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CEO Report Summer 2016

2016 Pillars

Four pillars define and organize the Barbershop Harmony Society's work and impact going forward. These pillars align directly with BHS' key external outcomes:

- 1. Through the medium of barbershop harmony, we maintain and expand supportive services for a global community of artists.*
- 2. Through the medium of barbershop harmony, we elevate artistic and leadership skills through education and best practices.*
- 3. Through the medium of barbershop harmony, we establish lifelong singing as a core community asset.*
- 4. We scale our impact by growing social enterprise, individual philanthropy and institutional philanthropy.*

Purpose of the CEO Report:

The summer 2016 CEO Report, will continue to introduce a new format and approach to reporting that aligns directly with our evolving strategy and business planning process. Last fall, the Board approved the first-ever staff-produced business plan, which itself stems from the newly developed and Board-approved Pillars serving as the organizing principle for current activities.

With this edition of the CEO Report, we provide a brief narrative for all key activities, through the lens of the Pillars and the key strategies articulated in the plan. We also track and report on progress towards the Key Performance Indicators (KPIs) for each area. The six main sections of this report include:

- Harmony University
- Outreach
- Membership
- Marketplace
- Events
- Corporate Activities

For ease of narrative and understanding, key charts and tables can now be found in the Appendices to the CEO Report, rather than in the narrative.

CEO OVERVIEW:

We are in the busiest time of the year, and preparing for our largest community engagement effort in the history of the Society (A Better World Singing Day) on top of executing our International Convention and Harmony University. While our year to date results have been up and down, just like every year, this year we've also taken on some large scale projects over and above our annual operations.

Current business results are both challenging and encouraging, as we are experiencing a few top line revenue challenges not encountered over the past three years. Here are the highlights:

- Revenue shortfall resulting from no full chapters attending HU Belmont.
 - Action: We have already started to advertise and fill 2017 HU-Belmont slots. The chorus "buying cycle" begins the summer preceding their desired participation date. One chorus is already confirmed for 2017 and a second group is pending.
- Budget vs actual revenue shortfall of nearly 700 International full registrations, but ahead of Pittsburgh by about 400 registrations.
 - Action: We are continuing to market and offer promotions to narrow the gap. Still a large shortfall for full registrations. Working on expense containment and acceleration other revenue sources like exhibits, program advertisements, ABWSD sponsorships, etc. , to help offset some of the shortfall.
- Key staff openings not yet filled
 - CMO - We are being patient in order to get the right person hired

- Marketplace Director/Program Manager - We hired Mark Morgan in mid June
- Membership revenues still declining, but at a slower pace
 - Action - Society membership campaigns (Lead Generation & Society Member) have started to make an impact
- Resources and negotiations - capacity management
 - Action: A new management tool (capacity sucking activities) has been implemented to manage our overall project activities, priority and dependency mapping. We have a ways to go, but this document has helped the management team manage through competing priorities and improve our delegation process
- Investments
 - Events - For the execution of A Better World Singing Day, we have hired a publicist who is bringing a lot of outside attention in Nashville and across North America.
 - Technology - The membership platform was placed on hold for the first five months due to a royalty payment system project. We took that opportunity to also change to a different contractor for the membership platform, which picked back up in June.
 - Strategy - The overall strategic planning process is going well, however external scan results from Choral Ecosystem was not as compelling as hoped. Alternatives for this phase of the work are being considered with a subset of external partners.
- Transition from AIMS to Pillars
 - The Pillars have been adopted at a much faster rate than planned.

Our most significant 2016 progress is the resiliency of the employees at Harmony Hall. The days of “we can’t” inside the Harmony Hall office walls have changed to a cadence of “we can” or “we will find a way.” Like various gears in a clock, the cadences are different, but strategically engineered to keep time. Like crafting an enjoyable concert, the repertoire selection and performance order require a unique set of cadences. Our staff is no exception. Our staff and departments/project teams have different cadences; swing, rhythmic, ballad, upbeat, jazz, etc...and we are beginning to see these emerge. Naturally, our human tendencies yearn for a faster cadence as hearts and emotions are engaged, but we know what that does to a great uptune. Have you ever experienced that? We are encouraged by these emerging cadences within Harmony Hall and our ability to maximize our impact.

There is a lot more to accomplish in 2016, but we hope this report gives you the insight into our day to day to make a determination on how are we executing against the annual plan and Pillars of the Society.

HARMONY UNIVERSITY

Program Objective:

To educate and inspire lifelong learning about music, leadership, and administrative excellence in the barbershop style through ongoing workshops, online training, and a yearly week-long immersion camp in Nashville.

Target Audiences:

- *First time people (not from barbershop world)*
- *Music educators trying to incorporate barbershop into their curriculum*
- *Unfamiliar but musically trained*
- *Curious choral students and teachers*
- *A cappella music enthusiasts*
- *Barbershoppers who desire immersive barbershop training*

Pillars:

- *Pillar #2: Through the medium of barbershop harmony, we elevate artistic and leadership skills through education and best practices.*
- *Pillar #3: Through the medium of barbershop harmony, we establish lifelong singing as a core community asset.*

Progress Towards Key 2016 Strategies:

1. *Harmony University will focus on two key audiences with whom we can create a strategic multiplier effect that inspires the growth and increases the credibility of barbershop singing..*
 - a. *Chapter leaders and directors. A key audience because they directly influence and impact chapter health and vitality.*
 - b. *Music Educators. They can create awareness in the barbershop art form in their classroom, amongst their colleagues, in contests, through music selection, etc. Long-term, these inspired educators can also become our judges, our music directors, and make barbershop music part of their solo/ensemble literature.*

- In the second quarter, Harmony University finalized more and better (professionally edited and branded) online content. In 2015, we learned our approach to capturing online content needed significant improvement, and much of our captured content did not meet minimal levels of quality acceptability. In Q2, finalized (pending a last copyright issue with The Music Man):
- History of Barbershop 1 and 2 with Dr. David Wright; and
- Chapter Secretary videos with 8 modules (0-7) with Antonio Lombardi

The secretary videos focus on our chapter leaders audience and the David Wright videos address both audiences, These two projects added approximately **15 hours** of new online content to HU Online.

Additionally, in the second quarter, we updated the music educator materials on the website with added videos, online tutorials, and our music theory program and worksheets. We removed dead links and added **6 hours** of content.

2. The HU team will more closely align its efforts and programs with the Outreach team to improve synergy and mutual impact.

We are working closely with the Outreach team on our Nashville International convention, using both teams to plan and execute Saturday's "A Better World Singing Day" event.

We have added Wayne Grimmer to the Harmony University Team from Outreach. Wayne will still partner with Outreach on his A Cappella method for teachers, his work with the MET singers in Nashville, and his attendance as a content expert at ACDA and NAFME booths, but he can now look at the outdated music materials we provide online and update them. He has begun with the 4 music theory courses, our website worksheets and handouts used at both Harmony University and by online students, and has begun to overhaul our outdated arrangers manual.

Donny represented Barbershop Harmony Society and Harmony University at Chorus America National Conference in mid-June, networking with leading choral professionals.

Lastly in Q2, HU worked with Outreach to develop messaging specifically targeted at music educators. Four separate targeted marketing communications were created to guide convention (NAFME and ACDA) attendees through Outreach program activities, resources, and participatory events, including offerings at Harmony University.

3. Program and curriculum design will focus on in-depth learning of barbershop, with more one-on-one time and focused attention than is available in any other program area.

HU Nashville will offer 111 classes over Tuesday, Wednesday, Thursday, and Saturday.

HU Belmont will offer over 500 individual titles of classes, with 96 of them being offered Monday to Friday, and the other 400 as private lessons, lunch time electives, masterclasses, and even local quartet coaching. We will video capture Sound Management 1, 2, and 3. This class is geared towards how to improve the sound of quartets and choruses and is a goldmine of help to our directors and quartets looking for improvement and understanding of how barbershop works. Eight of our evening masterclasses will professionally video captured as well, and we will make these materials available in Q4.

HU online, in collaboration with NECAT, has almost finished the editing for our History of Barbershop series with David Wright. This material will be available during Q3. Our chapter

secretary videos will serve struggling chapters with step-by-step video help with the forms our people encounter.

Our leadership offerings have expanded with additional faculty and courses, and our enrollment has grown from 2 students to 21 with our first ever facilitator course offerings created in partnership with the Leadership OPT. [Click here](#) to see a RACI matrix of how Harmony Hall works with Leadership OPT and other key stakeholders.

4. HU will use a variety of delivery mechanisms to provide flexible access to multiple, diverse learning opportunities.

We continue to provide new delivery of barbershop materials with

- HU online video library expansion
 - An easy to find resource on our web page, all linked through the HU brand at Barbershop.org
- HU international expansion of classes
 - We offered 6 classes in 2014 and now offer 111 in 2016
- HU Belmont expansion of electives on Saturday, giving students 500 classes
 - We offered about 14 electives at Belmont/St. Joe prior to 2015. We now offer
 - 52 private arranging lessons
 - 52 private conducting lessons
 - 6 private music theory lessons
 - 25 private performance coaching lessons
 - 18 private sight singing lessons
 - 95 private voice lessons
- HU Midwinter with All Chapter chorus and classes
 - We had members of 4 of our top 5 quartets and about 80 guys in our All Chapter in New Orleans in 2015. We increased this by adding 50 guys from Westminster and 100 guys in Reno in 2016. The instruction by Justin Miller and the Westminster music team was inspirational to all the singers. Survey's came back reflecting a very positive experience that the singers could take home and inspire/lead at home.

<u>Key Performance Indicators (Internal)</u>	<u>Progress Year To Date:</u>
<i>We will demonstrate that we have increased the ways by which people can access barbershop education materials (eg- leadership, music education, director tutorials, barbershop history).</i>	<p>In 2015, we had 0 to 60 views of our 6 director tutorials. In 2016, we have over 900 to 1,200 views of each one of Larry Dodge's 16 conducting tutorials.</p> <p>Our 2015 HU warm up series has view rates of 50</p>

	<p>to 500, in 2016 we are 950 to over 3000 views per video.</p> <p>David Wright's professionally captured and edited history of barbershop 1 and 2 have been completed, and will be released shortly, pending a last copyright issue with The Music Man.</p> <p>In 2015, our website had dead links and very low view rates of our music theory pages and director tutorials. In 2016, we have already had over 600 views per tutorial, and even emails with worksheet corrections: our page is being viewed and used!</p> <p>In 2015, our district leadership requested up to date material for our chapter secretary, and we only had documents and 3 outdated tutorials. In 2016, with the guidance of Antonio Lombardi, we now have seven chapter secretary tutorials captured,edited, and ready to release.</p>
<p><i>We will demonstrate increased levels of participation for all HU-related events, in the following order of priority:</i></p> <p><i>First-time educators</i></p> <p><i>Chapter directors</i></p> <p><i>Lifelong learners</i></p>	<p>We have granted 108 scholarships to HU Belmont 2016 as of June 1. These are almost all first time music educators and first time chapter front line directors. We had only granted 80 by this time last year.</p> <p>22 of our music educator scholarships were referred from previous music educator scholarship winners!</p> <p>Our life long learners now have access to more collated music education help on our HU page, including help with setting up CDWI's, music theory, how to direct polecats, our Larry Dodge video's, directing patterns, and a 100 page manual of directing a BHS chorus. This information can now be found in one location at http://www.barbershop.org/education/</p>
<p><i>We will provide next level education for 20% of all new outreach engagements every year.</i></p>	<p>Because we've granted 108 scholarships to music educators and know 22 of them are from 2015 referrals, we have met the next level education for our existing outreach engagements. We also granted 8 scholarships directly from ACDA and NAFME contact booth managers as well as 18 more who responded to an email invitation to join us. After meeting with the new education director</p>

	<p>from NAFME, he has accepted Donny's invitation to attend HU Belmont 2016.</p>
<p><i>95% of BHS membership will use some form of HU education during the year.</i></p>	<p>We have published Harmony How To articles in the last 5 Harmonizers, including challenging articles about the presentation category changing to performance. We were thrilled with the overwhelming positive feedback. Our Harmonizer editor received more email on this issue and our HU story than he has recalled on any issue in his tenure at BHS. Donny was personally contacted by over 40 members who either challenged or had questions about how to use this in their home chapter.</p> <p>Our Larry Dodge videos have view rates of over 6,000 hits. Many of these views are (most likely) the same people advancing to the next lesson. Lesson #1 has a view rate of 1,396.</p> <p>Our 10 HU Warm up series videos average from 2,000 to 5,500 hits each.</p> <p>Our 4 polecat directing videos all have hits of 2,000 each.</p> <p>Our Belmont school will have over 500 students, our Reno offerings touched over 300 students, and our Nashville international will touch over 3,000 students in workshops, classes, and tag zones.</p> <p>Our Harmony University website impact is growing. In May 2015, we had 580 visits. In 2016, we had 1,526 visits.</p>
<p><i>20,000 people will access our schools and online offerings in music education for directors, music training for members and the curious, and barbershop history.</i></p>	<p>As of Q2...</p> <p>Our Harmonize articles reached 20,000 members.</p> <p>Our Livewire blog posts and articles reached 30,000 subscribers with ~10,000 opens each week.</p> <p>Harmony University website was visited over 4,000 times in Q2.</p> <p>HU Belmont 2016 will have roughly 500 students and 100 faculty, staff, and facilitators.</p>

	<p>HU Leadership Forum 2016 will have roughly 60 students and 20 faculty, staff, and facilitators.</p> <p>All HU Online videos have a combined viewing count of 35,000.</p>
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OUTREACH

Program Objective:

To build an awareness of the intrinsic value of singing and provide inclusive opportunities to participate in the joy of harmony.

