

# Workgroup Updates

**ANNUAL REPORT 2017** 



#### **2017 Growth and Success**



160,000

Mother/Baby pairs served



67

New Accredited Counselors



Total Accredited Counselors



675 Enrolled

members



11.4K

Twitter followers



183K

Facebook page likes

Breastfeeding Counselors are currently serving in 40 States



PLUS District of Columbia, Armed Forces Europe, and Armed Forces Pacific

## VOLUNTEER SERVICES

Mia Gonzalez, Co-Chair Krystal Clayton, Co-Chair





#### VOLUNTEER SERVICES MANAGERS



Alura Hirsch Volunteer Support

Shevy Lowinger Volunteer Appreciation



Kate Nadeau Applicant Support



Sharon Knorr BRAID

Charlene Shenk BC Support

#### VOLUNTEER SUPPORT HIGHLIGHTS & GOALS

- > New chair and manager have transitioned into their roles
- We have cleaned up open items
- > Streamlined/cleaned up back office spreadsheet that helps us to organize volunteers and committees

#### VOLUNTEER SUPPORT GOALS for 2017/2018

- Monthly update sent out for open volunteer positions to all BCs
- Streamlining volunteer requests from managers/directors (no more e-mail, now a survey!)
- > Streamline the follow-up/check-in process for existing volunteers

#### APPLICATIONS HIGHLIGHTS & GOALS

- > We had been able to reduce the wait time to less than one week for an interview.
  - However a large influx of applications caused the wait to increase upwards of eight weeks
- Natalie Gates began the back-up manager; currently her role is closer to an assistant-manager
- Continuous improvement measures to the application process:
  - Better defining application questions to see if the applicant values breastfeeding as the biological norm
  - Updating the application acknowledgement to confirm more information for less delays
  - Working within the workgroup as a whole to better understand the personal experience requirements

### APPLICATIONS GOALS for 2017/2018

- Working with BCS on continued issues with non-responsiveness to applicants contacting and BCs responding to inquiries from application support
- Working with education to better develop flagging of potentially problem candidates

#### BC SUPPORT GOALS

#### Objective 2

For a ratio of 1:20, identified the number of Breastfeeding Counselor Volunteers (Regional Reps) to be:

- Volunteers (Regional Reps) to be:
- International--1 (4 BCs)
- Midwest--3 (79 BCs)
- Northeast--2 (56 BCs)
- South--3 (73 BCs)
- West--3 (62 BCs)

For most of the fiscal year, the four large regions had two (2) reps each. Ended the year with one rep per region, except for the Northeast, which has two.

#### Objective 3

Continued contacting Breastfeeding Counselors at:

- accreditation
- one month post-accreditation
- six months post-accreditation
- one-year anniversary of accreditation
- then every six months

Continued to track BC activity and responses with BC tracking spreadsheet which documents upcoming contact dates, type of contact email, and notes from contact. Also tracks Chapter, Facebook group/page, volunteer roles, and CE/BAMS enrollment.

Continued to use email protocol so that there is a record of all emails between regional reps and BCs.

Trained BC regional reps on contact procedures.

#### Objective 4

Used survey for resigning/retiring BCs to capture reason(s) for leaving Breastfeeding USA.

#### BC SUPPORT HIGHLIGHTS

- Contacted every Breastfeeding Counselor! All have been contacted at least twice. Newly accredited BCs are contacted four (4) times in the first year.
- > Began collaboration with Candidate Support to track BCs from candidacy through retirement to see if we can spot "red flags" in candidacy that help predict non-compliance as a BC, which we can try to address earlier in the accreditation process.
- ➤ Began updating the BC Guide content (with input from all workgroups) and access. It will be converted into a .pdf that is easily searchable and updated.
- > Continued to document FAQs for common questions from BCs for regional repreference.
- Developed and implemented procedure for type of contact for non-compliant BCs (BC Support Manager only).

### BC SUPPORT GOALS for 2017/18

- Recruit and train at least six new volunteers as regional reps: two reps each for the Midwest, South, and West regions to maintain the 1:20 ratio.
- Collaborate with Candidate Support to track BCs from candidacy through retirement to see if we can spot "red flags" in candidacy that help predict non-compliance as a BC, which we can try to address earlier in the accreditation process.
- Create instructional video for BC regional rep training and evaluate effectiveness of new and already implemented training.
- > Continue to document FAQs for common questions from BCs for regional repreference.
- Update BC Guide and make it searchable.

