

Illinois District Association of Chapters Board Meeting

February 2016

Location: Midwest Food Bank, Bloomington IL

Roll Call

Name	Governance Role	Operations / Other Role	Present	Quorum Count
Richard Hansen	President		Y	+
Jim Waldorf	Exec VP	YIH	Y	+
Mike Isely	Secretary	webmaster	Y	+
Jim Wagner	Treasurer		Y	+
Hugo Feugen	BMAL	Membership	Y	+
Will Thorndike	BMAL	Events	Y	+
Dave Cowin	BMAL	C & J	Y	+
Brett Mulford	BMAL		N	+
Jeff Bowyer	Imm Past President		Y	+
Mike Savard		CSLT	N	
Tim Woodall		Director Dev	N	
Kevin Deets		YIH	Y	
Kevin McClelland		Marketing & PR, webmaster	Y	
Terry Ludwig		Music & Perf	N	
Tim Pashon		Music & Perf	N	

Totals: 10 of 15 8 of 9

Called to order: 9:32 AM

Opening song - Jeff Bowyer, directing: "The Old Songs"

Administration

- Opening songs
 - Jeff Bowyer, directing: “The Old Songs”
- Quorum
 - Eight Governance Members present (from a possible total of nine), quorum established.
- Approval of Agenda
 - **Motion:**
 - ◆ **Subject: Approve Agenda**
 - ◆ **Originator: Jim Waldorf**
 - ◆ **Seconded: Dave Cowin**
 - ◆ **Voice vote: PASSED.**
- Minutes from previous (August 2015) Governance Board meeting
 - **Motion:**
 - ◆ **Subject: Approve Minutes from 29-Aug-2015**
 - ◆ **Originator: Jeff Bowyer**
 - ◆ **Seconded: Will Thorndike**
 - ◆ **Voice vote: PASSED.**
- Online vote completed on Jan 1st, 2016
 - **Motion:**
 - ◆ **Subject: I would like to make a motion to give \$500 from the YIH raffle monies to support the Illinois Representative Youth Chorus for their trip to the Mid-Winter Convention**
 - ◆ **Originator: Brett Mulford**
 - ◆ **Seconded: Jim Waldorf**
 - ◆ **Voice vote: PASSED.**
 - [Attachment: “01-vote_2016_1.pdf”]
- Consent Calendar Reports
 - Individual reports
 - ◆ President
 - [Attachment: “02-CEO_Report_Documents.pdf”]
 - [Attachment: “03-HOD_2016_Spring.pdf”]
 - ◆ Membership
 - [Attachment: “04-2016MemRept.pdf”]
 - Biggest indicators seem to be overdue members
 - Northbrook's numbers are pretty high here
 - Need to be acting on chapters that have fallen below 8 members and have been that way for at least a year.
 - HOD needs to discuss this
 - What about Chicago #1? Just one member (Rick Anthony)
 - Sandoval has just 2 members, who are also dual members with Collinsville

- Quincy has ghost members, no chapter leaders listed, and just 2 listed members (Terry Ludwig, Craig Rigg)
 - Apparently they are rehearsing and doing performances
 - Rich is having a lot of trouble contacting this chapter
- This has been a problem for a long time. It's a huge issue – non-members routinely performing as representing the Society puts everyone at risk for liability problems.
- Apparently there were some ghost members who showed up at the last IDAH.
- ◆ C&J
 - Update of what is coming...
 - Time limit proposed for choruses to get on the stage (for this Fall)
 - 6 minutes from time previous chorus clears the stage
 - No determination of who is responsible for enforcing this – concern from Will
 - Change in judging – presentation category will become the performance category
 - This comes after International but before the Fall
 - Possible new contest formats at mid-winter:
 - Possible district senior chorus contest, with qualification in the Fall, not competing with other contest tracks
 - A lot of nuts & bolts issues
 - Is there really time at mid-winter for another contest?
 - Logistical issues with the larger districts in having to qualify another category of chorus
 - Expand seniors quartet contest to 2 rounds
- ◆ YIH
 - Youth chorus contest will happen in the spring; everything is moving along
 - Question about handling youth registrations (these are not society members)
- ◆ M&P
 - [Attachment: “05-rpt_mp.pdf”]
- ◆ CDD
 - This is an area of focus for 2016
 - Get the right director in front of the chorus and this can drive membership

Treasurer's Report

- Treasurer's Report (Jim Wagner)
 - [Attachment: “06-rpt_treas.pdf”]
 - \$36K in the bank
 - ◆ However year-over-year we went from \$+3900 in 2014 to \$-1400 in 2015. That's significant.
 - Net loss of \$1400 for 2015...
 - ◆ ...which isn't **too** bad
 - ◆ IDAH gained \$1300
 - ◆ Spring jamboree has been based upon IDAH's numbers

- ◆ Fall convention lost \$4100 – much worse than expected, as Jim had discovered a lot of mis-categorized items
 - Comparison submitted with Fall 2014 convention in order to figure out what happened
 - How do we stop the bleeding?
 - Discussion over comp'ed rooms; this is a significant cost
 - BCPA ticket fees are a large effect
 - Discussion to HOD about increasing registration fee
 - There needs to be a bigger penalty for those who register at the convention – not because it's petty, because the on-site registration is costing us. The penalty should be representative of this cost
 - How many unregistered men are getting on stage? There's no teeth in this.
 - Suggestion made to check badges **after** crossing the stage, which is effectively a much bigger penalty (because then it's too late to pull those men out of the group and thus the whole group is de-q'ed).
 - Should be an announcement to all competitors before the Fall
 - Known example of a couple buying one registration and then “sharing” it.
 - Jim to make recommendations for changes

→ **Motion:**

- ◆ **Subject: Receive Treasurer's Report**
- ◆ **Originator: Jeff Bowyer**
- ◆ **Seconded: Jim Waldorf**
- ◆ **Voice vote: PASSED.**

Old Business

- Adoption of District Mission Statement
 - This is important when applying for grants
 - Discussed at length at the Fall 2015 HOD. HOD wants to take this up again in the Spring.
 - Board is going to suggest several possibilities. No more delays; the HOD either needs to adopt one of those or agree on something else – not put it off again.
- Convention Manual
 - Will need more updates after the Spring Jamboree
 - Rich will be doing a lot of work on this in the upcoming summer but it won't be complete in 2016. It will be passed onto Jim Waldorf.
 - Everyone directly involved in the convention is asked to take notes during the upcoming events and this will be used as input for manual updates
 - Notes need to be detailed; manual has not been updated for 20 years. The folks working on the conventions now won't be around in 20 years...

Tag Break

- Hugo Feugen

New Business

- Forum 2015 Reflections
 - Jeff Bowyer:
 - ◆ Format better than last year
 - ◆ Disciplines had a better opportunities to discuss matters
 - Hugo Feugen
 - ◆ A lot of new peoples, so a lot of material had to be rehashed
 - ◆ Compared to 3-4 years ago (Dallas/Ft Worth forum), this still wasn't as good
 - ◆ Time wasted (5-6 hours) for required reading, with simply no followup
 - Jim Waldorf
 - ◆ Repeated issue with “required reading”
 - ◆ Liked the breakout sessions – but nothing for EVP
 - ◆ Underwhelmed by Dwayne Gunn (motivational speaker at the Forum)
 - ◆ Rich Hansen quickly listed district goals for 2016
 - Convention Manual (work on it)
 - Hold a CSLT (already done)
 - Increase size of youth choruses
 - Hold a spring Jamboree
 - Hold a CDWI
- Midwinter 2016 Reflections
 - No so great, compared to prior midwinter
 - No resolutions from any DP/DVP discussions at the convention
 - Aside from the youth choruses, the best thing at Midwinter was finding good restaurants
- Harmony Foundation vs IDEA Contribution
 - We got “shamed” by HF into donating in 2015
 - Do we continue HF donation for 2016 or direct to IDEA instead?
 - Realize that IDEA is “our version” of HF
 - HF rejected funding the Spring Jamboree
 - “We should give back to the group that is helping us”
 - We gave \$500 to HF last year
 - **Motion:**
 - ◆ **Subject: Donate \$500 to IDEA**
 - ◆ **Originator: Jeff Bowyer**
 - ◆ **Seconded: Jim Waldorf**
 - ◆ **Voice vote: PASSED.**
- Chapter Visits/Board Visibility
 - They are generally happy to see the District show up at chapter rehearsals
 - We're all encouraged to visit chapters where possible
 - Those of us at CSLT were well received and appreciated

- Spring Harmony Jamboree Update
 - Note: See attachment for Music & Performance, previously referenced.
 - Hotel
 - ◆ Apparently we might have over-promised on the number of people who we anticipate will show up. This is having a large impact with the hotel setup
 - ◆ There is a cost behind this for the other hotel space; it could have been \$7500, but what is being proposed is... either a room charge of \$2200 for the weekend, or a food / beverage minimum purchase (\$3000) which would waive the room charge. Consensus: Opt for the \$2200 room charge.
 - 2 churches also providing space
 - Registration cut-off: April 1st (which is free). But at-the-door registration will be \$10.
 - We lose money with the hotels. We should be looking at a non-hotel site for future Spring Jamborees. “If we only have to bleed in the Fall and not in the Spring, that would be great...”
 - ◆ A lot of consensus over this
 - Will is going to arrange for an IDEA information table to be set up.
 - Lots of additional logistics from Will / Jeff, worked by others in the room (don't need to note here)
- Spring HOD Reminder
 - Friday April 15th, 1:30pm, Board Room
 - Breakout session in the fall went very well
 - ◆ Do this again? – if it ain't broke, don't fix it
- 2016 Fall Convention Update
 - Marriott / BCPA, as before
 - 9/23-9/25
 - No contract yet from the Marriott
 - BCPA costs from 2014 → 2015
 - ◆ Stage crew overtime: \$45 in 2014, \$645 in 2015
 - ◆ Video projector cost \$500, even though it didn't work as promised
 - ◆ \$50/hour ticket office staff after 6pm (normally \$20/hour)
 - ◆ High “ticket administration costs”
 - Some “communication difficulties”, with setup, from 2015; working to mitigate that this time
- Future Conventions Update
 - BCPA / Marriott penciled in for 2017, will likely push to 2018
 - After this year, our convention pushes out to October for 3-4 years
 - Nothing needed here
- 2016 Summer Board Meeting Date
 - Aug 27th 2016, Peru Ill (same setup as last year)
- Midwinter financial help
 - Do we want to have a policy of financially assisting choruses going to midwinter?
 - ◆ This was the cause of the ad-hoc motion passed in January.
 - Policy for International is \$1000 / chorus budgeted. Treasurer suggests similar policy for midwinter.

→ But how much does this help?

- ◆ For the recent midwinter, it is very expensive. Rich was able to help kids with \$70/each but that barely makes a dent. Rich thinks it probably cost \$10K → \$12K for our youth chorus to attend that convention.

→ Think about this for now. By August we should make a decision (input to the budget)

Closing song – Terry Ludwig, directing: “Keep The Whole World Singing”

Adjourned: 12:05 PM

Respectfully submitted by Mike Isely

Motion: I would like to make a motion to give \$500 from the YIH raffle monies to support the Illinois Representative Youth Chorus for their trip to the Mid-Winter Convention.

Role	Who	Vote	When	How	Notes
Executive VP	Jim Waldorf	yes	Dec 30, 2015	E-mail	seconded
Secretary	Mike Isely	yes	Jan 1, 2016	E-mail	
Treasurer	Jim Wagner	yes	Jan 2, 2016	E-mail	
BMAL	Brett Mulford	yes	Dec 30, 2015	E-mail	originator
BMAL (membership)	Hugo Feugen	yes	Jan 1, 2016	E-mail	
BMAL (events)	Will Thorndike	yes	Jan 2, 2016	E-mail	
BMAL (C&J)	Dave Cowin	yes	Jan 1, 2016	E-mail	
Immediate Past President	Jeff Bowyer	yes	Jan 1, 2016	E-mail	
President	Richard Hansen	(tie-breaker only)			

TOTAL	9
SIMPLE MAJORITY	5
YES	8
NO	0
ABSTAIN	0
NO RESPONSE	1
PASSED?	TRUE
STILL NEEDED TO PASS	0

CEO Report Midwinter 2016

2015 Aims and Program Alignment Four goals, five areas of focus

Goal 1: BHS Rebranding effort and launch

Goal 2: Financial Rebalance

Goal 3: Leverage success of Outreach and grow to new heights

Goal 4: All members working together

Area 1: Help with recruiting

Area 2: More visits from and communication with officers and staff

Area 3: Provide coaching help to chapters

Area 4: Help chapters plan and implement shared activities

Area 5: Modernize music and arrangements available through BHS

Programs aligned to Purposes (from bylaws)

- To perpetuate the old American institution, the Barbershop quartet, and to promote and encourage vocal harmony and good fellowship among its members throughout the world by the formation of local chapters and districts composed of members interested in the purposes of this corporation **[Membership]**
- To hold annual, local, district, state, national and international contests in quartet and chorus singing **[Events and Conventions]**
- To encourage and promote the education of its members and the public in music appreciation, and **[Harmony University]**
- To promote public appreciation of Barbershop quartet and chorus singing by publication and dissemination thereof; **[Marketplace]**
- To initiate, promote and participate in charitable projects and to establish and maintain music scholarships and charitable foundations **[Outreach]**
- To initiate and maintain a broad program of musical education, particularly in the field of vocal harmony and the allied arts **[Harmony University]**

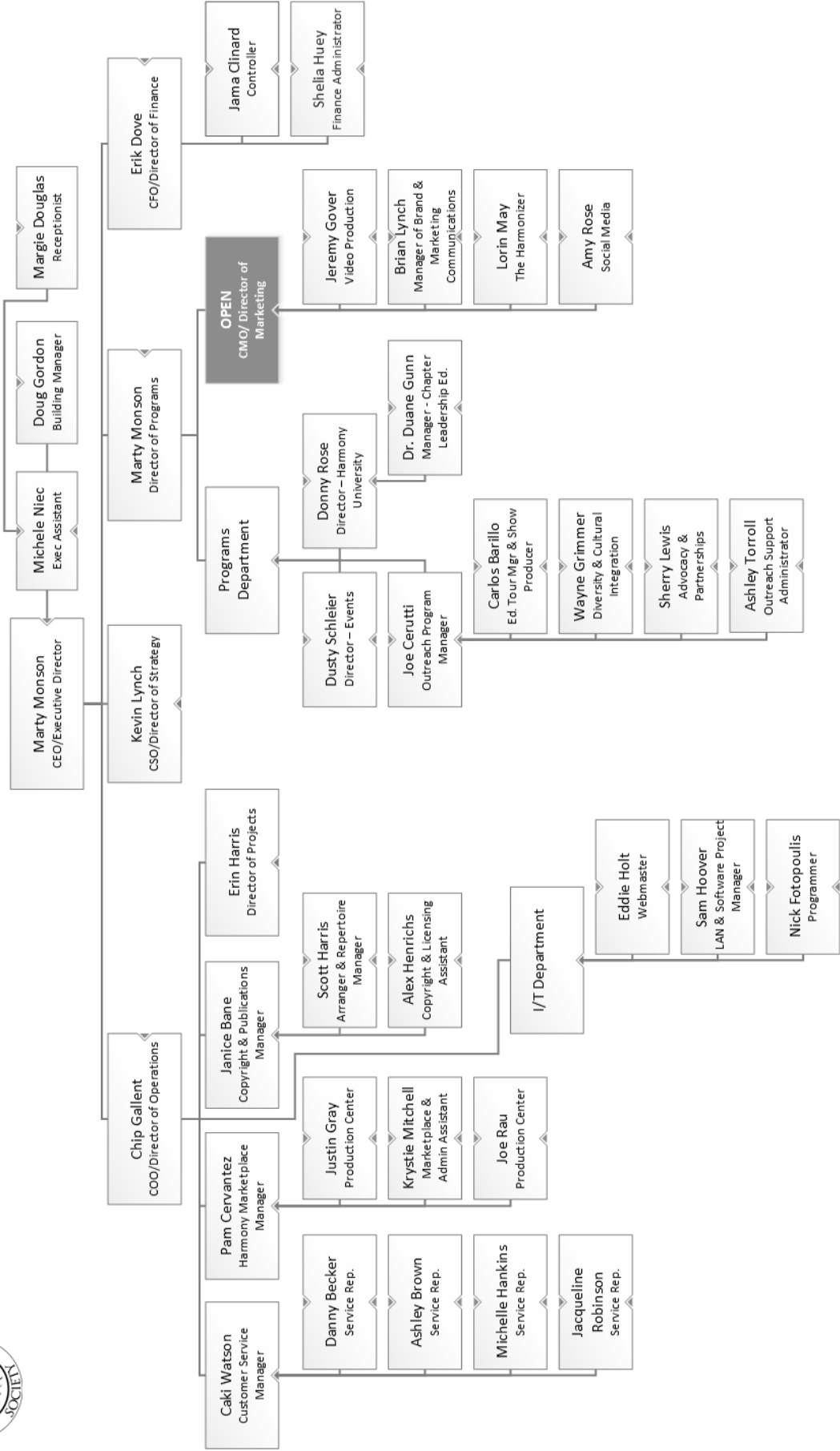
General Updates

People (staff, interns and volunteers):

- Staff full-time – 32
- Staff part-time – 4
- Contractor(s) – 2
- Open Positions – 1
 - CMO/Director of Marketing– 1st quarter
 - Marketplace Manager - 1st quarter (backfill - retirement)
- Volunteers - The Society headquarters reaps the benefits of having 8 volunteers who have provided 1,352 hours of volunteer service since January 1, 2015.
- Interns - none at this time.



