**BLINDED VETERANS ASSOCIATION**

**77th NATIONAL CONVENTION**

**ANNUAL REPORT OF THE NATIONAL**

**BOARD OF DIRECTORS**

**FISCAL YEAR 2022**

**(JULY 1, 2021 - JUNE 30, 2022)**

**Table of Contents**

[INTRODUCTION 5](#_Toc111912647)

[NATIONAL OFFICERS AND DIRECTORS FY 21-22 6](#_Toc111912648)

[National President and Chairman 6](#_Toc111912649)

[National Vice President 6](#_Toc111912650)

[National Secretary 6](#_Toc111912651)

[National Treasurer 6](#_Toc111912652)

[Past National President 6](#_Toc111912653)

[Director District 1 6](#_Toc111912654)

[Director District 2 6](#_Toc111912655)

[Director District 3 6](#_Toc111912656)

[Director District 4 6](#_Toc111912657)

[Director District 5 6](#_Toc111912658)

[Director District 6, 6](#_Toc111912659)

[National Chaplain 6](#_Toc111912660)

[National Sergeant at Arms 6](#_Toc111912661)

[COMMITTEES AND REPRESENTATIVES 6](#_Toc111912662)

[Executive Committee 6](#_Toc111912663)

[Finance Committee 6](#_Toc111912664)

[Government Relations Committee 6](#_Toc111912665)

[Awards Committee 7](#_Toc111912666)

[Scholarship Committee 7](#_Toc111912667)

[Blind Rehabilitation / Veterans Service Committee 7](#_Toc111912668)

[Membership / Regional Groups / Bylaws Committee 7](#_Toc111912669)

[Convention Committee 7](#_Toc111912670)

[Team BVA Committee 7](#_Toc111912671)

[Women Veterans Committee 7](#_Toc111912672)

[Dog Handlers Committee 7](#_Toc111912673)

[Golden Age Games Committee 7](#_Toc111912674)

[Assistant National Treasurers and Assistant National Secretary to the Board 7](#_Toc111912675)

[BVA NATIONAL HEADQUARTERS OFFICE STAFF FY21-22 7](#_Toc111912676)

[Executive Director 7](#_Toc111912677)

[Administrative Director 8](#_Toc111912678)

[National Service Director 8](#_Toc111912679)

[Deputy Director of Veterans Policy 8](#_Toc111912680)

[Deputy Director of Veterans Policy 8](#_Toc111912681)

[Deputy Director of Veterans Benefits 8](#_Toc111912682)

[National Service Officer 8](#_Toc111912683)

[Director of Public Relations 8](#_Toc111912684)

[Deputy Director of Public Relations 8](#_Toc111912685)

[Director of Member Relations 8](#_Toc111912686)

[Director of Development 8](#_Toc111912687)

[Deputy Director of Development 8](#_Toc111912688)

[Director of Community Relations 8](#_Toc111912689)

[Contractor for Finance 8](#_Toc111912690)

[Contractor for Website 8](#_Toc111912691)

[MEETINGS AND ACTIONS OF NATIONAL BOARD OF DIRECTORS 8](#_Toc111912692)

[Board of Directors Meeting March 29-31, 2022 8](#_Toc111912693)

[Board of Directors Meeting Minutes in FY 21-22 9](#_Toc111912694)

[Board of Directors Meeting August 12-13, 2021 9](#_Toc111912695)

[REGIONAL GROUPS 10](#_Toc111912696)

[DISTRICT DIRECTOR ELECTIONS 11](#_Toc111912697)

[Director District 1 Election 11](#_Toc111912698)

[Director District 2 Election 11](#_Toc111912699)

[Director District 4 Election 11](#_Toc111912700)

[MEMBERSHIP 11](#_Toc111912701)

[GOVERNMENT RELATIONS 12](#_Toc111912702)

[VETERANS SERVICE PROGRAM 13](#_Toc111912703)

[DIRECTOR OF DEVELOPMENT 15](#_Toc111912704)

[DIRECTOR OF COMMUNITY RELATIONS 15](#_Toc111912705)

[TEAM BVA 16](#_Toc111912706)

[PUBLIC RELATIONS TEAM 16](#_Toc111912707)

[The Bulletin: 16](#_Toc111912708)

[BVA Website: 18](#_Toc111912709)

[Zoom Meetings: 18](#_Toc111912710)

[Upcoming Printing and Design Projects: 18](#_Toc111912711)

[Public Service Announcements: 18](#_Toc111912712)

[Merchandise: 19](#_Toc111912713)

[Social Media: 19](#_Toc111912714)

[News Blurbs and Announcements Emailed to BVA Membership and Donors: 19](#_Toc111912715)

[Staff 19](#_Toc111912716)

[Newsletters: 20](#_Toc111912717)

[KATHERN F. GRUBER AND THOMAS H. MILLER SCHOLARSHIP PROGRAM 21](#_Toc111912718)

[BVA EQUIPMENT 21](#_Toc111912719)

[EXECUTIVE DIRECTOR SUMMARY 21](#_Toc111912720)

[Statement of Financial Position 21](#_Toc111912721)

[**ASSETS** 21](#_Toc111912722)

[**LIABILITIES AND EQUITY** 22](#_Toc111912723)

[Statement of Activities 23](#_Toc111912724)

[**REVENUE** 23](#_Toc111912725)

[**EXPENDITURES** 23](#_Toc111912726)

[Accounts Receivable Summary 25](#_Toc111912727)

[Accounts Payable Summary 25](#_Toc111912728)

[CONCLUSION 26](#_Toc111912729)

[APPENDICES: 26](#_Toc111912730)

[A - Membership Statistics 26](#_Toc111912731)

[B - Audited Financial Statement for FY22 (July 1, 2021–June 30, 2022) 26](#_Toc111912732)

[C - Composition of four Director Districts 26](#_Toc111912733)

**BLINDED VETERANS ASSOCIATION**

**77th NATIONAL CONVENTION**

**WASHINGTON, DC**

**AUGUST 22-26, 2022**

**ANNUAL REPORT OF THE NATIONAL**

**BOARD OF DIRECTORS**

# INTRODUCTION

The Blinded Veterans Association (BVA) National Board of Directors and the National Headquarters present this report for the fiscal year ending June 30, 2022. The Board is pleased to announce that BVA’s financial position remains stable, as we continually strive to further strengthen our financial position.

Below are some highlights over the past year.