Target Audiences:

- Music educators
- Middle school, high school, and college students
- Chapter leaders

Pillars:

- Pillar #1: Through the medium of barbershop harmony, we maintain and expand supportive services for a global community of artists.
- Pillar #3: Through the medium of barbershop harmony, we establish lifelong singing as a core community asset.

Key 2016 Strategies:

1. *BHS' reputation as a legitimate choral society will be enhanced by building partnerships with professional choral organizations to maximize exposure opportunities, share resources, and increase singing nationwide.*
 - a. *American Choral Directors Association (ACDA)*
 - b. *National Association for Music Education (NAfME)*
 - c. *Chorus America (see Choral Ecosystem project).*

Thanks to the efforts of Kevin Lynch and the Great Northern Union chorus, the BHS submitted an interest session proposal on intergenerational male singing for ACDA's National Conference in 2017. The Westminster Chorus also submitted an audition for performance at the same conference. We expect to hear in June the status on those opportunities.

Sherry Lewis has made excellent progress in developing the plans for our participation in NAfME's National Conference this fall. In addition to presenting 2-3 interest sessions, Dr. Jim Henry will serve as clinician for a chorus of male educators attending the conference. This chorus will be featured in NAfME's closing concert session, which will also include performances by Main Street and the Vocal Majority. Plans for significant follow-up activity at NAfME's 2017 conference are already under negotiation.

We are finalizing plans for Crossroads participation in NAfME's Hill Day on June 23, where BHS staff will join Crossroads in advocating for music education on Capitol Hill, before Crossroads receives NAfME's highest national award for their service later that evening. Additionally, Marty

and Kevin Lynch attended Yale University to participate in Chorus America's Choral Ecosystem Project. More information can be found on our blog by clicking [here](#).

Finally, this first outreach strategy has a very significant need at a more local, state, and county level that we do not have the capacity to address from HQ. Sherry Lewis is working to harness the power of our volunteer corps by certifying exhibitors and clinicians to help respond to the overwhelming requests for barbershop harmony at local music education conferences and workshops. While there is an immediate need for this support, we will take the necessary time to build this team of educated and experienced people and quality program content. . The first step of this process will take place during the Nashville convention, where we will have a booth set up in the exhibit area modeling what we typically display at music educator conferences. Sherry will schedule interviews with a handful of candidates. If you would like anyone to be considered for this program, please send their name, contact information and a brief reason for recommendation to outreach@barbershop.org.

2. *We will inspire and develop lifelong singing by:*
 - a. *Producing the Youth Chorus Festival, a choral festival that develops barbershop-related skills in music educators and delivers memorable barbershop experiences to young singers (ages 25 and under.)*
 - b. *Restaging CBQC as the Youth Barbershop Quartet Contest, a series of barbershop quartet festivals and competitions where young students (ages 25 and under) participate in memorable barbershop experiences that encourage more young people to sing.*

Since announcing our intention to experiment by opening the 2017 Youth Chorus Festival in San Antonio up to mixed and young women's choruses, we've had 35 choruses pre-register (typically we are still in the single digits of interested choruses). From the list of pre-registered choruses, we have selected 21 choruses (including one ensemble from Kenya) to participate in San Antonio based on their time of pre-registration (6 mixed, 5 young women, 10 young men). These choruses will be announced as they submit their official registration fee. The other 15 choruses have been waitlisted and invited to pre-register for the 2018 Festival.

We have invited 30 YBQC competitors to Nashville. All 30 have confirmed their invitation, including 8 quartets from outside of North America (a CBQC/YBQC record) and for the first time ever, 4 Junior quartets (under 18), making this contest sure to be one for the history books.

3. *Through our Grants Program, we will catalyze promising projects at the chapter and district levels. We will focus on:*
 - a. *Outreach projects that promote singing among seniors, youth, within communities, and among underserved populations.*
 - b. *Projects that strengthen chapters, districts, or the Society through ventures that represent new approaches and techniques within the Barbershop Harmony Society.*

The first grant cycle received 66 applications requesting \$227K. We awarded 38 of those applications, totaling \$115K. The second grant cycle, which recently completed its review and award process, received 39 applications requesting a total of \$133K. We awarded 28 of those applications, totaling \$78K. Of the awarded grants, we have over 40 youth events ranging from single-day workshops, multi-day festivals and various quartet competitions. Other awarded projects include: healthy singing classes for adult and senior communities, senior citizen performance opportunities and community chorus collaborations. **Applications that received the lowest scores from our reviewers were declined because they did not align with the appropriate grant application focus, they did not establish an appropriate need, they had an unclear project focus, or an unrealistic budget.** The outreach grants program continues to focus on encouraging applicants to evaluate their community or organization need and build their project(s) with outcomes to fill that need. **See 2015-2016 Final Report on grants results in Board packet.**

Additionally, we have contracted a professional consultant identified by the Grant Professionals Association (J. Bernard Bradley, PhD, GPC) and have been working with him to evaluate and improve our overall process, as well as the education of our applicants. Some or all of the results of Dr Bradley's feedback will be incorporated into the fall granting window. **See Consultant Report on grants process in Board packet.**

4. *We will introduce and create interest in barbershop among the general public through performance, collaboration and community engagement efforts. This includes expansion of International and Midwinter convention impact beyond the events themselves through educational tours and local outreach.*

We recently hired part-time contractor, Chad Bennett, to help facilitate our community engagement efforts through the Nashville convention. Chad is responsible for 4 main initiatives; 1) AIC/BHS partnership relations as it relates to the production of the AIC show, 2) touring the Great Northern Union around Nashville during our convention to create awareness of our "Better World Singing" Day, 3) the planning and production of the Nashville convention's Saturday Night Spectacular, 4) and recruiting and contracting talent for the 2017 Mid-Winter convention. Significant progress has been made on the Saturday Night Spectacular. Our very special trio of emcees will include Marty Monson, Deke Sharon and Dr. Tim Sharp (Executive Director of ACDA). It is our goal that, in addition to our 6,000 convention attendees, we will attract 4,000 of the local Nashville community to the show that evening. The show will showcase a number of different groups, but will feature our champ quartet Crossroads who will collaborate with the recent Grammy Award winning Fairfield Four!

Key Performance Indicators (Internal)	Progress Year To Date
The overriding KPI measurement for Outreach is a “share”, which is an external point of contact defined uniquely for different program activities. The KPI goal for 2016 is 80,000 shares.	
<i>We will achieve 20,000 shares through Advocacy and Partnerships. Defined as individuals or organizations who are introduced or influenced through an advocacy or partnership program and form a reciprocal relationship with BHS.</i>	3,739 shares to educators accepting materials at MMEA, TMEA and SWACDA, as well as materials sent to NY, AZ and OR MEA Conferences
<i>We will achieve 10,000 shares through Lifelong Singing activities. Defined as YCF and YBQC participants. This measure does not currently include non-member audiences and personal contacts of the participants.</i>	513 shares to the participants of the 2016 Youth Chorus Festival in Reno, NV In addition to paid purchases of the webcast, 283 FREE webcast subscriptions were used via the .edu promotion -- potentially reaching many multiples of viewers if shown in classrooms. This is an increase over approximately 180 .edu subscriptions to the 2015 YCF. 65,972 YouTube views on YCF- related content: Chorus performances 36,598 Other vids 16,714 Chorus previews (made by the performers) 12,480 . Some views were Barbershoppers, but a substantial number are friends, family, and schoolmates of performers. This is a dramatic increase over the 12,000 views of the previous year's videos, which were released in dribbles over the year.
<i>We will achieve 25,000 shares through the BHS grants program. Defined as both the participants in, and the audiences of, grant-funded activities.</i>	2,460 shares (of a projected 34,499 based on the awarded projects in the first grant cycle) to participants of outreach events supported by grants
<i>We will achieve 20,000 shares through Community Engagement activities. Defined as including one on one conversations, active or passive program participation, email inquiries, hits/likes on social media platforms, and referrals</i>	630 shares to participants of the educational tours through Reno, NV and Nashville, TN in advance of our conventions in those cities. With the recent departure of Carlos Barillo, we have not developed this KPI further in his absence, but intend to resume activity in this area in the weeks leading up to and during the Nashville convention and beyond.

<p><i>We will achieve 5,000 shares through Integration & Inclusion projects. Defined as including non-BHS participants in Choral Arts Link Collaboration, Harmony Curriculum Development, and other local outreach to the Nashville community.</i></p>	<p>1,537 shares to the audience of Choral Arts Link's MLK Day performance, as well as educators who are interested in beta testing Wayne's A Cappella Harmony Method. Wayne Grimmer recently transitioned to the HU team, so this focus area and KPI will be redefined immediately after the Nashville convention.</p>
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MEMBERSHIP

Program Objective:

To attract and retain an engaged and diverse intergenerational membership impassioned to educate and enrich lives through the medium of barbershop harmony.

Target Audiences:

- BHS Members and Associates
- Congenial men of good character who love harmony in music or have a desire to harmonize
- Music educators
- Music students
- A Cappella groups
- Current Harmony Marketplace Customers
- Anyone with an appreciation for music

Pillars:

- Pillar #1: Through the medium of barbershop harmony, we maintain and expand supportive services for a global community of artists.
- Pillar #4: We scale our impact by growing social enterprise, individual philanthropy, and institutional philanthropy.

Key 2016 Strategies:

1. *We will increase member/customer satisfaction as a result of fewer voicemails, more rapid response time to inquiries, and an easier to navigate website with little customer service input.*

Building on our 2015 successes, in 2016, we will be working on four different goals to increase customer service. In Quarter 1, we reduced the amount of time it took us to process years of service update requests from 90 days to less than 30 days, with 97% compliance. The average time to process a request was reduced to 12 days. In Quarter 2 we are tackling the usability of the shop.barbershop.org website via the following tasks:

- Verifying complete listing of learning track to sheet music related products
- Adding no less than 4 common search words to each item
- Editing descriptions on website (including removing any remaining references to arrangers fees)

Later in the year, we will focus on youth protection procedures with insurance and assisting other program areas with fewer email forwards.

