AAVSO CAP Organization Review

June 9, 2020
Agenda

• Financial
• IT
• Marketing
• Volunteers
• Board Governance
Real Purchasing Power Has Been Lost

AAVSO’s Assets, 2004-20 (Excluding Cash Reserves)

- $15.2M 2004 Assets, Nominal
- $21.2M 2004 Assets in 2020 Dollars
- $13.3M 2020 Assets

37% Lost Purchasing Power

- $15.5M
- $21.2M
- $13.3M
- $2.5M Real Estate FMV
Real Purchasing Power Has Been Lost (cont’d)

- Adjusted for inflation into 2020 dollars, AAVSO’s assets (endowment + real estate) have declined by more than 37% since 2004

- The Main Reasons:
  - Investment strategy underperformed and fees excessive
  - Overspending
  - Insufficient fundraising effort and yield
Over-Reliance on the Endowment is Risky

• Yale University endowment study, key takeaway:
  o If over 30% of operating budget is funded by the endowment, an organization faces unsustainable financial risks
    ▪ Report: Pioneering Portfolio Management, by David F. Swensen

• AAVSO relies on its endowment to fund over 75% of operating expenses (more than twice the Yale threshold)
  o The relatively large size of AAVSO’s endowment has weakened the pursuit of fundraising and grant revenues
    ▪ Typically, EDs spend 20-40% of time on fundraising
    ▪ Typically, Boards are actively assisting ED as ambassadors cultivating larger donor candidates
Status Quo Will Consume Purchasing Power

Yr End Value of AAVSO Assets, Including Cash + RE @ Constant $2.5M

- **Status Quo, Nominal**: Assets by 2025 will decline by over $1.75M vs. today.
- **Status Quo, Inflation Adjusted**: Assets by 2025 will be $13.3M, representing a nominal decline of $500K vs. today.
The Status Quo Model is Unsustainable Over the Long Term

By Status Quo, we mean:

- No reductions in current operations, staff, and expenses
- Current IT expenditure rate continues
- Low 2% inflation rate assumed (even for health insurance)
- Modest estimate of grants and fundraising gifts
- Endowment generates annual return of 5.25% after fees
- No sale of the real estate asset

If the status quo continues through 2025:
- Adjusting for inflation, AAVSO’s assets will decline by $1.75M
- Future will suffer an increasing loss of purchasing power
An Alternative “Prudent” Model

With prudent changes, today’s purchasing power can be maintained, after adjusting for inflation.

- Sell the real estate – est. proceeds of $2.5M (slides 9-11)
- Change investment advisors; seek low-cost, passive strategies
- Engage professional fundraising consultants to increase grants and gifts to $230K+ per year (slide 12)
- Cut at least $50K/yr in expenses (slide 13)
- Prepare to reduce expenses or grow grants/gifts further *IF*:
  - Real estate sells for less than $2.5M
  - Inflation, especially health care, is higher than 2% per year
  - Portfolio doesn’t return 5.25% every year
“Prudent” Model Protects AAVSO’s Purchasing Power in the Future

Value of AAVSO Assets, Inflation Adjusted, Incl. Cash + RE $2.5M

- **Status Quo 2025 = $12M**
- **Prudent 2025 = $13.8M**

<table>
<thead>
<tr>
<th>Year</th>
<th>Status Quo</th>
<th>Prudent</th>
</tr>
</thead>
<tbody>
<tr>
<td>2020</td>
<td>$11,000,000</td>
<td>$12,500,000</td>
</tr>
<tr>
<td>2021</td>
<td>$11,500,000</td>
<td>$13,000,000</td>
</tr>
<tr>
<td>2022</td>
<td>$12,000,000</td>
<td>$13,500,000</td>
</tr>
<tr>
<td>2023</td>
<td>$12,500,000</td>
<td>$14,000,000</td>
</tr>
<tr>
<td>2024</td>
<td>$13,000,000</td>
<td>$13,500,000</td>
</tr>
<tr>
<td>2025</td>
<td>$13,500,000</td>
<td>$14,000,000</td>
</tr>
</tbody>
</table>