1. BVA’s 77th National Convention is an in-person meeting hosted by the national headquarters. The convention will be held at the Hyatt Regency on Capitol Hill in Washington, DC from August 22-26, 2022.
2. Headquarters personnel produced a special mailing for newly formed Districts 1, 2, 3, and 4. Wanda Grover was elected as Director District 1, Brian Harris as Director District 2, José Rivera-Barris as Director District 3, and Kevin Jackson as Director District 4.
3. President McNeil presented the annual testimony during a joint session of the House and Senate Veterans Affairs committees held virtually on March 2, 2022. The testimony addressed Department of Veterans Affairs (VA) 508 accessibility compliance, caregiver benefits, women veterans’ benefits, renewable auto grants, and the PACT Act.
4. BVA currently owns a non-residential condominium unit purchased in 2019 for $2.025 million, consisting of approximately 11,314 GSF. The majority owner of the building has accepted an offer to sell, and the buyers have offered to purchase BVA’s unit for $2.1 million. The offer includes a leaseback clause allowing BVA to maintain occupancy until December 2022. The building will be converted to a primarily residential mixed-use condominium community.
5. BVA’s membership system reports 6,529 members, and forty (40) regional groups. Headquarters personnel processed 164 new membership applications in FY22 and marked 268 records as deceased.
6. The 78th National Convention is scheduled to be held at the Marriott St. Louis Grand Hotel in St. Louis, MO during the period August 11-20, 2023.
7. Headquarters personnel total ten (10) full-time employees and two (2) contractors. New to the team are Meredith Buono-Dagrossa (Director of Development) as of October 2021, and Joe Bogart (Director of Community Relations) as of April 2022.

# NATIONAL OFFICERS AND DIRECTORS FY 21-22

National President and Chairman, Joseph McNeil, Columbus, GA

National Vice President, Daniel Wallace, Grand Junction, CO

National Secretary, Elizabeth Holmes, Midland, GA

National Treasurer, Tracy Ferro, Biloxi, MS

Past National President, Dr. Thomas Zampieri, Pearland, TX

Director District 1, Leon Collier, Elmont, NY

Director District 2, Brian Harris, South Holland, IL

Director District 3, Calvin Poole, Memphis, TN

Director District 4, Kenneth Asam, Newhall, CA

Director District 5, Darryl Goldsmith, Pensacola, FL

Director District 6, Kevin Jackson, Austin, TX

National Chaplain, Dr. Ron Lester, Tucson, AZ

National Sergeant at Arms, Brian O’Connell, Greenville, SC

# COMMITTEES AND REPRESENTATIVES

The following appointments have been made by the National President:

## Executive Committee

Joseph McNeil, Chair; Daniel Wallace, Elizabeth Holmes, Tracy Ferro, and Dr. Thomas Zampieri

Finance Committee (Constitutes, Investment, Life and Audit Committees)

Daniel Wallace, Chair; Elizabeth Holmes, Tracy Ferro, Kennan Horn, Kevin Jackson, and HQ Staff Donald Overton

## Government Relations Committee

Joseph McNeil, Chair; Daniel Wallace, Elizabeth Holmes, Tracy Ferro, and HQ Staff Donald Overton, and James Vale

## Awards Committee

Kenneth Asam, Chair; Leon Collier, Tracy Ferro, and HQ Staff Stuart Nelson, and Brigitte Jones

## Scholarship Committee

Rosalind McQueen, Joe Amerling, and Dr. Michael Gandy

## Blind Rehabilitation / Veterans Service Committee

Elizabeth Holmes, Chair; Tracy Ferro, Leon Collier, Brian Harris, Calvin Poole, Kenneth Asam, Darryl Goldsmith, Kevin Jackson, and HQ Staff James Vale and Duayne Driscoll

## Membership / Regional Groups / Bylaws Committee

Tracy Ferro, Chair; Elizabeth Holmes, Kevin Jackson, Brian Harris, Leon Collier, Michaun Harrison, Wanda Grover, Carlos Pere, Eduardo Miranda, and HQ Staff Joseph Bogart and Brigitte Jones

## Convention Committee

Daniel Wallace, Chair; Elizabeth Holmes, Richard Lane, Kenneth Asam, Brian O’Connell, Benjamin Holmes, Margarine Beaman, and HQ Staff Donald Overton and Joseph Bogart

## Team BVA Committee

Kennan Horn, Chair; Brian Harris, Lonnie Bedwell, Tina Lemus, Scott Scieszinski, Eric Marts, Steve Baskis, Joe Amerling, and HQ Staff Donald Overton and Joseph Bogart

## Women Veterans Committee

Sharon Giovinazzo, Chair; Raquel Welch, Elizabeth Holmes, Michaun Harrison, Jeanie Murphy, and HQ Staff Marlene Davis-Lilly

## Dog Handlers Committee

Scott Quinlan, Chair; Eric Martz, Paul Mimms, Rae Hail, Darryl Goldsmith, Gary Traynor, Wade Davis, Timothy Hornik, Irena Howard, Ann Chiappetta, and HQ Staff Donald Overton and Joseph Bogart

## Golden Age Games Committee

Calvin Poole, Chair and Joseph Bogart, HQ Staff

## Assistant National Treasurers and Assistant National Secretary to the Board

* Donald Overton, Executive Director/Asst. National Treasurer
* Stuart Nelson, Director of Public Relations/Asst. National Treasurer
* Brigitte Jones, Administrative Director/Asst. National Secretary

# BVA NATIONAL HEADQUARTERS OFFICE STAFF FY21-22

**Position** **Incumbent**

Executive Director Donald Overton

Administrative Director Brigitte Jones

National Service Director James Vale

Deputy Director of Veterans Policy Erin McConnell

Deputy Director of Veterans Policy Sanaa Lucas

Deputy Director of Veterans Benefits Duayne Driscoll

National Service Officer Marlene Davis-Lilly

Director of Public Relations Stuart Nelson

Deputy Director of Public Relations Kylie Fitzgerald

Director of Member Relations Maria Ingegneri

Director of Development Meredith Buono-DaGrossa

Deputy Director of Development Andrea Malmer

Director of Community Relations Joseph Bogart

Contractor for Finance Smith-Bucklin

The Charity CFO

Contractor for Website Jordan Chesley

# MEETINGS AND ACTIONS OF NATIONAL BOARD OF DIRECTORS

## Board of Directors Meeting March 29-31, 2022

* BVA consists of forty-one regional groups, some with the risk of becoming inactive. Measures remain ongoing to promote stronger contact within regional groups to keep them actively involved and productive. Support and services to regional groups are endless. Most importantly, it remains paramount that regional groups remain in an active status. In early December 2021, BVA reported a total of 6,678 members.
* BVA is transitioning to a new accounting firm (The Charity CFO) to more efficiently manage financials, accounting, and budgeting deliverables. The SmithBucklin service agreement has been terminated.
* Life Membership Fund Account – The account value at the end of February 2022 was $1,181,998 million.
* Investment Fund Account – The account value at the end of February 2022 was $9,172,773 million.
* The Women Veterans Committee continues to be strong. They have a new chair, Sharon Giovinazzo, and vice chair, Raquel Welch. Meeting participants have been consistently increasing.
* The Board discussed merging North and South Carolina into a one state group known as the Carolina Regional Group.
* BVA’s Scholarship program is entering its 39th year for the Kathern F. Gruber Scholarship and the 10th year for the Thomas H. Miller Scholarship.
* Niki Sandlan, Blind Rehabilitation Service Chief, Department of Veterans Affairs, and the National Program Consultants presented reports across the enterprise. They have selected a new National Program Consultant for the NE Corridor to serve at the West Haven BRC covering VISNs 1, 2 and 4. Currently, there are 659 BRS professionals, of which, 161 are VIST Coordinators and 98 are BROS.
* Veterans Service Program (VSP) logged 5,268 veteran / client interactions over the last year. The VSP are the leaders in the VA Auto Grant and Special Adaptive Housing grant claims. The POA summary report from the VA in January shows representation of 1,470 claimants nationwide. BVA clients have received over $17 million in disability compensation and pension benefits during the current fiscal year.

