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ASSOCIATION OF LEADERS IN VOLUNTEER ENGAGEMENT

# ANNUAL MEETING



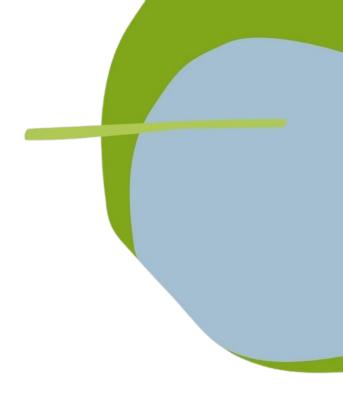
# ASSOCIATION OF LEADERS IN VOLUNTEER ENGAGEMENT

# ANNUAL MEETING





- Call to Order
- Organizational Updates
- Leadership & Strategy
- Special Acknowledgements
- Committee Reports
- Get Involved
- Questions & Open Forum
- Meeting Adjournment



## **Meeting Hosts**



Cathy Thoma, CVA President



Darlene Laird, CVA President Elect

## **About ALIVE**

#### 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.

# ASSOCIATION OF LEADERS IN VOLUNTEER ENGAGEMENT

#### Vision

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

# **Organizational Updates**

Congratulations on your retirement, Gretchen!

# Congratulations on your retirement, Gretchen!

Thank you for your dedication and service to AL!VE throughout the years.



## **Succession Planning Committee**

- Jordanya Reeves, CVA
- Wendy McClure CVA
- Darlene Laird, CVA
- Michelle Raymer, CVA
- Jenn Forristal, CVA
- Megan Vixie, CVA
- Jason Frenzel, CVA
- Alicia Campbell, CVA
- Grace Belizario, CVA
- Ashley Rieser, CVA



# Welcome Nicole R. Smith, CVA My Why UBUNTU



#### **Meet and Greet**

Monday, December 9 2 p.m. ET/11 a.m. PT RSVP



## **Executive Director 2025 Goals**

#### **Preparing for Growth**

- 1. Strengthen Infrastructure
- 2. Build Awareness
- 3. Increase Engagement
- 4. Raise Funds

Ideas? Suggestions? I am listening.



executivedirector@volunteeralive.org.

#### **Thanks for Your Service**



**Rebecca Verhoff-Kiss, CVA** 

Julie Booth, CVA

ASSOCIATION OF LEADERS IN VOLUNTEER ENGAGEMENT

# Leadership & Strategy

### **2024 Board Development Committee**

- Darlene Laird, CVA
- Michelle Raymer, CVA
- Wendy McClure, CVA
- Faiza Venzant, CVA
- Tim Suda, CVA
- Jenn Forristal, CVA
- Cathy Thoma, CVA



## **2025 Board of Directors**

#### **Executive Committee**

- Cathy Thoma, CVA, Past President\*
- Darlene Laird, CVA, President\*
- Jordanya Reeves, CVA, President Elect\*
- Jenn Forristal, CVA, Equity Leader
- Christi Brown, CVA, Treasurer
- Wendy McClure, CVA, Secretary

#### **Board Members at Large**

- Mark Heffner, CVA, Development\*
- Ashley Rieser, CVA, Membership
- Alicia Campbell, CVA, Advocacy
- David Horwitz, CVA, Marketing\*
- Carol Ayars, CVA, Programs\*
- Shelli Beck, CVA, Summit
- Amy Pinger, CVA, Service Enterprise
- William Webber, CVA, CAE, Technology, Local Associations\*
- Grace Belizario, CVA
- Amanda Schmierer, CVA
- Allison Schwartz, CVA
- Leigh Hersey, PhD\*
- Donna Finney\*
- \* Indicates new role