Organization Chart
Current as of 1/1/2016



2015 COMPLETED PROJECTS: See Appendix A

2016 Q1 PRIORITIZED PROJECTS:

Pillar	Q1 Project(s)	Brief Description
Community of Artists	12 month intro to barbershop in the first year (include associates)	Create regular communication and awareness campaign for first year members. This project will increase the likelihood of retention in the 2nd year by creating a connection with the barbershopper and the Society.
	Improve the licensing, chartering, creation, and dissolution of chapters process	Create a process for chapters that is less convoluted where the effort matches the result. This will also help close out chapters that no longer are viable.
Lifelong Singing	Community Engagement- Nashville	Project to enhance upon our Pittsburgh “pilot project” to engage the community (see Appendix A for those results) to engage the communities where our events are. This remains a “project” until we have absorbed it into our operations and understand the overall strategy of these efforts.
Education/Best Practices	HU Online (Phase 2)	Project to produce the HU 2015 and International 2015 content and made available for public viewing.
Scaling Impact	Nashville relaunch (marketing)-\$5,000/month	Project to reintroduce Nashville to the world in preparation for the International Convention.

2015 SCORECARD RESULTS: (Society wide)

ORGANIZATIONAL INDICATORS	2014	2015	ADDITIONAL COMMENTS

SHOW LICENSING-ASCAP/SOCAN	Number of chapters that have had paid performances YTD?	836	748	District details in EOM report; Executive team looking into additional opportunities to streamline the ACSAP/SOCAN/BMI process for chapters * implemented a new, more accurate counting method in Q4 of 2015
990/CRA	What % of chapters have filed their 990/CRA?	59%	57%	District details in EOM report; Deadline May 15 (990) & June 30 (CRA) - as of 1/20/16 and 9/2014
State/Province Incorporation Paperwork	What % of chapters have filed their State/Province incorporation paperwork?	60%	49%	District details NOT in EOM report, but will be as soon as we fully integrate with Great Plains; No standard deadline for every state. The % identified is a snapshot of current status based upon current reporting - as of 1/20/16 and 9/2014
Financial Review	What % of your chapters completed a financial review?	56%	49%	District details NOT in EOM report, but will be as soon as we fully integrate with Great Plains. The % identified is a snapshot of current status based upon current reporting - as of 1/20/16 and 9/2014
Do you prepare budgets?	What % of chapters prepared a budget?	N/A	TBD	Will need District Treasurers to survey chapters to determine compliance with this best practice.
Attendance: Guests & Membership	What % of chapters are reporting the # of guests and members at their meetings, performances, events?	N/A	TBD	Online Google forms (or something similar) will be used to capture this data on a weekly basis. This data may already be captured or integrated by alternative platforms (like Groupanizer) to easily log the # of guests at meetings, performances, and events

Collaboration	What % of chapters have either sung or served with outside organizations? (based on online form)	N/A	TBD	Online Google forms (or something similar) will be used to capture this data on a weekly basis. This data may already be captured or integrated by alternative platforms (like Groupanizer) to easily log the # of guests at meetings, performances, and events
Grant Program Participation	What % of chapters are participating in grants programs?	8.2%	16%	Indicator is based on participation (not # of awards) per award year.

2015 DISTRICT RESULTS- INDICATORS OF SUCCESS

At the 2014 Leadership Forum, Districts determined what the Key Performance Indicators (KPIs) would be for their programs in 2015. Below provides a summary of District success, lessons, learned, and overall activity in 2015,

LEADERSHIP: Districts established a baseline of participation at its Leadership Academies (LA) and adapted the program to work for them.

- 584 people participated in Leadership Academy from SLD, EVG, FWD, NED, NSC, RMD
- 88 Chapters attended Leadership Academy from CAR, DIX, ILL, LOL, MAD
- Districts are changing Leadership Academy to suit their needs
 - SUN moving to WEBEx in 2016
 - CSD is combining with Harmony Explosion
 - ONT is suspending in 2016 to prepare for a strong 2017 event

OUTREACH: Districts hosted and supported unique, often collaborative events focused on youth and outreach-related opportunities.

- Festivals were held by NSC, ILL, NED, RMD, SLD with at least 326 participants and mostly non-barbershoppers
- ONT held a successful Quartet Event with 63 singers
- RMD also did a collaboration with five BHS choruses and 1 SAI chorus to sing in a Christmas Chorus at retirement homes in Colorado Springs.
- FWD funded three events through its Outreach Endowment Fund
- The Districts held at least 7 Harmony Explosion Camps in 2015
 - 726 people attended Harmony Explosions in CSD, DIX, JAD, NED, ONT
 - NED had 400 locals attend its show

- LOL had more educators, youth, and schools represented at its Harmony Explosion than last year
- CAR's Harmony Explosion only cost chapters 9.82% of event-related expenses
- Participation in YBQC was sparsely reported with MAD and DIX indicating they had three qualifiers competing at International, ONT and SUN had participants brand new to barbershop, and SUN increased its quartet participation 20%
- Nine additional youth-specific events were held in MAD, NSC, SWD and CSD with over 363 youth involved. These events varied from workshops and joint shows to Youth in Harmony and Youth Quartet training
- Shows attached to youth events generated support from the local community. For example, CSD's Acappellooza attracted 800 guests to its final show
- Interchapter activities were widely supported by PIO such as Windsor's annual Send-Off Show, which is a 40-year program and raises money for International participants.

EDUCATION: Districts provided diverse educational & coaching opportunities with varying degrees of success

- RMD, JAD, PIO and SUN held Out Standing in Front (OSIF) programs
- The Districts have hosted 7 Chorus Director Workshop Intensive (CDWI) events with 21 participants from DIX, PIO, and EVG. SLD had 8% of its chapters represented and JAD hosted a CDWI with a packed house.
- SWD, CSD, and ILL are suspending their program due to lack of interest, while CAR recruited a Director to prepare for an active program in 2016
- SWD provided Paul Ellinger training to 7 chapters in 3 different areas
- EVG provided 2 chorus coaching workshops that are gaining traction
- NSC's district quartet coaching program is now up and running
- Harmony College had 640 attendees from RMD, EVG, and NED. In addition, MAD provided seven director scholarships and SWD hosted four Director's Colleges
- SWD, SLD, CSD, and NED hosted at least four Top Gun programs with at least 6 quartets
- CSD, SLD, and EVG have focused on teaching how to put on a great performance through the Standing Ovation Program (SOP) with at least 38 chapters

CHAPTER DEVELOPMENT: Chapter development and advocacy has been focused on member-retention and recruitment

- The Learn to Sing Program helped MAD recruit eight new members and SUN's program resulted in an average of 13% of participants returning after first visit
- Having people available to provide new member orientation was a focus for MAD and ONT (90% of chapters have someone that can provide new member orientation)
- Six new chapters were formed in 2015

- Cross-generational focus groups at NSC, a chapter leader roundtable at RMD, and a chapter achievement program hosted by LOL are some of the unique methods Districts are using for chapter development

Programs

Program	KPIs	2015 Results
Membership	Achieve a 70% retention rate in the second year by 2017	60.06% retention (since 2011, we have had 8401 new members join the Society with 5046 renewing at least once)
	Total membership is 22,000 or higher*	21,389
	Three major field reports w/video covering people or groups who exemplify the attributes of living the Society's vision.	<p>Kirby Shaw: The value of barbershop harmony in music education</p> <p>Musical Island Boys: How singing and barbershop changes lives (cover story for March/April 2015 issue)</p> <p>Shannon Jeffries: Big name music educator new to barbershop tells how it has improved her mens program</p> <p>Lori Lyford: Why music educators should try barbershop harmony and work with Barbershoppers</p> <p>Greg Clancy: How Vocal Majority came back, and what it's like to fill in for his legendary father</p>
	Average of 3 past Harmonizer articles per month to be promoted via social media or LiveWire	Completed
Outreach	Share barbershop with 90,000 people in 2015	63,059
	Increase levels of participation for all HU-related events (in order of priority-	<p>HU Midwinter</p> <ul style="list-style-type: none"> • 300 to 500 in each HU class session

Harmony University	1st time educators, 2nd priority- chapter directors, 3rd priority- lifelong learner	<ul style="list-style-type: none"> ● 90 men participated in the All Chapter chorus, assisted by our medalist quartets, and directed by Greg Clancy. <p>HU International</p> <ul style="list-style-type: none"> ● Instead of offering 10 classes on Saturday, we offered 101 from Tuesday to Saturday. ● Avg. class attendance increased 28% <p>HU Leadership Forum</p> <ul style="list-style-type: none"> ● All 17 Districts represented, 85 attendees (compared to 15 Districts in 2014) <p>HU Belmont</p> <ul style="list-style-type: none"> ● 685 total student enrolled...our highest in our history! ● Music educators at event has gone from 11 (2012) to 86 (2015)
	Increase in ways for people to access barbershop education materials (eg- leadership, music education, director tutorials, barbershop history)	HU Online now offers 25 remixed and re-branded educational videos on YouTube channel.
Marketplace	Total of units sold	209,531 (compared to 217,391 in 2014; revenue went up 13.36%)
Events & Conventions	Attendance Target for Events & Conventions at or above budgeted amount*	<p>New Orleans Target: 1,600 attendees- Achieved (1,636 full registrations)</p> <p>Pittsburgh Target: 5,200 attendees Short 475 attendees (4,725 full registrations)</p>
	Increased satisfaction levels among attendees using convention survey results	<p>We set benchmarks in 2015, with the ability to compare future conventions.</p> <p>(Satisfaction level on a 5 point scale)</p>

		New Orleans: 4.31 Pittsburgh: 4.32
	Increased community involvement/awareness in our convention cities	Pittsburgh Outreach including July 4th Celebrations, local television exposure, building a relationship with the Stephen Foster Museum, collaborating with college and high school level performing ensembles, multiple educational Tours to area to public schools, fostered collaborations within local Pittsburgh chapters resulting in increased memberships, culminating in a presentation of our outreach efforts during the Saturday Night Spectacular.

MEMBERSHIP

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

Chapter Stats

Current: 744 + Frank Thorne

	Q1	Q2	Q3	Q4	2015 Total
License Kit Inquiries	4	1	4	1	10
Licensed	2 Hershey, PA Caldwell, NJ	3 Northumberland Hills, ON Marquette County, MI Greater Oklahoma City, OK	1 Salt River Valley, AZ	1 Metro Cedar Rapids/Iowa City, IA	7
Chartered	2 Hershey, PA South Texas	1 Caldwell, NJ	1 Greater Oklahoma City,	2 Dover, NH Northumberland	6

	Alamo Regional		OK	Hills, ON	
Dissolved	2 New Haven, CT Riverside, CA	4 Cheyenne, WY Pottsville Area, PA Lethbridge, AB Bloomington, MN	3 Greater Pittsburgh, PA Syracuse, NY Lincoln, RI	2 Culpeper, VA Western Washington	11
Merged		1 Bedford-Sackville, NS merged into Halifax, NS			1
Changed Districts			1 Grove City, PA (from SLD to JAD)	0	1

Current Membership Breakdown & Trends

	Membership Trends				
	Current	Last Yr	Δ	New Last 12 Mos	Unrenewed/ Lapsed Last 12 Mos
1/1/2016	21,221	21,855	-2.90%	2,087	4,842
12/1/2015	21,249	21,897	-2.96%	2,018	5,792
11/1/2015	21,225	21,894	-3.06%	2,006	6,232
10/1/2015	21,612	22,020	-1.85%	2,213	3,887

Referral Type	Q1	Q2	Q3	Q4	Total	% of Total
BHS Website	12	3	9	7	31	5.70%
Chorus Performance	5	8	5	14	32	5.88%
Member Referral	45	51	124	182	402	73.90%
Other	9	8	10	16	43	7.90%
Outreach Event	3	2	6	5	16	2.94%

Quartet Performance	1	0	1	3	5	0.92%
Social Media	3	2	1	7	13	2.39%
Singing Valentine	1	1	0	0	2	0.37%

Customer Service

In quarter four, the department added Ashley Brown to our ranks as a new customer service center specialist. A Nashville native and recent graduate of The University of Tennessee, she comes with a passion for nonprofits and a lot of experience serving people. A lover of communities and the arts, she has been an enthusiastic addition to our team.

The entire customer service team worked towards improvement of customer experience in the form of four specific goals:

SMART Goal	Q1	Q2	Q3	End Result
Decrease Voicemails left by 20% by August 31st From 580 voicemails a month to 464 or less.	580	390	End Number: 406	End Result: 30%
Increase Happiness Average by 5 points by end of Q2 & sustain through Q3. From 86 to 91.	86	94	89	Though we did not meet our goal by the deadline, we were able to increase to 91 in Q4.
Decrease non website orders by 6% by end of Q3 From 16% to 10% or less.	16%	13%	8.50%	Success due to teaching folks how to use website.
Get & keep EZ Dues end of month missed captures due to outdated credit card information down below 100 by end of Q4	155	34	150	December saw a very successful push toward decreasing invalid credit card data and we <i>were</i> able to meet our goal!

As a reward for reaching these goals, the team took advantage of two professional development classes offered at the Center for Nonprofit Management in Nashville. The classes covered topics related to team building and managing conflict. They have sharpened their skills in communication, identifying conflict style, interpreting interpersonal behaviours, goal planning, and cooperation, forming a highly functioning team in order to serve better.