#### CCAR TRACKING HIGHLIGHTS

- Tracked all CCAR submissions for BC compliance and elections eligibility.
- Improved 2017-18 CCAR form to accommodate all types of Facebook helping and online meetings.
- Continued to add new Chapters to CCAR form as needed.

### CCAR TRACKING GOALS for 2017/18

- Analyze data from CCAR submissions and create a system where items needing attention (moves, life events, Chapter changes, etc.) are communicated to BC Support for follow up.
- Analyze data from CCAR submissions to see if CCAR form needs to be changed. Continue to streamline CCAR form as much as possible.

## EDUCATION

Sarah Harding, Chair



#### EDUCATION MANAGERS



Sharon Knorr Internal Continuing Education Karen Cuni Candidate Training Hannah Tello Candidate Support Sarah Harding Candidate Support

#### EDUCATION GOALS & HIGHLIGHTS

- Create 6 Continuing Education Units
  - ➤ We have one that is uploaded and ready to test and possibly deploy. Pending Moodle improvements, we have several others in the editing phase.
- Maintained an adequate level of volunteers in Candidate Support and Course Tutors.
- New course tutor manager
  - Karen Cuni to replace Toi when she moved to the Board.
- Extensive course platform investigation project
  - > We have narrowed down the options to two that will be a great improvement over Moodle.

## EDUCATION GOALS & HIGHLIGHTS

- > Ashley Hamby, Candidate Tracking volunteer
- > Karyn Dinovo, Candidate Tracking volunteer





### EDUCATION GOALS for 2017/2018

- Deploy 4 CEUs
- ➤ Launch the latest edition of the Comprehensive Course
- Move to a new course platform that is easier to manage without requiring additional expenses for technical services.

## COMMUNICATIONS

Jada Nichols, Interim Chair



#### COMMUNICATION MANAGERS



Bonnie Rutkowski **Public Relations** 



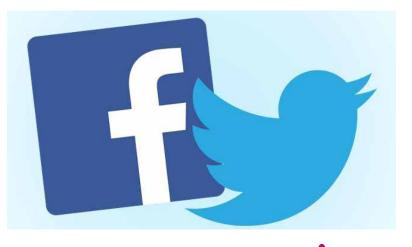
Gena Ortega E-Newsletter

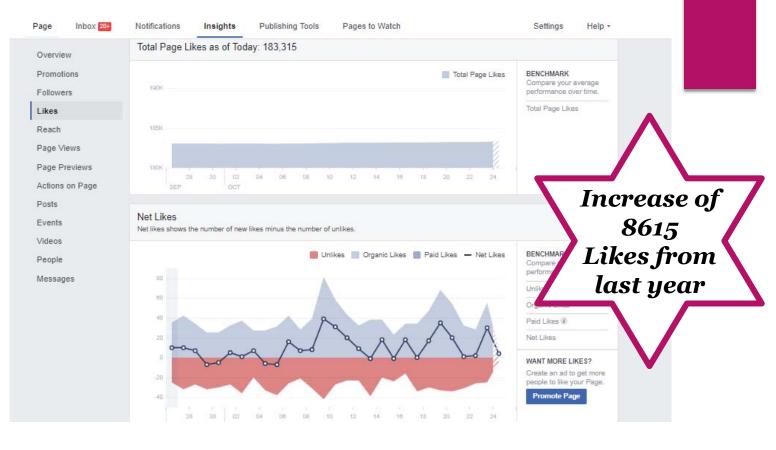
Norma Ritter Editorial Review Board

Genevieve Colvin Social Networking

#### SOCIAL NETWORKING GOALS & HIGHLIGHTS

- Conduct training for new Facebook volunteers
- > Attended a USBC webinar on using Twitter scheduling effectively.
- Re-engaged followers on Twitter in mid April 2017.
- Assisted F&D on 81 Campaign and the jay elle in August promotion





