



Association  
for Volunteer  
Administration



**Annual Report** Fiscal Year 2004 July 1, 2003 – June 30, 2004

**Pursuing  
Excellence  
in Volunteer  
Resources  
Management**

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## Introduction

Welcome to the fiscal year 2004 Annual Report of the Association for Volunteer Administration! This report covers the operating period from July 1, 2003 through June 30, 2004. We are eager to present the challenges the association and its members have faced over the past year, the bold renewal of AVA's vision and mission, and exciting plans for the development of the association over the next five years.

The board and staff of AVA strive to do all in their power to provide members with the tools they need to work more effectively in volunteer resources management and to develop dynamic and appealing volunteer programs. If you are a member, we hope that your experience in the past year has opened new avenues of professional development, lifelong learning, notable networking opportunities, and encouragement of **excellence in volunteer programs.**

Read on to learn what AVA has done for you – and how the best days of AVA still are ahead!

### The Board of Directors

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Sheri Wilensky, Director-at-Large

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## Governance Developments

The AVA Board of Directors authorized the development of a strategic plan for the association. As part of this process, the members developed a better understanding of their roles and responsibilities, and to make the transition from being an operations-oriented board to one focused on matters of policy and governance.

At the February 2004 board meeting, Dr. John Throop from The Summit Planning Group introduced board members to the Carver governance model, and suggested that the board needed to focus on

- FIVE KEY ◆ Legal status of the association
- AREAS: ◆ Strategic thinking
- ◆ Fiduciary review (including active fund raising)
- ◆ Relationship with the executive director
- ◆ Marketing, advocacy, and networking for the association.

At the June meeting, the board conducted its meeting with coaching from Throop regarding appropriate areas of policy-governance issues for discussion and decision.

In October 2003, the following individuals completed their terms of service on the board: Denny Barnett, AVA President; Nancy McLeod, CVA, MPA, Vice President for Administration; Vida Poole, Vice President for Member Services; Nedra Cutler, Chair of Network Development; and Lucy McGowan, Director-at-Large. Baruch Levy, Ph.D. completed one term of service as Director-at-Large and was elected to a second term. Sheri Wilensky and Vicki Clark were elected as Directors-at-Large, Meghan Kaskoun was appointed Chair of Communications, and Trudy Seita was appointed as Chair of Fund Development.

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## Executive Director Search

**AVA** Executive Director Katie Campbell resigned her position as of June 30, 2003, to pursue opportunities as a trainer and consultant. She continues her long-time association with AVA in overseeing the CVA program and in other projects as needed.

The board determined that, before the search for a new executive director was started, they would hire an interim director for a period of nine months with the understanding that the individual selected would be ineligible for the permanent position. AVA advertised for interim candidates and interviewed finalists. On July 1, 2003, Pam Pettengell began her work as interim director.

Pettengell quickly familiarized herself with the many aspects of AVA's work. She focused particularly on AVA's 2003 conference, the management of the strategic planning process, coordination with the consultant retained by the board, and the initial steps in developing the 2004 conference. She worked closely with the board of directors to coordinate the October and February board meetings. Finally, Pettengell worked diligently to help strengthen AVA's financial recordkeeping and reporting.

The executive director position description was dependent on the outcome of the strategic planning process. The board believed that, depending on the strategic initiatives, the key position responsibilities very well could change and, consequently, the compensation package would have to change as well. The board approved the strategic plan at the February meeting, and the revised position description was finalized at the end of February.

It became apparent that the Search Committee could not complete its work by March 31, 2004, as planned. In fact, advertising for the position did not occur until later in March and early in April. Adhering to the original schedule, Pettengell was offered a permanent (*and superb*) volunteer management position in an organization near her home, and accepted the offer. She left the interim position on March 31.

The board's Executive Committee accepted an offer from Dr. John R. Throop, the strategic planning consultant, to assist with AVA's leadership for a short period, until a permanent director could be hired. The Executive Committee determined that Throop should not be named an interim director in order not to confuse or concern members about AVA's stability. On April 1, 2004, he assumed a formal title of Director of Special Projects so that he could communicate official AVA representation to those inside and outside of AVA.

