and/or

## **Narratives**

issue areas for the purpose of empowering those organizations to operate as SEI Hub Partners and through providing the SEI Training of Trainers program to certify as new hub partners as trainers, provide ongoing training, technical assistance, and quality oversight to those organizations who will be operating as SEI Hub Partners in their communities. The second goal will be to certify a more significant number of organizations as a Service Enterprises in Arizona through the Commission and the existing and new SEI Hub Partners. The third goal will be to build an active network of organizations that have certified or are interested in certifying as Service Enterprises in Arizona.

SEI has been developed with CaliforniaVolunteers using year 1-6 VGF support and since 2013 with the additional support and funding from other organizations nationwide as an evidence-based train-the-trainer model to increase the effectiveness and impact of nonprofit organizations through the strategic engagement of volunteers. Key partners in these efforts include Points of Light (POL) as the national technical assistance and scaling partner. This 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 continued to receive refinement and data evaluation in years 4-6 Volunteer Generation Funding through CaliforniaVolunteers as well as several other nonprofits across the country using Volunteer Generation Funding to support SEI. To date nationally, 251 nonprofits have been certified as Service Enterprises and another 400 are engaged in or have completed the training and consulting program and are working towards certification.

SEI is a CaliforniaVolunteers social innovation inspired by Reimagining Service and led by Points of Light. Organizations introducing the initiative to agencies in their community are witnessing over 60% increase in volunteers engaged in service and specifically skilled based volunteers. These organizations are also witnessing implementation of plans for strategic volunteer engagement.

POL has served as a partner and technical assistance lead for Service Enterprise since May 2012. POL has refined the program model to equip participating Service Enterprise Hubs (those organizations implementing the model) with the tools and resources necessary to effectively deliver the program model in their local communities. Currently, the program model includes: template outreach and marketing materials; electronic application for interested nonprofit organizations where baseline data is collected; a rigorous research-based assessment tool (the Service Enterprise Diagnostic or SED)

## Narratives

developed collaboratively by researchers from TCC Group and the RGK Center for Philanthropy and Community Service at University of Texas at Austin; a 4 module, 16-hour curriculum designed to assist participating nonprofits in deepening their understanding of the Service Enterprise concept and how to apply it to their own organization, including strategies for effectively engaging skills-based volunteers; case studies of nonprofits organizations operating as service enterprises to re-enforce curriculum concepts; up to 10 hours of individualized coaching provided by the Service Enterprise 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 Service Enterprise concept.

Given the organizational change often involved in becoming a Service Enterprise, it is estimated that it may take some nonprofits 6-12 months following the completion of the training and coaching portion of the program model to earn certification. To date, participating nonprofits have responded favorably to the curriculum, with 90% of training participants stating that they "gained new knowledge", "training was worth time and resources" and "recommend to others". To date, organizations participating in this initiative are seeing over 60% growth in volunteer engagement, to include skills based volunteers.

### Anticipated Outputs and Outcomes

Anticipated THREE YEAR Outputs include: 1) Establish SEI Hub Partner MOUs with at least eight community organizations; 2) Provide 200 organizations with CNCS supported capacity building services through certifying 200 organizations as Service Enterprises, and 3) Engage 75,000 Arizonans in volunteer service.

Anticipated THREE YEAR Outcomes include: 1) AZ SEI Hub Partners will initiate at least 30 SEI certification programs; 2) 180 Organizations will report implementing three or more effective volunteer management practices as a result of capacity building service provided by a CNCS supported organization; 2) 750,000 hours of service contributed by community volunteers who are managed by CNCS-supported organization.

### Alignment with VGF Purpose

The goal of the Commission's VGF proposal is to support community-based entities to recruit, manage

## Narratives

and support volunteers through the implementation and expansion of the Arizona SEI. The Commission will work directly with community organizations to establish AZ SEI Hub Partnerships. The AZ SEI Hub partners will then engage community organizations in capacity building activities specifically related to the Service Enterprise model, leading toward certification as Service Enterprises. Through the SEI Training series, organizations will have the opportunity to learn from others certified Service Enterprises and learn great practices for managing volunteer programs and engaging volunteers.

### Evidence-Informed Intervention and Activities

As the economy continues to recover, nonprofit organizations are still challenged to raise the necessary financial resources to support their efforts to address community needs. And yet, recent research from TCC Group, a national program and evaluation firm, demonstrates that nonprofit organizations that effectively engage volunteers outperform peer organizations on all measures of nonprofit effectiveness and organizational capacity.