Increase of 1770 Followers from last year

Tweets **5,468** 

Following 416

Followers 11.5K Likes 509

### SOCIAL NETWORKING GOALS FOR 2017/2018

- Facebook
  - Find additional volunteers
- Twitter
  - > 1825 New Followers 5 per day
  - Host 2 Twitter Chats
  - Participate in as many Tweet chats as possible.
  - ➤ Use HootSuite to increase number of Tweets each week though scheduling.
  - Find additional Twitter volunteer

#### E-NEWSLETTER GOALS & HIGHLIGHTS

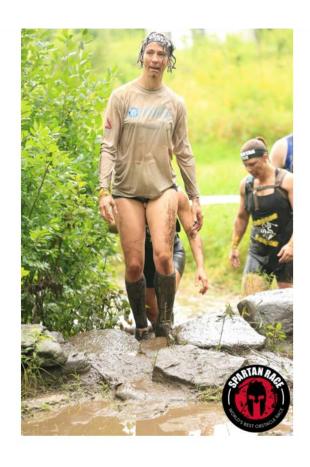
- The e-newsletter, #MilkMemos, aims to help Breastfeeding USA meet several goals, namely fundraising (through encouragement of its readers to donate), education (by providing valuable and timely evidence-based information from our organization and other reputable sources to its readers), and name recognition by driving more traffic to the website.
- This past year, 4 newsletters have been released, focused on pertinent issues relevant to the mothers and families who seek our help, as well as providing helpful information to Breastfeeding Counselors and guiding them to valuable articles on our beautifully-designed website.
- Some of our most-read and most popular newsletter articles were regarding: breastpump use, breastfeeding secrets from global moms, essential oils and breastfeeding, tongue ties, AAP sleep guidelines, perceived low milk supply. The design has improved over this year, focusing on improved readability, straightforward call to action, and increasing Breastfeeding USA exposure through social media channels.

### E-NEWSLETTER GOALS for 2017/2018

- Continued improvement in graphic design
- Continued curation of the best available current articles and videos, as well as increased reach, breadth, and open rate among Breastfeeding Counselors and the general public.

## ADVOCACY

Jennifer Viet, Chair



### ADVOCACY MEMBERS

- Beth Lichy
- Karen Cuni
- Lisa Watkins
- > Tamika Harris
- > Ellyn Fine

#### ADVOCACY GOALS AND HIGHLIGHTS

- Represented Breastfeeding USA at
  - NWA (National WIC Association) in Denver, CO
  - Breastfeeding and Feminism, Raleigh, NC
  - USLCA, San Antonio, TX
  - USBC, Arlington, VA
- Provided recommendations to the Board of Directors on national policy decisions including letter to Fed is Best and signing on as support for family friendly airport legislation

### ADVOCACY GOALS for 2017/2018

- ► Calendar has been initiated to include all conferences that both the committee and BOD are aware of.
- New USBC Lactation Support Providers Constellation representative -Welcome Tamika Harris!
- ► Training video for conference attendees should be completed.
- ► More opportunities to showcase our organization to groups that are not currently aware of us.

## INCLUSIVITY

Norma Ritter, Chair

#### INCLUSIVITY GOALS AND HIGHLIGHTS

- The Inclusivity Project has started to share informational articles with our BCs
- The inclusivity Project is looking to expand the diversity of the group with regard to race, ethnicity, age, sexual orientation, gender identity, and geography. If you are interested in joining us, please email norma.ritter@breastfeedingusa.org

## FINANCE

Carol Delaney, Chair

### FINANCE – TREASURE'S REPORT

https://docs.google.com/document/d/1Y7802VpHK-zZxKSnymL0VN5b2DJtCisxJxfUYsLKNpg/edit

