

## Analysis

### Item 1: Office of the Governor

#### Oregon Volunteers

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**Analyst:** Steve Bender

**Request:** Acknowledge receipt of a report on the Oregon Commission on Voluntary Action and Service (Oregon Volunteers) program, appropriate \$300,000 General Fund to continue program activities for the remainder of the biennium, and transfer the program to the Higher Education Coordinating Commission.

**Recommendation:** Acknowledge receipt of the report, and defer the funding and program transfer requests to the 2018 legislative session.

**Analysis:** During the 2017 legislative session, the Legislature approved the transfer of the Oregon Volunteers program from the Housing and Community Services Department to the Office of the Governor, and provided \$200,000 General Fund to support program operating costs for a portion of the 2017-19 biennium. The Joint Committee on Ways and Means approved the following budget note with SB 5521, the budget bill for the Office of the Governor, that requested the Governor's Office to report on the program transfer prior to the 2018 legislative session:

#### Budget Note

Funding for Oregon Volunteers is provided with the expectation that the Oregon Commission on Voluntary Action and Service will revise its five-year strategic plan to integrate activities within the Governor's Office, for the purpose of securing federal matching funds. The Governor's Office is requested to report, with the Oregon Commission on Voluntary Action and Service, to a meeting of the Interim Joint Committee on Ways and Means prior to the February 2018 session of the Legislative Assembly, to determine the amount at which to fund Commission activities for the remainder of the 2017-19 biennium. The information requested to be provided includes personnel requirements, amounts and sources of funding, including potential matching dollars, and changes to the Commission's 5-year plan that may result from the transfer of administration of the Commission to the Office of the Governor. If sufficient funding for Oregon Volunteers is not approved for the remainder of the 2017-19 biennium, Oregon Volunteers will take necessary actions to end all federal programs by September 30, 2018.

The Office of the Governor has submitted the requested report. The report includes the new three-year Oregon Volunteers strategic plan, and a request for additional General Fund to fund program activities through the remainder of the 2017-19 biennium. The report also includes a recommendation to transfer Oregon Volunteers to the Higher Education Coordinating Commission, effective July 1, 2018.

The primary activity of Oregon Volunteers is to administer the federal AmeriCorps program in the State of Oregon. AmeriCorps leveraged \$46.9 million in federal and local program funds and provided over 1.2 million hours of community service during the 2014-2016 program period. Additionally, Oregon Volunteers is charged with supporting volunteerism in the state. Prior to the

2017-19 biennium, the program was housed in the Housing and Community Services Department (HCSD), and the Commission also administered the statewide Court Appointed Special Advocates (CASA) program. To improve administration of both programs, last session the Legislature transferred CASA to the Department of Administrative Services, and transferred the Commission's remaining programs (primarily AmeriCorps) to the Governor's Office.

Because of these transfers, however, the state can no longer use the General Fund appropriated for the CASA program to meet the 50% state administrative expenses match required under the federal AmeriCorps program. To provide the required state match, the Legislature added \$200,000 General Fund to the budget of the Office of the Governor, understanding that the funds would be insufficient to support administrative expenses for the full biennium. The budget anticipated that some (undetermined) level of General Fund support in the Governor's Office base budget would qualify as in-kind match toward the 50% state match requirement, even if an additional General Fund appropriation was required as well. The Governor's Office now reports, however, that none of the other General Fund appropriated in the Office's base budget is eligible to qualify as AmeriCorps program in-kind match.

The Governor's Office recommends transferring Oregon Volunteers to HECC. The program's mission activities have some similarity to HECC's mission of providing post-high school pathways for education achievement, and public university students often serve in Oregon Volunteers. No General Fund in the HECC budget has currently been determined to qualify as AmeriCorps state match, but potentially some state match eligible activities are supported through HECC. The report requests \$300,000 additional General Fund to fully support program administration through the current biennium. This amount, added to the \$200,000 General Fund already appropriated, would increase total support for Oregon Volunteers administration to \$500,000, supporting a \$250,000 annual administrative budget.

A portion of the administrative budget would be used to support and establish new positions in HECC to support Oregon Volunteers, including an AmeriCorps Program Administrator, and an Event/Program Specialist.