## **Celebrating Board Diversity**

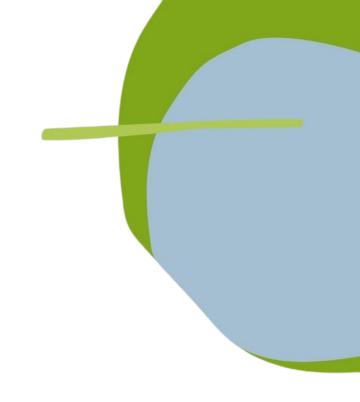
Gender and sexual orientation	Ethnic and cultural background	Ability
Family role and personal identity	Religion	Race
Location and environment	Educational and professional background	Socioeconomic status

## **2024 Board Accomplishments**

- 1. Published 2024-2028 Strategic Plan
- 2. Conducted Professional Career Pathways Survey
  - Pay Structure and Pay Differentials by State
  - Job Leveling Document
  - Career Mapping Worksheet
- 3. Advocated for the Volunteer Engagement Professional Occupational Code with the DOL
- 4. Conducted an Executive Search and Onboarded Our First Executive Director
- 5. Formed Development Subcommittee under Finance Committee
- 6. Selected and Developed 2025 Board
- 7. Created Technology Strategic Plan
- 8. Administered Second Year of Service Enterprise

#### **2025 Board Goals**

BDEAI	Technology
Executive Director Onboarding	Service Enterprise
Funding Strategy and Implementation	Marketing and Branding Updates



# **2026 National Summit on Volunteer Engagement**

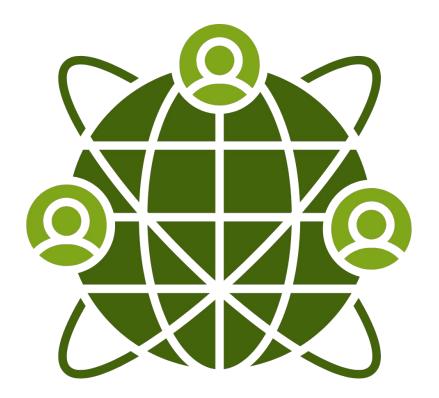
**#AL!VEfromSacramento** 

Save the Date

March 18-20, 2026

Sacramento, California

Special Thanks to Shelli Beck, Chair of the Summit Committee



# **Special Acknowledgements**



ASSOCIATION OF LEADERS IN VOLUNTEER ENGAGEMENT

### **Thank You National Partners**









ASSOCIATION OF LEADERS IN VOLUNTEER ENGAGEMENT

## **Thank You Donors**

Cash		In Kind
Anonymous Better Impact TD Bank Grace Marie Belizario Christi Brown Trudi Campbell Keita Cole Tara Dempster Liza Dyer Stephanie Eliason Bidney Enss	Kristin Keckler-Alexander Darlene Laird Stacey Luhring Wendy McClure Shelley Orloski Jordanya Reeves Susan Sanow Nancy Schafer Allison Schwartz Tim Suda Catherine Thoma	Better Impact Bill Jordan Jackie Jordan Alana Knoppow Traci Lato-Smith Dana Litwin Kayla Paulson Debbie Trueblood
Jenn Forristal Jason Frenzel Mark Heffner Monica Jasso	Rebeccah Verhoff-Kiss William Webber Adrienne Yoe	The

# **Committee Reports**

## **HR & Policy Committee**



Wendy McClure, CVA Secretary

## **HR & Policy Committee**

#### Members

- Wendy McClure, CVA, Secretary
- Crystal Lorah
- Laura Gray
- Nicole R. Smith, CVA
- Mark Heffner, CVA
- Jenn Forristal, CVA, BDEAI Representative
- Angelique De Luz, CVA, BDEAI Representative



#### HR & Policy Committee Report

#### **2024 Accomplishments**

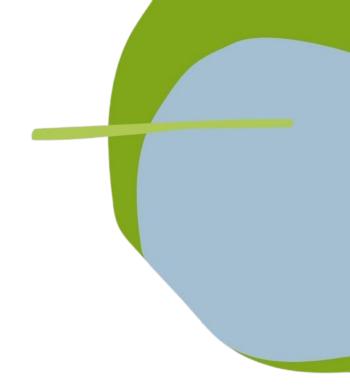
- Orientation
- Volunteer Handbook review of some policies
- Bylaws revision
  - Submitted for approval by membership

