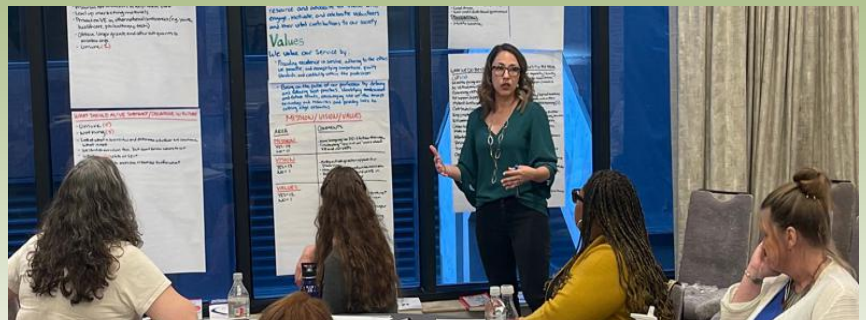




ASSOCIATION OF LEADERS IN VOLUNTEER ENGAGEMENT



## Strategic Plan 2024-2028



## To Our AL!VE Members,

In the Summer of 2023, the AL!VE Board of Directors convened for two days to develop our new Strategic Plan for 2024-2028. The need to do this was simple. Those volunteers who sat on the previous and current board of directors and AL!VE committees did what was unforeseeable when the previous Strategic Plan was established – we had completed all of the goals and objectives a year early!

The new goals and objectives set forth in the following Strategic Plan were conceived based on our Member Survey results, the current volunteer engagement environment, the growth of the association and the natural continuation of the previous goals. Throughout our discussions we kept in mind AL!VE 's mission, to enhance and sustain the spirit of volunteering by fostering collaboration and networking, promoting professional development, and providing advocacy for leaders in community engagement.

As you read through the new Strategic Plan, we hope that you will be as excited as we are about what the future holds for our national association and its members. It is our goal to strengthen volunteer engagement professionals and maintain ourselves as leaders in our field. As a member-driven organization, we invite you to join us on this journey by volunteering your time and talent on a special project, a committee or becoming a board member.

Thank you for your continued involvement and support for our mission.

*Yours in Service,*

*Cathy Thoma, CVA*

### AL!VE Executive Committee:

**Cathy Thoma**, CVA, President  
**Darlene Laird**, CVA, President Elect  
**Wendy McClure**, CVA, Secretary  
**Christi Brown**, MHA, CVA, CDVS, CAVS, Treasurer

**Grace Belizario**, CVA, Vice President of Marketing  
**Ashley Rieser**, CVA, Vice President of Membership  
**Jordanya Reeves**, CVA, Vice President of Programs  
**Alicia Morris Campbell**, CVA, Vice President of Advocacy  
**Jenn Forristal**, CVA, Equity Leader

### AL!VE Board of Directors:

**Carol Ayars**, CVA  
**Shelli Beck**, CVA  
**Julie Booth**, CVA

**Mark Heffner**, CVA  
**Amy Pinger**, CVA

**Allison Schwartz**  
**Rebecca Verhoff-Kiss**, CVA  
**William Webber**, CV

### AL!VE Staff:

Gretchen Jordan, CVA, (She/Her), AL!VE Association Manager  
Kayla Paulson, CVA (She/Her), Service Enterprise Administrator

### The Past:

## Our Mission, Vision & Values

### Mission

ALIVE 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.

*We are:*

- Professionals with expertise in volunteer management and engagement
- Advocates for the recognition and appreciation of Volunteer Management
- Trusted advisors for educational tools, research, and insights
- Educators of decision makers in all volunteer management arenas
- Influencers for redefining job descriptions, compensation, and the position of volunteer manager in our organizations
- Diverse, inclusive and member driven

### Vision

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

### Values

#### **We Value Our Service by:**

- Providing excellence in service, adhering to the ethics we promote, and exemplifying competence, quality standards and credibility within the profession.
- Being “on the pulse” of our professions by defining and following best practices, identifying current and future trends, encouraging the use of newest technology and providing access/links to cutting edge resources.
- Relevancy, progression and having impact within our profession.
- The promotion of learning and growth through training, connection of resources and providing forums for thought leadership to meet the needs of multi-level expertise within our membership.

#### **We Value Collaboration by:**

- Investing in the future of volunteerism through capacity building and being strong and viable in the communities we serve.
- Honoring current relationships within the field and building new ones.
- Building alliances that encourage innovation, creativity, vision, and passion.
- Being fluid and flexible in our approach with other organizations.