Search Committee Chair Marguerite McKinney had to resign due to an increase of responsibility in her workplace. The rest of the committee then reviewed all resumes and selected a set of semi-finalists to interview by phone and a group of finalists to interview in Richmond.

On July 2 (just after the close of this report's coverage) the Search Committee interviewed four finalists at the AVA office and an offer was extended to one of them. The candidate declined the offer for reasons having nothing to do with AVA. At that time, the employee compensation program came under careful review as the Search Committee became aware of its competitive inadequacy. The search continued. The new executive director was to be appointed as soon as possible in the 2005 fiscal year period.

## Strategic Planning

When Katie Campbell left the executive director position, the AVA Board of Directors determined that the interim period provided an ideal opportunity for the association to review its vision and mission and to re-position its work for the future. In the board's view, the completion of the strategic plan would shape the criteria for the selection of the new executive director.

The UPS Foundation provided a \$73,800 grant to AVA with the majority of the funds devoted to the planning process. Some of the funds were set apart for consulting assistance, and some for the gathering and incorporation of member and stakeholder input into the plan.

The board issued a Request for Proposals to identify a consultant to facilitate the process. With advice from funders, they determined that it was important to have an independent review of the association and its work, so in the final stages of the process the board examined proposals from non-members only. After interviewing several candidates, the board settled on The Summit Planning Group and its lead consultant, Dr. John R. Throop, to facilitate the strategic planning process, beginning July 1, 2003.

Throop worked with the staff, and coordinated and facilitated a Planning Task Force made up of several types of members and one non-member from the business community. These included several people from different fields and constituencies within AVA:

Denny Barnett (Volunteer Manager)	Jackie Jordan-Davis (Consultant)
Nancy Gaston, CVA (Consultant)	Sarah Jane Rehnborg, Ph.D., CVA (Academic)
Sarah Hayes, (Corporate-KPMG)	Steve Schultz, CVA (Nonprofit Business)
Linda Graff (Canada-Consultant)	Sheri Wilensky (National Organization)
Christer Leopold (Sweden-Consultant)	Pam Pettengell (Staff)

He also met with the board in October in conjunction with the annual conference to review the work of AVA in its operating environment, and in February to identify key strategies to carry the work forward.

In mid-December, and then again for much of the month of January, Throop met with member focus groups in various parts of the United States. He also had a phone conference with consultants and trainers, and another with leaders of groups such as United Nations Volunteers and the International Association for Volunteer Effort so that he could gain additional perspective regarding AVA's work on the international front.

**The strategic plan redefined AVA's vision and mission.** The revised vision statement reads, *A world where every volunteer is effectively led to change lives and communities.*

The shortened version reads, *Every volunteer, effectively led.*

The revised mission statement reads, *The Association for Volunteer Administration advances volunteerism and enhances quality of life locally and globally by engaging leaders of volunteers through professional development, networking, and quality products and services.*

The shortened version reads, *Inspiring Excellence in Leaders of Volunteers.*



Ultimately, the board developed six strategic initiatives.

1. **Governance and Management.**

AVA's board will become broad-based and influential, and the association's staffing will grow in depth and in entrepreneurial spirit, so that AVA will attract the global leadership needed to support members, find funding, and advance the agenda of volunteerism.

2. **Active Advocacy.**

AVA's local visibility and global influence will grow with policy-makers and mass media outlets, so that we are recognized for advocacy of volunteer initiatives, and the infrastructure and funding to support them.

3. **Better Products and Services.**

AVA will be the primary source of information about volunteer leadership and management, by developing a wider range of quality services and products that will expand our customer base and generate revenue.

4. **Diversified Professional Development Opportunities.**

AVA will be the preferred source for professional standards and education in volunteer resources management by creating and delivering diverse professional development opportunities that meet customer needs and generate revenue.

5. **Enhanced Research and Publication.**

AVA will be the preferred provider of information about volunteer resources management, by building a more comprehensive knowledge base through increased research, interpretation, and publication.