2. *We will drive retention and growth through the rollout of the Society Membership program.*

- a. *Phase 1, soft-launched in 4Q15 and supported in 1Q16 with a marketing campaign, will be focused on retention of current members for whom a chapter or district affiliation is not a value driver.*
- b. *Phase 2, launched in 2016, will focus on reactivation of a portion of the 90,000 lapsed members.*

As of the end of May, we have 156 folks who are members of the Society without a district or chapter affiliation . This does not include the 73 people who have filtered through the Society to end up in a district or a district and chapter since October 1, 2015. We have begun Phase 2 with our Lead Gen project which launched late April. We sent different versions of an email communication to upwards of 14,000 of the 90,000 lapsed members in our database, attempting to draw them back in with the new option. Customer Service followed up with phone calls to a portion of those that opened the email. We will expand our reach further with our efforts to attract new members at the International Convention.

3. *We will increase the perceived member value proposition by profiling and promoting how Barbershoppers create their own unique ways to participate.*

We have engaged Volunteer Project Coordinator Peter McBride to leverage a volunteer team to accomplish our “12-Month Orientation Project.” This project will help identify all the various ways to participate within the Society that generates a FUN factor and encourages membership retention beyond just the chapter experience (eg judging, arranging, quartetting). He and an as-yet-to-be-identified team will help staff put together an introduction to barbershop. Working off the internal project plan, Peter has developed a Project Charter which was approved. He is in the process of developing his own project plan with the entire project set for completion in Quarter 4.

4. *We will develop proactive two-way member education/awareness campaigns based on member profiles.*

Part of the Lead Gen campaign involves follow-up phone calls from the Customer Service team. We have already implemented this with the first round of contacts. In a short amount of time we were able to have conversations with 62 folks of which 67% would consider rejoining the Society, and 58% were welcomed back into our orbit via LiveWire subscription. Everyone on the Customer Service team had great conversations which provided essential feedback to shape the rest of the Lead Gen campaign. The future of two-way communication will require a more integrated membership system with possible CRM capabilities. Membership has also created opportunity at International-Nashville for people to inquire about membership and sign up on the spot for a Society membership.

5. *We will focus on the “middle 80%” of members with increased marketing touch points beyond the chapter experience. Merchandise, events, services, and overall connection with the mission and impact of the Society.*

This strategy is accomplished in 2016 by focusing on members in their first year with the 12-month intro to barbershop. As before, our plan is to contact a new member no less than once a month via mail, email, social media, phone calls, video marketing, or program highlights in order to let them know what it means to be a barbershopper and what's going on in the barbershop world. Should we see the results we expect, an additional project can be considered to expand these frequent communications with a comparable campaign beyond the first year.

6. We will leverage other program areas (especially HU and Outreach) to build the membership funnel for new members.

The plan to accomplish this strategy remains the same: We will be leveraging the other programs in the 12-month orientation project by introducing each BHS program area. The first year will focus on what each program is contrasting with a possible second year and beyond which would focus on what each program is doing now. We are creating a "booth set-up" to be introduced at the 2016 Nashville International Convention; it could then be used for Outreach and HU events going forward as staffing permits. It will include a banner and a ¼ page double-sided handout. On one side is info on what Barbershop is for the non-initiated, on the reverse side is info on joining at the booth and a url to the "Join Us" video and online application. We could staff with existing program staff, or assess the possibility of having additional staff just for a separate booth. This expanded strategy necessitated additional marketing support from a contractor.

7. We will leverage current channels and vehicles to improve the presentation of a strong member value proposition. Includes revamped marketing materials, pie chart of dues breakdown, etc.

Improving the communication touch points members receive from headquarters over the life of their membership has been an objective for well over two years. We had been actively working since December 2015 on updating the majority of our membership materials to move them from invoices and instructional documents to something that better represents the relationship with the member and incorporates our branding. We successfully created or updated fourteen membership, associate, and quartet communications (emails and mailed pieces) to include branding, graphics, and additional touch points (See Appendix E). For the first time, we are contacting folks *after* their membership has expired. This initial massive overhaul will now be replaced with annual tweaks and updates and is on the Marketing Team's calendar for every November. We have already tabled some updates due to capacity which we will hopefully tackle later this year (welcome pamphlet, associate flyer, different messaging based on age or tenure, etc.) . Those updated materials were first sent at the end of April; we will track the progress of member, associate, and quartet retention to gauge the impact.

In addition, we rolled out a brand new quartet section to the website this quarter increasing our value to members (www.barbershop.org/quartets). This area of the website (all accessible via one landing page), serves dual purposes of being a one-stop shop for all possible needs of an existing quartet and enticing those not in a quartet to consider joining one.

8. *We will work towards gaining clarity on key dynamics driving chapter development and the appropriate roles of Harmony Hall, Districts and the chapter, coordinating closely with the Healthy Chapter Initiative team.*

With the departure of Dr. Duane Gunn, limited progress was made on this. Beyond creating and dissolving chapters, our support in updating the leadership training materials for chapters in the document center, and meeting with Duane's replacement, the incomparable Antonio Lombardi, we will focus on this strategy more in the latter half of the year when he is a full staff member.

9. *We will continuously elevate the FUN! of being a Barbershopper.*

This doesn't change as it permeates everything that we do in all the other strategies. It informs our decisions to take more of the administrative work off a member and point them towards the other program areas (Events! Harmony University!) so they can do more barbershopping. We seek less struggling to reach a live person, sterile communications, paperwork to create a chapter, or inability to find what you are looking for online, and more barbershop videos, articles, and heartfelt informative letters each month.

<u>Key Performance Indicators (Internal)</u>	<u>Progress Year To Date:</u>
<i>We will achieve a 70% retention rate in the second year by 2017.</i>	2012 – 67.5% 2013 – 68.4% 2014 – 69.1% 2015 YTD – 62% (represent 5 months of data) May 15-16 - 64% (represents 1 full year)
<i>We will have a total membership of 22,000 or higher (rolling indicator that will be refined over time).</i>	No Grace – 20,931 3 Months Grace – 21,858 6 Months Grace – 22,496

Starting on March 16, 2016, membership numbers were measured on Wednesdays. Data was pulled for the given day and for all previous Wednesdays (ie, what are the member numbers as of given date). In this manner, membership numbers can be pulled on June 8th for June 1st, May 25th, etc. The graph showing how the membership on any given day changes over time can be seen in Appendix E. When membership numbers were measured on March 16th, they were 21,047. When they were measured again on June 8th for March 16th, they were 21,540. This is mostly due to the culture we have cultivated allowing up to 6 months grace period for late renewals. The gap you see in the graph after March 30th represents the large number of folks who still expire on March 31st as a result of the historical practice of grouping expiration dates together (at one time quarterly). A similar gap will be seen when we pass June 30th. A breakdown of these numbers by district can be seen at the beginning of each month in the EOM report [here](#). A snapshot of that report as of May 1st can be seen in Appendix E. Also contained in that report is a list of the leads generated by the online application to the Society including contact info. A graph showing the progress of our Society members since October 2015 can be seen in the Appendix E.

MARKETPLACE

Program Objective:

To be the world's market leader, creator, and provider of barbershop music, merchandise, & media.

Target Audiences:

- BHS members and Associates
- Music Educators
- Barbershop/A Cappella Music Fans and Consumers
- General Public

Pillars:

- Pillar #1: Through the medium of barbershop harmony, we maintain and expand supportive services for a global community of artists.
- Pillar #2: Through the medium of barbershop harmony, we elevate artistic and leadership skills through education and best practices.
- Pillar #3: Through the medium of barbershop harmony, we establish lifelong singing as a core community asset.
- Pillar #4: We scale our impact by growing social enterprise, individual philanthropy, and institutional philanthropy.

Key 2016 Strategies:

1. *We will launch new products with high appeal to our target audiences.*
 - a. *Three major launches: International, Midwinter, Labor Day*
 - b. *Major promotional offer for Cyber Monday*

The ramp-up to the Nashville Convention is nearly complete. We will have about 40 new products that will release in Nashville. This includes new merchandise options for glassware, apparel and music. We will also be adding to the convention apparel as a test to see if more than one style of convention tee will sell. The vintage quartet tees will be available with three new shirts for Fred, Crossroads and Storm Front.

2. *We will continue an aggressive sheet music release pace and strive for more predictability of popular song releases*

The addition of Scott Harris as our new Arranger & Repertoire Manager has been fantastic. We are slated to release two music folios at the convention - Yuletide Favorites Vol II (in our backlog

for two years) and Nashville: Barbershop Style. The Nashville: Barbershop Style folio will be a new type of item we release where five of the eight charts will only be available in the folio and not as individual sheet music. We are also releasing new charts at the convention which will be debuted again on the stage during the convention.

Mr. Harris has also implemented a new quarterly pitch meeting with a select team within Harmony Hall. This is meant as a check and balance type of event to review his song selections and plan their releases six to twelve months in advance.

3. *We will invest in equipment to improve back-of-the-house efficiencies and drive profitability and customer service.*
4. *We will invest in processes that improve back-of-the-house efficiencies and drive profitability and customer service.*

We continue to see improvement in our cycle times with an average time of 25 hours - a 12 hour improvement versus Q1 of 2016. We hired a new Marketplace Director/Program Manager, Mark Morgan. Justin Gray was promoted to Warehouse Manager to help us focus on the day-to-day warehouse operations. This will give us the latitude to have the new Marketplace Program Manager full-time in a management position to oversee and direct the program. Justin's contributions are already having an impact on the warehouse team. He has help streamline data entry, pricing adjustments, missing products, etc. More importantly, Justin has helped solidify the warehouse team by cross-training and his approach.

5. *We will refine website marketing strategy and product mix to improve user experience resulting in higher sales (more descriptions and standards for product specs, staff reviews, editor's choice, "just get started", top charts, regular vs. specialty products, etc.)*

Working in conjunction with the Customer Service team, we are continuing to improve the product descriptions and related products. See Membership Program Q2 report for specific initiatives. The Marketplace program is still operating without a marketing resource. We are awaiting the hire of the CMO before filling that role.

6. *We will address and gain clarity on several key strategy questions, including: the role of the Marketplace as a member service/benefit versus a profit arm for the Society; role of District Shops program; future Hal Leonard and similar partnership opportunities; wholesale business; role of ASCAP/BMI issues; sales of mp3s as part of digital strategy.*

We implemented the new District Shop program throughout Q1 & Q2 with some success and a few communications hiccups. We delivered \$14,510.04 in goods to the 5-6 Districts who participated under the new program with significantly less staff involvement and zero returns.

<u>Key Performance Indicators (Internal)</u>	<u>Progress Year To Date:</u>
<i>250,000 total number of units distributed. This is a key benchmark of total reach of marketplace.</i>	68,734
<i>Operate at least 40% gross margin on all products.</i>	53%
<i>Average Order-to-Ship (Cycle Time) ≤ 36 hrs or 1.5 days.</i>	25 hrs. - 1.05 days
<i>Merchandise inventory turn-over ≤ 6 months.</i>	Merchandise inventory turn-over as of 1Q'16 was 272 days, which is below our targeted KPI. We will continue to review inventory levels, which are substantially improved year-over-year, to determine the optimal level factoring working capital demands and staff management resources.

EVENTS (DUSTY)

Program Objective:

To provide highly visible, annual conventions and ad hoc events that will deliver enjoyment to close harmony enthusiasts, contribute to local communities, and create memorable experiences for all attendees.

Target Audiences:

- BHS Members and Families
- Close harmony enthusiasts of all ages & demographics

Pillars:

- Pillar #1: Through the medium of barbershop harmony, we maintain and expand supportive services for a global community of artists.
- Pillar #2: Through the medium of barbershop harmony, we elevate artistic and leadership skills through education and best practices.
- Pillar #4: We scale our impact by growing social enterprise, individual philanthropy, and institutional philanthropy.

Key 2016 Strategies:

1. *We will deliver content during our events that will appeal to all attendees with a focus on participation.*

We have several events that are being planned for the Nashville 2016 International Convention that will include participation:

- Over 100 Harmony University Sessions
- Gospel Sing
- MEGAsing at Walk of Fame Park
- Sunday Church Service
- Youth Tag Room
- AHSOW / Harmony Brigade / Harmony Platoon Sessions
- Informal Singing / Chorditoriums

2. *We will engage the local community in advance of each event.*

2016 YBQC finalist, Flightline, toured several schools in the Nashville area to expose them to Barbershop and inform about the convention. We have contracted a publicist to help us reach out to the local community. A featured article in the Tennessean (leading Nashville newspaper) was released about A Better World. Singing. Day. Nearly 500 locals have already signed up to participate in the day-long activities and the FREE show on Saturday evening.