## Board of Directors Meeting Minutes in FY 21-22

**Multiple Dates**

* BVA will be transitioning to a cloud-based system at headquarters and moving away from the server. District Directors will be trained on how to access the system to send out monthly reports, labels, rosters, and emails to regional groups. BOD meeting on January 12, 2022.
* Regional group apportionment checks will be by direct deposit starting this fall. BOD meeting February 9, 2022.
* BVA has rented a PO Box for all mail correspondence. The address is: PO Box 90770, Washington, DC 20090. HQ will still have a physical address. BOD meeting February 9, 2022.
* Paul Mimms was elected as Vice President due to the resignation of Daniel Wallace. BOD meeting May 11, 2022.

## Board of Directors Meeting August 12-13, 2021

* Board approved all prior meeting minutes distributed by e-mail.
* The Government Relations team celebrated major accomplishments this year championing the enactment of the VA Specially Adapted Housing grant bill, Ability One bill, and the 508 Website Accessibility bill benefiting blinded veterans. VA will be complying with the Mission Act beginning in October 2022. The team had good success utilizing the One-Click Politics grassroots advocacy system.
* Rio Grande and Wisconsin Regional Groups have dissolved. Southern Arizona Regional Group is in the process of merging with Arizona Central/Northern Regional Group to become a one state group.
* Spring 2021 Election Results: Leon Collier was elected in District 1, Brian Harris in District 2, and Kenneth Asam in District 4.
* Life Membership Fund Account – The account value on June 30, 2021, was $1.2 million. Apportionment distributions will be around $39,000.
* Investment Account – The account value on June 30, 2021, was $8.9 million.
* Budget Analysis for FY22 – SmithBucklin – The Operating budget is $1.8 million. Revenue from direct mail, contributions, online giving and bequests are $875,000. Operational expenses are $1.63 million, which includes salaries, payroll taxes and retirements. Cumulatively, the revenue and expenses result in an operational deficit of $449,000 as of June 30, 2021. Non-operations reflect a surplus of $15,000 from investment activities. The overall budget deficit when combining operations and non-operations is $433,000. The audit field work will begin on August 25, 2021.

# REGIONAL GROUPS

BVA currently consists of forty Regional Groups. Some of the groups have not been very active since the start of the pandemic, though they were authorized and encouraged to have teleconferences and virtual meetings. A growing number of groups are in a “not in good standing” status. Measures remain ongoing to promote stronger contact within regional groups toward becoming more active and efficient. Support and services from national are continuous.

Notices and forms for the submission of regional group financial reports are mailed by June 15th of each year to regional group treasurers. The fiscal year covers the period July 1 through June 30. Reports are due at BVA National Headquarters by no later than August 30. Delinquent regional groups are subject to being placed in a “not in good standing” status in accordance with Section 13a and b of Article XIV (Regional Groups) of the BVA National Bylaws, as amended.

# DISTRICT DIRECTOR ELECTIONS

## Director District 1 Election

Nominations for the office of Director District 1 were solicited by BVA National Headquarters memorandum dated March 29, 2021, for members in good standing residing in said district. The election is for a three-year term of office.

Members, Leon Collier (NY) and Warner Murray (NY) were nominees for the office of Director District 1.

A total of 840 ballots and biographical sketches of the candidates were mailed to Members and Associate Members residing in said district. Ballots were opened and counted on July 15, 2021. A total of 101 ballots were received at Headquarters for a .12% return rate. Mr. Collier was determined to be the winner of this election.

## Director District 2 Election

Nominations for the office of Director District 2 were solicited by BVA National Headquarters memorandum dated March 29, 2021, for members in good standing residing in said district. The election is for a three-year term of office. Brian Harris (Il), the incumbent, was nominated for the office of Director District 2.

Section 4k of Article VI (District Directors) of the BVA National Bylaws, as amended, provides that “in case there is only one (1) candidate for the office of Director from a Director District in which an election is being held, that candidate shall be declared the winner of the election and the procedures for conducting a mail ballot in that District shall be dispensed with.”

As Mr. Harris’ nomination was the only valid nomination received for Director District 2. Mr. Harris was therefore officially declared the winner of the Spring 2021 Election for Director District 2.

## Director District 4 Election

Nominations for the office of Director District 4 were solicited by BVA National Headquarters memorandum dated March 29, 2021, for members in good standing residing in said district. The election is for a three-year term of office. Kenneth Asam was nominated for the office of Director District 4.

Section 4k of Article VI (District Directors) of the BVA National Bylaws, as amended, provides that “in case there is only one (1) candidate for the office of Director from a Director District in which an election is being held, that candidate shall be declared the winner of the election and the procedures for conducting a mail ballot in that District shall be dispensed with.”

As Mr. Asam’s nomination was the only valid nomination received for Director District 4. Mr. Asam was therefore officially declared the winner of the Spring 2021 Election for Director District 4.

# MEMBERSHIP

The Association’s membership system continues to undergo revisions, data analysis, and cleanup. Headquarters personnel have completed the comprehensive data migration from outdated systems and merged records accordingly. Staff continue to work with the Board of Directors to identify opportunities to streamline data management processes (this project is ongoing) and are preparing to launch a new program in conjunction with the District Directors and regional group leadership to further refine member data.

Staff are actively engaged with association leadership and at-large members to ensure data accuracy. These efforts will result in enhanced member communications and overall organizational cost-savings. The volume of returned mail is becoming tenable, both nationally, and locally as we steadily make updates. We look forward to working alongside our membership and leadership to continue improving our operations and association.

# GOVERNMENT RELATIONS

Over the past year the BVA Government Relations team has continuously advocated on behalf of our blinded veterans. Utilizing the legislative priorities set forth in BVA’s 2022 Congressional testimony, the team scheduled meetings with Congressional staff and members. The team focused on meeting with members of the House and Senate Veterans Affairs committees and applicable subcommittees to relay BVA’s support for Congressional oversight of VA 508 Compliance, VA Caregiver benefits for catastrophically disabled blinded veterans, and renewable VA Auto grants for service-connected blinded veterans, as well as requesting stronger support for women veterans.

The BVA Government Relations team met with House and Senate Appropriations and Armed Services committee members to advance a $20 million earmark for VA accessibility in the MILCON/VA appropriations bill. These efforts resulted in a $40 million earmark in the Senate version of the appropriation bill. During these Congressional meetings BVA staff garnered political support for the creation of a Chief Accessibility Officer at VA to address accessibility issues across the entire agency.

The BVA Government Relations team helped raise significant congressional awareness on the issue of VA’s lack of 508 website accessibility for the blind. In response to the report mandated by the VA Website Accessibility Act of 2019, which showed that less than 8% of VA’s 812 websites are fully 508 accessible, a joint HVAC/SVAC letter regarding VA’s failings on 508 Accessibility was sent to the Secretary of Veterans Affairs. We have now requested a meeting with the VA Secretary on this issue.