- **Prudent 2025 = $13.8M**
- **Status Quo 2025 = $12M**

- **Status Quo, Inflation-Adjusted**
- **Prudent, Inflation-Adjusted**
Case for Sale of HQ Real Estate – Unlocking an Illiquid Asset

• Today, Real Estate locks up 22% of AAVSO’s assets

• By selling RE and reinvesting in portfolio, realize $100K+ of additional net income each year

• AAVSO doesn’t use existing space efficiently now

• Rental of excess, unused space at HQ is unreliable

• Continuing to own the Real Estate adds risk of deferred maintenance costs and consumes staff time
Case for Sale of HQ Real Estate – Higher Value as Residential Property

Existing HQ at Bay State Rd Cambridge is poorly configured, underutilized space

Recent multi-unit condo next door @ 54 Bay State Rd. is a higher-value property
# Impact of Selling the Real Estate

<table>
<thead>
<tr>
<th>Real Estate Value</th>
<th>$2,500,000</th>
<th>$3,000,000</th>
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</thead>
<tbody>
<tr>
<td><strong>Income</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rent Income</td>
<td>$40,000</td>
<td>$0</td>
</tr>
<tr>
<td>Endowment Income (5.25%)</td>
<td>$131,250</td>
<td>$157,500</td>
</tr>
<tr>
<td><strong>Total Income</strong></td>
<td>$40,000</td>
<td>$157,500</td>
</tr>
<tr>
<td><strong>Expenditures</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ED Lodging Expense</td>
<td>$0</td>
<td></td>
</tr>
<tr>
<td>Maintenance and Repairs</td>
<td>-$16,800</td>
<td>-$2,000</td>
</tr>
<tr>
<td>Property Insurance</td>
<td>-$13,500</td>
<td>-$3,000</td>
</tr>
<tr>
<td>Utilities</td>
<td>-$11,400</td>
<td>-$5,000</td>
</tr>
<tr>
<td>Large Repairs</td>
<td>-$10,000</td>
<td></td>
</tr>
<tr>
<td>Office Rent</td>
<td></td>
<td>-$43,500</td>
</tr>
<tr>
<td>Staff O&amp;M Time</td>
<td>-$5,000</td>
<td>-$1,000</td>
</tr>
<tr>
<td><strong>Total Expenditures</strong></td>
<td>-$56,700</td>
<td>-$54,500</td>
</tr>
<tr>
<td><strong>Net Gain/(Loss)</strong></td>
<td>($16,700)</td>
<td>$76,750</td>
</tr>
</tbody>
</table>

Net Gain/(Loss) if Annex Not Rented: ($56,700)  
Note: ED Lodging Not Considered
Hire Fundraising and Grant Consultants to Increase Non-Portfolio Revenues

<table>
<thead>
<tr>
<th>Grants, Donations and Bequests</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
<th>2022</th>
<th>2023</th>
<th>2024</th>
<th>2025</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status Quo Total</td>
<td>$185,822</td>
<td>$60,000</td>
<td>$75,000</td>
<td>$76,500</td>
<td>$78,030</td>
<td>$79,591</td>
<td>$81,182</td>
</tr>
<tr>
<td>Prudent Total</td>
<td>$185,822</td>
<td>$60,000</td>
<td>$75,000</td>
<td>$145,000</td>
<td>$220,000</td>
<td>$224,400</td>
<td>$228,888</td>
</tr>
<tr>
<td>Incremental Revenue</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$68,500</td>
<td>$141,970</td>
<td>$144,809</td>
<td>$147,706</td>
</tr>
<tr>
<td>Grant and Donation Consultants Cost</td>
<td>$50,000</td>
<td>$50,000</td>
<td>$50,000</td>
<td>$50,000</td>
<td>$50,000</td>
<td>$50,000</td>
<td>$50,000</td>
</tr>
<tr>
<td>Net Benefit</td>
<td>$0</td>
<td>$18,500</td>
<td>$91,970</td>
<td>$94,809</td>
<td>$97,706</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Reasons to engage professional fundraising consultants:

• Not employees: Costs paid for by incremental revenues
• Create organized fundraising program (prioritize targets, assign follow-ups, actively track results)
• Focused messaging, guidance on campaign sequencing
• Anticipate lag between hiring consultant and increased fundraising
Identifying Possible Cost Savings

• Office and Location Questions
  o Can AAVSO become a virtual organization and save $43K in rent?
  o How many FT staffers needed on site, how much space required?
  o Can 8% of staff-reported time on building and operations be reduced?