Helpscout Stats:

	Total Email Conversations	Total Customers Helped	Conversations Per Day	Happiness Score
Dec	1104	582	35	91
Nov	1224	656	40	90
Oct	1196	614	39	95
Sep	1067	637	35	94
Aug*	889	544	28	85
Jul*	823	533	26	88
Jun	1092	728	36	92
May	1154	819	37	94
Apr	1433	939	47	95
Mar	1778	1165	57	88
Feb	1600	1089	57	84
Jan	1824	1188	58	86

* Drastic reduction because of new marketplace website (both in emails and in happiness)

Division of Time in HelpScout

Marketplace	41%
Membership	38%
Insurance	18%
Quartets	2%
Conventions	1%

EVENTS/CONVENTIONS

International Convention: Nashville 2016

2016 Date	Weeks Out	Nashville 2016	Registration Revenue	Pittsburgh 2015	% of Prior Year	% 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
12/7/15	30	1190	\$266,121	971	122.55%	22.45%	20.63%	90	10%	18	2%
12/14/15	29	1249	\$279,510	1211	103.14%	23.57%	21.67%	240	25%	59	5%
12/21/15	28	1567	\$351,968	1255	124.86%	29.57%	27.28%	44	4%	318	25%
12/28/15	27	1663	\$371,087	1386	119.99%	31.38%	28.77%	131	10%	96	6%
1/4/16	26	1871	\$417,784	1592	117.53%	35.30%	32.39%	206	15%	208	13%
1/11/16	25			1816				224	14%		

- Currently tracking 17% higher than Pittsburgh (as of 26 weeks out)

Midwinter Convention: *Reno 2016*

2016 Midwinter Convention - Registration Summary Report						
Weeks Out	Reno 2016	Registration Revenue	New Orleans 2015	% of Prior Year	% of Budget Attendance	% of Budget Revenue
5	1229	\$180,632	1451	84.70%	91.04%	87.62%
4	1281	\$188,448	1524	84.06%	94.89%	91.41%
3	1297	\$190,657	1545	83.95%	96.07%	92.48%
2			1592			
1			1591			
Final Pre-Convention			1596			
On-Site			40			
TOTAL			1,636			
					1,350	\$206,150
					Budget	Budget

- Currently tracking 16% below New Orleans (as of 3 weeks out)
- Tracking very close to 2016 budget

2017 International Convention Update

- Confirmed Location of Las Vegas, NV
- Venue: Axis Theater (~7,000 seats)
- HQ Hotel: Planet Hollywood (Attached to Axis Theater)
- Average hotel rate: \$139/night

2018 Midwinter Convention Update

- Decision will be made in 1st quarter 2016

HARMONY UNIVERSITY

Leadership OPT

2015 LEADERSHIP OPT CURRICULUM UPDATE

Harmony University - Belmont

Eight chapters have now experienced the THINK curriculum as part of their instruction at Harmony University in Belmont. Routine contact with these chapters to determine growth, progress and value of curriculum has produced the following:

- All chapters reported the benefits of acquiring the knowledge of the process. Segments of the program have been absorbed into chapter and music planning on a situational basis.
- This THINK process of defining a chapter's identity and operations is intended for use when a chapter feels the situation warrants. It was never intended for immediate action steps upon the completion of the week at Harmony University. Chapters generally returned to their normal operational routine, and this curriculum, we are finding, is being utilized

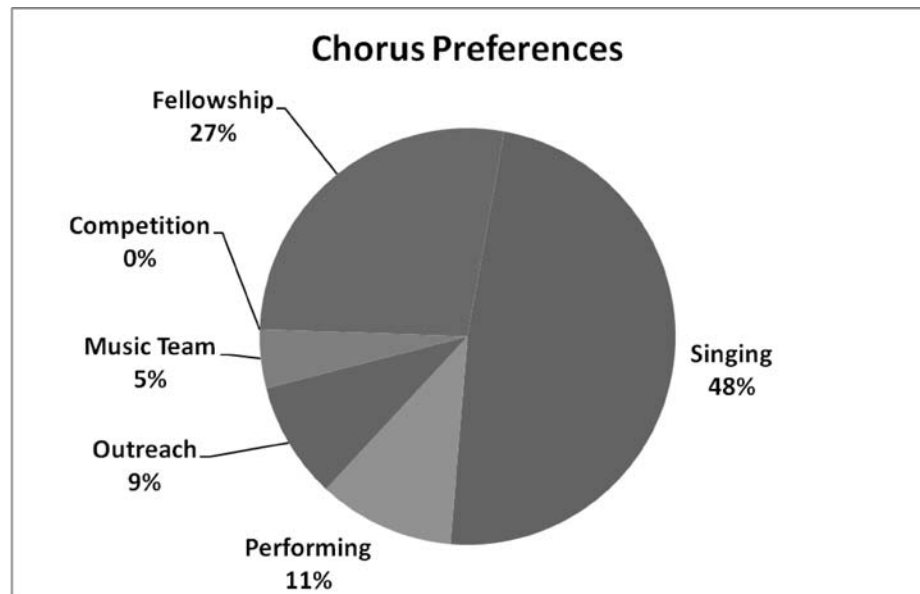
more at annual planning cycles and chapter administration rotation.

- In one instance, one of the chapters which participated in Belmont, invited Leadership OPT to sit in on its planning and strategy sessions.
- While the intent of THINK is organizational planning, indications are such that individuals are both experiencing personal development and also learning to ask the question "why" in terms of chapter involvement and practices along their own journeys.

District Leadership Academies

A grass-roots, non-intensive introduction to the THINK curriculum was presented at the 2015 JAD Leadership Academy to gauge response from small and possibly struggling chapters. Several groups moved to action following the school. One small chapter embraced all of the steps of the THINK process and attributed the success of their 2015 projects to the THINK curriculum. Part of that chapter's identity journey is illustrated below:

“When four of our chapter board members of the Bogmeister Chorus went to the Leadership Academy in 2015, we started the year with a new president and



a director who was about to retire. The future was uncertain, although we were actively advertising for a new director. We went to the Leadership Academy (Lead Ac), looking for some ideas to help us with our transition into a new era in our chapter's history.

In the THINK session, we learned a simple but effective way to have our members evaluate what we liked about our chapter and set goals of how we wanted to proceed in the upcoming year.

Our chapter members went through the THINK process in two consecutive meetings, while the search committee was interviewing potential director candidates.

We created a pie chart, as was suggested by the Lead Ac THINK program, and used those results to help choose our director and to plan the events of the year.

We found the techniques learned in the THINK session to be very valuable in the progress we made as a chapter this year and are anticipating a great time of companionship, instruction, and reflection this year at the 2016 Leadership Academy event.”

Bob Norris, president of the Greater Cranberry Men's Chorus

Leadership Forum

At our most recent Leadership Forum, District Presidents were invited to own part of the process in generating new curriculum. They were given a catalog of traditional, personal, and organizational leadership thoughts which could be converted into specific curriculum content. The District Presidents were asked to prioritize their wishes for district curriculum needs from this catalog. The District Presidents were then informed that their suggestions would be designed into curriculum and implemented for the JAD Leadership Academy in January 2016. Leadership OPT's initial salvo into this desired curriculum is evidenced in the chart below, numbers 1-12 inclusive. This content was facilitated at the JAD Leadership Academy, January 8-9, 2016.

A similar approach was taken in regards to the future of chapter assessment. A wide variety of potential evaluation line items was presented to the District Presidents and again, they were invited to prioritize this list based on what they believed would be accurate, fair, and objectively qualifying criteria for assessment. More to come on this topic in the near future.

2016 LEADERSHIP OPT OBJECTIVES AND TARGETS

The list below presents the Leadership OPT target dates for completion of curriculum initiatives. Traditional curriculum, while still the mainstay of leadership academy offerings, remains at the forefront. As these traditional offerings are completed, they will immediately be made available. The September 2016 release is the final date to coincide with district preparation for upcoming schools. Determination of video content for each traditional role is yet to be established.

An aggressive roll-out plan for facilitator training will be unveiled to the District Presidents in Reno at the Midwinter Convention.

#	Course	Quadrant	Release	Format	Class Length	Video	Notes
1	President	1	Sep-2016	Instructor	2 hours	TBD	These will be designed for local faculty, using HU branded materials. As necessary, they will be updated annually.
2	Treasurer	1	Sep-2016	Instructor	2 hours	TBD	
3	Secretary	1	Sep-2016	Instructor	2 hours	TBD	
4	Music and Performance	1	Sep-2016	Instructor	2 hours	TBD	
5	Marketing & Public Relations	1	Sep-2016	Instructor	2 hours	TBD	
6	Events	1	Sep-2016	Instructor	2 hours	TBD	
7	Compliance (BHS basics)	1	Sep-2016	Instructor	2 hours	TBD	
8	Five Practices of Effective Leaders	2	Jul-2016	Facilitator	1 hour	Complimentary	These are the "first five" for Facilitator Certification
9	Five Leadership Roles	2	Jul-2016	Facilitator	1 hour	Complimentary	
10	Member Capability Audit	2	Jul-2016	Facilitator	1 hour	Complimentary	
11	Goal Setting	2	Jul-2016	Facilitator	1 hour	Complimentary	
12	Feedback - the Breakfast of Champions	2	Jul-2016	Facilitator	1 hour	Complimentary	
13	Intro to Leadership	2	Dec-2016	Facilitator	1 hour	Complimentary	
14	Balanced Leadership	2	Dec-2016	Facilitator	4 hours	Complimentary	
15	Think! Overview	3	Dec-2016	Facilitator	2 hours	Complimentary	
16	Think! Chapter Deep Dive	3	Dec-2016	Facilitator	5 hours	Complimentary	
17	Succession Planning	3	Dec-2016	Facilitator	2 hours	Complimentary	
18	Relevance in Your Backyard	4	Dec-2016	Facilitator	2 hours	Complimentary	
19	Outreach	4	Dec-2016	Facilitator	2 hours	Complimentary	Includes Membership and YIH

HU Midwinter

Our HU class offerings switched from sit and listen to stand and do! We

- reduced class offerings from 12 to 3
- offer our first ever “All Chapter Chorus”

This change resonated with attendees. We had

- 300 to 500 in each HU class session
- 90 men participated in the All Chapter chorus, assisted by our medalist quartets, and directed by Greg Clancy.
- 100% approval rating in surveys for these types of activities to be offered in the future.

HU Pittsburgh

We changed our educational offering style for our week long convention. Instead of offering 10 classes on Saturday, we offered 101 from Tuesday to Saturday. Class counts confirmed our attendance to HU classes went up by 28%, and many attendees shared they were unaware that classes were being present early in the week, despite heavy marketing.

Our obstacle of a “Convention” format vs. a “Contest” format was received favorably by the vast majority of our survey takers. The 2% of attendees that shared it is not the “E” of “SPEBSQA” to offer classes at the same time as a contest even conceded that they will miss part of a contest to eat, catch up with friends, or simply rest came around very quickly.

Survey takers only negative was 101 classes is still not enough, and we need bigger rooms!

HU Leadership forum

Our leadership forum, *Healthy Chapters: Take Action, Get Results* was held in Nashville at the Music City Sheraton on November 13-15, 2015. We had 85 men and 1 woman registered with 17 of our 17 districts represented. Our survey data confirmed that:

- 95% of our attendees read and used “Good to Great” principles
- 95% took our personality profile to “know thyself” to lead back home
- 100% shared that our breakout sessions were “Just right/could have been even longer”
- Our leaders are getting together MUCH more often (November, January, and twice in July. This sets the stage for much more follow up on progress and initiatives
- 85% of our attendees took lessons back home from Dr. Gunn and his hands on extroverts/introverts activity, as well as 5 voices training.
- Of all our activities, Sunday morning’s challenge by Marty about membership gave a much clearer vision to our leaders, and this was highly energizing to our DP council members. Our attendees were VERY excited to go back home and share out.

HU Belmont

Registrations: 685 total student enrolled...our highest in our history! We also negotiated a 3 year deal, helping keep our costs from year to year predictable and much more gradual.

Faculty

- We had 58 on faculty, with 31 degreed musicians
- Student feedback on faculty ratings was one of the highest in the last 5 years
- Our faculty is a great mix of veterans and new to HU (16 first timers)
- We had students from 14 countries represented at HU this year.
- Music educators at HU
 - 2012 we had 11
 - 2013 we had 23
 - 2014 we had 29
 - 2015 we had 86

Attendee Feedback

- 329 attendees completed the survey for 2015
- 40% first time students
- 38% two to five year attendees
- 75% plan to attend next year or the year after
- 87% of those who attended on scholarship would like to attend again
- 98% are recommending HU to others
- All of our course offerings received a rating of Excellent to Very Good

- Survey had positive comments about Belmont (grounds, facilities, staff, food)
- Survey had staff and faculty being mentioned going “above and beyond”

HU online

We have finished negotiations with NECAT (Nashville Educational Cable and Television), who are helping us produce and edit video captured content from our HU classes (backlog), including Dr. David Wright’s History of Barbershop 1 and 2. In 2015, we remixed about 25 videos, re-branded them, and have placed them on our YouTube channel. We have already had dozens of hits since posted, and word is spreading as we build our site out in 2016.

OUTREACH

2015 KPI Achievements

Goal - “Share” barbershop harmony with 90,000 people in 2015.

Actual - In 2015, we “shared” barbershop harmony with 63,059* in 2015.

Integration and Inclusion: 2,650 of 5,000 shares = Participants and Audience members involved in Choral Arts Link (CAL) Collaboration, Harmony Curriculum Development, and other local outreach to the Nashville community.

Advocacy and Partnerships: 21,140 of 25,000 shares = Individuals or organizations who are introduced to and/or influenced by barbershop harmony through efforts of our outreach, as well as individuals or organizations who form a reciprocal relationship with BHS for mutual collaboration.

Life-Long Singing: 1,250 of 10,000 shares = YCF and YBQC participants and non-member audience members

Community Engagement: 15,000+ of 15,000 shares = Individual and organizational counts per Educational Tour, including in active or passive community activity

Grants: 23,019 of 25,000 shares* = Individuals who were actually involved in the project, as well as those who observed the project but did not participate

**With several outlying post-project reports to be returned, it is expected we will exceed our goal of 25,000 shares*

Advocacy & Partnerships

- ACDA
 - General partnership with ACDA making progress again this period.
 - February Conference helped to solidify working relationship, and add’l meeting in OKCity

between ACDA/BHS personnel revealed more possibilities of the mutual benefits. Beginning to witness true, valuable two-way partnership sharing.

- The quartet gold medal winners of both the regular contest and YBQC will be offered performance invitations to ACDA's Nat'l Conference in Minneapolis Feb 2017.
- NAFME
 - General partnership with NAFME is going well; relationship/camaraderie between BHS and NAFME staff personnel favorable and continues to grow with plans for future events.
 - Included at Oct. Nat'l Conference were a ground-breaking Opening Session performance by Crossroads, large booth exhibit, (2) Interest Sessions presented by W. Grimmer and Dr. Jim Henry, performances by Crossroads & Fairfield Four, and mini-clinic activities session for Honors Choir youth with Crossroads.
 - Connections formed will be extremely beneficial for future collaborations, including "Hill Day" in June 2016
- The "youSING" contest project for 2015 continued to provide a valuable & natural connection to high school programs. The packet contains appropriate sheet music & learning tracks, and it provides a unique way of introducing barbershop to busy classroom situations. During the year, 3 of the 4 schools who submitted videos were recipients of scholarship funding as a result of their participation & YouTube viewing in their respective areas. (UT and CA schools) Total views were over 5000. Unfortunately we had a glitch with the uploading video links which have been fixed for the 2016 program. Approximately 1000 packets were put into the hands of teachers attending ACDA and NAFME events or soliciting the packet online.
- Other accomplishments during 2015 included: ICDA (Iowa) exhibit/Opening Concert Performance/2 Interest Sessions; youSING contest w/ 3 winners named in CA and UT. NAFME Washington Roundtable seat; 2-day follow-up to Int'l Conv-Pittsburgh; Updating of principal Outreach materials; Provided support/materials/personnel for auxiliary events: MTSU (Tennessee), NYSSMA (New York), UCDA (Utah), MOCDA (Missouri), IMEA (Idaho), VCDA (Virginia), WMEA (West Virginia), N.Scotia Educ Conference, PMEA (Pennsylvania), Des Moines Dist Schools, KMEA (Kansas).....and resourced 25 HU ME Scholarships.
- The following are major events we expect to attend in various capacities during 2016:
 - Missouri Music Educators Association Conference - January
 - Texas Music Educators Association Conference -February
 - Southwest Division of ACDA Conference - March
 - Intercollegiate Men's Chorus Convention - March
 - Nat'l A Cappella Convention - April
 - Chorus America Nat'l Conference - June
 - NAfME "Hill Day" - June
 - Nat'l Assoc for Music Education In-Service Conference (NAfME) - OctoberEvents we are supporting through members, chapters and districts:
 - NYSSMA (New York), OMEA (Ohio), OMEA (Oregon),
 - AMEA (Arizona), ICDA (Iowa), UMEA (Utah),

Lifelong Singing Development

- YBQC - 2016
 - For the first time ever, we will have a YBQC qualifying event at the Mid-Winter convention. 10 quartets are registered to participate and we expect this to grow much larger in the future.
 - We will extend an invitation to all non-qualifying YBQC quartets to attend the Nashville convention and perform in a youth chorus that performs around the convention and Nashville community during the convention.
 - Initiated several significant changes to the YBQC program, to be executed in 2016
 - **name change** - We have removed the minimum age and wish to be more inclusive of high school and middle school quartets. Music educators recommended we change the word Collegiate to Youth, so that they know they can participate, so in 2016, CBQC will be YBQC.
 - **single panels will be permitted** - We will be removing the double panel requirement from this year. We feel it is important to the overall future vision of the program, but understand that the cost of the double panel would be debilitating for some districts.
 - **earlier deadline** - The latest CBQC prelims date needs to coincide with the latest regular quartet prelims date (first weekend in May). This is necessary for HQ planning and in fairness for invited quartets making travel arrangements (the end of May is too late, a major inconvenience to the competitor, and not cost-effective financial stewardship, which is extremely important for a nonprofit).
 - **International Contest or YBQC, not both** - Eligible quartets can compete in both CBQC and regular prelims, but any quartet qualifying for - and accepting - a slot in international quartet contest would be ineligible to compete in international CBQC. Pick one or the other, not both.
 - **new competitor categories added** - We will categorize the youth quartets into two new divisions - High School and Collegiate. Additional subdivisions will be added to each of the categories - Novice (no more than one member having competed at international CBQC) and Experienced.
 - **automatic video rep** - District representatives would be guaranteed for the 17 districts plus one for the video submission. Video submission will continue to be in place for district qualification and not in addition to it.
 - **minimum score** - There will a minimum qualification score (60) to participate in the international CBQC contest. Quartets failing to meet this

would still be invited (with some level of financial assistance) to participate in a number of experiences at the international convention that will be offered specifically for the youth quartets that did not qualify to compete.

