Annual Member Meeting

November 18th, 2020
Today’s Agenda

Call to Order
Welcome and Introductions
Opening Remarks from President
2021 Board of Directors
Committee Reports
Invitation to Engage
Open Forum/ Q & A
News & Upcoming Events
Meeting Adjournment
Meeting’s Hosts

Megan Vixie, CVA
AL!VE President

Michelle Raymer, CVA
AL!VE President Elect
The Why, Who and How of AL!VE

Mission:
AL!VE serves to enhance and sustain the spirit of volunteering by fostering collaboration and networking, promoting professional development, and providing advocacy for leaders in community engagement.

Vision:
The essential professional resource and advocate for those who engage, motivate, and celebrate volunteers and their vital contributions to our society.
Strategic Plan

Road Map for 2020 - 2024

- Involvement
- Membership
- Financials
- Programming & Advocacy
- No increase to membership dues
Your 2021 Board of Directors

Executive Committee
- Megan Vixie, CVA - President
- Michelle Raymer, CVA - President Elect
- Sean Devereaux - Treasurer
- Mark Smith, CVA - Secretary
- Cairn Reisch, CVA - VP of Membership
- Paula Allen, CVA - VP of Programs & Advocacy
- TBD - VP of Marketing

Board Members at Large
- Crystal Bell New!
- Christi Brown, CVA New!
- Kelli Crawford
- Allyson Drinnon
- Andrea Hill, CVA New!
- Alana Knoppow, New!
- Michael Mulhern, CVA New!
- Kayla Paulson, CVA
- Ashley Ramsdell, CVA
- Nicole Smith New!
- Jennifer Thompson, CVA
- Arletha Walker, CVA New!
## Committee Members

<table>
<thead>
<tr>
<th>Board Development</th>
<th>HR &amp; Policy</th>
<th>Finance</th>
<th>Marketing</th>
<th>Membership</th>
<th>Programs &amp; Advocacy</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Michelle Raymer</td>
<td>• Mark Smith</td>
<td>• Sean Devereaux</td>
<td>• Audrey Kidwell</td>
<td>• Cairn Reisch</td>
<td>• Paula Allen</td>
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<tr>
<td>• Paula Allen</td>
<td>• Wendy McClure</td>
<td>• Michelle Raymer</td>
<td>• Rebecca Hand</td>
<td>• Naomi Demarest</td>
<td>• Emilie Bromet Bauer</td>
</tr>
<tr>
<td>• Kelli Crawford</td>
<td>• Michelle Raymer</td>
<td>• Brent Sturm</td>
<td>• Adrienne Polumbo</td>
<td>• Dana Litwin</td>
<td>• Trudi Campbell</td>
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<td>• Ashley Ramsdell</td>
<td>• Megan Vixie</td>
<td>• Megan Vixie</td>
<td>• Anne Owens</td>
<td>• Kelli Crawford</td>
<td>• Ben Fertig</td>
</tr>
<tr>
<td>• Faiza Venzant</td>
<td>• Hannah Weier</td>
<td></td>
<td>• Corina Sadler</td>
<td>• Bonnie Davis</td>
<td>• Meagan Patterson</td>
</tr>
<tr>
<td>• Megan Vixie</td>
<td></td>
<td></td>
<td>• Local Associations</td>
<td>• Allyson Drinnon</td>
<td>• Ashley Ramsdell</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Sub-Committee</td>
<td>• Ben Fertig</td>
<td>• Nicole Smith</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Mark Smith</td>
<td>• Allyson Drinnon</td>
<td>• Cathy Thoma</td>
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<td>• Jenn Forristal</td>
<td>• Jennifer Thompson</td>
<td>• Jennifer Thompson</td>
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<td></td>
<td></td>
<td></td>
<td>• Jennifer Thompson</td>
<td>• Meagan Patterson</td>
<td>• Rebeccah Verhoff-Kiss</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>• Angela Williamson</td>
<td>• Paula Allen</td>
</tr>
</tbody>
</table>