The Great Northern Union chorus has worked with Chad Bennett to secure several free community performances to share harmony and promote the ABWS Day events. This is a pilot effort for a major chorus to attend the convention for the sole purpose of community awareness and goodwill, and we hope it will become a model that others emulate.

3. *We will provide memorable, “can’t miss” experiences at each convention.*

Several events for the Nashville 2016 International Convention will prove to be “can’t miss”.

- The YBQC contest at the Schermerhorn Symphony Center will showcase our future stars in the best possible venue. The MC for the contest is co-founder of Take 6, Dr Cedric Dent.
- A CD Release event on Tuesday night will feature various quartets and provide an opening party for our attendees.
- The Saturday Night Spectacular feature Deke Sharon, the Fairfield Four, Crossroads, Dr Tim Sharp (ACDA) and other performers should prove to be memorable.
- Of course, the highlight of the week will still include the best choruses and quartets in the world battling it out for the top prizes.

4. *We will continue to improve production value for shows and contests.*

We are continuing to push the envelope on what live a cappella music can be. From the acoustic hall of the Schermerhorn, to the new LED backdrop at the Bridgestone Arena....we are leading the way in how Barbershop should be presented to a live audience.

<u>Key Performance Indicators (Internal)</u>	<u>Progress Year To Date:</u>
<i>Attendance target for Events & Conventions at or above budgeted amount</i>	Int'l 2016 (Nashville): See Appendix B
<i>Increased satisfaction levels among attendees using survey results</i>	Nashville 2016 will be measured in Q3.
<i>Increased community involvement/awareness in our convention cities</i>	<p>We are involving the Nashville local community with our "A Better World Singing Day" activities: Gospel Sing, Outdoor stage, MEGAsing, Sat. Night Spectacular etc.</p> <p>We are engaging the local military community in San Antonio in prep for the 2017 Midwinter Convention.</p>

See Appendix B for the current registration report.

CORPORATE ACTIVITIES:

Harmony Foundation International (HFI) Partnership:

We will continue to build a strong symbiotic relationship with our key philanthropic partner by:

- *Increasing alignment between BHS programs and HFI's areas of giving interest;*
- *Presenting a clear, specific menu of funding opportunities and program descriptions;*
- *Coordinating with and leveraging HFI support in our pursuit of external institutional funding; and*
- *Using BHS vehicles, including marketing and event platforms, to supporting HFI donor development efforts towards BHS members.*

The relationship between the two organizations continues to improve. As HFI and BHS continue to grow and expand our respective employee resources, key enhancements to marketing and communications is critical. HFI hired their first Director of Communications, Connie Harris. She has been a wonderful addition and attends the BHS weekly marketing meetings. There are a number of areas this is helping both organizations but the annual report development stands out. Collaborating to produce alignment to message, data points and overall development will really help our membership and donors understand why, how and what we are doing collectively to make a difference with the funds raised for HFI and BHS programs. You will see these results later this summer as we produce our individual annual reports.

As a result of the effective BHS board retreat, our long-term development planning between HFI/BHS is beginning to take shape. Understanding our short term business drivers has been successful over the past four years, but we are lacking a long-term understanding of the program to fundraising strategies to ensure we are on the same page. Kevin, Clarke and Marty have met to discuss this project and how it is incorporated into the overall BHS strategic planning process.

Partnership Development and Advocacy:

- *We will deepen relationships with other choral and arts organizations, towards two goals:*
 - *Developing collaborative programs and initiatives that leverage BHS' membership and chapter footprint; and*
 - *Advocating on behalf of a strong choral arts ecosystem.*
- *Current partnerships under development include:*
 - *American Choral Directors' Association (ACDA)*
 - *Regional and State Music Educator Associations*
 - *National Association for Music Education (NAfME)*
 - *Chorus America*
 - *Association of International Champions (AIC)*
 - *Sweet Adelines International (SA)*
 - *Barbershop Harmony Society Affiliates*
 - *Harmony Inc.*
 - *National Museum of African American Music*
 - *Choral Arts Link*
 - *Metro Nashville Arts Commission*
 - *Nashville Choral Consortium*
 - *Hal Leonard Corporation*
 - *GALA Choruses*
 - *Association of Performing Arts Presenters (APAP)*
- *We will continue to evaluate deeper relationships with key potential business partners. Currently in discussion with:*
 - *Eventbrite*
 - *Groupanizer (Chapter support)*

1. NAfME CEO/Executive Director, Michael Butera, resigned after concerns about his statements regarding inclusion and diversity - Michael Blakeslee has been promoted to CEO/ED and has been with the organization for over 25 years.
2. Interviewing singers and community choir board members prior to Marty and Kevin's attendance at the Yale Choral Ecosystem, April 8 & 9 (Chorus America), the official report of event will be made available to BHS in June.
3. Launched marketing efforts for two AIC shows during Nashville convention, the results to date reflect roughly 100 local Nashvillians ordering tickets to the AIC show which according to our publicist and venue marketing team - locals don't typically purchase non-subscription events (and unknown) until 1-2 weeks prior to the event.

4. Attended Americans for the Arts - Arts Advocacy day in DC and captured a lot of excellent data points being used across the country for further expansion of the visual and performing arts.
5. Strategic meetings with Hal Leonard executive and management teams resulting in expanded distribution, partnering at state/regional educational conventions. After several negotiations, the 1996 agreement between Hal Leonard and BHS was, again, extended in its current state through the end of 2017..
6. Eventbrite Services Agreement signed -- in April, we entered into a three (3) year agreement with Eventbrite, an online ticketing solutions provider, to replace Tix as our ticketing partner for Society events starting with the 2017 Midwinter Convention in San Antonio. The benefits of this new online solution is greater flexibility and seating selection for BHS's events, discounted processing fees and fee caps, and the scalability of the Eventbrite solution and negotiated pricing for all BHS chapters and districts. The service will allow expanded cross-marketing services and promotions as well as better real-time visibility on registration and sales. For events that are not fee-based (e.g., Harmony Hall tours, Category Schools, Leadership Forum), there are no service fees. We will be going live in Nashville with San Antonio registrations. We will be working to convert districts and chapters that may currently use Eventbrite under our negotiated rates. Thereafter we will work with chapters and districts to educate on event planning options available to help drive operational efficiencies and discounted pricing for event planning.
7. SAI's Kelly Bailey resigned to pursue a consulting career - in the meantime, Tammy Talbot has resumed the position of acting CEO until a replacement has been identified.
8. Affiliate agreement and annual memorandum's have been sent to all Affiliates as of the beginning of June - in addition, a number of additional services (insurance, music clearances, etc) have been identified to be discussed during our Affiliate meeting in Nashville, July 9.
9. Harmony Inc, - Worked with Christina Lewellen to provided two Music Educator scholarships for Harmony University - Belmont
10. NMAAM - we continue to offer up storage space for their museum's archives as they await the final plan from the developer of the old Nashville convention center which isn't expected to be announced until the end of the year.
11. Choral Arts Link - an agreement between BHS and CAL has been executed and will result in additional Nashville singing programs for underserved middle school students - this is a two year agreement of \$5000 each year that will allow for a full year of instruction for two school year programs in two Nashville neighborhoods/middle schools - a press release is being prepared for release during Nashville Convention.

Staffing:

We will be on-boarding three new roles, representing additional capacity, in 2016:

- *Chief Marketing Officer (to be hired) — focused on membership growth, attendance at events, and greater visibility for our marketplace and outreach shares*
- *Manager, Chapter Leadership Education (Antonio Lombardi) — focused on advancing the Healthy Chapter Initiative*
- *Chief Strategy Officer (Kevin Lynch) — focused on developing a disciplined planning culture*

focused on impact and outcomes, and long-term institutional funding efforts

With the resignation of Duane Gunn, we are pleased to welcome Antonio Lombardi to the position of Manager of Chapter Leadership & Education. Antonio has jumped right into preparation of the Leadership Forum, and is quickly transitioning from his District duties to BHS. More of Antonio's initial projects are captured in the Harmony University and Healthy Chapter Initiative sections of the report.

The status of the CMO position continues to remain unfilled. After the failed attempt to fill the position via the traditional application process, we've continued to interview various individuals. Most recently we've been in discussions with a local Nashvillian that looks promising. If this individual doesn't result in a hire, then we will engage a recruiting firm to find the best candidate for the job.

Strategy Development

- *We will launch an 18-24 month zero-based process to produce the Society's first long-range strategic plan in many years. The process will be CEO-led, supported by the CSO and BHS staff, with Board oversight.*
- *We will continue to develop the Strategic Philanthropy Architecture project, which is designed to prepare BHS to pursue substantial institutional philanthropy opportunities.*
- *We will play a leadership role (partnering with ACDA, Chorus America, and Yale University) in the Choral Ecosystem project, designed to document the current state of the choral environment in the United States, and build collaboration and synergy between all sectors of the choral world.*
- *We will develop methods for evaluating external outcomes across BHS programs.*

The Choral EcoSystem Forum at Yale, April 8-10, was attended by 25+ choral leaders. The primary benefit was in building relationships and finding common ground among the leaders in attendance. The actual mapping of the eco-system was not delivered at as high a level as we expected. We are exploring the possibility of pursuing the mapping project in partnership with ACDA.

The Board met for its strategic planning retreat May 13-15 in Nashville. It appears that everyone felt it was quite a productive session, revealing more alignment among the Board than perhaps anyone would have expected. Marty and Kevin are receiving Elizabeth's final report on June 7. We are inviting Elizabeth to join the Board meeting at International to briefly present her report.

The Member Survey was launched mid-May and will be open until June 20. At this writing we have over 2000 replies.

Cultural Data Project launch date is targeted for August 15.

We are coordinating the communications plan for strategic planning with the marketing team. A [primary blog article](#) communicates the broad outline of the process. This is augmented by weekly

pieces in LiveWire (currently promoting the survey), Marty's column in the May-June Harmonizer, and a feature article in the July-August issue.

We are working with SPC to recruit one or more millennials to join the SPC.

Healthy Chapter Initiative:

This project will develop and test strategies for strengthening the overall health of the communities of artists that comprise the BHS chapter structure.

See Harmony University for further detail.

In Q2, Antonio Lombardi was hired as the new Manager of Chapter Leadership & Education, to facilitate the Healthy Chapter Initiative.. Antonio, with input from Harmony Hall staff and Leadership OPT, designed the agenda for the 2016 BHS Leadership Forum and further planning is underway in preparation for July 2016. The team continued the implementation of a “beta” chapter assessment model assisting chapters in completing a self-examination based on membership, finances, shows, chapter governance, music, and outreach. In an effort to provide ongoing training for our chapter leaders, eight training module videos were completed for Chapter Secretaries and will be available online this summer. Finally, we are looking forward to certifying a group of facilitators at the upcoming Harmony University who will be available to assist districts and chapters beginning in late fall 2016. For more detailed reporting on the efforts of Leadership OPT, specifically, see Appendix F.

Inclusion and Integration:

We recognize that substantial further efforts are needed to affirmatively expand BHS' community and culture beyond its current demographic core. In 2016 we will develop a more substantial I&I plan based on deep listening and collaboration with the Cultural Ecosystem project of Metro Nashville Arts Commission.

A staff paper on our Inclusion and Integration was discussed at the 4/17 Board meeting. We have prepared a prospectus for an Inclusion OPT and are in the earliest stages of identifying volunteers. We are planning two reflective half-day conversations on inclusion and diversity — one with staff in October, and one with the Board at the November Board meeting.