- **increased registration fee** - The cost to register will be increasing from \$15 to \$40 to help cover administrative costs.

- YCF
 - We successfully lowered the maximum age for YCF participants from 30 to 25 for the 2016 festival
 - Recruited 17 youth choruses for Reno, including one chorus from Hong Kong and our very first middle school chorus from the Philadelphia area.
 - Many exciting plans are beginning to firm up for 2017 San Antonio, some of which are currently under negotiation, but we hope to announce during the Reno convention.
 - We are also beginning to plan the big-picture artistic concepts for the 2018 Youth Chorus Festival.

Convention Legacy

Education Tours

- Reestablished connections with local allies to promote in Metro Nashville Public Schools.
- Planning on teacher professional development for Metro Nashville Public Schools. Received interest from school teachers.
- Connected with two educators in San Antonio. Gave an overview of what to be planned leading up to MidWinter. Gave expectations from them as to how to help develop the plan, which we will review at TMEA in February.

Community Engagement

- Engaged chapters/choruses in San Antonio who have collaborated with other performing entities to seek further collaboration going toward MidWinter 2017.
- Exploring a Friendship Concert.
- Seeking culturally diverse performing groups in San Antonio.
- Scouting areas for outdoor performing sites.
- Looking into military ensembles in San Antonio
- Looking at civic choruses (two German choruses here so there could be more)
- There is no knowledge of choral consortium. Waiting for TMEA

Inclusion

Choral Arts Link/BHS in 2015/2016:

- Efforts with Choral Arts Link have continued to progress. We were able to get into three

different schools to help educate the music educators and to assist in their program and to also prepare the students to perform at the Schermerhorn Symphony Center for the MLK concert, Let Freedom Sing! The schools we are in are:

- Madison Middle School
- IT Creswell Middle School
- Antioch High School
- The schools mentioned will be test schools for Wayne to test his teaching method (next bullet) along with the teachers, working with them side by side, getting their students to experience A Cappella harmony as well as Barbershop.

A Cappella Harmony Method/Curriculum:

- Completed an *A Cappella* Harmony Method of Adaptable Arrangements that was presented to music educators at the NAfME convention.
 - The *A Cappella* Harmony Method is an instructional manual accompanied by a series of arrangements that aid the music educator/choral conductor to get their students/ensemble to sing *a cappella* harmony, through a variety of voicings and keys to accommodate a vast majority of vocal textures.
 - Both High school and Middle school music educators were in attendance at the interest session and many if not all educators were appreciative of the format and how it was presented as well as able to understand and see the benefit of using this A Cappella method in many different settings.
- *A Cappella* Music Curriculum is still in its early stages of creation. We are continuing to get more educators interested in it and with the completion of the manual, we will be able to have these teachers test this method out in the field with their students and continue with feedback from said teachers. It will have lessons with short etude (tags), a songbook of arrangements that showcase the skill learned in the etude. A teacher could use the songs in the songbook for a concert program at the end of a semester.

Grants

Primary Accomplishments in 2015:

- Awarded 97 Applications totaling \$266.8K
- 66 applications received for projects occurring January 1st - December 31st, 2016

Primary Goals for 2016:

- Implement enhancements from the 2015 process
- Execute first full year project implementation for Spring application window
- Improve review and reporting process

For projects implemented between June 1, 2016 - May 31, 2017

- Application Window: **February 1 - March 30, 2016**
- Review: **April 1 - 30, 2016**

- Executive Review: **May 1 - 31, 2016**

Conclusion of Fall 2015 Grant window For projects implemented January 1 - December 31, 2016

*5 Applications are currently pending final decision

- Total Number of Applications Received: 66
 - Direct: 42
 - Vision: 19
 - Innovation: 5
- Total Funding Request: \$226,904
 - Direct: \$60,041
 - Vision: \$138,738
 - Innovation: \$28,125
- Total Number of applications Funded: 34
 - Direct: 24
 - Vision: 9
 - Innovation: 1
- Total Number of applications declined: 27
 - Direct: 16
 - Vision: 7
 - Innovation: 4
- Total Amount Funded: \$103,982 *Some applications funded partially
 - Direct: \$33,982
 - Vision: \$62,000
 - Innovation: \$8,000
- Total amount declined : \$97,184
 - Direct: \$23,059
 - Vision: \$54,000
 - Innovation: \$20,125

HARMONY MARKETPLACE

Music Publications & Merchandise

We continue to test new products and styles of BHS merchandise. One key piece of our Marketplace strategy is having a better understanding of what product sells when and where. Our general sales trends continue to reflect the following:

- 85% of our sales online are sheet music related.
- 70% of our sales at events are merchandise related (International, Mid-Winter & HU).
- 30% of Gross Revenue for the Marketplace comes from sales at events.
- Recent trends continue to suggest that 55% of Marketplace revenue comes from sheet music

& learning track sales...45% comes from merchandise and recordings sales.

We are using these findings to better guide us in our product development/acquisitions and buying periods. We are now adopting a new product release strategy where we will have three periods during the year where we release new product: Mid-Winter, International & Labor Day. Product will be unveiled at each convention with subsequent sales via the website. The Labor Day product launch will allow us to debut new product in anticipation of the fall and holiday seasons.

For the Midwinter in Reno we have several new approaches to product that we will be testing like more product options around the International Convention. Traditionally we have offered a hat, polo, t-shirt and pin. We have expanded this approach by offering more shirts, a high-end logoed fleece pullover, polo, event-specific tees and other items.

Sales Data & Trends

The Marketplace is currently posting a \$101,490.88 increase in sales in 2015 versus 2014. This is attributed to better product offerings, sheet music price increases and online sales nearly doubling with the new website coming online this past June. The capability to immediately download a chart versus having to wait for customer service to email has been a huge success. Downloadable sheet music sales are nearly on par with our total Published sheet music sales.

We have continued to see a significant reduction in our cycle time - the time it takes once an order is place to when it goes out the door. In the past, we were running at about a 72 hour cycle time. Now we are in the 36 hour range with a significant number of orders going out the same day - something that was physically impossible prior to the new website being operational.

Marketplace sales and transactional data YTD include the following:

Marketplace: Year End	2014	2015	% Change
Sheet Music & Learning Tracks	\$310,213.99	\$422,902.33	36.33%
Merchandise & Recordings	\$449,597.93	\$438,400.47	-2.49%
Total Sales	\$759,811.92	\$861,302.80	13.36%
Units Sold	207,808	194,757	-6.28%
Transactions	50,186	40,268	-19.76%
Revenue per Unit Sold	\$3.65	\$4.42	20.95%
Units Sold per Transaction	4.14	4.84	16.80%

** Sales revenue and data reflect the numbers in this chart as reported from our eCommerce & Aptify systems and do not reflect any accounting or other adjustments as reported in the financials.

Barberpole Cat Songbook, Volume II

We sold out of this product at International in two days (1,000 copies) and took orders for 600 more while there. In 2015, we shipped a total of 9,163 copies of this book - both physically and digitally. This book does not replace our Polecat I, which is part of a larger “challenge” program but provides additional ways for people to SING and advance their knowledge & skills. Book could also double as a complete show! \$16 for members and \$21.34 for nonmembers.

Top 50 Sheet Music Covers with New Branding (new)

We updated our Top 50 publications with the new BHS-branded cover, which was displayed at International. This is a 140% increase of publications with the new cover since January 2015.

Internal Clearance & Copyright Operations

Helpscout

The implementation of Helpscout (www.helpscout.com) for use in the publications department has been completed. All incoming emails to library@barbershop.org are now routed through Helpscout, which has created a more professional and personalized customer service experience for our members, associates, and affiliates. A breakdown of the type of services provided to date through Helpscout is indicated below:

General Advisement (Product/Arrangement Availability, etc.)	53%
Internationally-Based Inquiries	20%
Copyright Education	13%
Music Clearance Requests	7%
Hal Leonard Partnership Communications	7%

Distribution (Hal Leonard Corporation Partnership)

Our global distribution partnership with Hal Leonard Corporation (HLC) continues to flourish. The company currently offers 81 Society publications for sale on its website via the partnership. HLC sold 14,774 units of our music publications in 2015 - compared to 9,583 units in 2014. This is a 54% increase in domestic units sold over 2014 as well as 27% increase of international sales! Our fifth shipment of publications (8,250 units) shipped in mid-November and is expected to be online for sale Q12016.

Music Clearance Services

518 arrangement clearance orders were processed in 2015 for our members, associates, and for

Marketplace. Over \$27K has been received in music clearance service fees, a nine percent increase over last year. The Society currently has 6,664 arrangements in the catalog database, 877 which are published.

The Old Songs Library has recently acquired the vast music catalog of arranger Rudy Hart (*The Hartsmen*) and also received an additional shipment of Willis Diekema arrangements, graciously donated by the Battle Creek Chapter (Holland, Michigan).

Our wonderful volunteers have logged over 27,000 pieces of sheet music donated by our members, associates, and outside parties. This is a valuable reference resource for our arrangers, as retail sheet music discontinues quickly in the marketplace and becomes unavailable for sale. We estimate the archives will contain over 125,000 pieces of sheet music when completed. We thank long-time Society members Freeman Groat and Mel Joesten for their hard work and efforts this year in archiving these musical treasures for us all.

Harmony Hall has hired Scott Harris as Arranger & Repertoire Manager (formerly known as Music Publications Coordinator), succeeding Adam Scott. Mr. Harris began employment on January 1, 2016, and will oversee the development and evolution of Society publication products, prepare all incoming arrangements for the catalog, and assist arrangers, members, and associates in this focus area.

Music clearances for our 2015 Pittsburgh Convention products (Quartet CD/DVD; Chorus CD/DVD) were completed by deadline.

YouTube

Launched in May 2005, YouTube (www.youtube.com), a Google company, allows billions of people to discover, watch and share originally-created videos. YouTube provides a forum for people to connect, inform, and inspire others across the globe and acts as a distribution platform for original content creators and advertisers large and small.

The Barbershop Harmony Society's YouTube Channel is ***BarbershopHarmony38***. As of January 11, 2016, the channel has 20,706 subscribers and has enjoyed 12,022,083 views of the channel's music and non-music video content. As ***BarbershopHarmony38*** is an non-monetized channel, this allows advertisements to be placed in the video content. The copyright holders can then collect any ad-generated revenue through YouTube. This non-monetized channel option also allows the Society more freedom to upload music videos to the channel without (usually) having to seek pre-clearance from the copyright holders, as long as our music videos are used as promotional tools only. Of course, there are those copyright holders who have YouTube block policies in place; those uploaded videos will be blocked from view almost immediately. The Society would then seek clearance directly from the copyright holder if requested by the marketing department.

Harmony Hall strongly urges our chapters and groups to embed/feed directly from the **BarbershopHarmony38** YouTube channel if they are interested in adding this type of video content to their respective websites.

The phase of our YouTube strategy will be to continue the work with our digital content partners to determine our YouTube guidance and strategy for the rest of the BHS. We anticipate a second quarter release of those results to the field, in time to be shared at our summer Leadership Forum.

Digital Media

The Barbershop Harmony Society currently has a total of 120 album releases across various online platforms, which includes about 625 individual tracks, specified below:

- 106 Learning Track Albums – Download Only
- 12 Convention CD’s – Download and Streaming
- Musical Island Boys *Four* CD - Download Only
- Society 75th Anniversary album (75 songs) – Streaming Only

These audio recordings are available in the following territories: USA; Canada; Australia; New Zealand; Denmark; Estonia; Finland; Iceland; Latvia; Lithuania; Norway; Sweden; Anguilla; Antigua & Barbuda; Ascension Island; Bahamas; Bangladesh; Belize; Bermuda; British Antarctic Territory; British Indian Ocean Territory; British Virgin Islands; Brunei; Cayman Island; Channel Islands; Cyprus; Dominica; Falkland Islands; Ghana; Gibraltar; Grenada; Guyana, India; Isle Of Man; Malaysia; Malta; Montserrat; Netherlands; Pakistan; Pitcairn Island; Saint Helena; Saint Kitts & Nevis; Saint Vincent & The Grenadines; Seychelles; Sierra Leone; South Georgia; South Sandwich Islands; Sri Lanka; Tanzania; Tonga; Tristan Da Cunha; Turks And Caicos Islands; Uganda; United Kingdom; Zambia; and Zimbabwe.

These audio recordings are available on the following platforms: iTunes; Amazon Digital; Google Music; Spotify; MediaNet; Rhapsody; eMusic;; 24/7; 7 Digital; MixRadio; Mix&Burn; Touchtunes; Xbox Music; Gracenote; Shazam; Aspiro; Vervelife; Omnifone; rDio; Audible Magic; Boinc; JB Hi-Fi; Library Ideas; Freegal; Neurotic Media; PCM Technologies; YouTube Subscription; Facebook; and BuzzAngle.

	Revenue	Licensing Cost	Net Profit
Q1 Online Music Sales	\$281.74	\$71.87	\$209.87
Q2 Online Music Sales	\$984.07	\$216.53	\$767.54
Q3 Online Music sales	\$1,430.48	\$235.42	\$1,195.06

Q4 Online Music Sales**	\$1,427.46	\$285.50	\$1,141.96
YTD	\$4,123.75	\$809.32	\$3,314.43

**Q4 sales are estimates based on estimated initial report. The Orchard sends final reports one quarter after actual sales.

All of these releases are available in all territories that we could get permission for and are available at the same price for both members and nonmembers. We will continue releasing learning tracks until all are available digitally.