In December 2009, TCC Group, analyzed the data of 1,500 organizations nationwide that had completed its Core Capacity Assessment Tool (CCAT). The CCAT 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 far exceeded initial expectations. From TCC Group's data and analysis, it became clear 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) Nonprofits that engage at least 10 volunteers are as effective as their peers without volunteers, but at 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 implies that organizations that break the barrier of ten volunteers have as much capacity as peer

## Narratives

organizations that do not engage volunteers, but do not require the same level of financial resources to deliver the same level of services.

Despite this compelling evidence on the link between effective volunteer engagement and organizational capacity, the TCC Group research found that less than 15% of nonprofits nationwide were operating as Service Enterprises.

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 deliver one programmatic function for the organization. Instead, Service Enterprises 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, programmatic delivery, specific skills-based engagements, administrative support.

Additionally, in 2016, the Minnesota Association for Volunteer Administration and HandsOn Twin Cities published a Service Enterprise Initiative Outcomes Report, that describes results of focus groups with the now 28 Minnesota entities that are certified as Service Enterprises. Anecdotal evidence cited in the report suggests that organizations are very satisfied with the journeys they have undertaken to certify. To highlight responses to questions used for the focus groups, the following captures the tone of the report.

- 1) What separates SEI from other volunteer management trainings? Enabled organizations to make real progress unlike other one-time conferences; build consensus among staff from different departments; focused on organizational development.
- 2) What are the Key benefits of participating in SEI? Realizing the importance of taking a strategic planning approach to volunteer engagement; understanding the volunteers are not free and the need to think of volunteers as a program of the budget; recognizing that there are systems and processes for volunteer engagement and that it is important for the organization to agree on the processes.
- 3) How has the organization changed? An increased focus on Volunteerism; identification of new rules for volunteers; systematize processes and agreements on processes; increased training and orientation for both staff and volunteers; increased resources to support volunteers.

### Organizational Capability

## Narratives

The Arizona Commission is very capable of administering the proposed project. The commission is staffed by expert facilitators and an AmeriCorps VISTA member (engaged solely on implementing the AZ SEI) and all are certified SEI Trainers with the Points of Light Institute. Additionally, staff is supported by an active group of 23 Governor appointed Commissioners that represent many different geographic regions and interest areas across the state. The initiative will be driven primarily by a committee of Commissioners, chaired by the volunteer administrator of the Boys and Girls Club of Central Phoenix. Otherwise, the committee is comprised of four additional members, two of which are also SEI certified trainers. Additionally two represent higher education (Executive Director of the ASU Lodestar Center for Philanthropy and Nonprofit Innovation) and one represents a television station in Tucson. This committee will provide much of the oversight of the implementation and data collection design for this project, as well as report back to the full Commission on a timely and regular basis. The AZ SEI will be guided by this committee; the Commission Director and the AmeriCorps VISTA will provide the majority of staff support for the effort. In addition, the Commission will develop a dedicated network of AZ SEI Hub Partner contacts as well develop specific contacts with the organizations that will be served by the project.

In terms of managing the collaborative relationship between the Commission, the SEI Hub Partners, and the many organizations that will certify as Service Enterprises, the Commission will develop appropriate, specific MOUs that will require documented match, programmatic reporting, and active participation. Progress will be monitored by the AmeriCorps VISTA and reported back to the Commission committee on a regular basis.

In addition, we will rely upon America's Service Commissions (ASC) to convene the VGF grantees for sharing best practices through monthly VGF learning community calls in an annual VGF grantee convening at the Points of Light Conference, the development and sharing of VGF promotional materials, and membership for lead staff with AL!VE, National professional volunteer management/engagement Association.

Thus far, in the history of the Commission, fundraising to support service activities and initiatives has been successful. Consistently, the Commission provides the required match for the Commission Administrative Support Grant, as well as for other initiatives.

## Narratives

To date, Arizona organizations have responded to the AZ SEI with enthusiasm and with strong support. Given the design of this project, it is expected that goals are realistic, achievable and will be supported by community and by community partners. Over the course of the past 6 to 10 years, the Commission has developed a very positive reputation in the community and is known to provide high-quality, accessible programming even in some of the most remote communities in Arizona.

### **Budget/Cost Effectiveness**

In terms of cost-effectiveness, the proposed budget covers minimal costs associated with administering the overall project for the Arizona Commission and provides the majority of funds to local organizations serving as AZ SEI Hub Partners. The required 20% match will be provided through the AZ SEI Hub Partners, who will document accordingly.