### We Value Stewardship by:

- Diversity, inclusiveness, sensitivity and accessibility.
- Governing our organization with integrity and accountability by incorporating sustainable practices, both philosophically and financially.
- Building effective leadership on a local, statewide and national level and collectively influencing decisions that affect our profession.

### We Value Our People by:

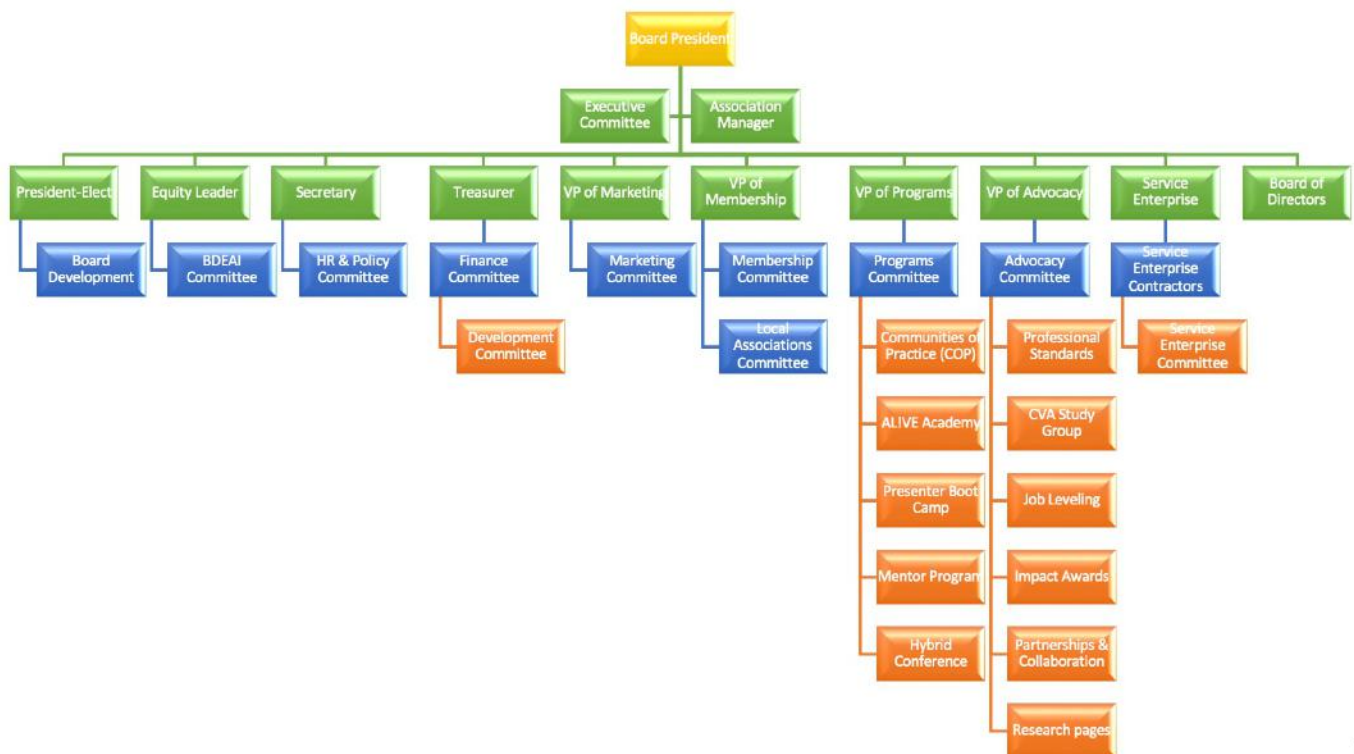
- Attracting, retaining, fostering and honoring the best and brightest talent.
- Engaging and recognizing the talents of volunteers in the mission and work of our organization.
- Open, proactive, transparent communication through being visible to all members.

## Organizational Structure

As a membership organization, each level of AL!VE's structure consists of dues-paying members at each level.

Our association's bylaws (also located on the AL!VE website [here](#))

has designed the following organizational structure that assists with all areas of the association:





Executive Committee	BDEAI Committee	Finance Committee
<ul style="list-style-type: none"> <li>• Consists of elected positions on the board</li> <li>• Sets board agendas</li> <li>• Takes necessary action between meetings</li> </ul>	<ul style="list-style-type: none"> <li>• Consists of board &amp; members</li> <li>• Manages nomination and election process</li> <li>• Manages board orientation and recognition</li> </ul>	<ul style="list-style-type: none"> <li>• Consists of board &amp; members</li> <li>• Prepares annual budget and monthly reports</li> <li>• Creates fund development plan</li> <li>• Creates and enforces financial policies</li> <li>• Oversight of Development Committee</li> </ul>
HR & Policy Committee	Executive Committee	BDEAI Committee
<ul style="list-style-type: none"> <li>• Consists of board &amp; members</li> <li>• Oversight of policies related to staff and volunteers</li> <li>• Places volunteers on committees or assignments</li> <li>• Tracks volunteer hours</li> </ul>	<ul style="list-style-type: none"> <li>• Consists of elected positions on the board</li> <li>• Sets board agendas</li> <li>• Takes necessary action between meetings</li> </ul>	<ul style="list-style-type: none"> <li>• Consists of board &amp; members</li> <li>• Trains and advises board and committee on BDEAI issues</li> <li>• Advocates for BDEAI in all aspects of ALIVE's mission and vision</li> </ul>
Advocacy Committee	Marketing Committee	Membership Committee
<ul style="list-style-type: none"> <li>• Consists of board &amp; members</li> <li>• Researches industry trends, legislation, etc. with recommendations for board action</li> <li>• Recognition for Volunteer Engagement Professionals at the national level</li> <li>• Promotes professional development</li> <li>• Develops partnerships</li> </ul>	<ul style="list-style-type: none"> <li>• Produces and manages website, newsletters, e-blasts, social media, etc.</li> <li>• Coordinates annual in-person networking</li> </ul>	<ul style="list-style-type: none"> <li>• Oversees member retention</li> <li>• Welcomes new members (calls, webinar)</li> <li>• Manages members-only web page</li> <li>• Conducts annual member survey</li> <li>• Oversight of Local Associations Committee</li> </ul>
Programs Committee	Service Enterprise	Board Development
<ul style="list-style-type: none"> <li>• Creates/ manages all programming</li> <li>• Runs ALIVE Academy and develops members to present webinars</li> <li>• Facilitates Communities of Practice</li> <li>• Mentoring Program</li> <li>• Produces Conferences</li> </ul>	<ul style="list-style-type: none"> <li>• Works with Training &amp; Implementation Partners</li> <li>• Sets and updates curriculum</li> <li>• Provides training for Trainers or Training &amp; Implementation Partners</li> <li>• Markets Service Enterprise program</li> </ul>	<ul style="list-style-type: none"> <li>• Consists of board &amp; members</li> <li>• Manages board elections</li> <li>• Provides board recognition</li> </ul>

### A Look at ALIVE's Successes

While ALIVE has cultivated many successes since inception, our board focused on the progress made over the last three years. Listed below are the highlights of goals set and accomplished by our board and committees. This information has been presented to our members over the last three Annual Meetings each November.

#### 2021

- Hosted 11 monthly ALIVE Academies
- Offered three bonus webinars on communication, virtual programs, and mental health
- Facilitated 42 Communities of Practice (COPs), launching 8 new COPs and the CVA study group
- Continued Emerging Leaders Mentor Program in Spring and Fall
- Recognized leaders in the field with the 2021 Impact Awards
- Hybrid Conference enrolled 41 host sites with 850+ participants
- Offered free access to BDEAI ALIVE Academy sessions
- Updated Board recruitment process to remove access barriers and encourage diverse applicants
- 9 member webinars and 4 member socials
- Hosted first Annual National Summit of Local Associations
- Developed a resource to share best practices with local associations on Board diversification

#### 2022

- Hosted 11 monthly ALIVE Academies
- Submitted a successful proposal to Points of Light to administer Service Enterprise
- Selected three highly qualified contractors as administrators for Service Enterprise and began program transition
- 10 member webinars and 4 member socials
- Hosted second Annual National Summit of Local Associations
- Developed and implemented a metrics tracking dashboard\*
- Developed and implemented a Board Exit Interview process\*
- Launched a Volunteer Engagement Professional Job Leveling Project\*
- Hybrid Conference enrolled 43 host sites with 850+ participants
- Facilitated 64 Communities of Practice (COPs), launching 2 new COPs
- Joined IAVE
- Evaluated organizational structure to ensure it serves current and future needs\*

\*Connected to strategic planning goal

#### 2023

- Amplified BIPOC & LGBTQIA+ voices at monthly Board meetings.
- Provided assistance in ensuring BDEAI perspective for information on the Annual Hybrid Conference.
- Developed a 'Pay What You Can' membership option
- Hybrid Conference had 46 total host sites and 900+ attendees
- Facilitated 72 Communities of Practice (COPs), launching 1 new COPs
- Explored consultant support to broaden BDEAI communication and educational initiatives.
- 9 member webinars and 4 member socials
- ALIVE Ambassador Program was developed to roll out in 2024
- Hosted a 2023 Board Retreat and Strategic Planning Session
- Continued to strengthen succession planning for board recruitment and future sustainability
- Developed a Service Enterprise Advisory Committee and implemented action items from SE Proposal
- Finalized VEP job leveling project and launched planning of advocacy for inclusion of VEP in DOL (Department of Labor) occupational handbook

## The Future:

### Strategic Plan: Desired Outcomes

After reviewing all information, the Executive Committee developed an action plan and prioritized desired outcomes over the next four years. While the table below places these items in time frames for completion and priority (e.g., high, medium, low), all these items are important and will continually review our plan to ensure these desired outcomes remain relevant and are in the best interests of ALIVE and its members.