SHARED SERVICES

Marketing/PR and Communications

Social Media:

Year over Year comparison across all platforms:

	<u>EOY 2014</u>	<u>EOY 2015</u>	<u>% Change</u>
Facebook subscribers	15,550	20,420	+ 30%
Twitter subscribers	5,580	6,424	+ 15%
YouTube subscribers -	12,820	19,732	+ 53%
LinkedIn members -	470	587	+ 24%
Instagram followers -	650	2016	+ 210%

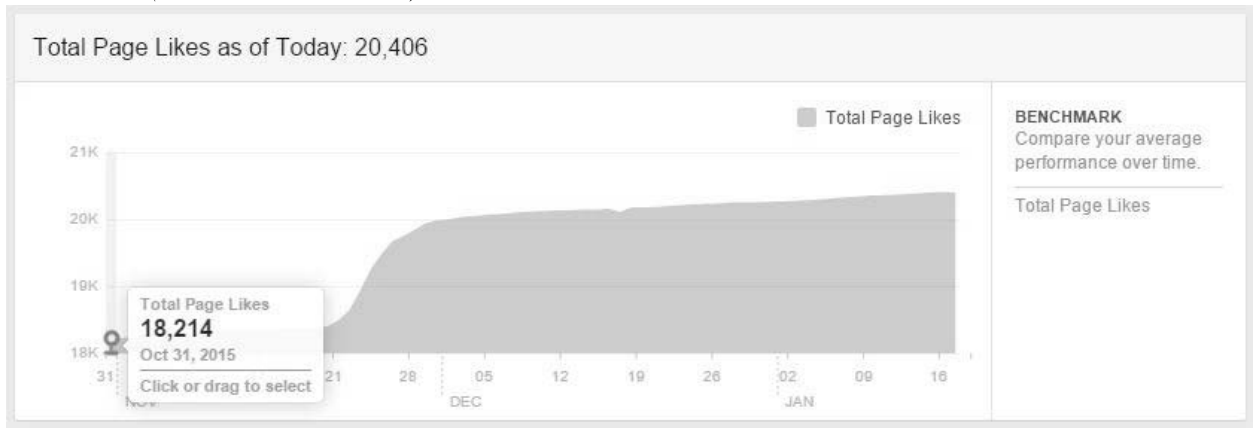
Facebook - This quarter saw a huge increase in followers for our official Facebook page. Total likes increased by 2,000 within a ten day period in November due to the continued popularity of a post originally shared in August. This simple photo meme generated nearly 9,000 Likes and 21,000 Shares, with a total reach of over 4 million users. While other posts were popular during this period, the exposure to many non-barbershoppers from tags in the comments section was the main cause of such an increase. Hopefully, many will continue to follow us as the page continues to feature a variety of photos, video, and educational and music related



posts.

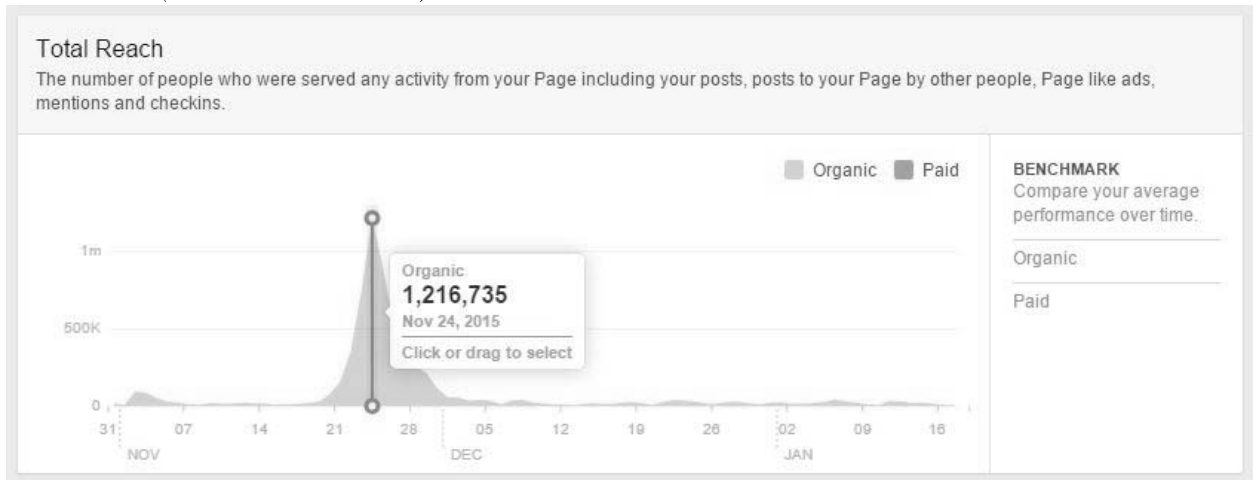
Top posts for this quarter include: a Halloween photo post of quadruplets dressed as a barbershop quartet, complete with color coordinated boater hats, spats, and mustaches (avg reach of 150K); a “What Type of Barbershopper Are You” flowchart (70K); and a recent article titled “Barbershop In A Nutshell” that gives a succinct explanation of why Barbershop sounds different (41K).

Total Likes (10/31/15 - 1/17/16)



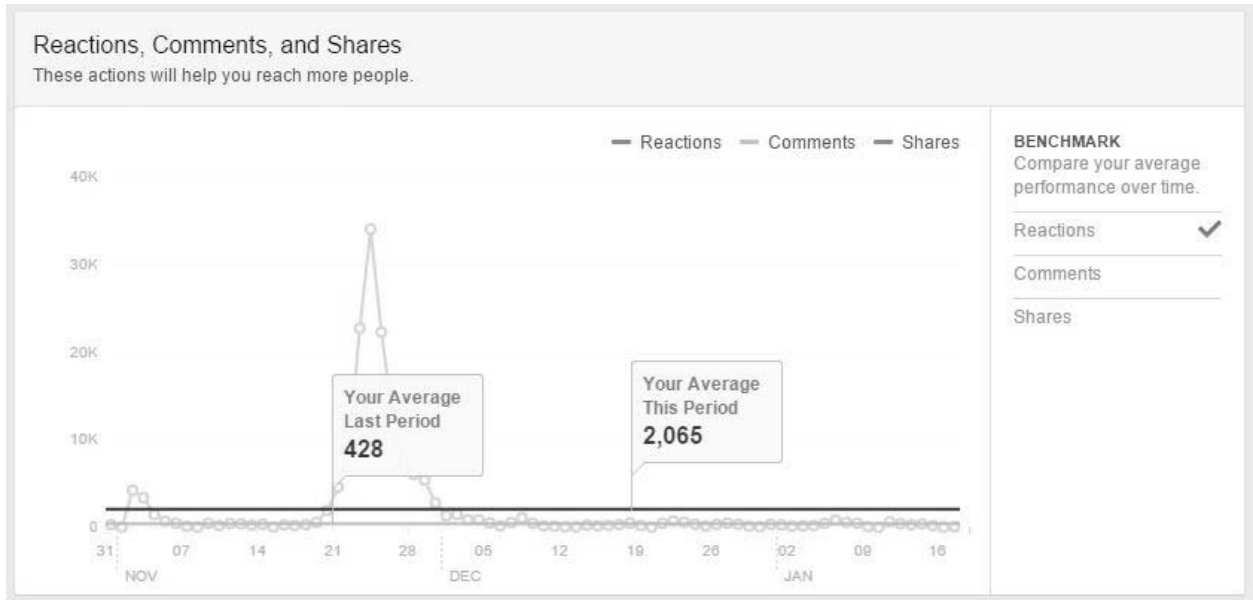
* 10% increase over last quarter

Total Reach (10/31/15 - 1/17/16)



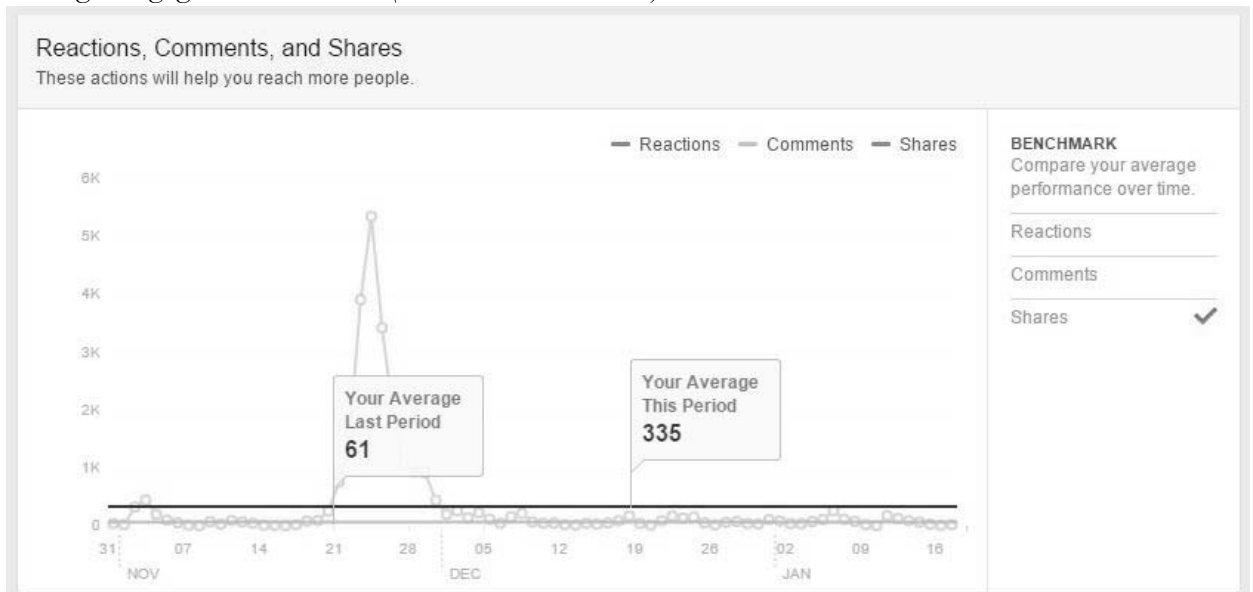
* 300+% increase over last quarter

Average Engagement - **Likes** (10/31/15 - 1/17/16)



* 186% increase in average number of likes

Average Engagement - **Shares** (10/31/15 - 1/17/16)



* 346% increase in average number of shares

**Reach: The number of unique people who saw our posts. The post counts as reaching someone when it shows up in their news feed.*

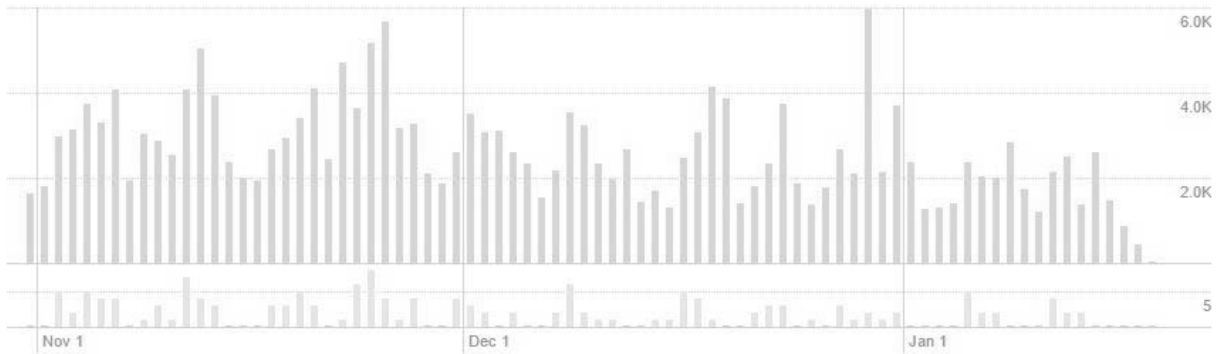
**Engagement: The unique number of people who liked, commented, shared or clicked on our posts.*

Twitter - We have 6,458 twitter followers, increasing by 209 followers since October 31, 2015 (+3%). Our growth on Twitter is steady, with regular cross-posting of our Facebook and LiveWire content. We also have continued to experiment with Periscope (a live-streaming app that uses Twitter to notify users of broadcasts), sharing both the International Chorus draw and the Senior

contest order of appearance draw. While not as widely viewed as the YBQC draw, both were successful and continue to bring our members an insider's view of Harmony Hall. More opportunities will be explored at the Midwinter Convention to share classes, social activities, and behind-the-scenes footage.

Engagement Rate (10/31/15 - 1/17/16)

Your Tweets earned **212.7K impressions** over this **80 day period**



YouTube –

Our YouTube traffic continues to grow, though at a more regular pace than seen last quarter with the release of the quartet contest performances from Pittsburgh. We are releasing new content regularly, with plans to post the Midwinter performances on a regular schedule through the first quarter. Chorus performances from Pittsburgh will also be scheduled for public release. In addition to performance footage, previously recorded HU class content is being edited and will be scheduled for release in the spring under the HU brand.

TOTAL YouTube Stats (Through 01/17/16):

Views: 12,151,348 (+8%)

Minutes Watched (Lifetime): 24,525,068 (+15%)

Minutes Watched this quarter (10/31/15 - 1/17/16): 3,104,834 (-50%)*

Likes: 55,945 (+12%)

Dislikes: 1,414* (+9%)

Comments: 10,234 (+6%)

Shares: 22,549 (+17%)

Subscribers: 20,812 (+7%)

Published Videos: 946 (+11%)

**Last month saw a 257% increase, so we are still significantly up in views, comparatively.*

Top Videos, by Views this quarter (6/16/15 - 10/30/15)

Main Street - Good Old Days medley (International 2015)	181,140 views
Old School - 2011 International Barbershop Quartet Champion	124,978 views
Old MacDonald Had a Deformed Farm - Lunch Break	42,536 views

Ambassadors of Harmony-2009 International Barbershop Chorus Champions	65,166 views
Tennessee Waltz-Masterpiece (2013 International Quartet Champion)**	33,967 views
Main Street - In Summer (International 2015)**	24,854 views

**Not in top ten for total views

Top Videos, Total Views

Ambassadors of Harmony-2009 International Barbershop Chorus Champions	2,573,150 views
Old School - 2011 International Barbershop Quartet Champion	1,316,381 views
Old MacDonald Had a Deformed Farm - Lunch Break	772,330 views
Main Street - Good Old Days medley (International 2015)	673,705 views
Crossroads - Lucky Old Sun	608,326 views
Storm Front - Lida Rose	546,551 views

LiveWire

LiveWire continues to grow as an effective communication tool. Calendar year 2015 saw a 12% increase in the running message open rate and a 41% increase in the running click rate. Again, we credit much of the activity to aggressively increasing the video content in each issue. Stats suggest that as many as 30% of readers click more than one link in each issue, which supports the notion that the attraction of “fun” video yields exposure to more mundane business and promotion content.

Date	Sent	Opens	Open rate	running 12-week avg opens	running 26-week avg opens	Clicks	Click rate	running 12-week avg clicks	running 26-week avg clicks
12/31/2015	29778	9083	34.18%	35.57%	35.81%	1921	21.15%	28.12%	28.97%
12/23/2015	29793	9595	36.02%	35.09%	35.84%	2908	30.31%	27.75%	28.57%
12/18/2015	29800	9417	35.33%	35.11%	35.85%	2838	30.14%	27.83%	28.39%
12/11/2015	29818	9258	34.72%	35.02%	35.85%	2025	21.87%	28.00%	28.66%
12/3/2015	29835	8832	33.05%	35.20%	35.77%	2995	33.91%	27.79%	28.69%
11/25/2015	29849	9640	36.04%	35.09%	35.62%	2282	23.67%	27.98%	28.98%
11/20/2015	29871	9833	36.75%	34.93%	35.46%	3068	31.20%	27.41%	29.15%
11/12/2015	29881	9779	36.48%	34.84%	35.28%	2651	27.11%	27.48%	29.15%
11/6/2015	29892	10030	37.37%	34.66%	35.13%	2964	29.55%	26.69%	29.07%
10/30/2015	29911	9800	36.67%	34.71%	35.01%	3011	30.72%	26.80%	29.12%
10/22/2015	29350	9489	36.04%	34.78%	34.87%	2755	29.03%	26.81%	28.81%
1/15/2015	27844	8190	32.30%	31.30%	31.91%	2314	28.25%	17.71%	20.41%

Harmonizer (Lorin)

Current magazine issues. The November/December featured a cover article in which two Barbershoppers performing with the Vocalosity a cappella tour discuss various topics. While the interview does discuss contemporary a cappella, most of the topics are spun to an angle that would primarily be of interest to Barbershoppers. Included in this issue was the announcement and description of the new Performance judging category, a panel's choices for best leads of all time, promotions from midwinter, and several articles submitted by District Storytellers.

The January/February issue cover story pertains to the Lincoln, Neb. chapter, and the considerable fruits that came from hiring a great director who had little background in barbershop. (He was also the Society's top recruiter in 2014.) We'll also see the 2015 district champs, learn the panels top baritones of all time, and learn from Crossroads quartet why they believe the tide is turning toward barbershop being a positive influence and resource among music educators and students.