6. **Strengthened Collaboration and Partnership.**

AVA will develop more effective leaders of volunteers by strengthening existing collaborations and partnerships and building new ones worldwide, so that AVA can deliver a wide range of services and products to a broader audience.

The plan is being implemented and monitored through an excellent business method called The Balanced Scorecard, in which strategy is turned into action, and organizational performance and outcomes are measured according to financial, human resources, work process, and ability to use intellectual capital to the organization's advantage.

The board provided unanimous support at the February meeting for the plan and its management directions, and it is shaping the work of the association and its services now and in the years to come.

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**2003  
International  
Conference on  
Volunteer  
Administration**

The 2003 International Conference on Volunteer Administration took place in Cincinnati, Ohio, USA, October 15-18. The theme of the conference, "Full Steam Ahead," emphasized the growth in professionalism and need for volunteer resources management. During the meeting, 766 persons were in attendance from the United States, Canada, and several other nations.

The number of attendees was lower than in previous years, but the conference was profitable, and the Cincinnati Planning Team was able to meet its financial objectives. After the conference, the Cincinnati team provided AVA with \$3,000 to assist the association in raising money to expand and develop its services and to attract new members.

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**Credentialing  
Developments**

Funded by a grant from The John and Lucile Packard Foundation, AVA reviewed its program for the Certified in Volunteer Administration (CVA) credential. Credentialing Program Manager Katie Campbell, CVA, working with Credentialing Technical Consultant Jackie Callahan, CVA, and a CVA Evaluation Committee, determined that the program had enough history and had credentialed enough volunteer resources managers to support an examination of effectiveness.

The committee reviewed the core competencies of the credential, the experiences of the persons seeking and achieving the credential, the nature of the study materials and the exam, and emerging needs in the field of volunteer resources management.

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**Credentialing Activity: January 2001 – July 2004**

- ▶ 313 New candidates registered
- ▶ 122 CVAs awarded
- ▶ 70 Did not successfully complete the program
- ▶ 121 Still "in process"

	2001	2002	2003	2004
New Candidates Registered (per cycle)	59	46	119	89
CVAs awarded (per calendar year)	28	3	25	63

The credentialing program is growing, with nearly 2.5 times the number of candidates completing their credentialing from 2003 to 2004 alone.

**Communications / Publications**

One result of the member focus group input was an on-line and print publications review, and a review of web site development. It became apparent from member comments that more timely and relevant content from periodical publications would encourage greater use and application of the best thinking and the most dynamic experience of experts and members alike.

**AVA MEMBER BRIEFING.** *Member Briefing* underwent a content and organization review. Issued six times per year, *Member Briefing* is the primary communication with all member constituencies. Paige Tucker, Marketing and Membership Director, created a new publication plan with member-driven themes, information and announcements four times a year, and with special focused themes twice each year. Content was more carefully organized to enable busy members to find quickly what they needed. A global component was added to address the needs of international members and those North American members serving significant ethnic communities.

The first themed quarterly issue, released in the Spring, centered on best practices in volunteer recognition (with National Volunteer Week occurring in April). The member contributions were numerous and excellent. Future issues will focus on subjects such as advocacy for the profession and risk management.

**THE JOURNAL OF VOLUNTEER ADMINISTRATION.** Under the expert direction of Editor Mary Merrill, and the work of the editorial committee, four well-received issues focused on topics such as the psychological contract/motivations of volunteers, volunteer screening issues and procedures, on-line volunteering, and working with teen and student volunteers. Initial exploration began in fiscal year 2004 regarding whether to publish the journal on-line in an Adobe PDF format, and the discussion continues.