The Legislative Fiscal Office (LFO) recommends deferral of the request to the 2018 legislative session. LFO requests additional time to review the budget and statutory requirements associated with transferring Oregon Volunteers to HECC. LFO believes that additional consultation with HECC is needed to determine necessary budget adjustments and the availability of qualified match for AmeriCorps, and to ensure the successful transfer of the program to HECC. There has been only limited discussion between the Oregon Volunteers program, the Governor's Office, and HECC to date. If approved, adjustments to the HECC and Governor's Office budgets will be included in the 2018 session budget reconciliation bill, and statutory language to transfer Oregon Volunteers to HECC will be included in the 2018 session program change bill.

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**Request:** Report on the status of the Oregon Volunteer program as requested in the budget note included in House Bill 5521 (2017), request additional funding of \$300,000 General Fund to continue the program through the remainder of the biennium and transfer the program to the Higher Education Coordinating Commission (HECC).

**Recommendation:** Acknowledge receipt of the report and approve the requests during the 2018 Legislative Session.

**Discussion:** The Oregon Volunteers program was transferred from Oregon Housing and Community Services (OHCS) to the Office of the Governor during the 2017 Legislative Session through House Bill 5521. With the transfer of this program, the Office of the Governor received \$0.2 million General Fund along with \$6.9 million Federal Funds expenditure limitation and one position (1.00 FTE) for the program. The budget report also included the following Budget Note related to the Oregon Volunteer program:

*Funding for Oregon Volunteers is provided with the expectation that the Oregon Commission on Voluntary Action and Service will revise its five-year strategic plan to integrate activities within the Governor's Office, for the purpose of securing federal matching funds. The Governor's Office is requested to report, with the Oregon Commission on Voluntary Action and Service, to a meeting of the Interim Joint Committee on Ways and Means prior to the February 2018 session of the Legislative Assembly, to determine the amount at which to fund Commission activities for the remainder of the 2017-19 biennium. The information requested to be provided includes personnel requirements, amounts and sources of funding, including potential matching dollars, and changes to the Commission's 5-year plan that may result from the transfer of administration of the Commission to the Office of the Governor. If sufficient funding for Oregon Volunteers is not approved for the remainder of the 2017-19 biennium, Oregon Volunteers will take necessary actions to end all federal programs by September 30, 2018.*

Since the transfer of the program, the Office of the Governor, the Oregon Volunteers program and the Oregon Commission on Voluntary Action and Services have experienced some changes and finalized a number of accomplishments:

- The Oregon Commission for Voluntary Action and Service finalized a revision of its three-year strategic plan with a focus on the short-term plan, given the transition from Oregon Housing and Community Services to a new home in state government. The plan notes the Commission's primary goals of fostering volunteerism, civic engagement and AmeriCorps service haven't changed and the Commission will phase its strategies by first focusing on strengthening the foundation of the AmeriCorps program.
- The Oregon Volunteers program finalized its 2018 proposed operating budget. The total need annually for the program is \$0.5 million, split evenly between the federal Corporation for National and Community Service (CNCS) and the state. The Office of the Governor received \$0.2 million General Fund for the 2017-19 biennium and is requesting the remaining need of \$0.3 million to continue the activities through the end of

the biennium. This total operating budget, which is split between the CNCS and state allows the state to access about \$6.6 million in federal funding biennially, primarily for the AmeriCorps grant.

- The previous Executive Director of the Oregon Volunteers program stepped down and an Interim Executive Director was brought on-board and plans to stay on through the transitions.
- The Oregon Volunteers program was transferred to the Office of the Governor with the intention to leverage current Governor Office staff time as in-kind match for the state's share of the operating budget. However, upon further review, the matching funds requirements are narrow and must directly relate to the work of the program and therefore leveraging the current staff time as match is not allowed; unless staff is tracking work directly related to the Oregon Volunteers program.
- With the focus on AmeriCorps and the limitation of matching requirements, the Office of the Governor is proposing to transfer the program to HECC effective July 2018. This is ideal timing given the program's grant cycle.

In summary, the Oregon Volunteers program has successfully transferred from OHCS to the Office of the Governor and has completed a number of key priorities and evaluations. The Commission and the program plan to continue its mission of strengthening communities by inspiring Oregonians to actively engage, volunteer, and serve. However after this initial evaluation, the proposed permanent home for the program is with the HECC; where the program most closely aligns with the work of the agency.