Storytellers. In 2015, stories sent to the Storytellers@barbershop.org address and to the Harmonizer magazine totaled 239, which is slightly less than the 2014 300+ stories captured during the project's launch year (Unlike the total for 2014, the 239 figure does not include stories that were exclusively covered in BHS social media, the website, or YouTube channel). Only 64 stories have been logged in the Storytellers database (some of which were from 2014), meaning that under the current system, the picture of which chapters/quartets are being covered is incomplete, and a better tracking system or process may be necessary. Due to that and to the high number of stories being submitted, members the Marketing staff members have recently outlined steps toward a new process to centrally consolidate and make rapid decisions on content. This system will come into clearer view into the first quarter of 2016.

Future editorial plans. *The Harmonizer* will be evolving in a more definitive way during 2016 and beyond, first in terms of content and eventually in terms of appearance and enhancements in delivery methods. Due to the ubiquitousness of email, social media and Internet, *The Harmonizer* will be adjusted to particularly play to its strengths (Permanence, Prominence, Perspective, Persuasion, Power, Polish) and will have less overlap (but more linkage) with the other BHS communication mediums that exhibit their own strengths. A survey of members has shown marketing staff many interesting details regarding the reading and viewing habits of Society members, associates and affiliates. Impact to *The Harmonizer* will be seen an evolutionary realignment in the types of stories covered most often, their length, their authorship, and many other factors.

Video/Audio Production

Through original and repurposed videos on YouTube, social media and other avenues, we have helped drive sales, registrations, brand awareness and attendance to our marketplace, membership "join now", Harmony University and events.

Our marketing resources have been active in developing Harmonizer advertising, Song of the Week, Polecat II book and the Stephen Foster songbook just to name a few. We've featured learning track

previews in Live Wire, our Song Premiere series on YouTube, etc. all of which lead back to our website, barbershop.org.

Some of our messages of philanthropy are included in other programs such as ACDA, NAFME, Saturday Night Spectacular, etc., for all of which we've produced "outsider" video content to further our reach.

Website/Landing Page Analytics: (Brian/Eddie)

- **Overview**

The unfortunate news is that for a while after the new website launched, Google wasn't capturing any data from the site. The error was on our end and it kinda caught us off guard when we noticed it in October and quickly resolved the conflict. Somehow we had two conflicting sets of google analytics code embedded on all the pages...we don't know how this happened, but going forward we're seeing some positive trends.

Comparing what we have so far with one year ago, it's interesting to note that from Oct 22-Dec 31 (2015 vs 2014) we have more sessions (84k vs 77k) and more users (51k vs 49k) yet significantly fewer pageviews (190k vs 357k). This means we have more people needing fewer clicks to find what they need. We're trimmed a LOT of pages from the old site to clean it up, and reorganized the content so it's more efficient.

More evidence of this is while total pageviews dropped by almost half, the unique pageviews actually went up from 138K to 148K.

Unique Pageviews (old vs new):

- Home page 42K up to 44K
- Get Music 6,722 down to 6,038
- Get Free music 5,587 up to 7,160

Also, adding huge amounts of youtube videos with the barbershop.org address and a more focused strategy on linking posts from the website to social media is gradually drawing more NEW users (up from 53.5% to 55.2%) to the site, which is a positive trend.

- **Bounce Rate** *(the rate at which website visitors leave your website after viewing their first page vs continue clicking through to other pages on your site)*

Ignore the old site's Bounce Rate which somehow was being incorrectly calculated. The new site is reflecting a Bounce Rate of about 60.57%, which is pretty average industry-wide, depending on who you ask. There's no "perfect bounce rate", but we want to push it as low as possible. Having a 50% bounce rate would be an excellent goal. More "in-site" engagement would draw people farther into

our content. We're already doing more of this by adding more interesting stories on more pages to which to click.

- **Outside Traffic Sources (since Oct 22)**

2015: Total of 891 sites linked to us, with 17,078 Sessions worth, and 9,997 new users.

2014: Total of 1004 sites linked to us, but only 10,496 Sessions and 4,706 new users.

So we've almost doubled the amount of engagement sessions TO our site, primarily through Social Media efforts. Facebook engagements alone went from 690 sessions to 10,009 sessions. Our strategy of pulling traffic through Facebook posting of stories that lead to the site is absolutely working to bring new people to the site.

Operations *Project* Teams (OProjeC'T- formerly OT)

A strong focus will be given to the OPT organization in 2016. Rolling out these volunteer based operational project teams requires a strong plan, vision, leadership and follow through. Much of this process has been used with the Leadership OPT rollout and will help us gather momentum in the rest of the OPT development and execution.

Leadership Development OPT - Steve Wyzermierski - chair, Dr Gunn - staff lead

- Updates from Forum included under Harmony University section (above)
- Below is the current Leadership Development OPT

SEE APPENDIX B FOR LOPT PROJECT STATUS

Musical Leadership Development OPT. Team consists of HU Deans:

- Gary Plaag - Quarter and Chorus College
- Richard Lewellen - Harmony College
- Don Campbell - Directors and Music Educator College
- Wayne Grimmer - Vocal Techniques
- Steve Denino - Leadership College

Barbershopper Is OPT - behind schedule. A project chair will be identified in 1st quarter 2016 (pushed from November in last report). Projects have already been identified and will be integrated into this OPT for volunteer support and engagement.

Events OPT. This team gathered for the first time in a couple years during Forum 2015. John Schneider and Nick Schwob provided the volunteer leadership guidance along side of Dusty

Schleier, Director of Events/Conventions for Harmony Hall. There was successful discussion and continued support to keep this group communicating via Basecamp. Not every district sent their district events representative. More details and identified projects will be forthcoming from this team in future updates.

Music Publications OPT. This team was pending the new A&R backfill position that is now Scott Harris, who started January 1st. Projects have been identified and will be launched in first half of 2016.

Branding OPT. This team is pending a CMO approval and hire. Projects have been identified and will be launched in the first half of 2016.

Outreach OPT. A project chair will be identified in 1st quarter 2016.

Technology OPT. This team will be headed up by our COO and include technology experts from within our membership who are willing to share their experience and talents to help guide the Society's technology needs. We are currently identifying candidates and expect to begin operations of this OPT in 2016.

Other OPTs identified for consideration: Chapter Expansion, Business Development, Inclusion

Financial Services

- **General updates:**

The Great Plains systems update phase 2 has been implemented and will start to improve efficiencies organizationally as staff understanding and use of the system improves. New financial modules were added for sales order processing, purchase order processing and inventory to allow between management of inventory, purchasing and accounting as business processes are solidified and fully implemented. The addition of these components was a necessary step in automating the district/chapter invoicing process for insurance and related Society expense that are currently manually intensive. Over time, we will work to initiate ACH options to fund chapters and receive payments from chapters electronically.

- **Insurance:**

BHS initiated a broker of record change in November 2015, electing to move our insurance business to Arthur J. Gallagher, a global leader in insurance brokerage. During the 4th quarter, BHS staff worked with Gallagher to go to market for the BHS insurance package to identify process improvements, improved coverage levels or reduced expenses if possible. The process was very good to initiate as it highlighted some risk management practices, particularly around the Society's youth events and volunteer efforts. Although the insurance policies ultimately remained with Philadelphia (U.S.) and Tokio Marine (Canada), we will be looking to implement certain process

changes to improve the certificate of insurance issuance process and potentially reducing certain administrative burdens for chapters that collaborate with outside organizations. More information will be forthcoming in the next few weeks and communicated to chapter and district leadership.

Building Maintenance

Following Patty's retirement, ongoing building management and routine maintenance has been assigned to Doug Gordon. In his short tenure taking over building management responsibilities, Doug has identified and scheduled work to be completed on the building, including stair treads, water leaks, and related items. Minor cosmetic improvements have been completed in the employee break room, purchasing of building consumables has been streamlined at lower costs, and he has developed a schedule to refresh building paint, where need, in advance of Nashville International 2016. In addition, he has taken over primary responsibility for managing building cleaning and upkeep to ensure a clean and safe work environment, including cleaning and organizing the 1st floor storage area.

Governance

Update provided in materials prepared by Kevin Lynch in connection with proposed G&B Bylaws changes.

Global Harmony

Affiliate Program - Unfortunately little progress has been made with the Affiliate agreements since our last update. We have completed agreements from Holland Harmony, SABS and BHA. We are close to having BING and NZABS completed as well. The annual memorandum is still being developed and is slated for 1st quarter 2016 completion. BABS has provided a suggested "partnership" agreement, which has been reviewed, shared with SCJC and is being discussed further with BABS leadership. The new French Association of Barbershop Singers (FRABS) has reached out to us inquiring about what it would take to become another Affiliate, but we are awaiting their next steps.

SA - BHS COO and SA publishing Director, have been in various discussions around the latest partnership challenges and changes with Hal Leonard. A senior management meeting is scheduled with SA senior management January 26th.

HI - HU Director and CEO attended the HI convention (along with Society Board EVP) and was treated with wonderful hospitality and welcoming energy. CEO was MC at their Harmony Queens show and had a great time. Many HU faculty were present as HI increased their educational classes during the week of their convention, which was received very well. Continued discussions about enhancing our partnership is ongoing.

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 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 exhausted
and
 - 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.

C. POLICY TITLE: *FINANCIAL CONDITION*

With respect to the actual, ongoing condition of the organization's financial health, the CEO may not cause or allow the development of fiscal jeopardy or a material deviation from budgeted expenditures for Board priorities established in Aims policies.

Accordingly the CEO may not:

1. Use any long-term reserves.
2. Allow cash to drop below 90 days cash on hand as calculated in the monthly Dashboard. He may not allow the quick ratio to fall below 1 (1) as an average over a calendar quarter.
3. Allow tax payments or other government-ordered payments or filings to be overdue or inaccurately filed.
4. During a fiscal year, move the budgeted income or the lesser of \$25,000 or twenty percent of the budgeted expense from one of the seven Society budget categories to another of the six Society budget categories without prior consent of the Board.
5. Fail to require that staff submit all expense accounts to their immediate superior for approval within thirty days following expenditure. The CEO is not required to submit the CEO expense accounts for approval, but the CEO shall review expense accounts with the Chief Financial Officer and Society Treasurer at least quarterly.
6. Fail to require that all travel by Society staff, Society committee and the Board be within the policy statement as published in the Society Personnel Policy Handbook. The Chief Financial Officer or the CEO must pre-approve reimbursable airline travel expense that exceeds \$500.

CEO: I'm in compliance with these limitations. This data is provided in the Finance report.

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.

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, through 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.

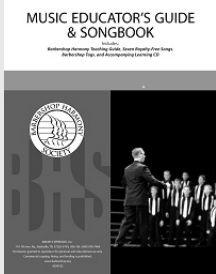
CEO: I'm in compliance with these limitations.

APPENDIX A: 2015 COMPLETED PROJECTS

Program Area	2015 Completed Projects <i>New in 2015</i>	Projects Rolling Over into 2016 <i>New in 2015</i>
MEMBERSHIP	Society Membership Indicators of Success Storytellers	Repurposing & Redesign of Harmonizer (HOLDING for strategy creation)
OUTREACH	ACDA 2015 YBQC (formerly CBQC) Video Qualification Comm. Eng. -Pittsburgh NAfME 2015 Inclusion & Integration (Partnership with Choral Arts Link)	
HU	HU Online (Phase 1)	Leadership Forum Transition HU Online Phase 2 Execution & Phase 3 Requirements
HM	Stephen Foster Songbook Polecat II Songbook Mobile Marketplace <i>Sheet Music (TOP 50) with new covers</i>	
SHARED SERVICES	Systems Overhaul (Phase 1) Systems Overhaul (Phase 2) Branding Initiative (Phase 2): Spreading the message Board on Board <i>Annual Strategy, Budget, Operational & Marketing Calendar</i>	HQ Reporting Analysis/Dashboard Restructuring of Operations Team Building Completion Media Inventory Systems Overhaul (Phase 3)

Program	Project	Summary/Result	Which KPIs did this project help to advance?	Which AIM/Annual Goal did this project help advance?
Membership	Society Membership (formerly MAL/SOM)	<ul style="list-style-type: none"> ● Reduced the Society’s dependency on chapter stability, by allowing people to become a member even if they are not a member of a chapter ● Creation of an online webpage and portal that allows any male to register and pay to become a member of the Society ● Membership-related materials created for those that join only the Society ● Brand new “Join Us” web pages with streamlined, easy access to how to become a member as well as the benefits and value of being a member ● New Society membership promotional video with close to 1,000 views since October 1 launch- lays out what the Society is all about with key brand messaging components ● Captured 72 membership subscriptions (as of 1.19.16) ● Created a District lead source for potential chapter members 	<p>KPI #1-Achieve a 70% retention rate in the second year by 2017</p> <p>KPI #2- Total membership is 22,000 or higher</p>	<p>Goal 1: Rebranding effort & launch</p> <p>Goal 3: Leverage success of Outreach and grow to new heights</p> <p>Goal 4.1: ALL members working together- Help with recruiting</p>
Membership	Indicators of Success	<ul style="list-style-type: none"> ● All Districts have access to Basecamp accounts with 10 projects/account ● Districts provided quarterly updates on Key Performance Indicators (KPIs)in their the individual Scorecards created at Leadership Forum 2014 	N/A (not program specific although focused on our members’ needs)	<p>Goal 4.1: ALL members working together- Help with recruiting</p> <p>Goal 4.2: ALL members working together- More visits from and communication with officers and staff</p>

		<ul style="list-style-type: none"> ● 2015 District collective results are substantial enough to incorporate it into the 2015 Annual Report ● This project will roll into ongoing operations to eventually capture our overall impacts as an organization. 		<p>Goal 4.3: ALL members working together- Provide coaching help to chapters</p> <p>Goal 4.4: ALL members working together- Help chapters plan and implement shared activities</p> <p>Goal 4.5: ALL members working together- Modernize music and arrangements available through BHS</p>
Membership	Storytellers	<ul style="list-style-type: none"> ● Captured 239 stories sent directly to magazine, Lorin May/Editor, or storytellers@barbershop.org (300+ in 2014 but included social media posts, LiveWire, and blog posts) ● 15 of 17 Districts have a District Storyteller and received training on logging their stories for Storytellers. ● Our original objective was to have 25% of our chapters providing stories to Storytellers. In 2015, only 64 stories were captured using the approved capture methods, so improvements are needed in the management and processing of that information. 	<p>KPI #3- Three major field reports w/video covering people or groups who exemplify the attributes of living the Society's vision.</p> <p>KPI #4- Average of 3 past Harmonizer articles per month to be promoted via social media or LiveWire</p>	<p>Goal 1: Rebranding effort & launch</p> <p>Goal 3: Leverage success of Outreach and grow to new heights</p>
Outreach	ACDA 2015	<p>Achieved and often exceeded all pre-determined objectives:</p> <ul style="list-style-type: none"> ● Attendance at reading session was 100 people in room (50 attended in 2013-meets every other 	<p>KPI #5- Share barbershop with 90,000 people in 2015</p>	<p>Goal 1: Rebranding effort & launch</p> <p>Goal 3: Leverage success of Outreach and grow to new heights</p>

		<p>yr)- ACDA team 230+.....all received packets with BHS-branded music & materials</p> <ul style="list-style-type: none"> ● Gave 2300+ pieces of music away. ● Generated 100+ music educators leads ● 24 music educators attended HU 2015 on scholarships distributed at ACDA; 8 additional inquiries made for 2016 ● Two brand new choruses are slated to enter YCF in Reno, NV ● 350 Music Educator Guides given to music educators ● Hal Leonard partnership secured additional music given away beyond the 2300 pieces given through Reading Session packet (300+ pieces) ● BHS hosted “You Sing” YouTube contest to benefit (2) music programs. 3 winners were announced/notified by May 14 & checks sent to benefit these music programs in CA(2) and UT. ● Captured 8-10 video testimonials and filmed all Crossroads and Fairfield Four sessions and reading sessions (sample - click here) 		<p>Goal 4.1: ALL members working together- Help with recruiting</p> <p>Goal 4.2: ALL members working together- More visits from and communication with officers and staff</p>
<p>Outreach</p>	<p>YBQC Video Qualification (updated)</p>	<ul style="list-style-type: none"> ● Quartets now have an alternative means of qualifying for International without the expense of traveling to a District qualifier. Although more enhancements are needed to attract “outsiders” to this opportunity, this project was meant to be a gateway for making an Outreach-related program more accessible and inclusive. ● On April 24, a triple panel of BHS certified judges scored 6 videos that were submitted for 	<p>KPI #5- Share barbershop with 90,000 people in 2015</p>	<p>Goal 1: Rebranding effort & launch</p> <p>Goal 3: Leverage success of Outreach and grow to new heights</p> <p>Goal 4.1: ALL members working together- Help with recruiting</p>

the CBQC video qualification. One quartet was invited to Pittsburgh as a wild card.