#### 2025 Goals

- Volunteer Handbook
- Employee Handbook
- Policies & Procedures
- Priority any requests from Service
   Enterprise, Summit Committee, &
   Employee

#### **Bylaws Amendment Vote** Get ready to vote using our Zoom poll!

- Bylaws overview and revisions
- Conduct vote



## **Marketing Committee**



Grace Belizario, CVA 2024 VP



David Horwitz, CVA 2025 Chair

# **Marketing Committee**

#### Members

- Grace Belizario, CVA, 2024 VP
- David Horwitz, CVA, 2025 Chair
- Shelli Beck, CVA
- Yvonne Dunphe, CVA
- Sarah Short, CVA
- Bekah Aisenbrey
- Adrienne Polumbo, CVA
- Jade Mizzell



#### Marketing Committee Report

**2024 Accomplishments** 

- Launched AL!VE T-Shirt Contest, fostering community pride and recognition.
- Made Ongoing Website and Newsletter Enhancements to improve usability and member engagement.
- Monitored and Analyzed Marketing Metrics to inform strategic decision-making.
- Collaborated on **Advocacy and Awareness** Initiatives to promote the volunteer engagement profession.
- Supported **Member Outreach Efforts** to continue growing our community and strengthening connections.

#### Marketing Committee Report

2025 Goals

#### **Strengthen Our Marketing Foundation**

- Streamline marketing operations and modernize communications technology.
- Leverage data to enhance value proposition, brand taxonomy, and key messaging, and develop new marketing resources and templates.
- Research brand refresh to align with BDEAI standards, 2024-2028 strategic plan, and long-term goals like membership growth and fundraising/development.

#### Increase Member, Prospect, Partner, & Funder Engagement

- Continuously improve communications channels and promotions (i.e., website, newsletter, social media, etc.) to increase reach, engagement, and satisfaction.
- Develop and execute marketing strategies for Service Enterprise and 2026 Summit.

#### **Rock Our Merch & Spread the Word** Visit the Shop

AL!VE has t-shirts for purchase, designed by members for members. Are you a MVP (Magical Volunteer Engagement Professional)?!

**Shop Here** 





### **Membership Committee**



Ashley Rieser, CVA 2024 VP & 2025 Chair

# **Membership Committee**

#### Members

- Ashley Rieser, 2024 VP & 2025 Chair
- Jared Peer, CVA
- Allison Schwartz, CVA
- Dana Litwin, CVA
- Karen Henry, CVA
- Yvonne Dunphe, CVA
- William Webber, CVA



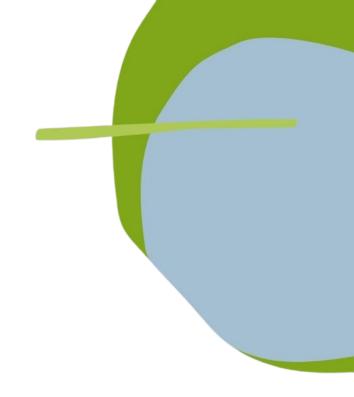
#### Membership Committee Report

Finding: Survey participants are engaged.

- 92% have visited the AL!VE website in the past two months
- 43% are volunteering with AL!VE
- 85% are satisfied or very satisfied with the content of the AL!VE newsletter

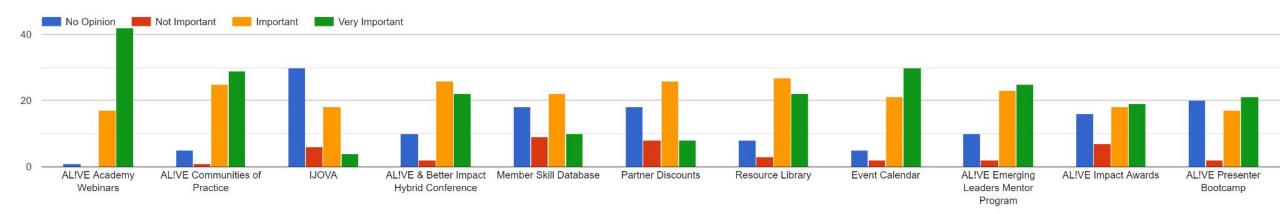
Finding: Survey participants <u>leverage resources</u>.