• Other Expenses to Test
  o Can $50k be cut from the IT budget after Drupal 8 conversion?
  o Can $500K+ annual staff payroll/benefits budget be reduced?
    ▪ How and where can AAVSO use volunteers in place of paid staff?
    ▪ Can 8% of staff-reported time spent on Oct ‘19 annual meeting be reduced?
    ▪ Can staff-reported 0.33 FTE spent on 50+ year member records be eliminated?
    ▪ Can memberships be renewed through greater automation and less staff time?
  o How mission critical is annual $12k spent on telescope network?
  o Can $7k for print/postage be replaced with digital member recognitions?
  o Test all travel necessity: Can 2019’s $40k travel budget be reduced?
Financial Recommendations Summary

• Locate alternative endowment management – in process
• Explore selling the real estate – in process
• More Focus on other revenue sources
  o Hire fundraising and grant professionals with a goal of at least $220K of grants/gifts by 2023 – in process
  o Marketing effort to augment fundraising
  o Board cultivation of major donors
• Identify at least $50K/year of expense reductions
• Introduce long-term goal to reduce endowment reliance
  o Prudent model reduces expense endowment reliance from 77% of expenses today to 61% in 2025
  o Policy should continue this trend of decreasing the proportion of expenses drawn from the endowment
Finance Reference Materials
- Supplied Separately

1. Spreadsheet with Prudent Model and Status Quo
   - Focus on (a) inflation-adjusted net asset figure over time and (b) expense endowment reliance factor

2. Spreadsheet XLS file with staff-reported, functional time allocation
   - Encourage greater use of this tool to help deploy limited staff well and identify possible volunteer opportunities

3. Memo on Real Estate redevelopment and sale milestones/process
IT is of Strategic Importance to AAVSO

• The information AAVSO has in its databases is critical assets for the astronomy community

• The tools and web site that enable observers to collect, and share their observations with the astronomy community are core strengths for the organization and the global community

• 5 key areas of improvement need to be worked on and invested in
  • Current Website, Databases, Future Website, Tools, IT Management
Current Website – Key action items

• Items Under Way
  • Complete migration to Drupal 8 and associated upgrades.
  • Clean up existing web design and simplify front page navigation menus

• Items to do
  • Clean up broken links (as much as possible)
  • Implement service for blocking DDoS attacks
    • Cloudflare (and others) provide basic free service
Databases – Key action items

- Every important database needs to have offline backups
  - Now running weekly
  - Keep at least 3 months of backups offline!
- Important databases must have a written backup and restore procedure that any knowledgeable person can do
  - Test this at least once a year
- All databases should have a designated “owner”
  - Database purpose, “manages fields, indexes, procedures”; controls who has access to the database
Future Website – Key action items

• Determine who are key target users of the website and what are their needs
  • Engaging the users’ community to value the website
• Engage a good web designer/implementation team
  • Introduction to Harry Bartlett team provided
• Map out the key tasks that target users are currently doing and how it should flow on the future website
  • Develop a modern clean design that is responsive for mobile, tablets and PC/Macs
• Build out an implementation plan for doing the work
  • Design + implementation using incremental roll outs wherever possible
  • Implement analytics for usage tracking and implement search engine optimization (SEO)
  • Enhance members’ participation with optional member profiles for knowing the community and connecting people
Tools and Applications – Key action items