#### DESIRED OUTCOMES- DETAILED

TIME FRAME	DESIRED OUTCOME
<b>1-2 YEARS</b>	
<b>HIGH</b>	<p><b>STAFFING/ ADMINISTRATION</b></p> <ul style="list-style-type: none"> <li>• <b>Determine staffing model that best positions ALIVE to meet current and future goals.</b> Staffing model should consider the role of contracts vs. employees, as well as the membership and Service Enterprise leadership and administration needs and required funding.</li> <li>• <b>Create succession plan for the Manager's departure at the end of 2024 that includes transition time and process documentation.</b> After implementation, plan should be reviewed and documented to serve as a resource for local associations and future ALIVE leadership transitions.</li> </ul> <p><b>FUND DEVELOPMENT</b></p> <ul style="list-style-type: none"> <li>• <b>Create and implement a funding strategy inclusive of sponsorships, grants, and fundraising.</b> Strategy should include collecting information about funding needs from committees and programs, identifying potential funding sources, and conducting outreach or applications in coordination with relevant committee representatives. Plan should be documented and activities tracked.</li> </ul> <p><b>BDEAI</b></p> <ul style="list-style-type: none"> <li>• <b>Conduct assessments of ALIVE to determine strategy/resources needed for BDEAI (Belonging, Diversity, Equity, Access, &amp; Inclusion).</b> (e.g., ICA, recommendations from retreat, board training, membership training and resources)</li> <li>• <b>Review and update, as needed, the Commitment to Community statement annually at minimum.</b> Ensure transparency with ALIVE's current activities and progress while communicating what the organization seeks to achieve.</li> </ul> <p><b>SERVICE ENTERPRISE</b></p> <ul style="list-style-type: none"> <li>• <b>Determine Service Enterprise long-term structure/funding strategy</b> Review program needs and identify potential grants, sponsorships, in-kind, and fee for service models to secure resources.</li> <li>• <b>Create Service Enterprise marketing plan</b> Identify success stories, create rationale for leadership- buy-in, develop earned media among trade publications, etc for hub and participant recruitment</li> <li>• <b>Ensure year over year increase of number of Training &amp; Implementation Partners, diagnostics, and number of organizations achieving accreditation</b> Determine baselines and set goals for categories, identifying strategies and target audiences to reach each.</li> </ul>



	<p><b>ADVOCACY</b></p> <ul style="list-style-type: none"> <li>• <b>Determine strategy and procedures for advocacy (e.g., recommendations from retreat)</b></li> <li>• <b>Advocate for inclusion of Volunteer Engagement Professionals with Department of Labor</b> Leveraging Career Pathways guide, convene a working group to research, develop, and implement an initiative to advocate to the Department of Labor.</li> <li>• <b>Release Career Pathways guide with accompanying template Volunteer Engagement Professional position descriptions</b></li> </ul> <p><b>MEMBERSHIP</b></p> <ul style="list-style-type: none"> <li>• <b>Create strategy for ALIVE Ambassadors</b> Develop position descriptions, orientation, training, supervision, recognition, and evaluation plans for ALIVE Ambassador program in collaboration with the HR committee. Recruit volunteers and implement program, evaluating for process and outcome improvement.</li> <li>• <b>Increase of membership rates</b> In collaboration with marketing, identify outreach and marketing opportunities to increase individual memberships. Review current membership and identify underserved areas for focus. Identify potential national groups and partners (AZA, AAMV, National Parks) and develop and implement plans to conduct outreach.</li> </ul> <p><b>MARKETING</b></p> <ul style="list-style-type: none"> <li>• <b>Develop a marketing campaign to grow membership</b> Collaborate with membership to develop and track goals for membership growth, including identifying current underrepresented areas. Develop marketing campaign materials in collaboration with the BBDEAI committee to ensure an inclusive approach is used.</li> <li>• <b>Streamline Marketing Processes</b> Develop and implement efficient marketing processes to ensure consistent and effective communication with ALIVE's target audience. Actions include standardizing content creation, using marketing automation, enhancing data management, and establishing a content calendar and efficient project trackers.</li> <li>• <b>Develop and Implement Marketing Templates and Standardizations</b> Create and utilize standardized marketing templates and guidelines to ensure consistency and efficiency across all marketing materials. This includes developing templates for email campaigns, social media posts, and promotional materials, as well as providing training for staff on their effective use.</li> <li>• <b>Enhance Website User Experience</b> Improve website navigation, content accessibility, and overall user experience to increase visitor engagement and satisfaction. This includes a user experience audit, redesigning navigation, optimizing content, and ensuring mobile and accessibility features.</li> </ul>
<p><b>MEDIUM</b></p>	<p><b>PROGRAMS</b></p> <ul style="list-style-type: none"> <li>• <b>Explore need, opportunities, and interest for national in-person professional development or opportunities for an ALIVE conference track to other national conferences.</b> Based on results, develop and implement a plan to meet identified needs.</li> </ul> <p><b>MEMBERSHIP</b></p> <ul style="list-style-type: none"> <li>• <b>Develop a volunteer engagement roadmap (e.g., how ALIVE supports professional development throughout career)</b></li> </ul>