- 77% have participated in an AL!VE Academy
- 52% have joined an AL!VE Community of Practice
- 68% have utilized the ALIVE calendar
- 43% have used the AL!VE resource library



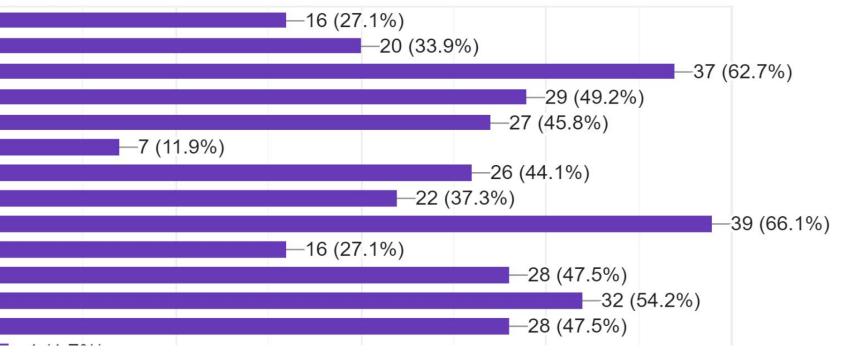
Finding: Survey participants leverage resources.

Please share the importance of each membership benefit. One selection per row.



Finding: Survey participants want to hear more about strategic planning reporting on impact.

Trainer Bootcamp Consultancy 101 Measuring and Reporting Im... Telling Compelling Stories Securing Leadership Buy-in Other/Free Format Marketing/Messaging Trainin... How to Do a Logic Model Strategic Planning Around St... Resources for Brand New V... Engaging Volunteers as Adv... Belonging Diversity Equity A... Using tools (Canva, Zoom, e...



#### **2024 Accomplishments**

- Strategy identified for recruitment campaigns aimed at identified groups
- Organizational presentation/recordings made to help increase retention
- Delivered annual satisfaction survey

#### 2025 Goals

- Develop a membership engagement roadmap to increase retention
- Develop a membership campaign in collaboration with the marketing committee
- Identify reports to share with members

## **State of the Association**

 100.00%
 83.60%
 84.80%

 78.80%
 77.20%
 77.20%

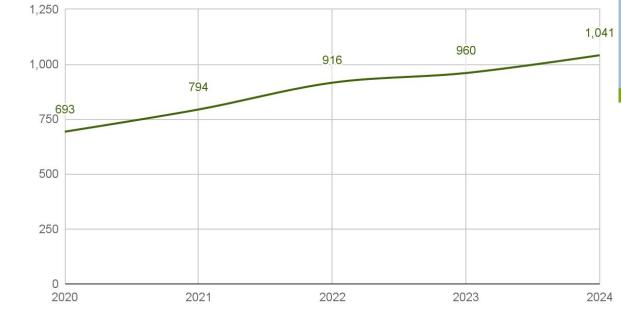
 50.00%
 9
 9

 25.00%
 9
 9

 25.00%
 9
 9

 2021
 2022
 2023

Year End Member Count



**Retention Rate** 

## **Local Associations Committee**



Jenn Forristal, CVA 2024 Chair William Webber, CVA 2025 Chair

# **Local Associations Committee**

#### Members

- Jenn Forristal, CVA 2024 Chair
- William Webber, CVA 2025 Chair
- Mary Lynn Perry
- Amanda Schmierer, CVA
- Gretchen Jordan, CVA
- Ashley Rieser, CVA
- Gerald (Jerry) Pannozzo, CVA