Governance:

- *We will continue to work towards greater role clarity within all the governance structures throughout the organization. The strategic planning and engagement process will help drive identification of key customers, stakeholders and responsibilities.*
- *We will report to stakeholders via our Annual Report. The 2016 Annual Report will incorporate feedback received from our first effort in 2015.*

See **Appendix D** for a Pillar Adoption & Integration timeline. To continue progressing along this timeline, in Q2, a WebEx was shared with the DPs and EVPs on the Pillars, strategic planning process, and overall business planning for 2017. Also, on April 4, the Strategic Planning Committee met in Nashville to prep for the May strategic planning Board retreat. The SPC also got to meet the facilitator, Elizabeth, and detailed how and why information would be collected from specific stakeholders.

In Q2, we finalized the 2015 annual report. We successfully completed the following objectives around this project based on what we learned from our first annual report in 2015:

- Created a more robust, visually appealing (more infographics) and compelling annual report compared to 2015
- Began to integrate the Pillars and DP Council activities into the reporting (gold medal moments)
- Connected the dots with HFI and how both organizations work together to achieve our collective mission
- Serves as the main Harmonizer article but also can live separately for distribution in local communities and outside (BHS) stakeholders
- Provides annual review that translates to both chapters and the external arts community
- Included more comprehensive financial overview with established 2015 baseline
- Addressed challenges head on (not everything is rosey) and future opportunities for growth

Systems Upgrades:

We will continue an organization-wide effort to rationalize and improve underlying business processes and systems. These efforts will yield greater efficiency/capacity, scalability, improved customer service and responsiveness, higher marketing results and better overall business intelligence. This is a three-year (2015-17) phased project, which will require regular maintenance even after all four phases are complete:

- *Phase 1 (Complete)*
 - *Web Store Platform — Migrated the BHS website platform (Joomla) and eCommerce (Americommerce) platforms to one shared platform using WordPress and CS-Cart.*
 - *Great Plains Upgrade — Updated our accounting software 4 generations from GP 2010, which was no longer being supported, to GP 2015.*
- *Phase 2 (Completion by YE 2015):*
 - *Great Plains Financial Module Upgrades, Integration Manager Build Out and Automated Royalty Accounting.*
- *Phase 3 (2015/2016):*
 - *Membership Database — Software development for the system that will replace the membership portion of Aptify/eBiz.*
- *Phase 4 (2016/2017):*
 - *Enhanced contest and CJ20 process and software*
 - *Continued automation and streamlining marketplace point of sale systems for Events*
 - *Continued roll-out and implementation of the membership software decoupled from Aptify/eBiz*
 - *Implement more automated chapter invoicing and payment processes to direct deposit into district/chapter accounts and minimize check issuance*

- *CRM system to act as central data repository regarding key stakeholders and prospects (outreach participants, music educators, etc.), manage and promote their engagement, and expand marketing reach.*

Due to issues with our product configurations in GP 2015, we were forced to abandon the Eclipse platform for royalty processing and accounting. We were forced to immediately develop and internal system to compute and report on royalties for copyright holders and arrangers due to contractual obligations. This forced our efforts on the membership system to be redirected to this immediate need. We were able to get payments out in a timely manner and still have some work to do to fully automate the system.

The new membership platform progress was delayed due to this, along with further issues related to the contractors. We terminated the relationship with the initial contractor and began a new search to find a developer to come in and finish the remainder of the project. The new developers have been retained and the project is in the process of resuming. In addition, we were fortunate to find a developer from within the Barbershop community to minimize the learning curve and understanding of our processes and culture.

Marketing and Branding:

- *The marketing function within BHS continues to grow, and now require a seasoned marketing veteran who will help us develop, execute and report on the impact of all our marketing efforts. Hiring a Chief Marketing Officer is targeted for 1Q16.*
- *Over the last several years, BHS has developed a brand architecture with several tag lines and logos directed at various audiences. In 2016, we will be working to develop one brand, that works across all audiences with one voice.*

The initial CMO search didn't result in a hire. In the meantime, Marty is still acting manager of the marketing team. The Saturday events of our international convention are being branded *A Better World Singing Day* to be marketed to the local Nashville community. A local publicist has been secured to help us with this local awareness campaign.

Management Processes:

- *Operational planning:*
 - *2015 was the first year BHS used a program structure and developed program plans for each program area in early 2015. Progress against plans has been monitored through organization-wide quarterly update meetings.*
 - *Based on these learnings, improvement is needed in aligning ambitions to capacity.*
 - *Continued emphasis will be placed on advancing the program/product management skills of employees who come to BHS with outstanding artistic and creative skills*
 - *For 2016 the process has been accelerated with the development of plans in*

4Q15 and consolidation of those plans into this Business Plan and alignment with the budgeting cycle.

- *In 2016 and beyond we intend to add further discipline to this process by aligning with the Strategic Planning Processes discussed earlier. We will also study possible adjustments to departmental structures and reporting relationships based on the “Pillars” structure.*
- *Other management processes:*
 - *We expect to begin 2016 with a fully functioning Executive Team including:*
 - *CEO, Marty Monson*
 - *CFO, Erik Dove*
 - *COO, Chip Gallent*
 - *CSO, Kevin Lynch*
 - *CMO, (to be hired 1Q16)*
 - *supported by Director of Projects, Erin Harris*
 - *Organization-wide, we will continue to train staff on project management disciplines and use the Director of Projects role to drive team alignment to overall BHS plans.*
 - *We will continue to use technology to power efficiencies and alignment, for example:*
 - *Basecamp as a vehicle for project management*
 - *Master scheduling calendar*
 - *Ongoing measurement of available project capacity days.*

We continue to incorporate the business plan into ongoing operations and are disciplined to what we say we are going to do. We are also noting changes we'd like to see in our 2017 business plan. In our Q2 results/Q3 planning meeting, program managers voiced their needs/wants/dreams for 2017. This was in anticipation of having a 2017 draft business plan complete by the end of August/beginning of September.

The Executive Team has used the capacity management spreadsheet to continue building our pipeline of project ideas while focusing on the highest priorities. These priorities are then shared on a monthly basis with staff. Those priorities in the second quarter included:

- Member Satisfaction (baseline) Survey
- Great Plains/CS-Cart Integration
- Lead Gen Project
- HU Online (Phase 1)
- A Better World Singing Day
- Leadership Forum Transition
- Harmony Method Project
- Strategic Planning Process
- 12-Month Orientation Project

As an organization, we now have multiple project management templates and tools (project

charter, project plan, statement of work, project management training guides, project idea intake process). The Director of Projects uses a quiz and monthly incentives to provide ongoing education on efficient planning and project management.

In Q2, we continued to pilot Basecamp 3 to see if it was a tool that we'd want to use in 2017. The Director of Projects is in conversations with and testing additional project management platforms from Projectplace, Project Insight, Trello, and dapulse.

Lastly in Q2, we began working with our Volunteer Project Coordinators in the field. We recognize the importance of leveraging our volunteer core for increased organizational capacity and engagement by members. This new relationship is our pilot attempt at creating project management best practices in the field, which is a stark contrast to the committee structure of the past. The first piloted project is the 12-month Orientation Project. We will use this project as a learning ground to inform ongoing and emerging projects conducted by the field and led by Volunteer Project Coordinators.

Shared Services

- Discrete outcomes
 - As we align programs to outcomes around the Pillars structure, one result will be the discovery that certain BHS activities and staff that had been considered purely “shared services” supporting BHS programs are actually delivering discrete outcomes independent of program support.
 - As these outcomes are discovered and highlighted it will inform budgeting, funding, staffing and management decisions.
 - For 2016, we will focus on uncovering Marketing department outcomes around the idea of “connecting and uniting a global community of barbershop artists and enthusiasts,” and developing a departmental business plan accordingly.
- Shared service projects (2015-2018) and improvements will include:
 - HQ reporting analysis/dashboard
 - Restructuring of operations team
 - Develop strategy for using, or monetizing, currently unused space at Harmony Hall
 - Media inventory
 - Employee parking solution
 - OPT completed roll out
 - Society wide travel approval and purchasing process (plus business card program)
 - Chapter and districts financials gathering tool
 - Review and modify chart of accounts aligning to Pillars
 - Financial Dashboard
 - Board document management
 - New breakroom
 - Media Inventory
 - Honorary membership and Hall of Fame walls at Harmony Hall

- *HQ reporting analysis/dashboard*- Met with each program manager and created a plan on how to report on specific internal management indicators on a weekly, monthly, or quarterly basis. It's a work in progress- we're questioning the value of the information

- EVERY time, so we don't lose site of the ultimate destination in the name of metrics
- *Restructuring of operations team*- Recruited three volunteer Project Coordinators to lead field-based project teams for the Society. Pilot project is the 12-month orientation to barbershop project.
 - *Develop strategy for using, or monetizing, currently unused space at Harmony Hall* - we continue to explore a variety of options for the use and/or monetization of the unused space at Harmony Hall, primarily the unfinished 1st floor space. Downtown Nashville continues to experience rapid development and expansion, with new hotels, office buildings and residential developments planned and expanding around Harmony Hall. During the 2nd Quarter, we have met with the following parties:
 - **Mary Roskilly (Tuck Hinton)** - prominent Nashville architectural firm that was part of the original Harmony Hall plans and expansion concepts and involved in several of the downtown development projects.

Discussions have centered on potential collaborations with these developments and concurrently looking at our current office configuration and planning for the potential remodeling of the Harmony Hall space to create greater efficiencies and collaboration spaces, including employee break room, conference rooms and collaboration spaces. Because of the rapid development in Nashville, we continue to pursue multiple strategies for the unused space: 1) collaboration with adjacent developments; 2) leasing space and remodeling space for longer-term efficient use of space; or 3) a sale of the entire building and move to new space.

Marketing provides discrete outcomes for the Society

We connect and unite a global community of artists and enthusiasts

The Marketing Team primarily provides service to program activities - the tangible, visible connection to members. In all these efforts, our BHS brand, tone, and attitude are infused into all of our promotion and communication of barbershop to the world.

In Quarter 2, even in the absence of a CMO, we created draft marketing plans for each program area (with the exception of Marketplace). Alongside the marketing plans are continuous conversations on the outcomes and value the marketing department brings to society (small s).

"Traditional" media (TV and print) placements continue to drive our message outside the barbershop world. An April 11 appearance on "**Fox & Friends**" by **Storm Front** (2010) and **ClassRing** (2014 SAI Rising Star) showcased a joint celebration of what is coming to be called "Barbershop Quartet Day," traditionally our Society's birthday celebration. **Crossroads** (2009) headlined a full thirty minutes of "Gospel Music Showcase" on the DaystarNetwork, in a lovely combination of music and testimonial.

The Woodsongs Old-time Radio Hour, distributed on 500 radio stations and more than sixty percent of PBS stations, will feature a full 60-minute show devoted to barbershop, to be recorded live on stage July 11 for later broadcast and YouTube distribution. Performers to be confirmed.

Recent local recognition of the Society headquarters in the *Nashville Business Journal* as one of its “**Best Places To Work**” adds to our cachet as a vigorous, energetic part of the local business community and music scene.

The Harmonizer

Beginning in April, Mark Holdeman formally began representing *The Harmonizer* magazine advertising, and a new, less expensive rate card went into effect. The March/April issue of *The Harmonizer* received considerable feedback -- mostly positive -- for its look at the very definition of a great barbershop performance. Now that the proverbial “gauntlet” has been dropped by both Barry Towner (C&J) and Donny Rose (Harmony University), only time will tell the effect this will have on quartets and on chapter Music teams in choosing music and programming performances.

The May/June issue of the magazine featured the ever-quotable Deke Sharon, who reinforced that Barbershoppers need to hold our heads high because the rest of the a cappella world wishes it had what we have. Instant Classic’s championship article was a great follow-up to the principles of authentic audience connection, and introduced a “resonance matching” paradigm that has the potential to someday become an historical milestone equal to the “vowel matching” practices of Dealers Choice.

The July/August issue will be our 2015 Annual report -- and will be a MAJOR step above last year’s report, both in content and presentation.

A feature story and accompanying video interview with Artie Dolt of San Antonio was aimed at celebrating chapter successes that come in forms other than contest.