**Thank you**

Members have donated more than 1,000 hours of volunteer time!
Leadership Development & Staffing Report

2020 Accomplishments

• Streamlined process for succession planning for executive positions*
• Evaluated organizational structure to ensure it serves current and future needs*
• Association Manager to serve on volunteer engagement planning committee for Points of Light Conference*

2021 Goals

• Formalize board buddies structure and create more social interaction for board engagement*
• Create engagement strategy for exiting board members*
• Identify reports in AL!VE’s archives that should also be on the Members Only website page (e.g., committee work, budgets) for further transparency to members*

*Connected to strategic planning goal
Leadership Development & Staffing Report

2020 Membership Survey Results

Skills or resources needed to address systemic Diversity, Equity, Accessibility, and Inclusion (DEAI) issues within your organization / What AL!VE can do nationally to help lead the charge for our industry?

- Host trainings that provide tactical tools to address DEAI at an organization (19)
- Share resources from other organizations (3)
  - Sample DEAI policies
  - Verbiage for volunteer orientation and handbooks
  - Case studies on how to involve volunteers with diverse backgrounds or abilities
- Provide a list of recommended consultants/speakers (2)
- Evaluate AL!VE Board and Leadership to have a more diverse voice (2)
- How to influence your organization’s leadership to accept DEAI issues to begin addressing them (2)
- Diversifying the profession
Secretary’s Report

2020 Accomplishments

• Established HR & Policy Committee and conducted policy review, including advocacy statement*
• Created volunteer position descriptions and set up website page for volunteer opportunities*
• Set up tracking mechanism for volunteer hours*

2021 Goals

• Create engagement strategy for exiting board members*
• Create review schedule for HR policies and procedures
• Identify project-based opportunities for members to be involved (e.g., blog posts, marketing roles)*
• Finalize Partner/Sponsor MOU for future partnerships/sponsors*
• Review current partnerships and discounts under new structure*

*Connected to strategic planning goal
## Treasurer’s Report

### 2020 Accomplishments

- Updated all financial policies*
- Formalized MOU and financial procedures as a fiscal agent*
- Streamlined financial reporting process to board*

### 2021 Goals

- Analyze any risk to cyber security to protect AL!VE’s financials*
- Explore potential grant funding and apply to 2022 budget*
  - Enhanced member benefits (e.g., website and member platform overhaul, start up capital for local associations)*
  - Continuation of Diversity & Inclusion efforts
  - Annual report design*

*Connected to strategic planning goal
## Treasurer’s Report

<table>
<thead>
<tr>
<th>INCOME In Dollars</th>
<th>2020 Budget</th>
<th>2020 Actual (YTD)</th>
<th>2021 Budget</th>
<th>Budget to Budget Variance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Donations (Board &amp; General)</td>
<td>$700</td>
<td>$473</td>
<td>$1,010</td>
<td>$310</td>
</tr>
<tr>
<td>Partnerships, grants &amp; sponsorships</td>
<td>$5,700</td>
<td>$2,149</td>
<td>$4,600</td>
<td>($1,100)</td>
</tr>
<tr>
<td>Webinars</td>
<td>$100</td>
<td>$72</td>
<td>$300</td>
<td>$200</td>
</tr>
<tr>
<td>Memberships (Individual/Orgs)</td>
<td>$13,500</td>
<td>$11,835</td>
<td>$15,875</td>
<td>$2,375</td>
</tr>
<tr>
<td>Memberships (Local Associations)</td>
<td>$2,500</td>
<td>$4,337</td>
<td>$4,125</td>
<td>$1,625</td>
</tr>
<tr>
<td>Hybrid Conference</td>
<td>$12,000</td>
<td>$11,702</td>
<td>$12,000</td>
<td>0</td>
</tr>
<tr>
<td>Administrative Fees</td>
<td>$8,000</td>
<td>$12,660</td>
<td>$5,000</td>
<td>($3,000)</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>$42,175</strong></td>
<td><strong>$43,228</strong></td>
<td><strong>$42,910</strong></td>
<td><strong>$735</strong></td>
</tr>
</tbody>
</table>
## Treasurer’s Report