• Implement management and tracking of the important tools/apps for the AAVSO community
  • Inventory the important tools for the community
    • Last done by Michael in 2017
  • Identify “product owners” for these to keep track of:
    • Measure the usage of tools, explicitly, wherever possible
    • Who are the volunteers who know the tool code?
    • What are the key features and bugs to improve/fix?
    • Who is available and willing to help improve these tools?
    • Motivation and feedback for the team working on them
    • Where is the source code kept (GitHub or other)?
    • Resources and documentation on using the tools
  • Build and publish priority list for work on improving these tools and applications
IT Work Management – Key action items

• In progress
  • Implement simple way to track and communicate the IT work tasks (example worksheet for this developed with Bert)
    • Publish monthly to key stakeholders for discussions and updates
  • Modify the IT work planning to break tasks into items that can be completed in 2 to 3 weeks
    • Move to regular incremental demos and deployments of done items
    • Every task must have a clear description of what it means for the task to be considered DONE
  • Investigate and build an action plan for managing and reducing the costs for AWS cloud services
IT Annual Expenditures

<table>
<thead>
<tr>
<th>Items</th>
<th>Annual Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clearview Development</td>
<td>$83,000</td>
</tr>
<tr>
<td>Clearview Maintenance</td>
<td>$35,000</td>
</tr>
<tr>
<td>Software Apps and Subscriptions</td>
<td>$7,000</td>
</tr>
<tr>
<td>AWS Cloud Servers + Storage</td>
<td>$24,000</td>
</tr>
<tr>
<td>Hardware</td>
<td>$2,000</td>
</tr>
</tbody>
</table>
## IT Budget – Key action items

<table>
<thead>
<tr>
<th>IT Budget</th>
<th>Key Action Items</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Annual Expenditures</strong></td>
<td></td>
</tr>
<tr>
<td>AWS - Cloud Storage</td>
<td>Work on consolidation</td>
</tr>
<tr>
<td>$ 24,000</td>
<td>Competitive Bid periodically</td>
</tr>
<tr>
<td>Software apps and subscriptions</td>
<td>Review periodically</td>
</tr>
<tr>
<td>$ 7,000</td>
<td></td>
</tr>
<tr>
<td>Clearview Development</td>
<td>What should continue after Drupal 8 implementation</td>
</tr>
<tr>
<td>$ 83,000</td>
<td>Prioritized, spec'd list</td>
</tr>
<tr>
<td></td>
<td>Zero-based budgeting</td>
</tr>
<tr>
<td>Clearview Maintenance</td>
<td>Review cost/benefit and alternatives</td>
</tr>
<tr>
<td>$ 35,000</td>
<td>Competitive Bid periodically</td>
</tr>
<tr>
<td>Hardware</td>
<td></td>
</tr>
<tr>
<td>$ 2,000</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
</tr>
<tr>
<td>$ 151,000</td>
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</table>
IT Conclusions

• This is the critical core asset of a distributed global organization like AAVSO
• A proactive IT Committee is essential for prioritization, execution and cost effectiveness
• IT work is a continual process of learning, trying things and incremental improvements
  o It is never done!
• Explore cost cutting opportunities
• Other deliverables –
  o Inventory of IT databases and tools
  o Note on SEO for non-profit website
  o Example IT project backlog worksheet
AAVSO Marketing Plan

Ideas Ideas Ideas Ideas

AAVSO resources

Goals Plans
Prioritized and Assigned Deliverables

Targeted Resources

Prioritized and Assigned Deliverables

Goals Plans
Prioritized and Assigned Deliverables

Targeted Resources

Prioritized and Assigned Deliverables

Goals Plans
Prioritized and Assigned Deliverables

Targeted Resources

Prioritized and Assigned Deliverables
Marketing Priorities

• Members and Observers
  o Enthusiastic, dedicated, value their contribution to science
  o Need to feel relevant to professionals, the science

• Professional Astronomers
  o Expand awareness and recognition of AAVSO value
  o Target university/college level with the need for data, tools and opportunity to publish

• Expand awareness through publishing in related newsletters and publications
  o Numerous opportunities; no resources today to address
  o Requires contracting with freelance science writer(s)

• Donors – expand communication beyond the “ask”

• Diversity – participate where appropriate
Members and Observers

• Explore opportunities for more online interaction
  o Zoom meetings, online presentations

• Ensure that AAVSO communicates their relevance in the science today and in the future
  o Mission statement, descriptions of the organization, tag lines etc.