Even the bread and butter work of announcing Society Board elections was infused with a new communications approach this year, with a brief YouTube conversation with John Donehower discussing the surprising makeup of the Board and its desire to extend its demographics and new ways of thinking.

Harmony University educates and inspire lifelong learning about music, leadership, and administrative excellence in the barbershop style through ongoing workshops, online training, and a yearly week-long immersion camp in Nashville.

HU Online - nearing completion on Phase One (David Wright’s History of Barbershop) and planning future NECAT collaboration that will increase both our output and the quality of product. In addition to on-site capture of classes, we are exploring options for studio time for local staff and select instructors to film specialized topics.

HU Belmont - In support of our weeklong event, an “evergreen” tutorial video was created to give first time attendees a stronger idea of what to expect when they arrive. This video is now a part of the HU web pages and has been shared via other social media channels. While attendance

numbers are healthy, the lack of chorus track participants has impacted the overall anticipated budget. To make up some ground here, a message was sent to each chapter leadership team inviting them to attend HU together in our Leadership track to grow their programs at home without the cost and time commitment of bringing the entire chorus. So far, two leadership teams have taken us up on this direct offer and will join us this year.

HU Nashville - A robust schedule of classes is in place, with plans to capture classes for future editing and release or to stream right from the classroom via Facebook Live. Promotion of individual classes continues across all platforms, including on site at the convention, to increase awareness of the many great offerings.

Outreach builds an awareness of the intrinsic value of singing together and provide inclusive opportunities to participate in the joy of harmony.

We are teaming with NAFME for June 2016 Hill Day appearance by Crossroads, who will be honored with the Stand Up for Music Award and meet with legislators to share personal testimony to the power of music in their lives. A video and press release was created to educate our barbershop audience about what this means. The video has been viewed over 1,200 times.

Membership attracts and retains an engaged and diverse intergenerational membership impassioned to educate and enrich lives through the medium of barbershop harmony.

A total revamping of member-facing materials was fully implemented in quarter 2 with extensive contributions by the marketing team in general, Brian Lynch in particular. Whereas members, associates or quartets who were up for renewal once received only a bill in the mail, from henceforth they will receive proper thanks for their contribution and role in the Society's larger mission; they will also be reminded of the benefits and satisfaction that come through an association with the Society. Marketing team members also created a series of clear statements that will help customer service team members easily clarify what happens in various scenarios in which a Society member changes the terms of his quartet or Society membership.

With regular coordination with Caki Watson Gray, the marketing team is in the middle of a sustained, data-driven membership campaign. Among the nearly 90,000 past members in our database, fewer than 30,000 listed email addresses, and testing shows that more than half of those addresses are no longer valid. But we are learning and tweaking the message and the product according to feedback, with many steps to continue throughout 2016 among this pool of past members.

Marketplace strives to be the world's market leader, creator, and provider of barbershop music, merchandise, & media.

The Marketing Team has helped develop promotions and videos for upcoming new releases at the Nashville convention, including new singles and the *Yuletide Favorites II* songbook and *Nashville*

Barbershop Style folio. Live stage performances will be YouTube'd immediately to drive online sales of these new titles. Other new merchandise promotion has lagged for lack of direct attention, which we will address especially in light of inventory turnover targets and upcoming holiday sales.

Events provides highly visible, annual conventions and ad hoc events that will deliver enjoyment to close harmony enthusiasts, contribute to local communities, and create memorable experiences for all attendees.

Through Scott Wetle and Nic with TNDV, we have secured a start/stop logging station inside the production truck for International this year. This is a huge win as we've made improvements on this idea each year. With the station in the truck, we expect this to cut considerable hours off of post-production times as well expedite the YouTube upload process.

II. POLICY TYPE: EXECUTIVE LIMITATIONS

POLICY TITLE: GENERAL EXECUTIVE CONSTRAINT

The CEO shall not knowingly cause or allow in the organization any practice, activity, decision, or circumstance that is imprudent, unlawful, unethical, in violation of commonly accepted business and professional ethics that is in violation of the organization's human resources policy and procedures, that is in violation of the Society's Bylaws or Policy Manual, or that would jeopardize the Society's tax exemption or cause any penalty to be imposed against the Society by the IRS.

CEO: I'm in compliance with these limitations.

A. POLICY TITLE: *TREATMENT OF STAFF AND VOLUNTEERS*

Dealings with staff and volunteers will not be inhumane, manipulative, unfair, undignified, unnecessarily argumentative, unresponsive, untruthful, disrespectful, or significantly disruptive to morale.

Accordingly, the CEO may not:

1. Operate without personnel procedures that clarify personnel rules for staff, provide for effective handling of grievances, and protect against wrongful conditions.
2. Discriminate or retaliate against any staff member for expressing an ethical dissent.
3. Prevent staff from appealing to the Board when
 - a. internal grievance procedures have been exhaustedand
 - b. the employee alleges either

(1) that Society personnel policy or Board policy has been violated to his or her detriment,
or

(2) that Society personnel policy or Board policy does not adequately protect those rights protected by law.

4. Fail to acquaint staff with their rights under this policy.

5. Use methods of collecting, reviewing, transmitting, or storing personnel records information that fail to protect against improper access to the material.

CEO: I'm in compliance with these limitations.

D. POLICY TITLE: *ASSET PROTECTION*

The CEO may not allow assets to be unprotected, inadequately maintained, or unnecessarily risked.

Specifically, the CEO may not:

1. Fail to insure against theft and casualty losses to at least 80 percent replacement value.
2. Fail to insure against liability losses to board members, staff, or the organization itself in an amount equal to or greater than \$2 million with a \$5,000 deductible.
3. Subject facility and equipment to improper wear and tear or insufficient maintenance.
4. Unnecessarily expose the organization, its Board, or staff to claims of liability or loss.
5. Make any purchase or commit the organization to any single expenditure or contract of greater than \$50,000, except Harmony/Directors College, hotel and other convention contracts, and payroll, and any Society-wide training event.
6. Enter into, or allow to be entered into, any binding hotel, services, or other contract or letter of agreement unless it contains an appropriate escape or termination clause that defines reduced or pro-rata liabilities.
7. Make any purchase:
 - a. wherein normally prudent protection has not been given against conflict of interest;
 - b. of over \$10,000 without having obtained competitive prices and quality;
 - c. which is unbudgeted and over \$25,000 without Board approval.
8. Receive, process, or disburse funds under controls that are insufficient to meet the standards.
9. Invest or hold operating capital in uninsured checking, savings or money market accounts.
10. Acquire, encumber, or dispose of real property.
11. Allow any staff member, or himself, to charge a personal expense to a Society credit card or account.

CEO: I'm in compliance with these limitations, except as hereinafter noted.

In regards to item #6, the 2017 International contract with the Caesar's organization in Las Vegas has an attrition provision that we are committing to achieve. Specifically, based upon the hotel nights guaranteed, attendance at the 2017 International would need to fall below approximately

4,300 attendees, which would reflect more than 20% below forecast 2016 attendance and almost 40% below our attendance levels in Las Vegas in 2014. Due to the time sensitivity to sign the contract following the cancellation of Minneapolis as the convention city for 2017, and following discussion with the Board on this issue prior to signing, we agreed with the provision and do not believe it places the Society at a heightened risk .

In regards to item #11, the Finance Department carefully monitors credit card usage to ensure personal expenses are not charged to Society-provided credit card. Exposure for these cards is technically the employee's liability, but are intended solely for Society-related expenses and are regularly reconciled and paid by Finance. In instances where the card has been unintentionally used for a personal expense (1-2 instances per year), the employee is required to pay the expense immediately and warned not to allow such use in the future or risk losing access to the Society-provided credit card. We have had two instances of inadvertent personal use of the Society-issued card by staff in FY2016. These items were repaid immediately by such staff member.

E. POLICY TITLE: *COMPENSATION AND BENEFITS*

With respect to employment, compensation, and benefits to employees, consultants, contract workers, and volunteers, the CEO may not cause or allow jeopardy to fiscal integrity or public image.

Accordingly, the CEO may not:

1. Change the CEO's own compensation and benefits.
2. Promise or imply guaranteed employment.
3. Establish current compensation and benefits that:
 - a. Deviate materially from the geographic or professional market for the skills employed.
 - b. Create obligations over a longer term than revenues can be safely projected, in no event longer than one year and in all events subject to losses of revenue.
 - c. Deviate materially from practices that would, in the aggregate, position the Society at or slightly above the median of ASAE (American Society of Association Executives) survey data.
 - d. Fail to use ASAE Association Executive Compensation & Benefits Study survey data reported for "Individual Membership Organizations" with similar staff and budget profiles. When appropriate for problematic recruitment/retention salary management situations, ASAE "All Organizations" data may also be referenced.
 - e. Fail to benchmark Society staff productivity closely with "Personnel Expense and Budget Ratio" standards reported in the ASAE Blue Chip Compensation & Benefits Study survey for "Individual Membership Organizations" with similar staff and budget profiles in categories of: "Salary Costs as a % of Total Annual Budget" and "Salary Costs Per Employee," and also for "Budget Productivity Ratios" corresponding to "Total Annual Budget Per Employee" and "Total Annual Budget Per Member."
4. Establish or change benefits that:

- a. Cause unfunded liabilities to occur or in any way commit the organization to benefits that incur unpredictable future costs.
- b. Provide less than some basic level of benefits to all full-time employees, though differential benefits to encourage longevity in key employees are not prohibited.
- c. Allow any employee to lose pension benefits already accrued from any foregoing plan.
- d. Treat the CEO differently from other comparable key employees.

CEO: I'm in compliance with these limitations.