BVA advocacy efforts have raised congressional and VA senior leadership awareness of the need for VA to obtain an enterprise license for Fusion, JAWS, and ZoomText screen readers to improve accessibility while reducing the agency’s costs of compliance for reasonable accommodation for blind and visually impaired veterans and VA staff.

Additionally, the BVA Government Relations team was actively engaged with various Congressional offices advising on proposed legislation, offering press release statements, and providing subject-matter expertise when requested, including participation in congressional round table discussions. The Government Relations team consulted on issues ranging from military toxic exposure, eligibility standards for caregiver benefits, blind rehabilitation, and VA electronic health record accessibility. The team has made connections with key offices which will improve future advocacy efforts and elevate BVA’s representation on Capitol Hill.

BVA was diligently represented at several relevant stakeholder and outside organization meetings by members of the Government Relations team. BVA tracked and attended all relevant Congressional committee and subcommittee meetings regarding upcoming legislation on veteran issues, VA reports, and oversight hearings. The team continues to be actively engaged with The Military Coalition (TMC) supporting several organization initiatives, and engaging on subcommittees, and advocating alongside other MSOs/VSOs to accomplish TMC goals. Government Relations staff also worked with and maintained solid working relationships with Department of Labor VETS, ITEM Coalition, and the VSO prosthetics group on a variety of advocacy initiatives.

# VETERANS SERVICE PROGRAM

The Veteran Service Program (VSP) provides representation (at no charge) to blind and visually impaired veterans, their families, and caregivers for VA claims and appeals. According to the Veterans Benefits Administration (VBA), the total amount of monetary benefits for Compensation and Pension claims for veterans represented under BVA Power of Attorney between July 1, 2020 – June 30, 2021, is $51.19 million. This is the total value of ongoing monthly benefits and not the total value of new claims won. The total amount of retroactive awards for new claims and appeals won is well over $1 million for tracked claims, but not all retroactive awards have been captured in our data reporting, and the total amount of all retroactive claims and appeals is significantly higher. Consolidation of all claim submissions via VetPro and improved custom reports from the VA will enable more granular data reporting in future reports.

On average, VSP staff manage 111-122 active claims under BVA representation in the claims backlog at the VBA. The most common errors found by VSP staff continue to be claims for Special Monthly Compensation (SMC), and eligibility adjudications for Special Adaptive Housing (SAH) grants. VSP staff have been crucial in helping blinded veterans in obtaining ancillary benefit claims for auto grants, SAH grants, and VA clothing allowance claims.

Over the past 12 months, VSP staff have maintained Informal Hearing Presentations (IHP) legal brief backlogs for legacy appeals at the Board of Veterans Appeals to under five. Our backlog is now small enough that VSP staff can submit the IHP at the time of appeal submission rather than waiting for the Board to request the IHP later in the appeal process, thereby reducing the wait time for adjudications.

Our current backlog at the Board of Veterans Appeals is 20 legacy appeals and 49 Appeals Modernization Act (AMA) appeals, for a total of 69 appeals.

Between July 1, 2021 – June 30, 2022, there were 32 legacy appeal dispositions by the Board of Veterans Appeals. The outcome of these legacy decisions are as follows: Grants 28%, Denials 25%, Remands 25%, Other 22%. We have a 53% win-ratio (Grants + Remands) for legacy appeals during the past year.

Between July 1, 2021 – June 30, 2022, there were 13 AMA appeal dispositions. The outcome of these AMA decisions are as follows: Grants 38%, Denials 38%, Remands 23%, Other 0%. We have a 62% win-ratio (Grants + Remands) for AMA appeals during the past year.

The combined outcome for 32 Legacy and 13 AMA appeals (45 total appeals) under BVA representation are: Grants 31%, Denials 29%, Remands 24%, Other 16%. We have a 55% win-ratio (Grants + Remands) for all Board appeals.

Between July 1, 2021, to June 30, 2022, VSP staff recorded over 5,800 interactions with veterans--a 240% increase from 2,385 interactions in the prior year--which includes phone calls, emails, claims and appeals reviews. The actual number of interactions is still much higher as these numbers are underreported as not all interactions were documented, but the documenting of veteran interactions is improving.

VSP staff conducted the first BVA Ambassador Training class. The training has been a major success and was very well received. A total of 30 candidates completed the training, passed the final exam, and passed the panel interview. They will be recognized at the upcoming 2022 BVA National Convention and will be deployed in their respective communities to begin assisting blinded veterans, including those at VA Blind Rehabilitation Centers, VICTORs/VISORs, and VIST/BROS programs.

VSP staff have started the second BVA Ambassador class with over 75 registrants. The training has been upgraded with a robust set of 25 topics which will be presented by subject matter experts. This class will run through the end of January 2023, with a schedule consisting of:

* BVA History
* BVA Organization & Governance
* BVA Membership
* Public Relations/BVA Bulletin
* Government Relations
* Veteran Service Program (VSP)
* VA Benefits Overview
* No class due to National Convention
* Team BVA
* BVA Fundraising & Scholarships
* VA Auto Grant
* Guide Dogs/Service Dogs 101
* BVA Care Review Partnership
* VHA Benefits
* VHA Community Care Program
* VHA Caregiver Program
* VHA Patient Advocate Program
* VHA Prosthetics
* SAH/HISA/VR&E IL Grants
* NCA & Survivor Benefits
* Appeals (VBA, VHA, CG, Board, Court)
* Eye Conditions
* BRS Continuum of Care
* VA Experience Office
* VA Volunteer Service Program
* No Class due to Winter Break
* Accessibility
* Ambassador Ethics & Responsibilities
* Effective Advocacy
* Training Wrap-Up

# DIRECTOR OF DEVELOPMENT

The Director of Development implemented new strategies of stewarding donors of $100 or more with phone calls and handwritten notes for a more personalized touch. The intent is to retain current donors and move them up the pipeline to increase their giving.

The Development team is working with the Executive Director and Public Relations team on more cause marketing strategies to bring greater awareness and revenue to BVA. Storytelling is a major component to development, and we have been working on a video and testimonials for the BVA website to increase traffic and giving.

Historically much of our revenue has come from direct mail, but there are other options to increase revenue and we are transitioning into those models. The Development team is working on a deep analysis of our direct mail program and a new strategy with Direct Mail to acquire and retain our donors for our 2022/2023 year.

In addition to direct mail and emails we have developed a new system for our Promises to Give. Currently, the Development Team is working on uploading paper files digitally to our new Customer Relationship Management (CRM) database so we can have a more effective follow-up. We have already seen an increase in revenue due to this process.

A significant portion of the Director of Development’s time has been focused on Convention operations, exhibitors, and sponsorships. BVA’s Development Team have worked closely with the Director of Community Relations and the Convention Committee to develop, revise, and refine the plan of execution for the upcoming 77th National Convention. The Director of Development and Executive Director worked on implementing an online registration system for members, sponsors, and exhibitors which has proven to be much more effective in planning and tracking all registrations. The Director of Development has worked on new sponsorship packages that allow BVA to directly engage with sponsors to build year-round relationships resulting in more revenue, not only during convention but during the entire year. Packages which include opportunities for sponsors to engage with our members while aligning with their business goals have been very successful. These packages include virtual opportunities to engage with our Ambassador and Vet Tech programs.