## Local Associations Committee Report

#### **2024 Accomplishments**

- Updated Local Associations Listing
   on website
- Facilitated 3 Communities of Practice (CoP)
- Held 5th Summit for Local Associations

#### 2025 Goals

- Host four CoP events throughout the year (March, June, September, November)
  - Host 6th Summit of Local Associations
- Create new materials and update website to reflect revised benefits
- Repackage benefits for Local Associations to ensure clarity and alignment with goals
- Update handbook and add resources
- Produce short video highlighting the CoP for promotional or informational use

## **BDEAI Committee**



**Jenn Forristal, CVA** 2024 & 2025 Equity Leader

## **BDEAI Committee**

#### **Members**

- Jenn Forristal, CVA
- Lisa Marie Mooney, CVA
- Angelique DeLuz, CVA
- Alli Zuel, CVA
- Noni Virani
- Tiana Watts
- Collin Kind, CVA
- Becky Mwambi



# **BDEAI Committee**

## What is Our Why?

A community of thought and learning partners serving as a resource and providing opportunities for volunteer engagement professionals to develop skills to incorporate BDEAI into all aspects of our work.

We support AL!VE by encouraging welcoming and inclusive spaces for members.

Our goal is to provide volunteer engagement professionals with the tools needed to cultivate spaces in which all can belong and thrive.

## **BDEAI Committee** Report

## 2024 Accomplishments

- Defined meeting structure, established agreements, cultivated community
- Drafted committee mission statement
- Evaluating website content, equity statements, drafting revisions (in progress)
- Served in an advisory capacity for various committees and projects for AL!VE
- Made recommendations for more inclusive roles and less patriarchal structures within AL!VE
- Contributed to CCVA's ADEVI toolkit project

#### 2025 Goals

- Complete website content revisions
- Make recommendations for equity training for board members
- Collaborate with other committees and on projects throughout AL!VE

## **Programs Committee**



Jordanya Reeves, CVA 2024 VP



Carol Ayars, CVA 2025 Chair

## **Programs Committee** Members

- Jordanya Reeves, CVA, 2024 VP
- Carol Ayars, CVA, 2025 Chair
- Paula Allen, CVA
- Shelli Beck, CVA
- Olympia Friday
- Amy Pinger, CVA
- Chris Rechsteiner, CVA
- Kim Soto, CVA
- Tim Suda, CVA
- Sarah Sukhram, CVA
- Megan Vixie, CVA

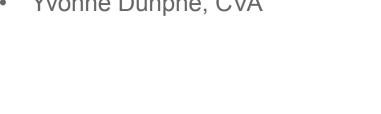


## **Programs Committee**

#### **Community of Practice Facilitators**

- Allison Schwartz, CVA
- Brandy Tolbert
- Carol Ayars, CVA
- Chris Moorehead via AAMV partnership
- Elizabeth Garrabrant, CVA
- Elizabeth Rachchh, CVA
- Emily Braley
- Haley Matherly, CVA
- Jenn Forristal, CVA
- Kathy Cahill

- Kayla Paulson, CVA
- Manny Moreno
- Marcelle Austin, CVA
- Marie Howell, CVA ٠
- Mark Heffner, CVA
- Meagan Patterson, CVA
- Shelby Nelsen via AAMV partnership ٠
- Sheri Burke
- Val Parker
- Yvonne Dunphe, CVA



# **Programs Committee**

### **2026 Summit Committee**

#### • Chair

- Shelli Beck, CVA
- At Large
  - Jordanya Reeves, CVA
  - Wendy McClure, CVA
- Finance
  - Mari Reyes, CVA
- Development
  - Mark Heffner, CVA
  - David Horwitz, CVA
- Program
  - Allie Zuel, CVA
  - Sue Carter-Kahl

#### • Marketing

- David Horwitz, CVA
- Bekah Aisenbrey
- Grace Belizario, CVA
- Hospitality
  - Mary Lynn Perry
  - Twyla Pratt
- Resource Groups
  - Ashley Reiser, CVA
  - Monica Jasso, CVA
- Technology