• Encourage members to be AAVSO community builders.
  o Encourage participation in astronomy clubs, local school and community groups
  o Create downloadable flyers, links to astronomy club calendars, videos on recent discoveries, instructions on how to host a star party online, etc.
  o Consider a new Section and Section leader
Professional Astronomers

• Target professors and graduate students at the university/college level with the need for tools for their students as well as the need to publish
  o Even more important in this time of remote learning
  o Not a proposal to create curricula or educational materials
  o Leverage existing AAVSO educator member experiences
• Concentrate Stella Kafka’s activities in conferences and university consortia geared to professionals
• Participate in AAS and other significant professional organizations
  o Invest more time in promoting AAVSO activities and materials
  o Prioritize education committee activities
  o Town halls, workshops
• New section and section leader for educators
Action Items

• Hire Science Writer(s)
  o Multiple candidates based on project type (science-based; human interest, etc.) - $20K included in “Prudent” model
  o Articles, website content, volunteer and member profiles

• Expand Communications Manager position to include Publicist
  o Search for opportunities; outreach to media contacts

• Continue the Marketing Task Force for direction and marketing calendar

• Provide tools for AAVSO Members to become Community Builders
  o Supply the team with materials, suggestions and encouragement

• Assign Board Members to engage with high priority astronomy organizations
  o Assign board members for highest priority organizations (e.g. AAS)

• Recruit new Section Leader volunteers
  o Professional educators
  o Member community outreach
## Present Marketing Calendar

<table>
<thead>
<tr>
<th>Month</th>
<th>January</th>
<th>February</th>
<th>March</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Monthly Newsletter</td>
<td>Monthly Newsletter</td>
<td>Monthly Newsletter</td>
</tr>
<tr>
<td></td>
<td>AAS Annual Meeting</td>
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<table>
<thead>
<tr>
<th>Month</th>
<th>April</th>
<th>May</th>
<th>June</th>
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<tbody>
<tr>
<td></td>
<td>Monthly Newsletter</td>
<td>Monthly Newsletter</td>
<td>Monthly Newsletter</td>
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<tr>
<td></td>
<td></td>
<td>Donor Campaign</td>
<td>AAVSO Journal</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>SAS Symposium (online 2020)</td>
</tr>
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<table>
<thead>
<tr>
<th>Month</th>
<th>July</th>
<th>August</th>
<th>September</th>
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<tr>
<td></td>
<td>Monthly Newsletter</td>
<td>Monthly Newsletter</td>
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<table>
<thead>
<tr>
<th>Month</th>
<th>October</th>
<th>November</th>
<th>December</th>
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<tbody>
<tr>
<td></td>
<td>Monthly Newsletter</td>
<td>Monthly Newsletter</td>
<td>Monthly Newsletter</td>
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<tr>
<td></td>
<td>Journal Subscription Renewal</td>
<td>Annual Meeting</td>
<td>Donor Campaign</td>
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<tr>
<td></td>
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<td>AAVSO Journal</td>
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### Moving Forward – Targets and Activities