8:14 AM 08/08/17 Accrual Basis

## Breastfeeding USA Profit & Loss Prev Year Comparison July 2016 through June 2017

|  | Jul '16 - Jun 17 | Jul '15 - Jun 16 | \$ Change |
|--|------------------|------------------|-----------|
| Ordinary Income/Expense                  |                  |                  |           |
| Income                                   |                  |                  |           |
| 4000 · Cash Contributions                |                  |                  |           |
| 4010 · Membership Fees                   | 17,025.00        | 16,465.00        | 560.00    |
| 4020 · Contributions                     | 5,709.52         | 6,677.01         | -967.49   |
| 4022 · Recurring Donations               | 835.00           | 0.00             | 835.00    |
| 4330 · Workplace Giving                  | 803.57           | 0.00             | 803.57    |
| 4390 · Other Indirect Contributions      | 603.36           | 443.35           | 160.01    |
| Total 4000 · Cash Contributions          | 24,976.45        | 23,585.36        | 1,391.09  |
| 4100 · In-Kind Contributions             |                  |                  |           |
| 4111 · IKC from BF USA V - Goods         | 2,023.16         | 707.73           | 1,315.43  |
| 4122 · IKC from Others - Services        | 6,859.70         | 13,150.00        | -6,290.30 |
| Total 4100 · In-Kind Contributions       | 8,882.86         | 13,857.73        | -4,974.87 |
| 5000 · Education and Training Fees       |                  |                  |           |
| 5010 · BC Application/Training Fees      | 10,990.00        | 13,260.00        | -2,270.00 |
| 5099 · Education Fee Waivers             | -300.00          | -150.00          | -150.00   |
| Total 5000 · Education and Training Fees | 10,690.00        | 13,110.00        | -2,420.00 |
| Total Income                             | 44,549.31        | 50,553.09        | -6,003.78 |

| 7100 · Professional Fees<br>7120 · Accounting and Audit Fees              | 3,000.00           | 2,500.00              | 500.00            |
|---|--------------------|-----------------------|-------------------|
| 7130 · Legal Fees   | 3,859.70           | 150.00                | 3,709.70          |
| Total 7100 · Professional Fees  | 6,859.70           | 2,650.00              | 4,209.7           |
| 8000 · Information Technology   |                    | Walles Children Sales | 10.000 (10.000 V) |
| 8021 · Website Development  | 6,595.00           | 10,500.00             | -3,905.00         |
| 8030 · Website Server/Hosting   | 2,484.18           | 2,837.41              | -353.23           |
| 8040 · IT Services  | 12,490.00          | 5,250.00              | 7,240.00          |
| 8090 · Website Services   | 530.25             | 525.00                | 5.25              |
| Total 8000 · Information Technology                                       | 22,099.43          | 19,112.41             | 2,987.0           |
| 8100 · Training & Support Group Exp.<br>8112 · Volunteer Develop/Training | 475.00             | 700.00                | -225.00           |
| Total 8100 · Training & Support Group Exp.                                | 475.00             | 700.00                | -225.00<br>-225.0 |
|   | 475.00             | 7.00.00               | -223.0            |
| 8200 · Supplies and Materials   | 4 070 07           | 4 CCE C2              | 205.24            |
| 8210 · Books, Pubs, and Subscriptions                                     | 1,870.97<br>617.01 | 1,665.63<br>188.56    | 205.34<br>428.45  |
| 8220 · Office Supplies  |                    |                       |                   |
| Total 8200 · Supplies and Materials                                       | 2,487.98           | 1,854.19              | 633.7             |
| 8300 · Communications Expenses  |                    | 700000 BUTT           |                   |
| 8390 · Other Communications Expenses                                      | 296.94             | 372.24                | -75.30            |
| Total 8300 · Communications Expenses                                      | 296.94             | 372.24                | -75.3             |
| 8400 · Public Relations and Advocacy                                      |                    | 200                   |                   |
| 8420 · Professional meetings  | 400.00             | 0.00                  | 400.00            |
| 8422 · Exhibits   | 2,530.00           | 154.20                | 2,375.80          |
| 8423 · Postage and Shipping   | 632.85             | 476.30                | 156.55            |
| 8424 · Printing and Copying   | 1,072.50           | 1,582.77              | -510.27           |
| Total 8400 · Public Relations and Advocacy                                | 4,635.35           | 2,213.27              | 2,422.0           |
| 8500 · Travel Expenses  |                    |                       |                   |
| 8510 · Common Carrier Travel / Mileage                                    | 7,783.00           | 802.16                | 6,980.84          |
| 8520 · Lodging  | 4,117.46           | 925.63                | 3,191.83          |
| 8540 · Meals & entertainment  | 2,067.79           | 178.65                | 1,889.14          |
| Total 8500 · Travel Expenses  | 13,968.25          | 1,906.44              | 12,061.8          |
| 8600 · Facility and Equipment Expenses                                    |                    | 0.010.00              |                   |
| 8680 · Depreciation and Amortization                                      | 5,000.04           | 2,916.69              | 2,083.35          |