KATE BROWN  
Governor

December 8, 2017

The Honorable Senator Richard Devlin, Co-Chair  
The Honorable Representative Nancy Nathanson, Co-Chair  
Interim Joint Committee on Ways and Means  
900 Court Street NE  
H-178 State Capitol  
Salem, OR 97301-4048

Replacement Letter

Dear Co-Chairpersons:

**Nature of the Request:**

During the 2017 session, the Oregon Legislature enacted House Bill 5521 A, which transferred the Oregon Commission on Voluntary Action and Services from Oregon Housing and Community Services (OHCS) to the Office of the Governor. The accompanying budget report included a budget note:

HB 5521 A Budget Note

“Funding for Oregon Volunteers is provided with the expectation that the Oregon Commission on Voluntary Action and Service will revise its five-year strategic plan to integrate activities within the Governor’s Office, for the purpose of securing federal matching funds. The Governor’s Office is requested to report, with the Oregon Commission on Voluntary Action and Service, to a meeting of the Interim Joint Committee on Ways and Means prior to the February 2018 session of the Legislative Assembly, to determine the amount at which to fund Commission activities for the remainder of the 2017-19 biennium. The information requested to be provided includes personnel requirements, amounts and sources of funding, including potential matching dollars, and changes to the Commission’s five-year plan that may result from the transfer of administration of the Commission to the Office of the Governor. If sufficient funding for Oregon Volunteers is not approved for the remainder of the 2017-19 biennium, Oregon Volunteers will take necessary actions to end all federal programs by September 30, 2018.”

The intent of this letter is for the Governor’s Office to report to the Interim Joint Committee on Ways and Means as requested in the above budget note, request additional funding of \$300,000 General Fund be allocated during the 2018 Legislative Session to fund the Commission’s activities for the remainder of the biennium, and transfer the program to the Higher Education Coordinating Commission.



**Agency Action:**

Outlined below are actions the Office of the Governor has taken or will take to ensure a smooth transition out of Oregon Housing and Community Services agency and the stability of Oregon Volunteers (OV).

<b>Action Item</b>	<b>Status</b>
Transition leadership	Ongoing The former Executive Director of OV stepped down and the Governor's office found an Interim Executive Director that will stay in place as we work through the transition.
Confirm parameters for matching funds	Completed The Governor's office has confirmed that matching funds requirements are narrow and must directly relate to OV work and tasks. This development has led to a recommendation to transition OV out of the Governor's office to the Higher Education Coordinating Commission (HECC) effective July 1, 2018.
Evaluate accounting and budgeting procedures	Ongoing Much of the retrospective financial analysis was completed by OHCS and contributed to the HB 5521 budget note.
Execute Grant Transfer	Ongoing The grant is set to transfer from OHCS to Office of the Governor by 2018.
Execute Inter-governmental Agreement (IGA) with Portland State University to cover costs associated with OV starting July 1, 2017	Ongoing The Governor's office is close to completing this agreement.
Revise strategic plan	Completed Attached you will find an updated three-year strategic plan. To qualify for the next round of the Commission Support Grant (CSG), a three-year strategic plan was required and submitted.
Funding needed for Commission activities through the remainder of the biennium.	Request \$300,000 General Fund be allocated during the 2018 Legislative Session. HB 5521 (2017) allocated \$200,000 General Fund to support this program and request OV return to request additional funding needed to continue activities through the end of the biennium. OV projects a need of \$250,000 in state funding annually, for a total need of \$500,000 per biennium. The request of \$300,000 brings the total to the \$500,000 needed.

**Background:**

The Oregon Volunteers Commission for Voluntary Action and Service (OV) was created by Governor Barbara Roberts in 1994 with the purpose of:

1. Providing Oregonians with a statewide entity to focus on service and volunteer efforts
2. Enhancing the ethic of service and volunteerism in the state
3. Overseeing administration of federal funds designated for state-based AmeriCorps programs

A significant portion of OV's work is administering federal AmeriCorps funds. As the federally-required state commission, OV distributes these funds to local agencies and organizations in order for them to operate AmeriCorps programs within their communities. Currently, 186 members are serving in 11 programs at 125 sites covering 23 urban and rural counties.

These programs address critical needs in areas of: education, health, environmental, economic opportunity, disaster services and nonprofit capacity building. For example, last year, AmeriCorps members provided services to over 250 veterans and military families, improved 1,824 acres of public green spaces, planted 14,870 trees and shrubs, helped over 7,000 economically disadvantaged youth in school, and educated 9,520 youth and 7,950 adults in environmental conservation practices.