We want to thank all involved with the development of the journal especially:

- Mary V. Merrill, *Editor-in-Chief*
- R. Dale Safrit, *Associate Editor*
- Zora McLachlan, Jan Davison, Colin Hoare, *Copy Editors*
- Meghan Kaskoun, *Board Liaison*

**Editorial Review Board**

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- Tere Calvo
- Wendy MacDonald
- Nancy Macduff
- Michael Lee Stills, CVA

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- Christine Nardecchia
- Connie Pirtle
- Pamela Robinson, CVA
- Larissa R. Silver
- Marti Sowka
- Barbara Wentworth

## New Publication Releases

Three new publications were in preparation during fiscal year 2004:

1. *An Advocacy Toolkit* to assist members in promoting the profession in their organizations and workplaces;
2. *A Communications Toolkit* to assist members in describing to internal and external audiences the results of volunteer action as well as the importance of volunteer programs; and
3. *An Executive Guide to Volunteer Programs* to assist CEOs and executive directors of nonprofits and public agencies in thinking through the importance of volunteer management. These publications will be released in fiscal year 2005, with the Advocacy Toolkit slated for a summer release.

**WEB SITE.** The AVA web site has not been reviewed thoroughly in a few years. The strategic planning input articulated the need for a revamped electronic presentation. Members wanted more content to be reserved for members only. They also wanted the opportunity to register online for the annual conference, and to order and pay for materials and sign up and pay for the credentialing program electronically. These changes will occur in the next two years.

## Membership Trends

Membership in the Association for Volunteer Administration remained relatively static in fiscal year 2004. On July 1, 2003, there were 2,072 members representing themselves as well as nonprofits and public agencies at the local, state/provincial, and federal levels in the United States and Canada, and 18 countries. In fiscal year 2004 the cost remained at US\$50 for an individual membership.

As part of the strategic planning process, the membership patterns were reviewed, and the board decided in June 2004 to adopt a new membership structure to go into effect in January 2005. Instead of one membership category, there will be seven: organizational (three positions for one price); individual; individual in an AVA affiliate; student; consultant/trainer; business; and large affinity group. AVA began to beta-test the large affinity group concept with the United States Veterans Administration, signing up volunteer managers at all VA sites at the same time.

## 2004 Donors

Thank you to our donors and sponsors.

2002 International Conference  
on Volunteer Administration  
Committee  
Sal Alaimo, CVA  
Jean S. Ambrose  
Dave Andrews and Clyde Yoshida  
Deirdre C. Araujo  
Bank of America Matching Gifts  
Marjorie M. Bhavnani, CVA  
Denny Barnett  
Douglas Blankinship  
Debra Bowman  
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Katie Campbell, CVA  
Rita Chick  
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 John R. Throop, Director of  
 Special Projects  
 Paige Tucker, CVA, Director of  
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 Alice Soto, Office Manager

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 Darlene Reilly, Graphic Design

**ADMINISTRATIVE VOLUNTEERS**

Emily Driver  
 Kathy Perun  
 Vida Poole  
 Paul and Virginia Tucker

**Professional Service**

Many of our members were very much involved in the ongoing work of the association between July 1, 2003 and June 30, 2004 in the areas of administration, communication, and professional development. We salute them for their service to AVA.

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Item writer

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## Professional Awards

AVA is honored and proud to bestow awards on individuals, organizations, and corporations that have demonstrated excellence in the volunteer management profession, and in service to their fellow professionals in the association. In fiscal year 2004, we saluted the award recipients:

### The Journal of Volunteer Administration Award

Paula M. Anderson, CVA  
Mary E. Zimmerer, Ph.D, CPA

### Distinguished Service Awards

Mary Merrill  
City of Plano Volunteer Resources Program  
JPS Health Network

### Volunteer Administrator of the Year Award

Jane Hilfer, CVA

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## Financial Results

AVA switched fiscal year boundaries in 2003, from a January 1 to December 31 year to a July 1 to June 30 year. The mid-year fiscal year reflects more accurately the pattern of how revenues are generated and spent. As a result, there was an 18-month financial reporting period to enable the transition in fiscal years, but a six-month review at June 30, 2003. This review enables a comparison from June 30, 2003 to June 30, 2004 to determine financial performance.

AVA held its own financially as reflected in the association's audited statements as of June 30, 2004. From a cash standpoint, AVA generated \$590,270 in income from memberships, the annual conference, subscriptions to *The Journal of Volunteer Administration*, and other sources. AVA had cash expenses of \$574,295 but also had some capital improvements, such as an upgraded computer service and rental of more suitable office space for association management.