## **2025 Hybrid Conference**

- Save the Date
  - 11th Annual Hybrid Conference
  - October 28 or 29, 2025
- Timeline
  - February: theme announced
  - April: speaker RFP released
  - May: Host site registration opens
  - August 1: Individual registration opens

2024 Success 1100 94% **INDIVIDUAL** of survey PARTICIPANTS respondents said 8 participation inspired them -5 () to set goals or try something **US HOST** new SITES

**"The** amazing resources provided by each of the speakers that I will be using right away for some current and upcoming projects and planning."

## **Programs Committee**

#### **2024 Accomplishments**



## **Programs Committee** Report

#### **2024 Accomplishments**

- Launch of Summit preparation and Steering Committees
- 11 AL!VE Academies with higher attendance with awesome speakers and topics, including 4 DEI workshops
- Created new COPs, including a Disability COP, and a new partnership with AAMV to lead the Museum and Cultural Institutions COP
- Held 2nd Presenter's Bootcamp with all graduates going on to present locally, regionally, and nationally

## **Programs Committee Report** 2025 Goals

- Streamlining program marketing for consistent message and appearance
- Plan to diversify programming to including hands-on-experience for the National Summit
- Increasing awareness and visibility of COPs through strategic marketing
- Strengthen Presenter Bootcamp to include more cohesive facilitation across multiple presentation techniques
- Launch Presenter Database as a resource for AL!VE members and Local Associations

## **Advocacy Committee**



Alicia Campbell, CVA 2024 VP & 2025 Chair

## Advocacy Committee Members

- Alicia Campbell, CVA 2024 VP & 2025 Chair
- Emilie Bromet-Bauer, CVA
- Lynn Lauritzen, CVA
- Meagan Patterson, CVA
- Julie Booth, CVA
- Mark Heffner, CVA
- Sherrill Isenhower, CVA
- Megan Vixie, CVA



## Advocacy Committee Report

#### **2024 Accomplishments**

- Launched the stand-alone committee
- Determined purpose, structure, and goals
- Restructured Impact Award process
- Increased CVA study group participation

#### 2025 Goals

- Develop and refine industry standards to align with best practices and promote professional excellence within AL!VE.
- Strengthen collaborations to advocate for the profession and advance supportive legislation.
- Empower members with knowledge and tools for effective advocacy in their communities.
- Influence job-leveling standards to ensure clarity and equity in career pathways.
- Educate stakeholders on the committee's role in driving organizational and social change.

# **Advocacy Committee**

#### **2024 Impact Awards**

#### **Exemplary Leader**

- Sidney Enss, CVA
- Rob Toonkel, CVA
- Anthony Richardson, CVA

#### **Emerging Leader**

- Elizabeth Rachchh, CVA
- Molly Patterson
- Reagan Maldonado





Christi Brown, MHA, CVA Treasurer

#### **Members**

- Christi Brown, MHA, CVA, Treasurer
- Rebeccah Verhoff-Kiss, CVA
- Lori Pilley, CFRE
- Elizabeth Soch
- Cathy Thoma, CVA
- Darlene Laird, CVA
- Mari Reyes, CVA



#### **Treasurer's Report**

#### **2024 Accomplishments**

• Fiscal management & practices

#### 2025 Goals

- Continued preparations for retirement of manager/transition of Executive Director
- Continued fiscal diligence (new revenue streams and cost saving opportunities)
- Defined plans & goals for sponsorships and grant opportunities

#### Income

INCOME	2024 Budget	2024 Actual (YTD Oct)	Budget Variance
Donations (Board & General)	\$1,250	\$1,755	\$505
Partnerships/grants & sponsorships	\$20,600	\$12,297	(\$8,303)
Webinars	\$300	\$0	(\$300)
Memberships (Individual/Orgs/Local Associations)	\$37,400	\$37,010	(\$390)
Hybrid Conference	\$8,000	\$10,255	\$2,255
Administrative Fees	\$1,000	\$0	(\$1,000)
Service Enterprise	\$117,500	\$60,500	(\$57,000)
Interest Income	\$0	\$7	\$7
TOTAL	\$186,050	\$121,824	(\$64,226) <



Invoices for SE in the amount of \$36,850 were sent in October and are not reflected here, bringing the total to \$97,350.