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|--|------------------|------------------|------------|
| Total 8600 · Facility and Equipment Expenses | 5,000.04         | 2,916.69         | 2,083.35   |
| 8700 · Business Expenses                     |                  |                  |            |
| 8711 · Credit Card/PP Fees                   | 1,012.46         | 929.94           | 82.52      |
| 8712 · Other Financial and Bank Fees         | 38.56            | 0.00             | 38.56      |
| 8720 · Licenses and Registration Fees        | 155.00           | 75.00            | 80.00      |
| 8730 · Insurance                             | 4,197.00         | 3,240.82         | 956.18     |
| Total 8700 · Business Expenses               | 5,403.02         | 4,245.76         | 1,157.26   |
| Total Expense                                | 61,225.71        | 35,971.00        | 25,254.71  |
| Net Ordinary Income                          | -16,676.40       | 14,582.09        | -31,258.49 |
| Net Income                                   | -16,676.40       | 14,582.09        | -31,258.49 |

# INFORMATION TECHNOLOGY

Susan Penrod, Chair



### IT MANAGER



Keyana Harrison Content Management

#### IT GOALS & HIGHLIGHTS

- Improve support for BCs and admins Goal 1
  - Continued customizing for admins' needs and solving problems for admins and users.
  - > Transitioned to support contract with Wanna Pixel.
- Support and Accountability Goals 1 and 3
  - ➤ Wanna Pixel has taken on the CRM project, which will proceed in stages. First up is shifting our sales of memberships and education fees to CiviCRM, which will improve tracking and management of these sales and users.

#### IT GOALS & HIGHLIGHTS

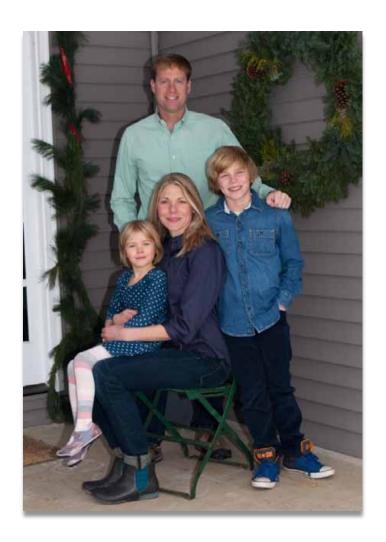
- Increase diversity Goal 2:
  - IT has filled 2 open positions and a candidate has been nominated for Chair to replace Susan Penrod (leaving at the end of this year).
  - Charlene Shenk is the new Google Apps Admin, and we've added a woman of color in a leadership position, Keyana Harrison is the new Manager of the Website Content team. Thank you, Charlene and Keyana!
- Fundraising capacity Goal 4:
  - Launched redesigned Donate and Membership pages.
  - Added monthly donation and recurring annual membership options.

#### IT GOALS for 2017/2018

- > Fill the open IT Chair position.
  - A nomination has being made; awaiting acceptance.
- Train the new Google Apps Admin and Content Manager.
- Continue documentation of standard procedures.
- Complete work on policy items currently underway.
- The new Chair will continue our adaptation to the support contract arrangement and support the continuation of the CRM project.

# FUNDING AND DEVELOPMENT

Amie Teslaw, Chair



#### FUNDING AND DEVELOPMENT MANAGER



Karyn DiNovo Membership Manager

#### MEMBERSHIP NUMBERS

#### Last fiscal year

2015-2016

New= 352

Renewed= 279

**total= 631** 

#### This fiscal year

2016-2017

New= 279

Renewed= 396

**total= 675** 

# **Current membership breakdown**

Applicants: 78

Candidates: 182

BC's: 214

Recurring memberships purchased (Feb-Aug 2017): **140** 

There is a decrease in new membership purchases, but more members are renewing their memberships.