# DIRECTOR OF COMMUNITY RELATIONS

The Director of Community Relations (DCR) onboarding began in April 2022. During the remainder of the fiscal year, the DCR reviewed and analyzed the Team BVA Program and budget. Additionally, the DCR met with the Team BVA Committee and Executive Director in order to begin preparing the following fiscal year to better communicate with and serve all BVA members.

A significant portion of BVA’s DCR involved close work with the Director of Development and the Convention Committee to develop, revise, and refine the plan of execution for the upcoming 77th National Convention. This involved countless telephone and virtual meetings, estimate reviews, research, analysis, discussions, and high-level event planning. As BVA transitioned into the new fiscal year the DCR continued a close working relationship with the Director of Development to finalize the plans for the convention. By forming into a strong and trusting team, both directors will be able to capitalize on their experiences into the future of Team BVA and development events.

# TEAM BVA

Team BVA transitioned in FY21-22 from Operation Peer Support (OPS) and assumed that program's budget and expenses. The program began planning and budgeting for 19 events over the fiscal year during which BVA members participated in 8 events. Several events were cancelled for the fiscal year to include the Major Rob Soltes Golf Tournament, Project Gemini Exchange with BVUK, Congressional Advocacy and Research.

The committee’s standard operating procedure for BVA members attending events was to cover any first-time attendee travel while others covered their own travel expenses.

In January 2022, an event with STARS in Steamboat Springs, Colorado, was cancelled due to a COVID-19 outbreak. BVA’s only expense for this event was travel. We were able to recoup a portion of the travel expenses in the form of credits while the remaining credits are available to the individual veterans for future travel. Most of those veterans attended later events at STARS with only a few outliers still retaining flight credits.

BVA HQ was able to use the final STARS Ski Trip to film and begin to produce the first hig-quality promotion video. BVA members in the film varied in age, race, and gender to show the true diversity of our organization.

Later in the year, an additional Blue Ridge Retreat event was added with no planned additional expenses. Initially, the June trip was of no cost to BVA because all attendees were covering their own travel. During the May meeting, the committee voted to accommodate the increased travel costs and added up to $6,000 to the budget and an up to $1,000 reimbursement. Three attendees requested reimbursement totaling just over $1,875.

BVA brought on a Director of Community Relations to be the HQ Staff representative within this committee and to review this program. After a thorough review of budget documents, expenses, and receipts, we have the following information current as of June 8, 2022:

* Starting Balance FY21-22: $141,488
* Approved Budget: $50,650
* Debits: $22,220
* Credits: $6,507
* Remaining Budgeted Amount: $27,429
* Remaining Balance end of FY: $125,769

\*All figures have been rounded down to the nearest whole dollar.

The future of events and activities for FY22-23 are not scheduled nor locked down. New committee members, direction, and guidance will positively affect the opportunities for all members of the Blinded Veterans Association. One Vision, One Team, One Fight! Team BVA.

# PUBLIC RELATIONS TEAM

The Bulletin: The Public Relations Team continued working with at least modest success in putting together The Bulletin throughout FY 2022, despite the various challenges that continuously emerge in producing the publication in the various formats.

Editorial contributions from BVA members and regional groups increased in FY22 as the pandemic eased and events were held in various portions of the country for the first time in some 18-24 months. Special note should be made regarding the contributions received from the Georgia Regional Group, especially the Columbus Chapter; the Louisiana/Mississippi Regional Group; the Spokane Inland Empire Regional Group; and the Mid-Atlantic Regional Group. Each of these groups, especially the elected leaders, have been active and, in turn, willing to provide detailed accounts and impressions of their events to share with Association members throughout the country.

The Editor and Associate Editor, which also comprise the Public Relations Team, have similar writing and editing styles, resulting in consistency within each publication and from one issue to the next. Aside from the area of capitalization, where they have adopted specific rules unique to The Bulletin, they use the Chicago Manual of Style for the publication. They also have similar judgment regarding Bulletin content and layout but can comfortably disagree at times and arrive at optimal solutions.

The Public Relations Team continues to utilize the services of Karen Smith Design of Manassas, Virginia, for layout and design of The Bulletin and The Vomela Companies of Lorton, Virginia, for both printing and mailing services. Throughout most of FY22, BVA paid approximately $1,200 for design and approximately $4,200 for printing and mailing services. The cost of the professional recording, editing, and CD duplications via John O’Leary Productions and Digital Recollections is approximately $1,250, bringing the total cost per issue to $6,550 per issue. The exception was the recent Spring issue, which saw a jump in the price due to inflation and a supply chain issue in which a different grade of paper had to be used. The Spring issue’s 44 pages was also some eight pages above the average number due to the amount of available content needing to be included. That was another reason for the increase in cost for that final issue of FY22.

At present, The Bulletin is distributed in the formats and quantities provided below this paragraph. It is currently not available to read directly from a webpage as it was prior to 2018, when the webmaster programmed the entire Bulletin in HTML and uploaded all photos from each issue using a Content Management System that is much different from the one used now. This format is no longer necessary as the publication is now accessible on the website in additional formats as a PDF, a descriptive Word document, and as audio files that allow the user to listen to the entire production all at once or by individual section. Search engines also pick up subjects covered from the online PDF version. Prior to 2018 it was available online only in HTML. Although it was easy to access and read at that time, it was restricted to the single format. In 2022, the publication’s audio files, Microsoft Word version, and PDF version are all available online.

All formats of The Bulletin now produced are time consuming and tedious work to bring to completion. The editing process is long and requires multiple proofs for each format. The audio recording and editing are accomplished segment by segment. With 15-16 segments, the intensive back and forth between the narrator and the Director of Public Relations requires considerable time and attention for 5-7 days. This is a drawback. The advantage of the process, however, is a more professional publication with fewer errors in the final product. Although Karen Smith does not participate in the editing process as did a previous layout and design specialist, BVA also did not have a skilled Associate Editor during those years as it does now.

Copies of the most recent issue, Spring 2022, were sent in the following approximate quantities:

* Hard copy U.S. Mail—3,950 copies (150 fewer than the issue right before) Word (email)—940 copies
* PDF (email)—180 copies
* Audio—90 copies
* PDF (website)—analytics not currently available as to number of visits.
* Audio (website)—analytics not currently available as to number of visits.

A small but an increasing number of spouses of deceased veterans have contacted the Public Relations Team to request that print copies of The Bulletin continue for them. These mailings require postage and are sent manually from National Headquarters. There are ten spouses currently in this category so the expense of doing this is minimal. The most recent addition to this list is Patricia Mower, wife of past Director of District 4 Bob Mower. A single copy is also sent to a limited number of individuals and libraries. A few BVA and BVA Auxiliary Board members have requested multiple copies, which are also mailed from the national headquarters.