<table>
<thead>
<tr>
<th>Target</th>
<th>Activities</th>
<th>2Q 2020</th>
<th>3Q 2020</th>
<th>4Q 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Members, Observers, Volunteers</strong></td>
<td>Explore opportunities for more online interaction (Zoom meetings, webcasts)</td>
<td>Draft topic/schedule for Zoom mtgs</td>
<td>Schedule interactive zoom meeting</td>
<td>AAVSO Annual meeting (Nov 2020) Launch community builder &quot;campaign&quot;</td>
</tr>
<tr>
<td></td>
<td>Ensure that AAVSO communicates the relevance of the data and the organization</td>
<td>Discuss Section activities w/Leaders</td>
<td>Mission Statement update</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Turn the members into the AAVSO community builders</td>
<td></td>
<td>Flesh out concept</td>
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<td>Create list of materials - existing and new</td>
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<td></td>
<td>Identify candidate section leaders</td>
<td></td>
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<td></td>
<td>Prepare list of &quot;target&quot; Universities, Colleges, Professors</td>
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<td></td>
<td>Identify who to contact; prepare &quot;pitch&quot; for AAVSO collaboration</td>
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<td></td>
<td>Prepare rolling 6-month schedule for Stella's meetings, conferences. Identify &quot;Alternates&quot;</td>
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<td></td>
<td>Prepare proposal for AAVSO-hosted session at AAS January 2021 meeting (Phoenix AZ)</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Provide marketing-related inputs to Website development activity (audiences, content, focus of our offering)</td>
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<tr>
<td><strong>Professional Astronomers</strong></td>
<td>Target professors, graduate students and other educators with the need for tools and ideas for projects for their students.</td>
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<tr>
<td></td>
<td>Leverage Stella Kafka’s activities in conferences and university consortia to gain exposure to professionals</td>
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<tr>
<td></td>
<td>Leverage relationship with AAS</td>
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<tr>
<td><strong>Generate awareness</strong></td>
<td>Add part-time (contract) science writer(s)</td>
<td>Draft list of organizations with publishing opportunities; draft list of topics and members with interesting stories</td>
<td>Interview and hire science writers (s); place 1-2 articles in publications</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Continue finding publishing opportunities and creating content</td>
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</table>
Volunteer Plan

June 9, 2020
Volunteers – The life blood of a non-profit

- People who can help make a difference
- Retain and incent leaders & trainers
- Skills matched with needs
- Review, evaluate and improve your process
- Recognize and promote the impacts of these efforts

Recruiting
Leadership, Engaging Coaching
Learning Improving
Results Recognition

HARVARD BUSINESS SCHOOL
COMMUNITY ACTION PARTNERS
HBS ASSOCIATION OF BOSTON
Volunteer Survey Results – May 2020

• Volunteers love their work and want to continue it
• Most report feeling appreciated and receiving the support they need
# Hours volunteered in last year

<table>
<thead>
<tr>
<th>Volunteer Hours</th>
<th>n</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>2</td>
<td>4%</td>
</tr>
<tr>
<td>1 to 50</td>
<td>15</td>
<td>33%</td>
</tr>
<tr>
<td>51 to 100</td>
<td>9</td>
<td>20%</td>
</tr>
<tr>
<td>101 to 200</td>
<td>7</td>
<td>15%</td>
</tr>
<tr>
<td>201 to 300</td>
<td>5</td>
<td>11%</td>
</tr>
<tr>
<td>301 to 400</td>
<td>1</td>
<td>2%</td>
</tr>
<tr>
<td>401 to 500</td>
<td>1</td>
<td>2%</td>
</tr>
<tr>
<td>More than 500</td>
<td>5</td>
<td>11%</td>
</tr>
<tr>
<td>Unknown</td>
<td>1</td>
<td>2%</td>
</tr>
</tbody>
</table>
Support would be most helpful in:

- Connecting with professional researchers (53%)
- Communicating with observers (42%)
- Recruiting members for section or activity (34%)
- Other (29%)
- Communicating with members (26%)
- Improving the website (26%)
- Presenting to other groups (21%)
- Using the AAVSO databases (21%)
Quotes from Volunteers

• “I love the AAVSO, the resources, the mission and the staff, everyone is awesome!”

• “…being part of AAVSO and its mission is a privilege. I am often torn between this and other interests, concerns and responsibilities, but AAVSO and VStar changed my life. Thank you!