### **Clarification Responses**

Clarification Items -8/15/2007

Other Narrative Items:

Clarification Item 1:

Please provide more detail about how a VISTA member and commissioners will have the time and availability to implement, manage, monitor, evaluate, and report on the proposed activities on an ongoing basis.

Clarification Response 1:

In terms of VGF project implementation and management, a standing meeting of the Governor's Commission on Service and Volunteerism's Service Enterprise Committee will be established for this purpose. A detailed project task and timeline will be developed and shared with the committee and then will be updated on a monthly basis. In addition, Commissioners that serve on the committee will be available to participate in Training of Trainer activities, as well as be able to periodically attend Hub Partner delivered training activities. The Commission Director and SEI AmeriCorps VISTA will staff this committee, developing agendas with the chair, managing the posting as a Public Meeting, and keeping appropriate Meeting Minutes, etc. Additionally, regular updates will be provided to the full Commission at the regular Commission meetings. The SEI AmeriCorps VISTA with the support of the Commission Director will provide much of the day to day support for the VGF activity, including but not limited to: Organizing and facilitating Training of Trainers; providing additional support, training

## Narratives

and technical assistance to hub partners; monitoring and providing feedback on Hub Partner delivered trainings; managing the coordination of Hub Partner activities (coordinating calendars, regular conference calls, etc.); And, developing and administering cohort organization satisfaction surveys.

In terms of time and availability for Commissioners, above and beyond participating in regular, full meetings of the Governor's Commission on Service and Volunteerism, the Commissioners will be able to dedicate 3 to 5 hours a month to support the Arizona Service Enterprise Initiative. Additionally, the VISTA Assignment Description is specific to Service Enterprise, so this individual dedicates a vast majority of time to this effort. In addition, the Commission Director will provide general leadership and overall support for this effort.

Performance Measure 1 items:

Clarification 1 item 2:

In PM2, OG3-3.3 appears to be a duplicate of G3-3.3. Please remove this measure.

Clarification 2 Response:

PM2 has been deleted.

Budget 1 items:

Clarification 1 item 3:

Please adjust the math in the narrative for the Contributed Hub Partner Time under Contractual and Consultant Services: where it says 640 hours x \$25 average hourly rate = \$25,600. This should equal \$16,000, which is correctly marked in the total amount.

Clarification 3 Response:

The math has been corrected in the detail for Contributed Hub Partner Time.

Clarification 1 item 4:

Please break out the proposed match into cash and in-kind.

## Narratives

Clarification 4 Response:

The match has been broken out by match source.

Clarification Item 5:

Please provide additional detail about the \$100,500 requested for services provided to local organizations. Is the calculation of \$1,500 x 67 organizations the fee that the Hub Partners will charge to provide the training? Please identify the Hub Partners and explain/justify this choice of delivery of training.

Clarification Response 5:

Yes, you are correct. The calculation of \$1500 x 67 organizations is the fee that the Hub Partners will charge to provide the training. At this point, the Hub Partners remain to be determined. Given the amount of funding potentially available for this purpose, the Commission will be required to run a Request for Proposal (RFP) for SEI Hub Partners, in accordance with Arizona State Procurement Law. The process will involve developing and releasing an RFP through ProcureAZ. The RFP will be on the street for a minimum of two weeks, and the Commission's Service Enterprise Committee will use an evaluation rubric to evaluate and recommend organizations to serve as Hub Partners. It will be the goal of the Commission to conduct the SEI Training of Trainers for the new hub partners before the end of November. Additionally, depending on the results of this first RFP process, and subsequent implementation of the hub partner model, if we have enough responses to the RFP, it may be possible to bring on additional Hub Partners, if warranted.

This choice of training delivery will have significant advantages to the Commission and to the Hub Partners. For the Commission, it will significantly simplify the process of providing payments to Hub Partners for services rendered, and will be administered with a vendor contract, purchase order, and invoicing system. For the Hub Partner, it offers a simplified billing and accounting process. It can also incentivize performance, in that, the more organizations engaged in the training and certification process, the more the Hub Partner will benefit financially.

The Points of Light Institute publishes guidance suggesting that the Service Enterprise Training and Certification program has an estimated value of \$5,000 per organization, which seems a bit high for

## **Narratives**

Arizona. For the long-term, it is the commission's thinking that if awarded, this Volunteer Generation Fund, will help us to accelerate the process of providing SEI training and certification to organizations across the state. Secondly, for the long-term, it is intended that Hub Partners develop the track record and positive community reputation to begin offering the SEI training and certification program as a fee-based offering.

### **Grant Characteristics**