- The Outreach team will be working to connect this initiative with other externally focused Outreach-related offerings, like YouSing, so that participants who submit videos for such programs can be automatically entered in the video contest.
- After careful listening, social media discussion, and testing the waters, event name has been changed to Youth Barbershop Quartet Contest. Program graphic refreshed.



- Additional recognitions added for high school groups, first-time competitors.
- To encourage more accessibility to finals for new quartets, rules for finals updated to specify entry in YBQC or International Quartet Contest, but not both.
- Finals event in Nashville to include opportunities for non-qualifiers to attend and have a memorable barbershop experience.

Goal 4.2: ALL members working together- More visits from and communication with officers and staff

Outreach	NAfME	<ul style="list-style-type: none"> ● Provided two HU- Belmont 2016 scholarships to music educators new to barbershop ● Conference's opening performance included 3 standing ovations from 1700+ for Crossroads and a staggering 'following' of new bbs fans ● Gave away approx. 200 Music Educator Guides, 110 Jan-Feb '15 Harmonizer issue (Roots of BBS article) & 170 YouSing packets ● A total of 100+ music educators attended two interest sessions ● Premiered a cappella harmony method/pre-curriculum for first time ● Collected 30+ music educator leads for future marketing ● Secured an approved activities period for barbershop on the youth schedule that was started by youth on FB (Crossroads facilitated: 60 youth attended) ● Re-captured a higher quality version of the African American Roots of Barbershop presentation with Fairfield Four and Crossroads. ● Secured an excellent location for a double booth exhibit that supported high traffic ● Will report on any success with YCF recruitment for Midwinter 2016 in the upcoming Winter CEO Report ● The Front Desk Admin pool reports that many more calls have been coming in from Music Educators 	KPI #5- Share barbershop with 90,000 people in 2015	<p>Goal 1: Rebranding effort & launch</p> <p>Goal 3: Leverage success of Outreach and grow to new heights</p> <p>Goal 4.1: ALL members working together- Help with recruiting</p> <p>Goal 4.2: ALL members working together- More visits from and communication with officers and staff</p>

		<ul style="list-style-type: none"> ● Was offered a \$500 donation from an exhibiting tour company to help fund an HU scholarship. Have turned this over to HFI. 		
Outreach	Community Engagement-Pittsburgh	<ul style="list-style-type: none"> ● Established community rapport with Pittsburgh city organizers and performing organizations, resulting in a genuine interest in our mission to leave a legacy after the convention: ● Significantly inspired students (approx. 400), music educators, and the public in barbershop through educational tours (using The Academy), marketing support of local events, and performance opportunities on an international stage: ● Local chapters conduct ongoing efforts of collaboration ● ‘Shoptimus Prime and Vintage Mix Quartet performed for approximately 40 children being treated in the Pittsburgh Children’s Hospital, the doctors and staff, volunteers, and family members; they routed mics to the higher floors in the atrium so children with contagious diseases could still hear the performances. They even had the atrium decked out with red, white, and blue...AND barbershop hats. ● Saturday Evening post, Vintage Mix Quartet, ‘Shoptimus Prime, and The Originals performed in Market Square in front of thousands (approx. 4,000). ● Adam Scott led barbershoppers and approximately 500 non-barbershoppers in patriotic songs to celebrate the Fourth of July in the Clemente Bridge MEGA-Sing 	KPI #5- Share barbershop with 90,000 people in 2015	<p>Goal 1: Rebranding effort & launch</p> <p>Goal 3: Leverage success of Outreach and grow to new heights</p> <p>Goal 4.1: ALL members working together- Help with recruiting</p> <p>Goal 4.2: ALL members working together- More visits from and communication with officers and staff</p>

		<ul style="list-style-type: none"> ● Barbershop groups performed at Point Park during the Regatta events. Because the Regatta is a large tourist attraction with thousands of people, barbershop was shared/experienced by over 5,000 people. Performing groups included Steel City Harmonizers, The Regulars, Sounds of Pittsburgh Chorus, David Wallace, dir. Mayhem 		
Outreach	Inclusion & Integration (partnership with Choral Arts Link)	<ul style="list-style-type: none"> ● Developed a strong relationship and partnership between Choral Arts Link and Barbershop Harmony Society focused on choral development and the joy of (quality) singing through the performance of A Cappella music. ● Created a plan to create a harmony method to implement and enhance harmony curriculum in schools. ● This program will provided children, their families, and music educators the opportunity to experience and enjoy harmony regardless of background, culture, or socio-economic status. ● Students participating in program have more ownership & accountability; they're "stepping up" and helping the entire group out. The energy amongst the group has created love for one another. Love for one another has created harmony. ● Multiple collaborative performances held: Let Freedom Sing, Side by Side, AOSA ● Parents have become more involved, more engaged. They are coming to rehearsals more, have more ownership similar to the students, 	KPI #5- Share barbershop with 90,000 people in 2015	Goal 3: Leverage success of Outreach and grow to new heights

		and have become an integral part of the group.		
Harmony University	HU- Phase 1	<p>The completion of Phase 1 resulted in the following videos produced, uploaded, and available online:</p> <ul style="list-style-type: none"> ● Larry Dodge conducting tutorial videos ● Jim Henry’s Gold Medal Moments re-organized ● Dave Stevens video - “What we are trying to preserve?” has the correct link to full version ● Highest priority videos from HU and International 2015 	KPI #7- Increase ways for people to access barbershop education materials (eg- leadership, music education, director tutorials, barbershop history)	<p>Goal 4.2: ALL members working together- More visits from and communication with officers and staff</p> <p>Goal 4.3: ALL members working together- Provide coaching help to chapters</p> <p>Goal 4.4: ALL members working together- Help chapters plan and implement shared activities</p>
Marketplace	Stephen Foster Songbook (new)	<p>The Stephen Foster songbook was a unique Marketplace product that also leveraged our Events and Outreach program areas. The 4 songs included the following public domain songs:</p> <ul style="list-style-type: none"> ● Oh! Susanna ● Camptown Races ● Gentle Annie ● If You’ve Only Got a Mustache <p>This songbook was used as a community engagement tool with 3 schools in Pittsburgh, all of whom will be participating in the convention; as a showcase at the Stephen Foster museum to commemorate a local Pittsburgher; as a product to build excitement and drive thematic decisions for the convention. Hal Leonard has already requested 1,000 copies for global distribution. \$10 for members/\$12.50 for nonmembers</p>	<p>KPI #5- Share barbershop with 90,000 people in 2015</p> <p>KPI #8- Total # of units sold</p>	<p>Goal 1: Rebranding effort & launch</p> <p>Goal 2: Financial rebalance</p> <p>Goal 3: Leverage success of Outreach and grow to new heights</p> <p>Goal 4.1: ALL members working together- Help with recruiting</p>

Marketplace	Polecat II Songbook (new)	<p>We sold out of this product at International in two days (1,000 copies) and took orders for 600 more while there. Since International, we are fulfilling hundreds of requests for this book on a weekly basis featuring the following songs:</p> <ul style="list-style-type: none"> ● After You've Gone ● Bright Was The Night ● Caroline ● (When It's) Darkness On The Delta ● Drivin' Me Crazy ● From The First Hello To The Last Goodbye ● Goodbye, My Coney Island Baby / We All Fall ● Hello Mary Lou (Goodbye Heart) ● I Don't Know Why (I Just Do) ● I've Been Workin' On The Railroad ● Lida Rose /Will I Ever Tell You ● Over The Rainbow <p>This book does not replace our Polecat I, which is part of a larger “challenge” program but provides additional ways for people to SING and advance their knowledge & skills. Book could also double as a complete show! \$12 for members and \$15 for nonmembers</p>	KPI #8- Total # of units sold	<p>Goal 1: Rebranding effort & launch</p> <p>Goal 2: Financial rebalance</p> <p>Goal 3: Leverage success of Outreach and grow to new heights</p> <p>Goal 4.1: ALL members working together- Help with recruiting</p>
Marketplace	Mobile marketplace	<p>This pilot project tested having a remote marketplace at the arena in Pittsburgh. We sold \$1,000 worth of MIB CDs. While it did not provide us with significant revenue, it enhanced our learning around ensuring the marketplace hours of operation made sense and was coordinated with our events schedule. We have now incorporated the proximity of the marketplace to the main venues in our overall planning as well as more</p>	KPI #8- Total # of units sold	Goal 2: Financial rebalance

		negotiation with venues for selling our merchandise at International and Midwinter.		
Marketplace	Top 50 Sheet Music Covers with New Branding (new)	Updated our Top 50 publications with the new BHS-branded cover, which was displayed at International. This is a 140% increase of publications with the new cover since January 2015.	KPI #8- Total # of units sold	Goal 1: Rebranding effort & launch
Shared Services	Systems Overhaul (Phase 1)	<p>Using a more agile methodology of project management (less reporting, more flexibility, more constant iterations with feedback), we've migrated the BHS website platform (Joomla) and eCommerce (Americommerce)platforms to one shared platform using WordPress and CS-Cart. The completion of this Phase 1 project resulted in the following operational upgrades/improvements:</p> <ul style="list-style-type: none"> ● Provides digital downloads for U.S. and Canada for many arrangements. ● Does not require adjustments in final price or accounting by customer service. ● Eliminates re-keying orders into another system. ● Provides greater membership value by intentionally and obviously distinguishing between member and non-member pricing - focused on a member discount of 25% versus leading with member pricing. ● Works seamlessly across computers and mobile devices. 	N/A (Shared Services did not have KPIs)	Goal 2: Financial rebalance
Shared Services	Systems Overhaul (Phase 2)	This Phase 2 of the Systems Overhaul project attached accounting module enhancements to Great Plains and an integration manager set up for our web sales. The	N/A (Shared Services did not have KPIs)	Goal 2: Financial rebalance

		<p>modules provided enhanced operational capacity with the following:</p> <ul style="list-style-type: none"> ● SOP (sales order processing)- web transactions can now be accounted for in our financial system and communicate with one another through a shared file server with great Plains ● POP (purchase order processing)- Purchase order process sync's GP purchases with shipments received and creates accounting records to confirm A/P invoices matches purchases in quantity and cost. ● Inventory Management- Inventory counts and COGS are properly captured to support annual audit reporting; Staff trained to use GP for internal billings & inventory controls. ● AR (Accounts Receivable)- staff trained to use GP for internal billings & inventory controls. 		
Shared Services	Branding Initiative (Phase 2)	<p>In the Program Learning phase (Phase 2), key messages centering around "For the Joy..." were incorporated into signage, a mosaic banner, and an interactive online photo mosaic, launched at the international convention in Pittsburgh.</p> <p>These messages were reinforced in an ongoing series in The Harmonizer beginning in September 2015. This will be succeeded by a "Living the Brand" series which relates the values to specific actions by barbershop chapters and individuals.</p>	N/A Shared Services did not have KPIs	Goal 1: Rebranding effort & launch
Shared Services	Board on Board	Provided a project management platform for Board-specific items to be managed and tracked.	N/A Shared Services did not have KPIs	N/A

		Identified a separate need for document management through the process and ongoing Basecamp training through orientation of Board members.		
Shared Services	Annual Strategy, Budget, Operational & Marketing Calendar	Created a “Master Calendar” with all strategy, budget, operational, and marketing related deadlines that can be used year after year in order to better manager capacity.	N/A Shared Services did not have KPIs	Goal 2: Financial rebalance

Appendix B- Leadership OPT Project Status, 1.21.16

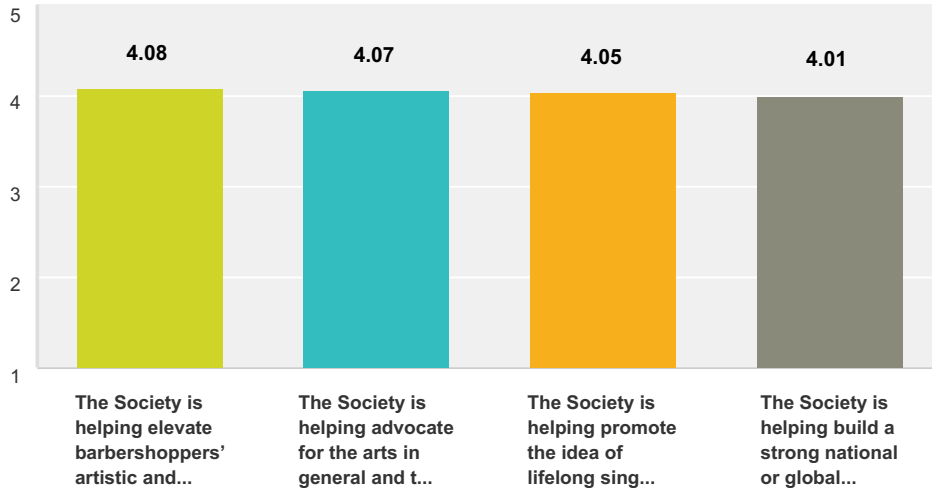
LOPT Priority	2016 Scope	Priority Lead	Significant Milestones in 2016	
1. Develop a Chapter Leadership Assessment Model	Develop a chapter leadership assessment model that will be used as a systematic method of determining strengths and weaknesses at the chapter level.	Terry Reynolds	Mar: Apr: Jul: Sep:	Target Measures Finalized Testing Begins Modifications from testing Tool Available
2. Develop Leadership Curriculum	Establish a comprehensive leadership curriculum that embraces multiple methodologies and solutions under a single, branded BHS/HU umbrella for consistency and clear expected outcomes. This will become an ongoing yearly activity for the Leadership OPT.	Rob Macdonald	Feb: Apr: May: Jul: Sep: Dec:	Begin leaders template development Leaders template v1.0 finalized Bring "first five" courses into template Complete "first five" courses in template Traditional materials published for 2017 schools Additional curriculum brought into template
3. Develop Leadership Facilitators (SMEs)	Identify and train leadership facilitators for the consistent delivery of #2 above. Under consideration is modelling this after the judge certification process where facilitators go through training, become certified, and go through a recertification process on a regular basis.	Steve Denino	Jan: Mar: Jul:	Call for first class of facilitators First class of facilitators identified and invitations sent First class trained and certified at Forum and HU on "first five" courses
4. Develop a Chapter Assistance Solution	Create a method for responding to chapters who ask for help. This may include assignment of a mentor from the leadership facilitators (#3), use of the assessment model (#1) and appropriate curriculum (#2).	Greg Caetano	Jan: Mar: Jun:	Identify requirements Select tracking and feedback solution, begin customization if needed Begin using tracking and feedback solution
5. Develop Relationships with Related Organizations	Establish a working relationship with related affiliations and external entities that serve the barbershop community. This will serve as an opportunity to share and compare ideas from multiple sources.	Duane Gunn		
6. Develop a District Assistance Solution	Create a method for responding to districts who ask for help. This may include assignment of a mentor from the leadership specialist team and assistance with planning for local leadership schools.	Steve Wyszomierski	Jan: Aug:	Establish method for requesting assistance Begin assignment of certified facilitators to district schools

Barbershop Harmony Society
2015 Chapter “Gut Check Survey
Summary Results
January 16, 2016

(234 Responses)

Q1 Impact: Based on what you know about all of the Society's programs, how much do you agree or disagree with the following statements?