BVA Website: The Public Relations Team provides a limited amount of content for the site, primarily the blogs and testimonials. Other content is copy edited. The Deputy Director of Public Relations now has the capability to upload content to the blogs and is doing so consistently. Much of the design work, however, continues to be accomplished by the webmaster under the direction of the Executive Director. It can be argued that BVA.org is, at present, more comprehensive, more well organized, and better designed than at any time in its approximately 24-year history. Most noteworthy are the sections in the dropdown menu that link to regional groups, committees, and the various BVA initiatives such as Team BVA, the new Ambassador program, One-Click Politics, Awards and Scholarships, and Care Review. These features on the site are all new, if not entirely new then at least new in terms of accessibility and presentation.

Zoom Meetings: For most of FY22 the Public Relations Team scheduled, coordinated, and monitored Zoom meetings for the National Service Director, Veterans Benefits and Policy; the Chairman of the Regional Group, Bylaws, and Membership Committee; the Women Veterans Group; the Guide Dog Handlers Committee; and the Directors of Districts 2 and 5. Aside from problems with a meeting scheduled for former members of the Wisconsin Regional Group to discuss the reestablishment of the group, the Zoom meetings have been highly successful and have come off without any technical hitches. The leadership and regional groups of District 2 have secured their own Zoom account and no longer rely on the Public Relations Team to set up or host meetings.

Upcoming Printing and Design Projects: On a previous calendar of upcoming printing and design projects for the Public Relations Team was a brochure to bring public awareness to the issues of vision loss to be placed in eye care professional offices. Still another was a written piece on Planned Giving, targeted to those who could offer increased financial support and perhaps remember BVA in their will. For budgetary reasons and for reasons related to the pandemic, these projects have been placed on hold. The 77th National Convention program booklet and a new general BVA brochure highlighting Team BVA activities are projects that are likely on the not-too-distant horizon.

Public Service Announcements: Due to critical budgetary concerns and an inability to establish a clear link between BVA revenue and new BVA members with ad value numbers, the Public Relations Team has suspended for the time being the traditional print, radio, and television releases. This has been the case since September 2020. Replacing them are the targeted revenue email and online appeals that also saw an increase in online donations in FY22.

Merchandise: Following a long hiatus from securing and shipping merchandise due to the pandemic, the Public Relations Team has recently coordinated the purchase and delivery of 5,000 Vision Simulator Cards in English and 1,000 in Spanish from Sales and Marketing Strategies, Inc. of Royal Palm Beach, Florida. The shipment was received on March 24. An order of 5,000 white cane pens also arrived at National Headquarters on March 22. Both items should prove to be effective marketing tools in the near future, especially for the upcoming 77th National Convention and White Cane Day 2022.

Social Media: Facebook still exists as the most popular social media platform for all BVA demographic groups and types of interests. The organization will not see any major increase in followers or social media engagement without truly relevant content—Veterans Service Program wins, small and large accomplishments of the membership, member photos, etc. Donors wish to SEE how BVA is helping the Association’s members in the form of testimonials, reports on volunteer efforts of regional groups, accounts of veterans training to use a guide dog, or features on blinded veterans kayaking or climbing mountains. Appeals with photos or videos of BVA members continue to secure the greatest engagement and financial return. The challenge for the Public Relations Team is coming up with the content and effectively presenting it.

As of July 19, 2022, the number of BVA’s Facebook followers was at 6,480, a very modest gain since March of this year. The Twitter followers numbered 4,785 and the Instagram number had reached 2,231. BVA’s lower Twitter numbers are consistent with those of other similar organizations since the platform is not as popular as Facebook with the majority of age groups across the broad spectrum.

News Blurbs and Announcements Emailed to BVA Membership and Donors: In March 2020, in response more than anything else to the onset of the COVID-19 pandemic, the Public Relations Team began distributing news alerts on subjects of importance to the National Board of Directors and presidents of the regional groups. Many of these early messages were related to the pandemic and the organization’s response. Most had links to resources that originated with VA or the Centers for Disease Control. Because the response from BVA members to such communications was as positive as it was, the Team, under the direction of the Executive Director, expanded the topics of the messages and began sending them more frequently and to the financial supporters of the Association for whom an email address was available. Upon request, and because there were still some regional group leaders who did not promptly forward the messages to their members, members without leadership positions were added to this group. Following BVA’s Zoom educational sessions in August 2020, several individuals from VA BRS (mostly Visual Impairment Team Coordinators) also asked to be added to this email group permanently. Ironically, a few of them have commented that they learned things routed to BVA from VA that they were not receiving themselves directly at VA, at least not as quickly as BVA was receiving the updates. Beginning in early FY22, this email group expanded to include all BVA members for whom the National Headquarters had an address. In January 2022, the email group was merged into Salesforce and Constant Contact and is now managed by the Deputy Director. See below.

Staff: Kylie Fitzgerald, previously a “Communications Specialist” within the Public Relations Team, was temporarily away from BVA for approximately five months while she relocated. She left in April 2021 and returned in mid-September just weeks after the virtual national convention. At that time, she was named Deputy Director of Public Relations. Jordan Chesley, although working remotely throughout his tenure and extensively with the Executive Director, has been a de facto member of the Public Relations Team since December 2020. The new Director of Development has been interacting extensively with the Public Relations Team on several projects relating to revenue generation and the upcoming BVA 77th National Convention, with specific focus on the convention program booklet.

Newsletters: The PR Team was distributing a monthly electronic newsletter at the end of each month until September 2020. The target day for newsletter production at the time was the final Wednesday of the month. The e-newsletter was initiated sometime in 2012 or 2013 as a means of engaging with BVA’s donors. In approximately 2015, the piece became more of a supplement to The Bulletin as BVA members were added to the recipient list. In some cases, Bulletin material was repeated in the newsletter, meaning that members were receiving the entries twice. In FY19, the Team switched from Vertical Response as the newsletter mailer to MailChimp. The latter was easier to use and more aesthetically pleasing to sighted readers. The Team also received positive feedback that the MailChimp format was more screen reader friendly than Vertical Response.

As has been the case with both BVA’s Public Service Announcements and certain membership subscriptions such as Meltwater, the Public Relations Team and the Executive Director have been equally unable to establish a clear link between online donations (or any donations, for that matter) and the monthly newsletters. What was determined instead, and what seems to have worked much better for bringing in limited revenue online, is the distribution of a single-message communique with a direct appeal from the Executive Director for donations. This has been accomplished for the most recent Veterans Day, the Thanksgiving holiday weekend, and the 2021 end-of-year holidays (i.e., Christmas, Hanukkah, and New Year’s Day). While the appeals may not yet have met the PR Team’s goals, nor the needs of the organization at this point, the results have provided at least a starting point—and yielded better numbers than for any other similar appeals of the past.

After a lengthy process of data clean-up, the Public Relations Team recently switched from Mailchimp to Constant Contact, resulting in an ability to better target the messaging. The Deputy Director is the go-to staff member with the best knowledge of the technical features of Constant Contact. To avoid reports of message fatigue from BVA members, the Public Relations Team, in discussion with the Executive Director, is considering the option of transmitting only one message per week but with multiple topics embedded in the transmission. The move would constitute a return, at least in some form, to the original newsletter concept.