\_\_\_\_ Budget variance with October invoices paid: \$20,150.

#### **Expenses**

EXPENSES	2024 Budget	2024 Actual (YTD Oct)	Budget Variance
Executive	\$3,710	\$2,514	\$1,196
Finance	\$6,200	\$5,689	\$511
HR	\$36,000	\$30,247	\$5,753
Marketing	\$8,950	\$6,283	\$2,667
Membership	\$300	\$224	\$76
Programs	\$4,550	\$1,217	\$3,333
Technology	\$6,390	\$4,842	\$1,548
Service Enterprise	\$116,750	\$76,210	\$40,540
TOTAL	\$182,850	\$127,226	\$55,624



Variance

2024 ACTUALS (YTD OCT)	AMOUNT	
TOTAL INCOME	\$121,824	_ With October invoices paid: \$158,674
TOTAL EXPENSES	\$127,226	
Variance	(\$5,402)	With October invoices paid: \$31,448

#### **Statement of Financial Position (as of 10/31/24)**

	TOTAL
ASSETS	
Current Assets	
Bank Accounts	
Business Market Rate Savings (9932)	51,837.28
Initiate Business Checking (7160)	41,400.70
PayPal	7,167.03
Total Bank Accounts	\$100,405.01
Total Current Assets	\$100,405.01
TOTAL ASSETS	\$100,405.01
LIABILITIES AND EQUITY	
Liabilities	
Total Liabilities	
Equity	
Opening balance equity	60,728.90
Retained Earnings	45,079.06
Net Revenue	-5,402.95
Total Equity	\$100,405.01
TOTAL LIABILITIES AND EQUITY	\$100,405.01

#### **Donor List (as of 11/26/24)**

Cash		In Kind
Anonymous	Kristin Keckler-Alexander	Better Impact
Better Impact	Darlene Laird	Bill Jordan
TD Bank	Stacey Luhring	Jackie Jordan
Grace Marie Belizario	Wendy McClure	Alana Knoppow
Christi Brown	Shelley Orloski	Traci Lato-Smith
Trudi Campbell	Jordanya Reeves	Dana Litwin
Keita Cole	Susan Sanow	Kayla Paulson
Tara Dempster	Nancy Schafer	Debbie Trueblood
Liza Dyer	Allison Schwartz	
Stephanie Eliason	Tim Suda	
Sidney Enss	Catherine Thoma	
Jenn Forristal	Rebeccah Verhoff-Kiss	
Jason Frenzel	William Webber	
Mark Heffner	Adrienne Yoe	
Monica Jasso		

w ith



## **Development Committee**



Rebecca Verhoff-Kiss, CVA 2024 Lead



Mark Heffner, CVA 2025 Chair

## **Development Committee** Members

- Rebeccah Verhoff-Kiss, CVA, 2024 Lead
- Mark Heffner, CVA, 2025 Chair
- David Horwitz, CVA
- Cathy Thoma, CVA
- Lori Pilley, CFRE



## **Development Committee** Report

#### **2024 Accomplishments**

- Established a Development Subcommittee within the Finance Committee to drive strategic growth initiatives.
- Began work on sponsorships, partnerships, and grants strategy.
- Designed a comprehensive sponsorship package guide to attract and engage potential sponsors and partners.
- Began our Matching Gift program.
- Thank you to Better Impact as our first Gold Sponsor!

#### 2025 Goals

- The Development Committee will become a stand alone committee.
- Begin to identify and implement strategies to increase financial support for our organization.
- Secure funding and sponsorships for our National Summit in 2026.
- Research and write grants for the association.