<table>
<thead>
<tr>
<th>EXPENSES</th>
<th>2020 Budget</th>
<th>2020 Actual (YTD)</th>
<th>2021 Budget</th>
<th>Budget Variance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive (insurance, postage, memberships, misc.)</td>
<td>$3,930</td>
<td>$1,556</td>
<td>$2,626</td>
<td>$1,304</td>
</tr>
<tr>
<td>Finance (bank fees, expenses)</td>
<td>$150</td>
<td>$725</td>
<td>$150</td>
<td>$0</td>
</tr>
<tr>
<td>HR (Contractor fees)</td>
<td>$16,500</td>
<td>$12,972</td>
<td>$18,000</td>
<td>($1,500)</td>
</tr>
<tr>
<td>Marketing (advertising, booths, member event, supplies/displays)</td>
<td>$5,950</td>
<td>$500</td>
<td>$6,700</td>
<td>($750)</td>
</tr>
<tr>
<td>Membership (postage, printing, website hosting, misc.)</td>
<td>$350</td>
<td>$0</td>
<td>$340</td>
<td>$10</td>
</tr>
<tr>
<td>Programs (conference speakers, awards)</td>
<td>$9,500</td>
<td>$9,742</td>
<td>$8,200</td>
<td>$1,300</td>
</tr>
<tr>
<td>Technology (website, webinar host)</td>
<td>$2,920</td>
<td>$2,206</td>
<td>$4,000</td>
<td>($1,080)</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>$39,300</strong></td>
<td><strong>$27,701</strong></td>
<td><strong>$40,016</strong></td>
<td><strong>($716)</strong></td>
</tr>
</tbody>
</table>
Treasurer’s Report

2021 BUDGET | AMOUNT
---|---
TOTAL INCOME | $42,910
TOTAL EXPENSES | $40,016
Variance | $2,894

Current cash on hand (as of 11/15/20) = $25,264
Membership Report

2020 Membership Survey Results

How likely are you to recommend the Association of Leaders in Volunteer Engagement to a friend or colleague?

Survey completed September 2020; 101 responses

Are you likely to renew your membership?

Survey completed September 2020; 101 responses
## 2020 Membership Survey Results

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Participated in past 12 months</th>
<th>Rank which benefits are most important to you.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Yes</td>
<td>Very Important</td>
</tr>
<tr>
<td>AL!VE Academy</td>
<td>68 (67.3%)</td>
<td>66 (65.3%)</td>
</tr>
<tr>
<td>Resource Library/Calendar</td>
<td>61 (60.4%)</td>
<td>49 (48.5%)</td>
</tr>
<tr>
<td>Hybrid Conference</td>
<td>27 (26.7%)</td>
<td>40 (39.6%)</td>
</tr>
<tr>
<td>Partner Discounts</td>
<td>19 (18.8%)</td>
<td>21 (19.8%)</td>
</tr>
<tr>
<td>IJOVA</td>
<td>32 (31.6%)</td>
<td>20 (19.8%)</td>
</tr>
<tr>
<td>Communities of Practice</td>
<td>27 (26.7%)</td>
<td>32 (31.6%)</td>
</tr>
<tr>
<td>Member Skill Database</td>
<td>18 (17.8%)</td>
<td>16 (15.8%)</td>
</tr>
</tbody>
</table>

*Survey completed September 2020; 101 responses*
Membership Report

2020 Accomplishments

● Hit membership target
  ○ 164 vs. goal of 125
  ○ 24% increase over last year
● Offered grace period for those experiencing financial constraints due to COVID-19
● Hosted virtual social during Points of Light Conference and implemented quarterly socials
● Celebrated members who received CVA certification*

2021 Goals

● Launch “Membership Tips” to help members navigate the website
● Develop Recruitment Campaigns
● Continue and improve upon New Member Webinars, Quarterly Socials, New Member Calls and CVA outreach
● Develop strategy to reconnect with past members
● Establish scholarship program*