• “If you are interested in astronomy, this is the place to be.
Takeaways from the Survey

- AAVSO has a remarkably dedicated group of volunteers who love their work
- They plan to keep working a long time
- Individuals have ideas about changes or kinds of support that would be useful
- No consensus on future needs for AAVSO
- AAVSO should build on its successful volunteer program and find new ways to involve them
## Overview – AAVSO Volunteer Teams

Volunteer Committee – working with volunteer team leaders
- Initial focus will start with Mentor Program and Observing Sections

<table>
<thead>
<tr>
<th>Team</th>
<th>Current Team Leader</th>
<th># Volunteers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mentor Program</td>
<td>Sebastian (Staff)</td>
<td>22</td>
</tr>
<tr>
<td>Observing Sections</td>
<td>Bert + Stella (Staff)</td>
<td>~20 section heads</td>
</tr>
<tr>
<td>IT/Oversee</td>
<td>Bert + Stella (Staff)</td>
<td>2</td>
</tr>
<tr>
<td>Chars and Sequences</td>
<td>Tim Crawford + Elizabeth (Staff)</td>
<td>8</td>
</tr>
<tr>
<td>Choice Instructors</td>
<td>Sara (staff)</td>
<td>10</td>
</tr>
<tr>
<td>Data Validation Team</td>
<td>Sara (staff)</td>
<td>8</td>
</tr>
<tr>
<td>VSX</td>
<td>Sebastian (Staff)</td>
<td>3</td>
</tr>
<tr>
<td>Software Development</td>
<td>Bert + Sara (Staff)</td>
<td>14</td>
</tr>
<tr>
<td>JAAVSO</td>
<td>Nancy Morrison</td>
<td>10 editors</td>
</tr>
<tr>
<td>AAVSOonet</td>
<td>NA</td>
<td>~10</td>
</tr>
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</table>
Volunteer Program – Current Situation

- Currently there are 11 active volunteer teams with about 100 participants
- Most teams are led by a staff member
- More volunteers/teams = more staff time
- Volunteer “Process” is not consistent
  - Leadership
  - Recruitment
  - On-Boarding
  - Communications/Coordination
  - Recognition
Expand Support of Volunteer Team Leaders

• Guide and coaching for the team leaders
  o Create a short guide/handbook for team leaders and update regularly
  o Tips and suggestions for recruiting volunteers
    ▪ Needs, the impact they have, time commitments for the team
  o Suggestions for training their volunteer team members
  o Expectations on what they do – coaching not task managers
  o Wherever possible assign a co-chair leader for an area to share the load and learn/backup

• Team leaders should update the committee at least every 6 months from every team
Volunteer Team Leaders – Doing Coaching

Expectations for Volunteer Team Leaders

• The volunteers who participate want to help and are not paid staff
  o Ensure there is a shared expectations on time commitment for the work

• Leaders need to be clear to the team about expectations and available resources
  o What’s expected in the time they are helping
  o Training resources to help them be effective

• Help facilitate the learning for the team volunteers
  o Guide to Resources, FAQs, Experts to consult
Team Leader role - Coaching, Managing

- Task assignment and tracking progress for the team
- Team leader manages backlog of work items
- Team progress reviews and information sharing
- Coaching 1 on 1 – review progress, any training needs
- Cross training in the team
Recruiting Volunteers

- **Plan for recruiting team member**
  - Where are volunteers needed
    - What’s the need? Number of people or hours
    - Targeted results
  - For prospects: What’s their impact?
  - Skills needed
  - What training is available for volunteers

- **Implementation**
  - How to sign up to help as a volunteer
    - Information needed to get started
  - Create a checklist for “on-boarding” new volunteers to the team
    - What access rights, accounts, resources are needed.
    - Joining Google groups and other software tools the team uses
  - Volunteer profile pages on who they are for each person
    - Builds esprit de corps
  - Build a simple database of skills
    - Team Leaders can easily know who has what skills
Coordination

• Have a way for volunteers to “check-in” and update the rest of their team on work progress, status and issues
  o Use team tool like Slack for coordination and status updates, free-level service at Slack
  o Team members update the other team members on progress
    ▪ Regular short team progress updates by conference call or email or slack updates – Depending on need might be monthly or every two weeks
    ▪ Helping keep people connected, sharing progress and tracking issues
Expand Tracking Results, Rewards, Recognition