Appendix A- Harmony University

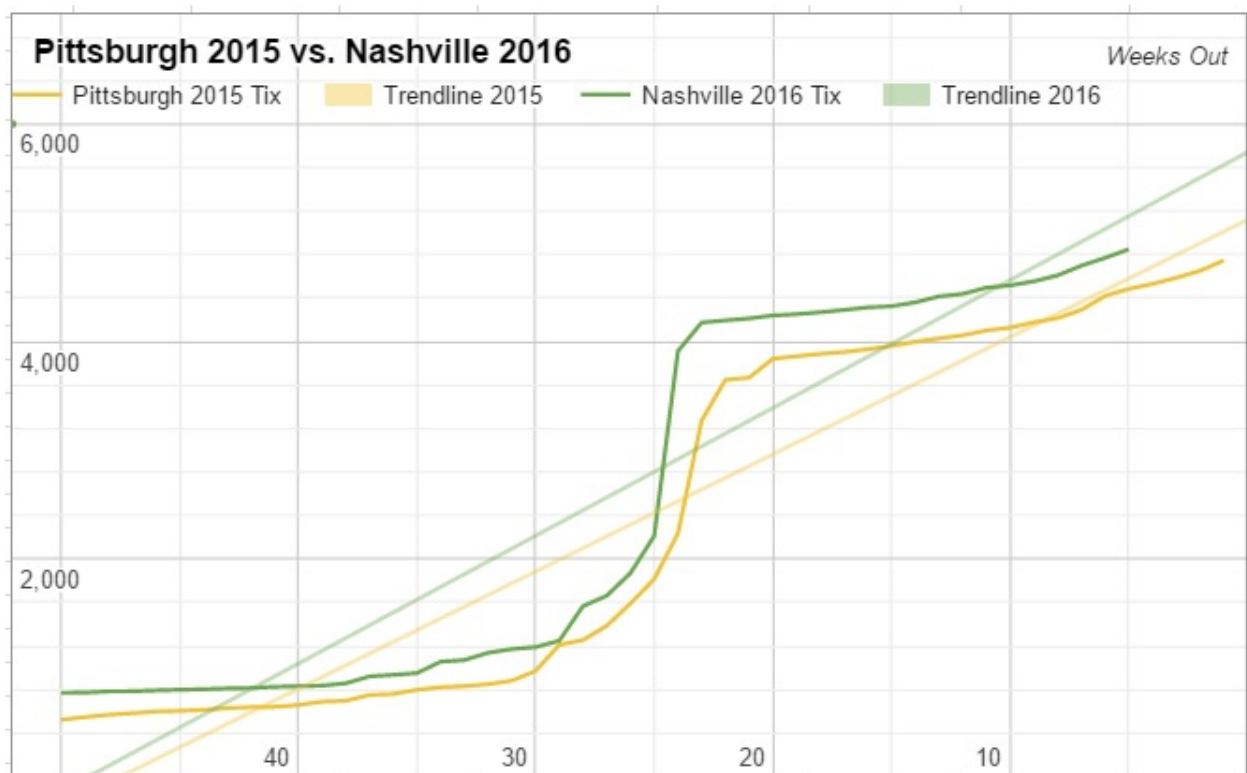
Capture plan/schedule for HU Online

Shooting at HU	DESCRIPTION	DATE
<p>The Power of Positive Coaching(NECAT)</p> <p>Cindy Hansen-Ellis, Paul Ellinger</p>	<p>Positive communication in a coaching session can and will impact the singer, the performance and the audience. Cindy and Paul will model coaching styles with both registered and pick up groups, and will show do's and don't that may not be on your radar based on gender, age, experience, or other issues that need to be navigated.</p>	<p>Monday, July 25</p>
<p>Directors Roundtable (NECAT)</p> <p>Gary Steinkamp, Rob Mance, Steve Armstrong</p>	<p>Let's share ideas and strategies, and investigate barriers and frustrations. We will develop a new network of peers and friends who want you to succeed as a director, and you will learn the most important thing of all.. you are not alone!</p>	<p>Tuesday, July 26</p>
<p>Make a stand: the science behind riser placement (NECAT)</p> <p>Rob Mance, Steve Scott</p>	<p>Have you noticed how the instrumental world is very specific about the order and placement of the instruments of the orchestra and band, yet the choral world doesn't seem to follow any formal thought process? Rob and Steve will explain the science behind riser placement and chorus formations.</p>	<p>Wednesday, July 27</p>
<p>Directors: stop talking! (NECAT)</p> <p>Don Campbell, Kirk Young</p>	<p>Watch Don direct a group with limited verbal cues, and then have Kirk break down what just happened. We can communicate so much more by speaking less, and have wonderful, unintended results!</p>	<p>Thursday, July 28</p>
Shooting at Studio		
<p>All Ears: Turn your group into an organism</p> <p>Danny Ozment</p>	<p>What do you listen for at advanced levels of A Cappella music? It's already good, but what pushes it from good to great? Let professional studio engineer Danny explain how me mixes and coaches professional studio groups to make them even better, by... listening to each other!</p>	<p>TBD</p>
<p>Shaping the Sound of Your Singers</p>	<p>We focus on so many important pieces of our performance and can forget this core element...our collective sound. When one person</p>	<p>TBD</p>

Joe Cerutti	is added or subtracted from the group, the group is changed, yet the group's understanding of techniques must be the same. Let Joe teach concepts that can unify and guide your singers to a new model for excellence in sound and production.	
One ensemble, Three Lenses (Jeremy & Mike) Marty Lovick, Anthony Colosimo, Steve Tramack	How can working on a singing skill improve your performance? Why is it when we make a better performance choice our music score also goes up? Watch three of our best judges and coaches work with a group, and how each concept impacts the other category... and that's a good thing!	TBD
Training Games for Performers Kim Wonders	Give your performers tools and training in concentration, imagination and energy on stage. This will help them move meaningfully on stage, using their whole body and strengthening their stage performance. This is a very interactive class, don't miss out on this opportunity to make performing more fun! So get ready to MOVE!	TBD

Appendix B - Events

2016 Date	Weeks Out	Pittsburgh 2015 Tix	Nashville 2016 Tix	Registration Revenue	% of Prior Year Tix	% of Budget Attendance	% of Budget Revenue	# new Tix sold per wk 2015	% increase per wk 2015	# new Tix sold per wk 2016	% increase per wk 2016	Avg \$/Ticket 2016
5/16/16	7	4291	4698	\$1,039,556	109.5%	78.30%	71.52%	75	1.8%	89	1.9%	\$221.28
5/23/16	6	4420	4770	\$1,056,068	107.9%	79.50%	72.65%	129	3.0%	72	1.5%	\$221.40
5/30/16	5	4485	4849	\$1,075,281	108.1%	80.82%	73.97%	65	1.5%	79	1.7%	\$221.75
6/6/16	4	4530						45	1.0%			
6/13/16	3	4587						57	1.3%			
6/20/16	2	4651						64	1.4%			
6/27/16	1	4746						95	2.0%			
Final Pre-Convention		4,766						20	0.4%			
Budget			6,000	\$1,453,575	122.5%							\$242.26
On-Site		133										
Total w/ comps		4,899	4849									
Comps		174	189									
TOTAL PAID		4,725	4660									



Appendix C - Marketing

Social Media

Facebook

Total Likes (04/05/16 - 05/31/16): **22,210**

3% increase over last quarter



Top Posts (04/05/16 - 05/31/16):

Reach: Organic / Paid Post Clicks Reactions, Comments & Shares							
Published	Post	Type	Targeting	Reach	Engagement	Promote	
04/11/2016 9:10 am	Storm Front Quartet and ClassRing Quartet join together to sing			59.5K	7.9K 2.1K		Boost Post
04/26/2016 8:28 am	After breaking the record for highest Regional score this spring,			45K	4.1K 1.2K		Boost Post
04/11/2016 3:07 pm	In addition to sharing the barber shop classic "Lida Rose" along			29.1K	3.2K 645		Boost Post
04/09/2016 11:42 am	Looking for your next quartet suit...			25.9K	924 632		Boost Post
03/16/2016 10:43 am	"When I was 11, our music teacher laid his hand on my arm and			25.1K	2.2K 504		Boost Post

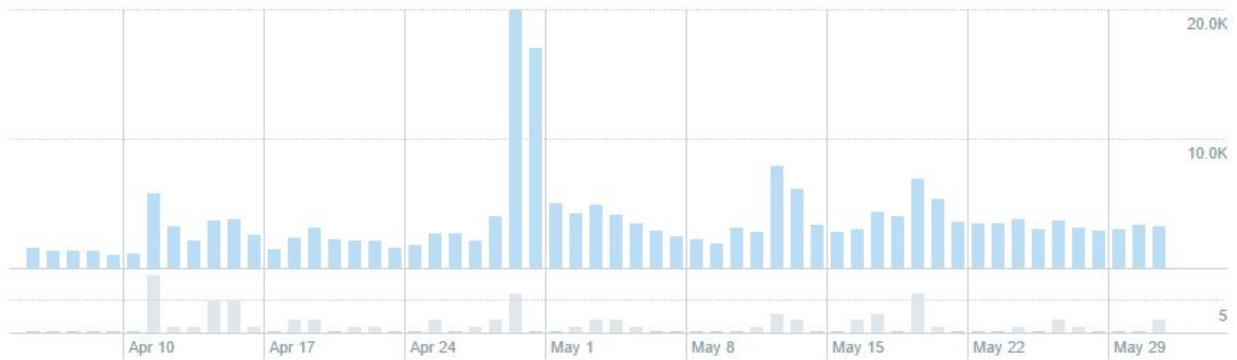
Twitter

Followers (04/05/16 - 05/31/16): **6,834**

2% increase over last quarter

3.1K impressions per day.

Your Tweets earned **175.0K impressions** over this **57 day** period



Instagram

Followers: (04/05/16 - 05/31/16): **2,773**

2% increase over last quarter



YouTube

TOTAL YouTube Stats (Through 05/31/16)

Views: 14,413,194 (+5%)
 Minutes Watched (Lifetime): 30,748,765 (+7%)
 Minutes Watched this quarter (04/05/16 - 05/31/16): 2,215,556 (-41%)
 Likes: 68,514 (+7%)
 Dislikes: 1,741 (+8%)
 Comments: 10,960 (+2%)
 Shares: 30,156 (+11%)
 Subscribers: 23,438 (+4%)
 Published Videos: 1169 (+5%)

Top Videos, by Views this quarter (04/04/16 - 05/31/16)

	Views this quarter
Main Street - Pop Songs Medley (International 2015)	68,752 views
Kentucky Vocal Union - Footloose**	55,751 views
Old School - 2011 International Barbershop Quartet Champion	44,035 views
Lunch Break - Old MacDonald Had a Deformed Farm	23,026 views
Masterpiece - Tennessee Waltz**	21,265 views

**Not in top ten for total views

Top Videos, Total Views

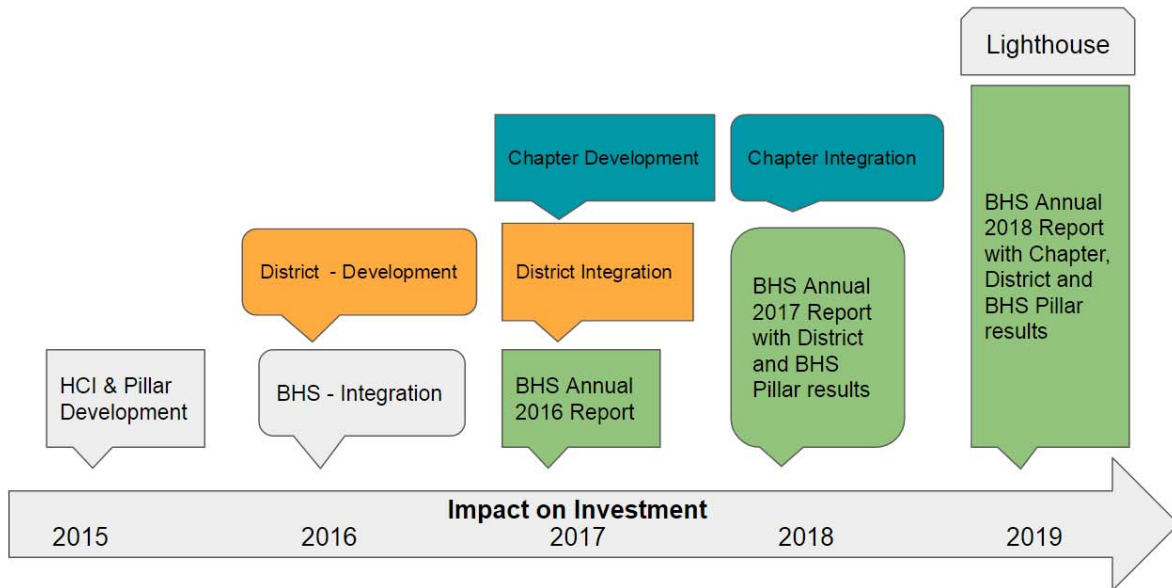
	Total Views
Ambassadors of Harmony-2009 International Barbershop Chorus Champions	2,640,288 views
Old School - 2011 International Barbershop Quartet Champion	1,417,924 views
Lunch Break - Old MacDonald Had a Deformed Farm	837,281 views
Main Street - Pop Songs Medley (International 2015)	836,577 views
Crossroads - Lucky Old Sun	638,640 views

LiveWire performance

Date	Sent	Opens	Open rate	running 12-week avg opens	running 26-week avg opens	Clicks	Click rate	running 5-week avg clicks	running 12-week avg clicks	running 26-week avg clicks
6/3/2016	30758	9807	36.00%	36.05%	36.00%	2151	21.93%	28.35%	26.23%	27.10%
5/26/2016	30771	9802	35.94%	36.14%	35.96%	2661	27.15%	26.11%	26.35%	27.09%
5/19/2016	30776	9696	35.54%	36.27%	35.94%	2631	27.13%	26.05%	26.47%	27.10%
5/12/2016	30797	9873	36.12%	36.29%	35.88%	2469	25.01%	27.06%	26.22%	27.03%
5/6/2016	30812	10061	36.81%	36.21%	35.83%	3432	34.11%	24.83%	25.99%	26.85%
4/29/2016	30826	9743	35.62%	36.11%	35.61%	1772	18.19%	26.12%	26.20%	27.09%
4/22/2016	30855	9753	35.58%	36.14%	35.61%	2622	26.88%	24.94%	26.45%	27.24%
4/15/2016	30863	9982	36.36%	36.07%	35.51%	2900	29.05%	24.37%	26.52%	27.08%
4/7/2016	30867	10027	36.50%	35.94%	35.48%	2526	25.19%	24.96%	26.29%	27.27%