Additional extensive data clean-up has occurred since last March, resulting in much-improved records. Currently, the Public Relations Team is averaging two emailed messages per week to either members or donors—or, in some cases, both. Since March 1 there has been a gain of 264 contacts in the general list, which brings the total to 3,474. Although some individuals have unsubscribed or opted out, there are still many positives, among which is that the Constant Contact subscribers increased by 24 in just 24 days recently. Many of those resulted from the online forms available through social media or the BVA website.

Relevant data about the Public Relations Team’s efforts with Constant Contact are as follows. Please note that BVA’s open rate with messages continue to be better than the industry average. The same is true with respect to the bounce back rate. Although the click rate is lower than the industry average, the “member only” messages have far higher click rates.

* Open Rate:
	+ Industry average – 35.33 percent
	+ Our Average – 39.00 percent
* Click Rate:
	+ Industry average – 1.88 percent
	+ Our Average – 1.00 percent
	+ Member only emails have higher click rates, averaging between 2 and 6 percent.
* Bounce Rate:
	+ Industry Average – 11.11 percent
	+ Our Average – 9 percent

Having up-to-date and accurate email addresses for as many BVA members as possible will allow the Team to push out timely, relevant information more quickly than ever before. The last time the Public Relations Team pulled its statistics for a Board report (mid-winter 2022), there was only a month of data from Constant Contact. Transmissions have now been sent for the past six months so it is somewhat expected for numbers to fall due to bad addresses and opt-outs. Feedback on usability and the appearance of Constant Contact messaging continues to be satisfactory as the product seems to avoid spam filters better than MailChimp, allowing for additional emails in subscriber inboxes.

# KATHERN F. GRUBER AND THOMAS H. MILLER SCHOLARSHIP PROGRAM

BVA awards seven (7) scholarships each year. There are six (6) scholarships for $2,000 each available through the Kathern F. Gruber Scholarship Program and one (1) for $1,000 offered through the Thomas H. Miller Scholarship Program. The Gruber program is in its 39th year, and Miller its 10th year.

The scholarships are open to dependent children, grandchildren, and spouses of blinded veterans to include active-duty blinded service members of the U.S. Armed Forces. The blindness may either be service-connected or non-service-connected and membership in BVA is not a prerequisite. A BVA Scholarship Committee comprised of three volunteers, none of whom is a blinded veteran, reviews the scholarship applications and chooses the seven primary recipients based on “best qualified.” The Committee also selects two alternates.

# BVA EQUIPMENT

BVA purchased two laptops and several docking stations last September for office staff. With fewer staff coming into the office since the start of the pandemic, the need for ordering equipment and supplies is down.

# EXECUTIVE DIRECTOR SUMMARY

## Statement of Financial Position

As of June 30, 2022

 **Total**

### **ASSETS**

 **Current Assets**

**Bank Accounts**

|  |  |
| --- | --- |
| 1010 Capital One - Operating | 250,000 |
| 1020 Capital One - Sweep | 461,504 |
| 1028 Capital One - LMF | 17,757 |
| 1051 Paypal Bank | 12,297 |
| **Total Bank Accounts** | **741,558** |

**Accounts Receivable**

|  |  |
| --- | --- |
| 1350 Pledges Receivable | 74,768 |
| **Total Accounts Receivable** | **74,768** |

**Other Current Assets**

|  |  |
| --- | --- |
| 1600 Prepaid Expenses | 2,442 |
| 1610 Other Prepaid Expenses | 12,104 |
| **Total Other Current Assets** | **14,546** |

**Total Current Assets 830,873**

 **Fixed Assets**

|  |  |
| --- | --- |
| 1650 Building | 2,040,911 |
| 1700 Furniture & Equipment | 227,891 |
| 1750 Accumulated Depreciation | (363,192) |
| **Total Fixed Assets** | **1,905,611** |

 **Other Assets**

|  |  |
| --- | --- |
| 1220 Morgan Stanley - LMF | 1,103,887 |
| 1230 Morgan Stanley - Main | 8,733,099 |
| 1240 Morgan Stanley - Gift | 5,131 |
| **Total Other Assets** | **9,842,116** |

 **TOTAL ASSETS $12,578,59**

### **LIABILITIES AND EQUITY**

 **Liabilities**

 **Current Liabilities**

**Accounts Payable**

|  |  |
| --- | --- |
| 2000 Accounts Payable | 17,100 |
| **Total Accounts Payable** | **17,100** |

 **Credit Cards**

|  |  |
| --- | --- |
| 2040 Commerce Credit Card | 325 |
| **Total Credit Cards** | **325** |

 **Other Current Liabilities**

|  |  |
| --- | --- |
| 2042 Accrued Payroll | 25,649 |
| 2050 Accrued Vacation | 30,900 |
| 2400 Deferred Revenue | 66,255 |
| **Total Other Current Liabilities** | **122,804** |

 **Total Current Liabilities 140,229**

 **Total Liabilities 140,229**

 **Equity**

|  |  |
| --- | --- |
| 2900 Unrestricted Net Assets | 2,420,219 |
| 2910 Temporarily Restricted Net Assets | 136,616 |
| 2920 Board Designated Net Assets | 9,842,116 |
| Net Revenue | 39,419 |
| **Total Equity** | **12,438,370** |

 **TOTAL LIABILITIES AND EQUITY $12,578,599**

## Statement of Activities

July 2021-June 2022

 **Total**

|  |  |
| --- | --- |
| Jul 2021 – Jun 2022 | Jul 2020 – Jun 2022 (PP) |

### **REVENUE**

 **Contributions Revenue**

|  |  |  |
| --- | --- | --- |
| 3010 General Contributions | 217,510 | 121,774 |
| 3300 Grant Contributions | 320,967 | 1,500 |
| 3700 Bequests | 448,008 | 382,826 |
| 3740 Miscellaneous Revenue | 20,996 | 13,385 |
| 4000 Regional Group Contributions | 16,176 | 23,767 |
| 4300 Direct Mail Contributions | 530,311 | 560,916 |
| 4400 Online Giving | 67,682 | 42,921 |
| 4700 Corporate Contributions | 6,899 | 5,000 |
| 4801 Major Donor Contributions | 36,700 | 65,000 |
| **Total Contributions Revenue** | **1,655,249** | **1,217,090** |

 **Event Revenue**

|  |  |  |
| --- | --- | --- |
| 3800 Golf Tournament Revenue |  | 3,935 |
| 4800 Sponsorships | 6,000 | 0 |
| 4810 Exhibit Revenue | 1,000 | 0 |
| 4820 Event Registration Revenue | 25,200 | 0 |
| **Total Event Revenue** | **32,200** | **3,935** |

 **Program Revenue**

|  |  |  |
| --- | --- | --- |
| 3020 Life Member Dues | 3,284 | 2,970 |
| 3030 Affiliate Dues |  | 50 |
| 3540 Merchandise Revenue | 659 | 1,165 |
| 3900 Sightless Summit Revenue | 23,639 |  |
| 4000 Awards Revenue (deleted) |   | 50 |
| **Total Program Revenue** | **27,581** | **4,235** |