Intermediary organizations play a strong role in providing AmeriCorps service opportunities to communities of all sizes around the state. Through this strong intermediary network, more than 10,500 students were involved in school-based and out-of-school learning as a result of AmeriCorps member efforts in the previous year of services (2014-15). Ten percent of those students received music instruction in some of Oregon's most remote rural communities through one of the nation's only rural music education AmeriCorps programs.

Overall, during the 2014 – 2016 program years, OV leveraged \$46.9 million in federal and local program funding, and collectively, AmeriCorps members, and the volunteers they engage in their communities, completed 1,259,657 hours of service addressing critical community needs across the state.

**Action Requested:**

Acknowledge the receipt of this report and recommend to the 2018 Joint Committee on Ways and Means allocate \$300,000 General Fund to continue Commission activities for the remainder of the biennium and transfer the program to HECC.

**Legislation Affected:**

None at this time.

Sincerely,



Governor Kate Brown



# Oregon Volunteers: Oregon Commission for Voluntary Action & Service

## State Service Plan 2018-2020

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**OUR MISSION:** Strengthening our communities by inspiring Oregonians to actively engage, volunteer, and serve.

**OUR VISION:**

*For Oregon Volunteers:*

- Oregon Volunteers is the trusted resource on volunteerism and civic engagement.
- Oregon Volunteers is integral and vital to Oregon's addressing of our state's greatest needs.
- Oregon Volunteers is sustainable with resources and stability to meet its mission.

*For Oregon:*

- Volunteering is an integral, prominent, and essential part of everyday life.
- Oregon's 36 counties have strong, healthy communities built and sustained through service.
- Public engagement drives government.

**OUR VALUES:**

*Community* - Strengthening Oregon through service and volunteerism is at the heart of everything we do.

*Diversity* - Commission programs, members and OV staff strive to reflect the full diversity of all Oregonians. We are strengthening our commitment to issues of diversity including: race, gender, political affiliation, class, education, geography, interests, disability, sexual orientation, age, and culture.

*Effectiveness* - The results of an efficient, effective, strategic use of resources will further the commission's mission. We will make decisions in line with short and long-term priorities.

*Mutual Benefit* - We take intentional action to create a triple win (win 3) – a win for the commission, for our partners, and for Oregon communities.

*Integrity* - We do what we say we will do and only what we are able to do.

*Partnership* - We invest time in building relationships, honoring diverse perspectives, and creating winnable solutions.

*Innovation and Creativity* - We encourage new ideas and find solutions to better serve Oregon communities.

## Commissioners:

<b>Michael Fieldman</b>	UCAN	Roseburg
<b>Brenda Brooks</b>	Oregon Youth Development Council	Salem
<b>Adele McAfee</b>	City of Bend	Bend
<b>Kevin Billman</b>	UFCW - Local 555	Tigard
<b>Ross Cornelius</b>	Walsh Construction Company	Portland
<b>Mila Buckland</b>	Campus Compact of Oregon	Portland
<b>Josh Todd</b>	Campus Compact of Oregon	Portland
<b>Jorge Cruz</b>	Metropolitan Family Services	Portland
<b>Gary L. Carroll, II</b>	Boy Scout of America - Cascade Pacific Council	Portland
<b>Derenda Schubert, PhD</b>	Bridge Meadows	Portland
<b>Pablo Brito</b>	Friends of Trees	Portland
<b>Bill Deiz</b>	Retired	Portland
<b>Kelly Wessels</b>	UCAN	Roseburg
<b>Elias Villegas-Plascencia</b>	Chemeketa Community College	Salem
<b>Jeannemarie Halleck</b>	Portland City Club	Portland

*The Commissioners owe a debt of gratitude to Mary Moller, Executive Appointments Director, in the Office of Governor Kate Brown, who has spent countless hours working with Oregon Volunteers to steer the way to a successful future.*

## STAFF:

### **Carie Bauer**

*Interim Executive Director*

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### **Maria Sceva**

*Events & Program Specialist*

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## Executive Summary

### **ABOUT THIS PLAN**

At the start of 2018, the Oregon Volunteers Commission will find itself transitioning to a new home within state government. Aligning with this transition and fresh start under a new state partnership, the Commission has decided to strategically focus its efforts in the short term to plan for long-term growth and success.

Oregon Volunteers' primary goals of fostering volunteerism, civic engagement and AmeriCorps service in Oregon remain unchanged. In implementing this State Service Plan, Oregon Volunteers will phase its strategies, focusing first on strengthening the foundation of AmeriCorps programming, one of Oregon's greatest assets promoting service and civic engagement. These efforts will foster a stable environment for continued growth of the organization's capacity, and implementation of the volunteerism and civic engagement strategies described herein.