In terms of economies, the association saved some money on the Interim Director's compensation. The positions of Office Manager and Marketing and Membership Director were not full-time and also were paid at a rate much lower than market rate. The association has done very little advertising or marketing, and travel expenses were kept at a minimum. Much specific professional work was outsourced and underwritten by grant funding.

Factoring in various capital expenses and prepaid expenses, the association decreased in cash and cash equivalents by \$17,067. Additionally, for an association or organization its size, AVA has a minimal reserve account from which to draw for operating expenses ultimately, about \$30,000 at year end. That reserve needs to be much closer to \$100,000 for long-term financial viability and to be able to cope with unexpected losses. Total operating revenues from all sources in fiscal year 2004 were \$527,356.97. Total expenses in fiscal year 2004 were approximately \$553,386.40, with the deficit financed by some grant funds and some use of reserves.

The board has developed strategies to address the long term financial condition of the association, striving for not only greater efficiencies in expenses, but also greater income from greater attendance and income generation at the annual conference, grant sources, membership, and fund raising. As part of the planning process, the board also is attempting to determine AVA's necessary level of financial health if it grows according to the plan implementation.

As one way to plan financial management more carefully and to monitor financial performance more closely in fiscal year 2005, the board will work with AVA's first-ever program-based budget, developed by Throop.



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## What's Ahead in Fiscal Year 2005

In fiscal year 2005, a new executive director will be in place at AVA to help guide the implementation of the strategic plan, strengthen management practices, and raise the visibility of the association. He or she has a large responsibility ahead, helping the association grow in numbers, influence, and strength in ways never before reached.

The membership structure will change, as outlined in this report. It is the board's sincere hope that more people, involved not only in the management of volunteer programs but also in the support and supervision of volunteer resource managers, will find AVA to be a useful and valuable association.

More professional development opportunities will be offered in the current fiscal year, especially in teleconferencing and in the "webinar" format. AVA also plans to offer more products and services, both through internal development as well as through partnerships with quality service and product providers. In this way, AVA will offer more to its members and will be more attractive to potential members.

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## From the President of the Board of Directors

What a year this has been! As a former secondary teacher, I compare the progress of AVA this past year to the cognitive and emotional growth spurts I observed in so many of my older adolescent students as they made great leaps in understanding of their environment, their strengths, and their possibilities.

As an association, we have made great leaps in:

- ▶ **CONFIDENCE:** Having demonstrated that we are competent managers, we now also claim our rightful place at the leadership table—not just managing change envisioned by others, but helping to shape the future, equipping, and empowering ourselves and others as leaders.
- ▶ **COLLABORATION:** We have taken part in a growing number of dialogues with current and potential partners, exploring as equals how we might combine strengths and resources effectively for our mutual benefit and the benefit of society.
- ▶ **COMMUNICATION:** We communicated in depth with hundreds in the strategic planning process. And we are better able to communicate with our members around the globe by e-mail. Members have responded promptly and positively – I typically receive 40 or 50 personal replies to an e-mail message to members.
- ▶ **CREATIVITY:** We have a new vision and mission, and are developing a range of innovative paths toward their fulfillment, always aware of the effects on finances, governance, and staff. New membership categories, strategic directions and initiatives promise to move us well beyond business as usual.

We do not claim to know exactly what AVA will look like in a year, five years, or a decade. We do know that change will sometimes feel uncertain or chaotic. But we have a vision. In the words of planner Gil Rendle, "Discernment can be like driving an automobile at night; the headlights cast only enough light for us to see the next small bit of road immediately in front of us. Ultimately, discernment requires the courage to keep moving toward the vision that is not yet reality."

We are off to a good start on the path toward a world where every volunteer is effectively led to change lives and communities. And we are committed to inspiring excellence in leaders of volunteers. I celebrate our progress and look forward to an ever-more-effective future for AVA.

*Nancy A. Gaston, CVA*  
President  
AVA Board of Directors



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