Uncategorized Income 183,922

**Total Revenue 1,908,952 1,225,260**

**GROSS PROFIT 1,908,952 1,225,260**

### **EXPENDITURES**

 **Event Expenses**

|  |  |  |
| --- | --- | --- |
| 5000 Venue Expenses | 5,151 | 0 |
| 9521 Parliamentarian | 1,160 |  |
| 9523 Other Event Expenses | 12 | 3,601 |
| **Total Event Expenses** | **6,323** | **3,601** |

 **Facilities & Equipment**

|  |  |  |
| --- | --- | --- |
| 5870 Building Fees | 96,488 | 101,156 |
| 6000 Property Taxes | 42,570 | 30,298 |
| 6800 Depreciation Expense | 81,275 | 83,141 |
| 7460 Storage | 2,868 | 2,299 |
| 8000 Building Repairs & Maintenance | 543 |  |
| 8030 Equipment Repairs & Maintenance | 26,867 | 33,563 |
| 8040 Condo Parking | 435 | 8,640 |
| **Total Facilities & Equipment** | **251,046** | **259,097** |

 **General Expenses**

|  |  |  |
| --- | --- | --- |
| 5340 Bank & Credit Card Fees | 7,946 | 12,979 |
| 5830 Dues & Subscriptions | 6,581 | 16,799 |
| 6710 D&O Insurance | 15,554 | 19,496 |
| 6715 General Liability Insurance | 39,399 | 10,358 |
| 7350 Miscellaneous Expenses | 5,527 | 457 |
| 7760 Postage & Shipping | 74,362 | 135,920 |
| 7890 Printing | 39,486 | 71,742 |
| 7960 Permits & Licenses | 10,534 | 0 |
| 8990 Supplies | 12,606 | 4,772 |
| 9100 Employee Training | 1,337 | 450 |
| 9250 Telephone | 6,686 | 9,351 |
| 9390 Travel | 18,222 | 1,853 |
| **Total General Expenses** | **238,239** | **284,178** |

 **Personnel & Payroll**

|  |  |  |
| --- | --- | --- |
| 7000 Salaries & Wages | 735,095 | 653,970 |
| 7010 Payroll Taxes | 60,521 | 62,468 |
| 7020 Employee Benefits | 2,982 | 84,582 |
| 7030 Health/Vision Insurance | 280 | 31,239 |
| 7040 Life/Dental Insurance | 6,697 | 7,249 |
| 7050 Retirement Plan Expense | 6,452 | 2,931 |
| 7080 Worker's Compensation | 2,545 | 1,494 |
| 7300 Payroll Service Fees | 16,038 | 21,772 |
| **Total Personnel & Payroll** | **830,611** | **865,705** |

**Professional & Contract Services**

|  |  |  |
| --- | --- | --- |
| 5020 Accounting Services | 103,190 | 125,186 |
| 5240 Audit & Tax Services | 12,184 | 16,973 |
| 5800 Other Contract Services | 60,433 | 100,902 |
| 6510 Fundraising Services | 29,831 | 20,127 |
| 6540 Marketing Services | 42,292 | 48,870 |
| 6830 Legal Services |  | 3,056 |
| **Total Professional & Contract Services** | **247,930** | **315,115** |

Uncategorized Expense 638

 **Total Expenditures 1,616,486 1,752,779**

**NET OPERATING REVENUE 292,466 (527,518)**

**OTHER REVENUE**

|  |  |  |
| --- | --- | --- |
| 3570 Interest Revenue | 336,466 | 217,546 |
| 3580 Unrealized Gains & Losses | (1,370,568) | 1,338,629 |
| 3590 Realized Gains & Losses | 820,599 | 300,534 |
| **Total Other Revenue** | **(213,503)** | **1,856,709** |

**OTHER EXPENDITURES**

|  |  |  |
| --- | --- | --- |
| 5350 Investment Fees | 39,355 | 21,885 |
| 8700 Apportionment of Investment Income | 189 | 38,723 |
| **Total Other Expenditures** | **39,544** | **60,608** |

**NET OTHER REVENUE (253,047) 1,796,101**

**NET REVENUE $39,419 $1,268,583**

## Accounts Receivable Summary

As of June 30, 2022

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | **Current** | **1 - 30** | **31 - 60** | **61 - 90** | **91 and over** | **Total** |
| The Credit and Marital Trusts of the Buttery Trust |  |  |  |  | 64,000 | 64,000 |
| The Ward Family Trust |  |  |  |  | 10,768 | 10,768 |
| **TOTAL** | **$0**  | **$0**  | **$0**  | **$0**  | **$74,768**  | **$74,768**  |

## Accounts Payable Summary

As of June 30, 2022

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | **Current** | **1 - 30** | **31 - 60** | **61 - 90** | **91 and over** | **Total** |
| Andrea Malmer | 51 |  |  |  |  | 51 |
| EngageUSA | 3,115 |  |  |  |  | 3,115 |
| Harbor Compliance | 1,975 |  |  |  |  | 1,975 |
| Jordan Chesley | 1,500 |  |  |  |  | 1,500 |
| Karen Smith Design, Inc. |  | 1,200 |  |  |  | 1,200 |
| King Street Condominium Unit Owners Association | 8,159 | (8,159) |  |  |  | 0 |
| Konica Minolta | 400 |  |  |  |  | 400 |
| Lonnie Bedwell |  | 849 |  |  |  | 849 |
| Michael Neal | 6,823 |  |  |  |  | 6,823 |
| Old Mill Resort | 700 |  |  |  |  | 700 |
| Quadient Leasing | 383 |  |  |  |  | 383 |
| Robert Moreno |  |  |  | 104 |  | 104 |
| Special Event Transportation Management (v) | 3,945 | (3,945) |  |  |  | 0 |
| **TOTAL** | **$27,052**  | **($10,055)** | **$0**  | **$104**  | **$0**  | **$17,100**  |

\*\*The annual BVA audited financial statement for FY22 will be appended to the hard-copy edition of this report as Appendix B.

BVA is closing the sale of its National Headquarters property located at 1101 King Street, Alexandria, VA 22314 on or about August 26, 2022. The sale was a result of the majority property owners selling to a development group with a multi-year conversion to residential mixed use. BVA was able to favorably leverage this transaction, overcoming the current depreciated property value, which will allow the Association to reinvest $2.1M to the investment fund.

Headquarters staff have been successfully working remotely and from our federal office spaces throughout the preceding two years. We will seek to acquire a small, leased office space to accommodate a strategic team of staff within the metro Washington, DC, region. This will result in additional cost savings as the current monthly HQ assessments will be eliminated.

# CONCLUSION

Given the numerous changes that have been made within the Association over the past fiscal year, the National Board of Directors has continued to provide sound financial management and has acted prudently and responsibly in their decision-making and oversight. For that reason, BVA has remained in a stable financial position, notwithstanding continuous challenges over the years. Your National Board of Directors deeply appreciates the support of the membership along with the national headquarters staff and looks forward to serving you during the coming year.

For the National Board of Directors,

Joseph McNeil

National President and

Chairman of the Board

JM:bj

# APPENDICES:

###  A - Membership Statistics

###  B - Audited Financial Statement for FY22 (July 1, 2021–June 30, 2022)

###  C - Composition of four Director Districts