	<p><b>MARKETING</b></p> <ul style="list-style-type: none"> <li>• <b>Design new strategic plan for 2024-2028</b> Collaborate with the Executive Committee to incorporate information to communicate the mission and vision of the organizations and goals and objectives working toward that mission.</li> </ul>
<b>LOW</b>	<p><b>STAFFING/ ADMINISTRATION</b></p> <ul style="list-style-type: none"> <li>• <b>Develop Past President Advisory Board, determine roles and expectations.</b></li> </ul>
<b>2-4 YEARS</b>	
<b>HIGH</b>	<p><b>HR &amp; POLICY</b></p> <ul style="list-style-type: none"> <li>• <b>Meet standards for operating as an accredited Service Enterprise.</b> Assess current internal volunteer engagement practices, ensuring structures for identifying and recruiting for new roles, including project-based roles outside of committees. Complete SE diagnostic, participate in training, and develop an implement action plan to achieve accreditation.</li> </ul> <p><b>MEMBERSHIP</b></p> <ul style="list-style-type: none"> <li>• <b>Increase member retention rates</b> Develop a process for measuring and tracking member retention rates, and set retention goals. Leveraging the member survey and member interviews, identify and implement activities to increase retention.</li> </ul>
<b>MEDIUM</b>	<p><b>STAFFING/ ADMINISTRATION</b></p> <ul style="list-style-type: none"> <li>• <b>Determine business residency for long-term planning/staffing.</b> This review will include location of physical address, mailing address, banking, incorporation, copyright, any other location-based systems.</li> </ul> <p><b>INFRASTRUCTURE</b></p> <ul style="list-style-type: none"> <li>• <b>Review technology, file storage, and communication platforms and identify alternatives as needed.</b> Conduct a review of current technology and organizational systems and compare with alternative systems in price, usability, and functionality. Solicit feedback from committees to ensure needs are met, and if needed, consider productivity losses from transitions to new systems. If changes are determined, develop and implement transition plan and timeline including training of committee members. communication are meeting needs or recommend and transition to alternatives.</li> </ul> <p><b>PROGRAMS</b></p> <ul style="list-style-type: none"> <li>• <b>Investigate and create a resource or toolbox for new VEPs</b> Develop training pathway and template toolkit, as well as process to evaluate and enhance resources based on user feedback.</li> </ul>
<b>LOW</b>	<p><b>MISSION/VISION/ VALUES</b></p> <ul style="list-style-type: none"> <li>• <b>Document ALIVE's history</b> Conduct interviews and collect historical documents and materials from veteran board members, staff, and leaders in the profession to preserve ALIVE's history.</li> </ul> <p><b>ADVOCACY</b></p> <ul style="list-style-type: none"> <li>• <b>Delineate relationship between ALIVE Standards and Service Enterprise</b></li> </ul>

3-5 YEARS	
LOW	<p><b>MISSION/VISION/ VALUES</b></p> <ul style="list-style-type: none"> <li>• <b>Review and update, as needed, ALIVE's organizational Values.</b> Ensure alignment with ALIVE's mission and vision, and clarity in the language used.</li> </ul>

## Next Steps:

ALIVE's Board of Directors have integrated more immediate desired outcomes into the current goals. A summary of all progress on goals is provided at the memberships Annual Meeting each November.

Should members be interested in helping us move these objectives forward, please review current opportunities and complete an application [here](#).

Should you have any questions, please feel free to reach out to us at [info@volunteeralive.org](mailto:info@volunteeralive.org).

Thank you!