*Connected to strategic planning goal
Membership Report - Local Associations

### 2020 Accomplishments

- Hit Local Association target of 5 new associations
- Launched Local Association National Directory*
- Hosted 1st Annual Local Association Summit with 32 organizations attending*

### 2021 Goals

- Recruit additional members for Local Associations Committee
- Review and enhance benefits to local associations based on feedback*
- Create speakers list from past AL!VE events for local associations to utilize*
- Refresh Local Associations Handbook and Mentorship Program

*Connected to strategic planning goal*
What could or should AL!VE be doing to advance the volunteer engagement sector?
- Strengthen and build relationships with other organizations in the nonprofit space (5)
- Advocacy (3)
- More resources to use on a daily basis (training, graphics, engagement ideas, etc.) (3)
- DEAI education & tools (2)
- Continue to highlight meaningful ways volunteers contribute to the missions of organizations they serve (2)
- Formal recognition of profession by the Department of Labor
- Elevating the profession to encourage members to think at a higher strategic level

What would you like to see AL!VE do around advocacy?
- Information on how to advocate for yourself as a professional (3)
- Take stances on policies and offer opportunity for members to support critical legislative initiatives (3)
- Inform members about potential impact in our programs to empower us to advocate at local, state, and national level for our programs (2)
- Partner with organizations for better visibility of volunteer engagement needs (2)
- Continue to work on validating the need for funding to be invested in volunteer engagement (2)
- I loved what AL!VE did to support the CORPS Act, and the VCLA changes. More of that
## Programs & Advocacy Report

### 2020 Accomplishments

- Hosted 13 AL!VE Academies
  - Offered legislative advocacy webinar in partnership with ASC*
- Facilitated Communities of Practice (COPs), launching 3 new COPs (healthcare, arts, transportation)
- Launched Emerging Leaders Mentor Program with 12 matches
- Received more than 50 submissions for Impact Awards
- **Managing Risk:** Balancing Aversion & Innovation
- 29 host sites with 700+ participants
- Recruited intern to research advocacy issues, trends, etc.*

### 2021 Goals

- Launch Job Transitions COP and CVA Study Group
- Launch next round of Mentor Program
- Feature Impact Award Winners via website & social media*
- Offer DEAI webinars quarterly
- Utilize LinkedIn Group for featured blogs
- Review/update AL!VE’s standards of practice*
- Explore VEP job classification with DOL
- Feature committee members on website

*Connected to strategic planning goal

**SAVE THE DATE: 2021 Hybrid Conference**

**Diversity, Equity, & Inclusion: Real Impact for the Real World**

October 19th and 20th, 2021
Marketing Report

2020 Membership Survey Results

- 87.1% believe AL!VE’s official communication channels keeps them well informed
- 87.1% read all of the monthly AL!VE newsletter
- 63.4% visit the AL!VE website at least once a month (10.9% visits weekly)

![Pie chart showing best way for members to receive updates from AL!VE]

Survey completed September 2020; 101 responses
Marketing Report

ENGAGEMENT NUMBERS

- Instagram: 4100+
- Email: 1800 +
- Facebook: 2500+
- Twitter: 1800 +
- LinkedIn: 4100+
### 2020 Accomplishments

- Moved newsletter delivery from bi-monthly to monthly
- Rebooted Marketing Committee and sourced new members
- Increased exposure to Impact Awards and Hybrid Conference*
- Designed AL!VE Zoom background for members to utilize
- Implemented Member Monday on social media to highlight members
- Continually post on website’s newsfeed and also include content in monthly newsletter

### 2021 Goals

- Recruit additional members to Marketing Committee
- Refresh templates for e-blasts, newsletters, PowerPoints, flyers, etc.
- Create annual marketing strategy to highlight all of AL!VE’s offerings
- Host member social at Points of Light Conference