Appendix D- Corporate Activities

Pillar Adoption & Integration Timeline



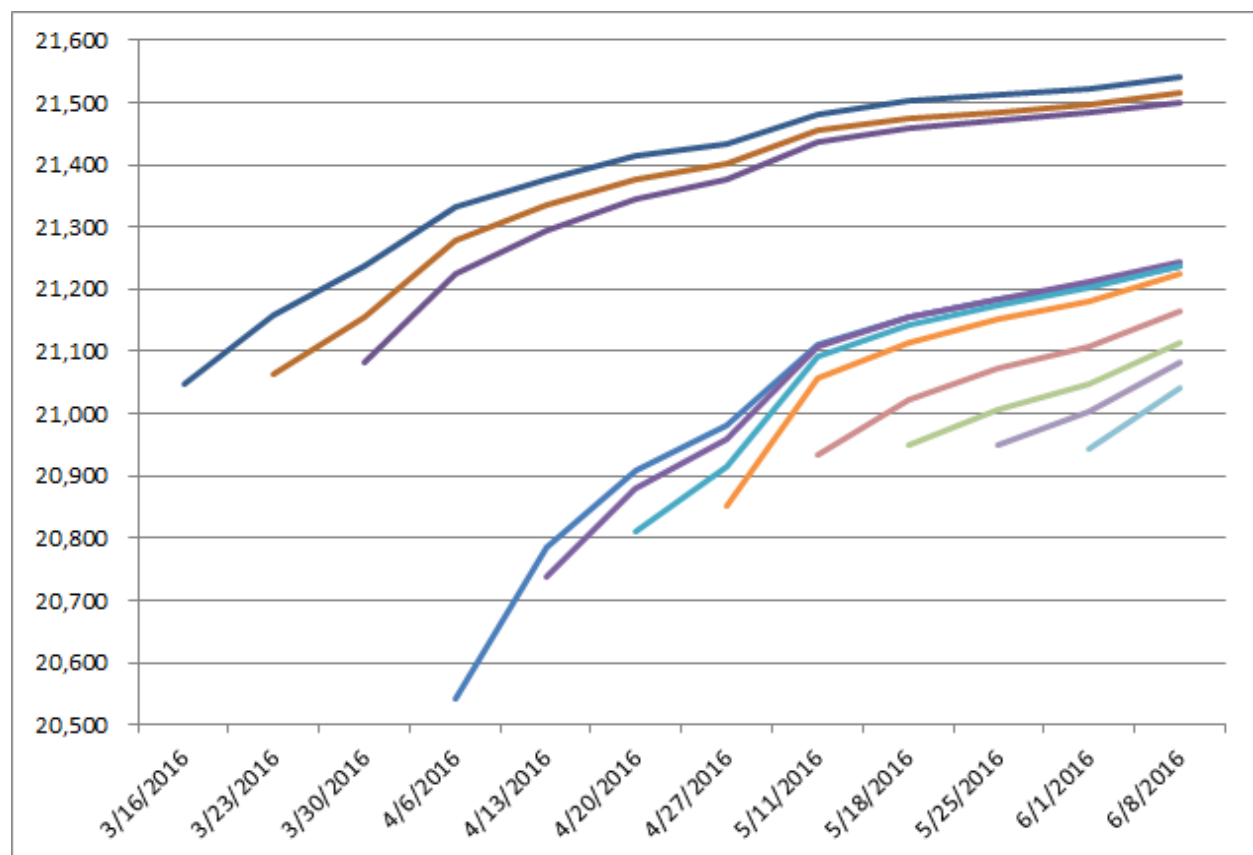
Appendix E - Membership

Membership Program Materials

Membership Associates Quartets	Before	After
Post-expiration date email	Didn't Exist	https://drive.google.com/file/d/0BwP9GrG3LzJMTIpSSGs2SG93aU0/view?usp=sharing
Post-expiration date email	Didn't Exist	https://drive.google.com/file/d/0BwP9GrG3LzJMV2lhSmlzdnBCTIk/view?usp=sharing
Post-expiration date email	https://drive.google.com/open?id=0BwP9GrG3LzJMWDA5LV9VUzFDek0	https://drive.google.com/file/d/0BwP9GrG3LzJMRmNpTjZOOW13N00/view?usp=sharing
Renewal Mailed Letter (30 days pre-expiration)	https://drive.google.com/open?id=0BwP9GrG3LzJMLWk1REV4aFFEck0	https://drive.google.com/file/d/0BwP9GrG3LzJMWWFnVFpWejM5eEE/view?usp=sharing
Renewal Mailed Letter (30 days pre-expiration)	https://drive.google.com/open?id=0BwP9GrG3LzJMbDI4NENOWG14d3c	https://drive.google.com/file/d/0BwP9GrG3LzJMXzROZFI5R2hQMUE/view?usp=sharing
Renewal Mailed Letter (30-60 days pre-expiration)	https://drive.google.com/open?id=0BwP9GrG3LzJMTm9aVG12dVFESTQ	https://drive.google.com/file/d/0BwP9GrG3LzJMZEFEOUhudWxyaGM/view?usp=sharing
Renewal Emailed Request (60,45,15 days pre-expiration)	https://drive.google.com/open?id=0BwP9GrG3LzJMems0eWF1Wm1aWXc	https://drive.google.com/file/d/0BwP9GrG3LzJMZGs3NXB2ZTd4aUk/view?usp=sharing
Renewal Emailed Request (60 days pre-expiration)	https://drive.google.com/open?id=0BwP9GrG3LzJMSmFMUIdRYi1kWDG	https://drive.google.com/file/d/0BwP9GrG3LzJMaEIDZ3pzSGJDd00/view?usp=sharing
Renewal Thank You With Card	https://drive.google.com/open?id=0BwP9GrG3LzJMWHPGQWJuTHlrZ0E	https://drive.google.com/file/d/0BwP9GrG3LzJMaUZ2amhuZUdoZEE/view?usp=sharing
Renewal Thank You With Card	https://drive.google.com/open?id=0BwP9GrG3LzJMdmx0LXpOLUVrbWs	https://drive.google.com/file/d/0BwP9GrG3LzJMaU9IbXF3Nk4yZm8/view?usp=sharing

Renewal Thank You With Card	https://drive.google.com/open?id=0BwP9GrG3LzJMcHV1VnJ0clEwbms	https://drive.google.com/file/d/0BwP9GrG3LzJMc1I0M0NPN2VMVkuU/view?usp=sharing
Welcome Letter With Card	https://drive.google.com/open?id=0BwP9GrG3LzJMYTI0cGJjcIV6MFE	https://drive.google.com/file/d/0BwP9GrG3LzJMNW1NT1p4dWpBdjg/view?usp=sharing
Welcome Letter With Card	https://drive.google.com/open?id=0BwP9GrG3LzJMS3ZKbWM1S2pGRHM	https://drive.google.com/file/d/0BwP9GrG3LzJMMS1xeFkwWDFPMVE/view?usp=sharing
Welcome Letter With Card	https://drive.google.com/open?id=0BwP9GrG3LzJMcDZkRU9NOWp4MDA	https://drive.google.com/file/d/0BwP9GrG3LzJMQW5sOU1BRmZLTzQ/view?usp=sharing

Membership Numbers



District EOM Report - Jun 1, 2016

District	Current	Last Yr	Δ	New Last 12 Mos		Lapsed Last 12 Mos		Members/Chapter
CAR Cardinal	642	657	-2.28%	65	10.12%	133	20.72%	24.69
CSD Central States	1,702	1,791	-4.97%	141	8.28%	389	22.86%	29.86
DIX Dixie	733	743	-1.35%	65	8.87%	148	20.19%	29.32
EVG Evergreen	1,417	1,430	-0.91%	157	11.08%	284	20.04%	26.24
FHT Frank Thorne	75	88	-14.77%		0.00%	16	21.33%	75.00
FWD Far Western	2,270	2,300	-1.30%	239	10.53%	445	19.60%	29.48
ILL Illinois	844	842	0.24%	68	8.06%	162	19.19%	26.38
JAD Johnny Appleseed	1,533	1,519	0.92%	146	9.52%	315	20.55%	30.06
LOL Land O Lakes	1,516	1,535	-1.24%	129	8.51%	242	15.96%	30.32
MAD Mid-Atlantic	2,701	2,734	-1.21%	246	9.11%	493	18.25%	29.36
NED Northeastern	1,524	1,514	0.66%	182	11.94%	279	18.31%	28.75
NSC Carolinas	726	723	0.41%	84	11.57%	155	21.35%	25.93
ONT Ontario	1,003	1,023	-1.96%	96	9.57%	187	18.64%	30.39
PIO Pioneer	862	858	0.47%	83	9.63%	161	18.68%	29.72
RMD Rocky Mountain	795	810	-1.85%	90	11.32%	181	22.77%	24.84
SLD Seneca Land	654	667	-1.95%	71	10.86%	112	17.13%	20.44
SUN Sunshine	1,257	1,257	0.00%	128	10.18%	239	19.01%	33.97
SWD Southwestern	1,239	1,277	-2.98%	131	10.57%	342	27.60%	25.81
Totals	21,493	21,768	-1.26%	2,121		4,283		
BHS	21,139	21,466	-1.52%	* Variances in District & BHS data are due to the influence of dual members.				
YTD Members Served	22,573	23,540	-4.11%	* Cumulative count of members served in a calendar year				
BHS Associates	355	322	10.25%					

Society Members - June 1, 2016

Society Member Program - Since Oct 1, 2015**	Members	Percentage
New (Never been a member of the Society before)	48	31%
Saves (Current member of the Society dropping their dist/chap affiliations)	22	14%
Reinstated (Rejoining the Society after at least 6 months out)	86	55%
** this does not include the 73 redirects to a chapter	156	

Appendix F- Leadership OPT Update

The Leadership Operations Project Team continues to concentrate on three target areas: chapter assessment, curriculum and facilitators. While each of these targets advances toward its own singular completion, each one also represents a component of a much larger Barbershop Harmony Society influence: the Healthy Chapter Initiative.

CHAPTER ASSESSMENT:

Beginning with the 2015 Leadership Forum, District Presidents were offered a catalog of potential assessment categories and topics and asked to define each line item in terms of its perceived relevance in a chapter assessment model. New line items were also encouraged from this group. From these sessions, LOPT created a chapter assessment model that, upon approval by Society staff, will be ready for immediate rollout.

CURRICULUM

During the 2015 Leadership Forum, District Presidents were offered another catalog of several hundred potential curriculum threads and possible content ideas. In group settings, the District Presidents studied this list and made recommendations of potential course content value to their chapters and leaders. In order to ensure that leadership needs were being met, District Presidents were encouraged to add or delete line items as they believed. From these sessions, LOPT developed its “first five” leadership curriculum courses. As a test, these five courses were facilitated by LOPT members at a district leadership academy. Following the school, LOPT met to positively adjust any of the content that needed attention. When the LOPT next convenes, it will begin to shape the next round of leadership content curriculum.

FACILITATORS

The first cadre of facilitators will be introduced to the “first five” leadership curriculum courses during Harmony University at Belmont. These men will delve into all aspects of facilitation including knowledge of content, professionalism, presentation strategies and course content follow up. The timing of this facilitator training is such that this new group will be available to deliver the “first five” leadership courses to any district school that requests and has the capacity to receive the full course content.

HEALTHY CHAPTER INITIATIVE

As chapter assessment strategies become active available resources, they become strategic indicators of initial healthy chapter status. While the definition of a healthy chapter rests with the chapter itself and its own reasons for existence, the assessment models and subsequent discovery of chapter needs will certainly drive future specific curriculum development. This, in turn, creates the need for more facilitators and potentially helps mold future district leadership schools.