Recognize and promote what has been accomplished

- What key results have been accomplished
- What are the impacts of the volunteers
- Periodically (3 or 6 months) review and share
- Web page postings, newsletter updates
- Annual meeting section breakouts with zoom connect to non-attendees

Rewards

- Recognize the volunteers for their efforts
- Promote their results
- Share success stories on the web site, newsletter
Learning from your experience, Improving and Adapting

Volunteer Committee Reviews - Questions to think about

- Review how things are going.
- What do the volunteers think (surveys + interviews)
- What areas are behind expectation or ahead of expectations
- What should you do more of, less of or change
- What changes to make things better and more effective

Adjust your plans and process as needed
Build best practices for improving volunteer programs
Recommendations - Volunteers

- Based on the current successful volunteer program
  - Recruit more volunteers
  - Create more volunteer teams
  - Identify non-staff to be Volunteer Leaders
- Make the volunteer process more consistent and more rigorous
  - Provide oversight and support to build high-performing teams
  - Enhance training for Volunteer Team leaders
  - Identify resources to support volunteer teams
  - Create participation guidelines and onboarding resources for volunteers
- Establish a Volunteer Committee – build best practices
  - Improve recruiting
    - Identify leadership candidates continuously; cultivate their commitment
    - Improve volunteer recruiting – planning, implementation, and curation
  - Increase motivation and recognition
    - Celebrate team accomplishments, and individual achievements
  - Enhance learning
    - Track outcomes and reporting on best practices across all teams (“what gets measured, gets done better”)
    - Have clear roles for volunteer leaders with guidelines for engagement, training, coaching
  - Scheduling
    - Review the mix of volunteer teams to keep AAVSO up to date
Board Governance

June 9, 2020
Board Governance

• Based on interviews, the AAVSO Board is inconsistent regarding its role in AAVSO activities
  o Big Picture Oversight vs. Management
  o Contributing vs. Managing Staff
• Need to clarify Board Member involvement
  o Acting as Board Member
  o Acting as “Super-Volunteer”
  o Acting as Management
Committee Structure

- **Board Committees (Relatively Few)**
  - Governance
  - Finance
  - Audit?
  - Programs? – Ongoing review of Programs and Activities
  - Volunteers?

- **Task Forces – Subject Area Groups – Expertise Committees**
  - Marketing
  - IT
  - Volunteers
  - Programs

- **Ad Hoc Committees**
  - Real Estate
  - Strategy
Executive Summary

• Financial Actions
  ○ Review and change endowment strategy – Goal 5.25% return
  ○ Monetize the real estate – Estimate $2-3M inflow.
  ○ Expand non-endowment revenue sources
  ○ Find reductions in expenses
  ○ Reduce reliance on endowment

• IT Plan
  ○ Continue the IT Committee
  ○ Finish Drupal 8 conversion, then zero-based budgeting for development
  ○ Examine IT elements for possible cost savings
  ○ Improve IT discipline.

• Marketing Plan
  ○ Prioritize stake-holders and time-phase activities to best utilize limited resources
  ○ Leverage members and the board to expand the community and engage in association activities
  ○ Take advantage of publishing opportunities by engaging a writer
Executive Summary - continued

• **Expand the focus on volunteerism**
  - Need a plan to recruit, schedule, train, rate, and manage volunteers
  - Need non-staff volunteer leaders
  - Create a Volunteer Committee

• **Board Governance**
  - Fewer board committees, more subject matter committees
  - Clear roles for board members
  - Be specific on efforts to enhance the member experience vs. attracting new members
Next Steps

• By mutual agreement, the CAP team did not address the “business and mission” of AAVSO.
  • Programs – Need user numbers
  • Scope – Are variable stars sexy enough in 2020
  • Competitive Advantage
  • Mission Statement/Tag Line/Elevator Pitch
• Financial constraints will limit the options.
  • Need a method for discontinuing activities as well as adding new ones.