*Connected to strategic planning goal
### Partnerships

#### AL!VE PARTNERS

<table>
<thead>
<tr>
<th>Partners</th>
<th>Benefits</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>AL!VE</strong></td>
<td>AL!VE serves as fiscal sponsor</td>
</tr>
<tr>
<td><strong>CCVA</strong></td>
<td>10% member discount on certification fees, Partner webinars</td>
</tr>
<tr>
<td><strong>IJOS</strong></td>
<td>Current and past journal issues available, Partner webinars</td>
</tr>
<tr>
<td><strong>IMPACT</strong></td>
<td>Hybrid Conference Impact Award Sponsor</td>
</tr>
<tr>
<td><strong>CIMA</strong></td>
<td>Volunteer Insurance Service - checklists on risk/safety, Partner webinars</td>
</tr>
<tr>
<td><strong>VolunteerPro</strong></td>
<td>Partner Webinars</td>
</tr>
</tbody>
</table>
Alliance Update

AL!VE continues to work with the National Alliance for Volunteer Engagement (www.allianceforengagement.org)

2020 Accomplishments

•

2021 Goals
thank you so much

AL!VE Association Manager
Gretchen Jordan
Complete a Volunteer Application!

Interested in a committee? Or have a new idea to share or way to be involved?

Fill out an application: [www.volunteeralive.org/getinvolved](http://www.volunteeralive.org/getinvolved)

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### Invitation to Engage

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities</th>
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</thead>
<tbody>
<tr>
<td>Finance</td>
<td>• Review financials, ensure compliance with procedures, etc.</td>
</tr>
<tr>
<td>HR &amp; Policy</td>
<td>• Review policies; create new policies needed; ensure process for compliance</td>
</tr>
<tr>
<td></td>
<td>• Develop additional tools and processes for AL!VE’s volunteer engagement</td>
</tr>
<tr>
<td></td>
<td>• Ensure volunteer hours are submitted; analyze donated time for annual report</td>
</tr>
<tr>
<td>Marketing</td>
<td>• Assist with social media, website enhancement, outreach, etc.</td>
</tr>
<tr>
<td></td>
<td>• Write content for the newsletter (spotlights on members, partners, benefits, etc.)</td>
</tr>
<tr>
<td>Membership</td>
<td>• Conduct new member calls and webinars, develop additional member benefits</td>
</tr>
<tr>
<td></td>
<td>and materials, etc.</td>
</tr>
<tr>
<td></td>
<td>• Mentor a local association; develop more resources for local associations</td>
</tr>
<tr>
<td>Programs &amp; Advocacy</td>
<td>• Present to your peers at an AL!VE Academy</td>
</tr>
<tr>
<td></td>
<td>• Facilitate a Community of Practice or mentor program</td>
</tr>
<tr>
<td></td>
<td>• Serve as a mentor in the Emerging Leaders Mentor Program</td>
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<tr>
<td></td>
<td>• Research and recommend advocacy opportunities for AL!VE and its members</td>
</tr>
</tbody>
</table>
Ways to Donate

AL!VE Fundraising Efforts

► Make a donation
► Amazon Smile
► eBay for Charity

Learn more at: www.volunteeralive.org/donate
SAVE THE DATE:

December

AL!VE Member Social
12/1 @ 6pm E

AL!VE Academy:
Modern Trends in Volunteer Engagement
12/4 @ 2:30 E

New Member Webinar
12/14 @ 2pm E

January

AL!VE Academy:
Diversity & Inclusion
1/22 @ 1pm E

BONUS AL!VE Academy:
Building a Compelling Case for Your Volunteer Program
1/13 @ 1pm E

Upcoming COP’s:
Job Transition 1/6
Transportation 1/6
Healthcare 1/14
Rural Communities 1/19
Cultural Arts 1/28

February/ March

AL!VE Academy:
Advocacy
February TBD

AL!VE Academy:
Navigating Difficult Situations
3/3 @ 1pm E

Register at www.volunteeralive.org
Announcements

**Volunteer Management Progress Report**
Survey closes Wednesday, November 25th!
Go to: [https://volpro.net](https://volpro.net)

**Information Session on Obtaining Your CVA**
Friday, November 20th
2:30pm EST
Register at: [https://cvacert.org](https://cvacert.org)