## **Contribute to Our Success** Consider Donating

Donations to AL!VE help our leaders, volunteers, board, and committees accomplish our shared strategic goals for the association.

**Donate Here** 





## **Service Enterprise**



Kayla Paulson, CVA National Administrator

## **Service Enterprise**

#### **Volunteers & Advisory Council Members**

- Grace Belizario, CVA, ACNP
- Rachel Bruns\*
- Katie Campbell, CVA
- Cathy Caples\*
- Kathy Davis
- Rosie Drumgoole, CVA\*
- Michele Francesconi
- Lauren Finke, CVA
- SJ Foltz, CDIA+
- Victoria Grasela, MPA
- Lisl Hacker\*
- Kristy Judd\*

- Abby Krstulic, CVA
- Lynn Lauritzen
- Haley Breese, CVA, ACC
- Donna Martin
- Lea Metz
- Meg Pearson
- Amy Pinger, CNP, CVA\*
- Michelle Raymer, MPA, CVA\*
- Lauren Reynolds\*
- Polly Roach, MSW
- Elizabeth Schwan-Rosenwald\*

- Adrianna Silver
- Beth Steinhorn
- Jerome Tennille\*
- Barbara Thomas
- Megan Vixie, MPA, CVA, PHR, SHRM-CP\*
- Alli Zuel, CVA\*

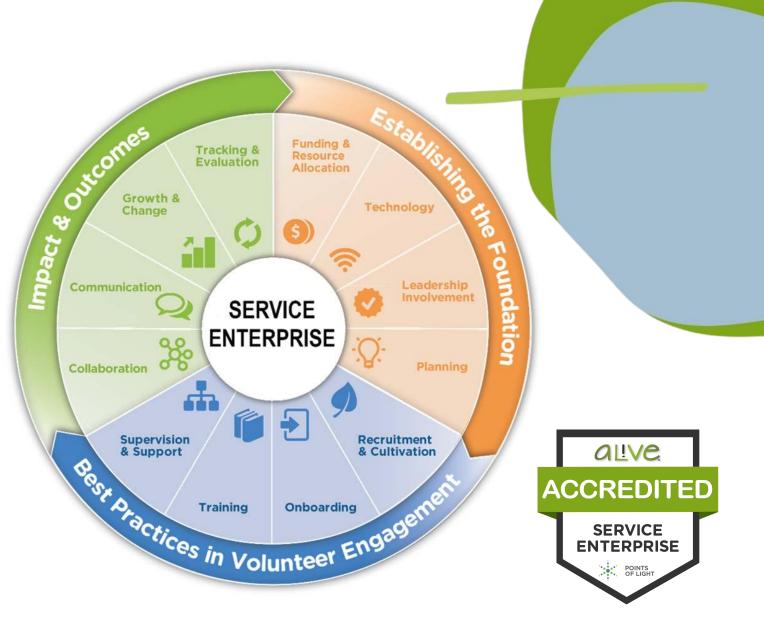


\*Advisory Council Member

## Service Enterprise Background

Beyond the Volunteer Engagement Professional

- Brings together a cross-functional team to assess & improve strategic volunteer engagement.
- Strengthens capacity through the fundamental & strategic use of volunteers & their skills to address community needs.





## **Service Enterprise** Outcomes

"Service Enterprise significantly enhanced our team's understanding of the intentional work that it takes to effectively manage a successful volunteer program. It was validating to have more buy-in for processes that ultimately supported our organization's goals to better partner with the community."



# Get Involved

## UBUNTU

- Network
- Connect
- Get Involved





#### **New Volunteer Information Session**

Wednesday, January 15 3 p.m. ET/12 p.m. PT

# In 2025 THRIVEWITH ΤM

ASSOCIATION OF LEADERS IN VOLUNTEER ENGAGEMENT





## **Thank You!**



# ASSOCIATION OF LEADERS IN VOLUNTEER ENGAGEMENT

# ANNUAL MEETING