This plan serves two key roles for the Oregon Volunteers Commission. First, as a three-year State Service Plan, it showcases our priorities, goals, and desired outcomes. Second, as an organizational strategic plan, it provides a roadmap for OV staff, Commissioners, and stakeholders. The goals and strategies of this plan were determined collectively by the Interim Executive Director, OV staff, and Commission members, utilizing input from AmeriCorps program staff, state and federal government partners, and community member participants from a recent statewide community engagement process that took place in 17 communities across all regions of Oregon.

## Goals and Strategies

### **GOAL 1: Strengthen Oregon's AmeriCorps programs**

*Outcome:* High quality AmeriCorps programs address local needs identified by communities, leveraging additional resources in terms of funding and people-power, which in turn increases both volunteerism and civic engagement in Oregon.

#### **Strategies:**

- 1.1 Provide targeted training and technical assistance to AmeriCorps staff based upon annual needs assessments and emerging community priorities.
- 1.2 Implement data quality review standards and framework that increase ability of Oregon's AmeriCorps programs to track and submit quality data, providing the Commission and the network with data tools necessary for identifying community needs.
- 1.3 Support programs to meet or exceed their programmatic performance measures.
- 1.4 Provide training and technical assistance and other identified supports to AmeriCorps programs on topics of recruitment, retention, marketing and branding.

### **GOAL 2: Strengthen Oregon Volunteers: Commission for Voluntary Action and Service**

*Outcome:* The Commission has ample support, staff resources and funding to promote AmeriCorps, volunteerism and civic engagement to strengthen Oregon communities.

#### **Strategies:**

- 2.1 Increase diversity of Commission membership through more racial, ethnic, youth and regional representation.
- 2.2 Increase staffing to ensure successful achievement of OV goals, including increased Volunteerism and Civic Engagement-focused activities.
- 2.3 Strengthen local, statewide, and national partnerships.
- 2.4 Develop communication and outreach plan to amplify Oregon Volunteers' voice and reach.

### **GOAL 3: Increase National Service Focus on Statewide Education Outcomes**

*Outcome:* Within Oregon's AmeriCorps portfolio, programs providing educational services that align with statewide educational directives are highlighted, promoted and connected.

#### **Strategies:**

- 3.1 Raise awareness of state educational priority focus areas, and available resources and funding opportunities, to Oregon AmeriCorps programs.

- 3.2 Identify partnerships and resources available to assist Oregon Volunteers and AmeriCorps programs in providing programming that support Governor Directives for improving educational services, including measures that strengthen community supports for Early Learning transition of students from pre-kindergarten through 3<sup>rd</sup> grade.
- 3.3 Through funding opportunities, support Oregon AmeriCorps programs aiming to provide high school dropout prevention efforts to increase Oregon's four-year cohort graduation rates.

**GOAL 4: Align Oregon project funding opportunities with state and federal partners' priority focus areas**

*Outcome:* Oregon's AmeriCorps programs respond to community issues that are having an impact in communities both locally and nationwide.

**Strategies:**

- 4.1 Raise awareness of state partner and/or CNCS priority focus areas to Oregon AmeriCorps programs. These include the focus areas of education, environmental stewardship, disaster services, healthy futures, veteran services and safer communities and special initiatives.<sup>i</sup>
- 4.2 Identify partnerships and resources available to assist Oregon Volunteers and AmeriCorps programs in providing programming that addresses the priority focus areas of state and/or national partners.
- 4.3 Through funding opportunities, support Oregon AmeriCorps programs providing programming that addresses the areas of: education, environmental stewardship, disaster services, healthy futures, veteran services or safer communities and special initiatives.

**GOAL 5: Support Disaster Preparedness efforts in Oregon**

*Outcome:* The Commission is engaged in statewide disaster preparedness efforts with local and statewide partners.

**Strategies:**

- 5.1 Establish role for OV within the statewide agency framework by coordinating through the Oregon Office of Emergency Management and other affiliated partners.
- 5.2 Develop plan for unaffiliated volunteers, AmeriCorps, and CNCS programs to align with statewide response, including all responding state agencies and nonprofits.

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<sup>i</sup> 2018 AmeriCorps Funding Priorities (<https://www.nationalservice.gov/documents/2017/2018-ameri-corps-state-and-national-grants-notice-funding-opportunity>)