#### F&D GOALS AND HIGHLIGHTS

- In March we rolled out a change in membership policy and donation structure
  - > BCs and volunteers become members
  - > All others who wish to contribute are donors
- Accompanying the membership policy was a change to website
  - Membership and donation are separate pages
  - Donors can choose
    - One-time donation
    - Monthly recurring donation
    - Yearly recurring donation

#### F&D GOALS AND HIGHLIGHTS

- Spring Appeal 81 Campaign launched May 2017
- Campaign to appeal for monthly donors, both to utilize our new recurring donation function and to capture important recurring revenue
- Aimed for 81 donors because 81 mothers intend to breastfeed after birth, but not all make it
- > Achieved 31 monthly donors, 7 one-time donations
- Raised the annual equivalent of more than \$2,500

#### F&D GOALS AND HIGHLIGHTS

- Received a major corporate donor jay elle by JL Childress
- Manufacturer of attractive breast pump bags with philanthropic mission to support breastfeeding supporters
- Company founded in California by two sisters, moms themselves, who were inspired by their own mother's journey of pumping and employment
- Two of our Directors vetted the company for WHO Code compliance
- > F&D worked with Social Media to promote jay elle in August



#### F&D GOALS for 2017/2018

- End-of-year campaign with a focus on workplace giving (corporate matches)
- Utilizing the Facebook donate button
- > Spring appeal involving promotion of Facebook donate button

# ETHICS

Patty Jacobs, Compliance Officer



# ETHIC ADVISOR



Rosalie Rust Ethic Advisor

#### ETHICS GOALS & HIGHLIGHTS

- Goal: to fill the position of Compliance officer
  - Patty Jacobs was appointed in April of 2017
- Goal: To increase the number of Ethics Advisors from one to three
  - Job description written for Ethics Advisor
  - Ethics Advisor application written in Google Forms
  - Ethics Advisor job posting letter written

#### ETHICS GOALS FOR 2017/2018

- Create an Ethics continuing education course that could help reduce the numbers of ethics related cases by improving BC understanding.
- > The number of ethics related reported violations are very low.
- For discussion: Will BCs be better served with an addition to the existing BC Orientation module? Because policy understanding, Ethics and Conflict of Interest issue are so specific, will live presentations that are interactive, and ongoing, (ie: quarterly) be more effective? Presentations will be ready for January 2018
- > Support the Strategic Plan by serving to support BCs individually and in groups with questions, conflicts or concerns.

# GRIEVANCE

Nikkole Cooper



## GRIEVANCE COMMITTEE MEMBERS



Nikkole Cooper



Tonja Carpenter

#### GRIEVANCE GOALS & HIGHLIGHTS

- > Tonja Carpenter joined the committee.
- > Tamika Simpson joined the BOD.
- Nikkole Cooper became the Grievance Committee Chair

#### GRIEVANCE GOALS for 2017/2018

- > Currently seeking a new volunteer for the committee
- Creating an activity report to help with tracking

# ELECTIONS Lauren Logan, Elections



# ELECTIONS TEAM



Sara Spalding



Rachel Fenton



Jasmine Rau

#### ELECTIONS

- ➤ Elections are complete for 2017
- > Thanks to Ann for teaching me and Tamika for helping with the verification for eligible voters process
- ➤ Elections Committee: Sara Spalding, Rachel Fenton, and Jasmine Rau thank you for being a sounding board and for proofreading

#### ELECTIONS GOALS

- > From the strategic plan:
  - ➤ **Goal 2**: Increase the diversity of our membership, committees, workgroups and Board of Directors
  - > The strategic goal was mentioned in the call for nominees
- > Internal committee goals:
  - Transition to a new chair
  - > Fill committee
  - Meet deadlines and have plans regarding my due date

#### ELECTIONS REPORT HIGHLIGHTS

|                  | 2016     | 2017     |
|------------------|----------|----------|
| Membership       | 680      | 607      |
| Eligible to Vote | 126      | 129      |
| Voted            | 75 (58%) | 49 (38%) |

#### ELECTIONS HIGHLIGHTS

- Continued with the verified voters process in July
- > Three candidates nominated for the three seats:
  - ➤ Ginger Gorrell, Rebecca Ruhlen, and Tamika Simpson were reelected
- Decrease in the percentage of eligible voters who actually voted.

#### ELECTION REPORT - RECOMMENDATIONS

- Increase nominations and participation by voters
- Postmortem report submitted to board

# Questions

and

Answers

99