Answered: 222 Skipped: 12



	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree	Total	Weighted Average
The Society is helping elevate barbershoppers' artistic and leadership skills through its educational offerings.	28.18% 62	55.00% 121	13.18% 29	3.64% 8	0.00% 0	220	4.08
The Society is helping advocate for the arts in general and the choral arts more specifically.	29.22% 64	52.51% 115	14.61% 32	3.65% 8	0.00% 0	219	4.07
The Society is helping promote the idea of lifelong singing as a key asset for individuals and communities.	30.59% 67	48.86% 107	15.98% 35	4.57% 10	0.00% 0	219	4.05
The Society is helping build a strong national or global barbershop community.	22.52% 50	60.36% 134	13.96% 31	1.80% 4	1.35% 3	222	4.01

Barbershop Harmony Society

2015 CHAPTER "GUT CHECK" SURVEY / VERBATIM RESPONSES

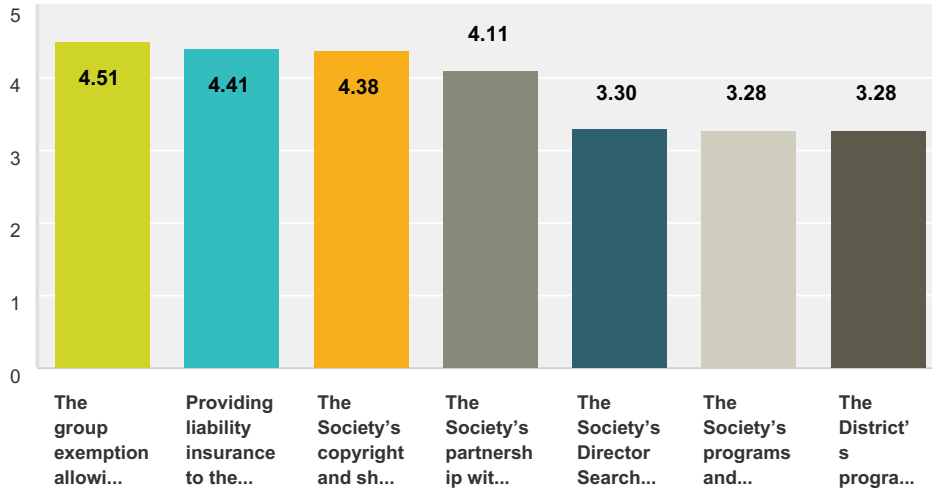
Question 1: IMPACT: Agree or disagree with these statements:

- *The Society is helping advocate for the arts in general and the choral arts more specifically.*
 - *The Society is helping build a strong national or global barbershop community.*
 - *The Society is helping elevate barbershoppers' artistic and leadership skills through its educational offerings.*
 - *The Society is helping promote the idea of lifelong singing as a key asset for individuals and communities.*
-
- After Regional Competition this past month, it will be hard for our association to put together a hard working competitive chorus for a Springtime competition. It was very very disappointing experience. When an adjudicator walks in to talk to us about our performance and the first question he asked, is if we make competition a priority and whether we compete once a year or in both yearly competitions. We do compete twice a year. We do attend special performance guidance events. We do a retreat yearly to introduce new music for competition.
 - all of the above is mostly lip service
 - As a Canadian chapter we are not see a lot of what the Society is doing in the US, however from what we read and hear all of the above seem to be items that are being addressed.
 - BHS can do at the national level what it can. Local chapters need to reach into their communities.
 - Chapter members' responses ranged from "strongly agree" to strongly disagree" on some questions
 - Hi, it is unclear to me whether you are referring to the society as a whole or to the district (Mid-Atlantic) or both together. Our district ranks as "outstanding" in my opinion for all of the above. The society itself is somewhat less visible to the rank-and-file member, although the "Harmonizer" is a good tool for that.
 - It is my opinion that contest is too important to some, and the grotesque facial contortions of contest participants does lend to having a good time on stage. If you watch the small trailer of the 1958 contest the society provided, those guys look they are having fun and enjoy what they are doing. Lets get our society back to the original idea of saving and preserving the style of singing, and make contest a gathering place for our members to have fun.
-
- Keep up the good work with youth.
 - Leadership training for me has been nonexistent
 - Most education happens at district level.
 - No consensus on above statements. Degree of agreement seems to correlate with amount of personal involvement with the district and national organizations, through conventions or Harmony U attendance.
 - Opportunities to develop artistic and leadership skills are often out of reach for smaller chapters with limited resources (both personnel and finances).
 - OUR CHAPTER IS GETTING OLD AND WE MAY NOT BE AROUND MUCH LONGER.
 - Our chorus average age is 73 years old with some members well over 80. We are done with competing and find the demands for competition to be 'over the top.' One thing that would help us is a reasonably priced source of recorded songs and parts to help us speed up our learning process. We love our hobby, but our needs and perspective is largely ignored.
 - Pittsburgh was led to believe that the Convention and the Society would leave an impact on the city, but that did not happen. You were in and now your gone. There was little done to help with our problems here. Very disappointed.
 - Representatives from the society should be making themselves available to chapters such as ours that is floundering and try to help grow these small chapters.
 - Since I'm a new president not sure of all the responsibilities. I'm eger to promote the chorus and it's actives. Our chorus is mostly older dudes only 2 younger members.
 - Society is too technical bond scaring the hell out of average I like to Sing Type of person.

- Strategy to support excellence is well conceived. The BHS does not have a strategy for encouraging choruses that fit into the "just for fun" category. They subsist in the shadows and yet probably outnumber the excellent choruses/chapters. Can we do better by them?
- The message of "the idea of LIFELONG singing" is kinda light on the Lifelong part.
- The questions limit the response, the Society is indeed "intending" to do all of these, but the success is variable. Yes we must have strong musical influence, and yes we must emphasize the "Barbershop" traditional music, but that sometimes creates a bicameral house. Those traditional BARbershoppers (usually in charge) and the "lesser" singers who, though motivates, can never hope to "achieve" to the level expected by the pureists.
- The Society has apparently moved to music educators as the agent for skill and artistic improvement. Schools presented at the Society and District level reflect this single-source approach. Perhaps there are other approaches to achieve the desired end.
- The Society has developed a lot o activities, but unfortunately, membership at the local levels still remains a challenge. The Society outreach to Choral Directors has been a significant positive.
- The Society is certainly trying, and seems to be trying harder lately to make these kinds of positive contributions. There is a difficulty for some chapters to make full use of this striving because of geography and demographics when at least some of what the Districts or HQ offer involve difficult and/or expensive travel. At the same time the chapters/ choruses should make a concerted effort to make better use what IS offered, especially where "you" are willing to come to "us"
- The Society is promoting singing, good singing, and singing communities. It seems to be promoting these things more than it is promoting, or preserving, barbershop.
- The Society needs to find ways to reach out and help support/SUSTAIN those smaller choruses that for a variety of reasons, never evolve into a competing/entertaining chorus. The trend is leaning toward individual accomplishment (a quartet, administrative position) or plain lack of interest in becoming a better singer.
- The Society should be doing more with some of our great Choruses and Quartets in increasing widespread media exposure of Barbershop Harmony as a mainstream musical art form- It would certainly make it much easier to approach singers with recruitment efforts at the local level if there was already some familiarity with how much fun it is.
- Too many people still don't realize that barbershop singing still exists.
- Very impressed with changes and evolution at the Society level. Harmony University is outstanding and improvements to the conventions as well.
- We need ALL Chapters to want to use what the Society offers.
- While we see and hear about growth in other countries, we do not see the society active in this way in our division.
- With the exception of Harmony University I feel the Society has abandoned the education of its members to the Districts, which may or may not be ready, willing or able to assist in the education of our members. I don't see the Society doing the things it needs to with the local chapters to promote lifelong singing in the local communities.

Q2 Chapter services: Based on your own chapter's experience, how much do you agree or disagree with the following statements?

Answered: 226 Skipped: 8



	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree	Total	Weighted Average
The group exemption allowing the chapter to operate as a 501(c)(3) non-profit (CRA Canadian charity) is a valuable service provided by the Society.	62.95% 141	27.23% 61	8.48% 19	0.89% 2	0.45% 1	224	4.51
Providing liability insurance to the chapters is a valuable service provided by the Society.	57.52% 130	29.65% 67	10.62% 24	0.88% 2	1.33% 3	226	4.41
The Society's copyright and show clearance services are valuable to the chapter.	50.45% 113	37.95% 85	10.71% 24	0.89% 2	0.00% 0	224	4.38
The Society's partnership with Harmony Foundation which returns a portion of donors' gifts to the chapter, is valuable to the chapter.	37.05% 83	41.07% 92	18.75% 42	2.23% 5	0.89% 2	224	4.11
The Society's Director Search service is valuable to the chapter.	12.56% 28	17.94% 40	59.19% 132	8.07% 18	2.24% 5	223	3.30
The Society's programs and efforts are helping our own efforts to build a strong local chapter.	8.04% 18	35.71% 80	35.27% 79	18.30% 41	2.68% 6	224	3.28
The District's programs and efforts are helping our own efforts to build a strong local chapter.	8.48% 19	36.16% 81	34.82% 78	16.07% 36	4.46% 10	224	3.28

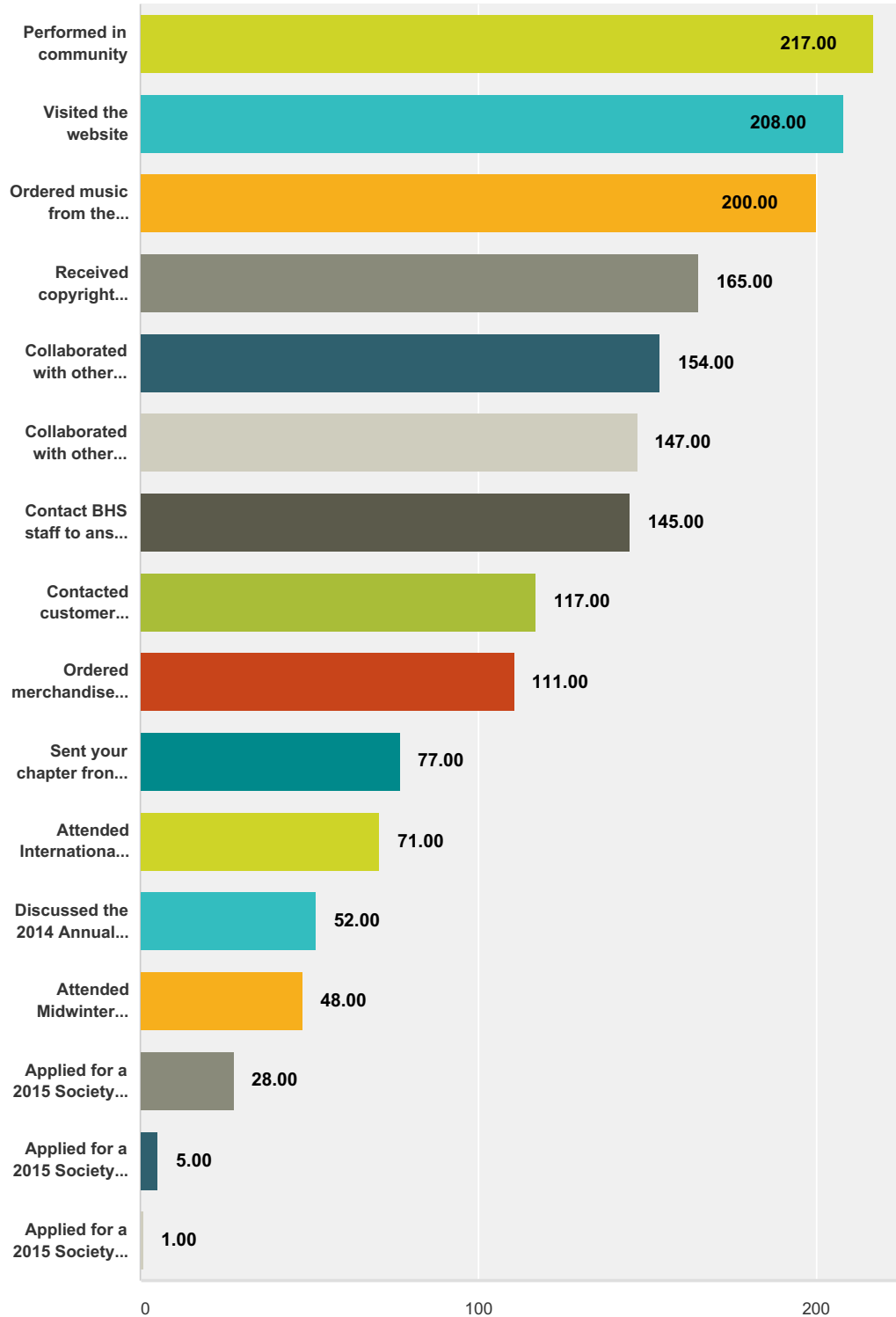
Question 2: CHAPTER SERVICES: Agree or disagree with these statements:

- *Providing liability insurance to the chapters is a valuable service provided by the Society.*
 - *The District's programs and efforts are helping our own efforts to build a strong local chapter.*
 - *The group exemption allowing the chapter to operate as a 501(c)(3) non-profit (CRA Canadian charity) is a valuable service provided by the Society.*
 - *The Society's copyright and show clearance services are valuable to the chapter.*
 - *The Society's Director Search service is valuable to the chapter.*
 - *The Society's partnership with Harmony Foundation which returns a portion of donors' gifts to the chapter, is valuable to the chapter.*
 - *The Society's programs and efforts are helping our own efforts to build a strong local chapter.*
-
- A challenge we face in the rust belt is a decreasing population that has increasing demands on its time. Our efforts to gain new members have met with very limited success.
 - Again the local Chapter needs to use them.
 - Although the liability insurance is important, the new fees and process are causing a real problem for us...this needs looked at.
 - Any and all advertising, public performances, etc., that work toward educating the public on barbershop music is a proactive venture.
 - As a Canadian chapter, we do not benefit from most of these services.
 - As a chapter, there is still a good disconnect between Society and District. I think the District needs to rethink what they are. Currently I think they are acting too much like a "mini-Society". There is no contact from the Society to the District on a weekly level. I know there was a new position created. Hopefully that will help.
 - As always, the hard part is pushing the rope. Programs are available and awesome, but difficult to make happen in smaller choruses.
 - As noted above, I think the society has abandoned its education roll to the Chapters, and the Districts are not as well suited to provide those functions to the local chapters.
 - Aside from any hidden benefits that we are unaware of, we don't see any direct program help for our chapter to grow or even survive.
 - District dues go to the big performing choruses and remote and smaller choruses like those in Montana get very little in return.
 - District has little or no impact on our chapter
 - Haven't seen our CC in years.
 - If it wasn't for the direct support of the Evergreen district, our chapter would probably have folded. They helped us with consultation and mentoring when numbers were faltering and we lost our director. Also our members don't have the time or technical skills to maintain the web sites or do the paperwork involved in protecting themselves against liability issues. If our treasurer ever retires I am not sure what we will do. It's a complicated job. The coaching services have also been very valuable to our chapter. Whatever problems there may be in the national organizational structure as a whole, the society appears to have its eye on the ball when it comes to supporting its member chapters.
 - Illinois District Leadership programs are good.
 - In Canada, Sing Canada is our support. This should be acknowledged more by Society!
 - Insurance approval process through BHS office is extremely slow and a source of frustration to our Chapter Treasurer
 - Insurance is good, but no one can get us the full policy and explain what the coverage is
 - It remains to be seen if we will be able to develop a strong chapter or if we will just fade away
 - It would be nice to know exactly what it is that BHS's copyright and show clearance service involves: What headaches is it saving our chapter? Regarding programs, our geographic distance means we don't take as much advantage as we perhaps should, or are able.
 - need help but cannot seem to connect

- Need more information on insurance coverages in general. What nullifies insurance, understanding of insurance needs if someone not a barbershopper appears on your shows
- no outreach
- Our Chapter is paying for Insurance that we don't need. I have persued this issue with the staff and was referred to the Insurance Company. As I was told and understand, the insurance if to cover liability if we have a show or other performance we sponsor. We only perform for customers who hire us or perform for no fee. As it is we are actually working for the one who hired us and they are liable for the audiance for insurance purposes. I further understand that we pay on the basis of our Membership Roster regardless of wether they participate in the Chapter or not. I cannot get the answers in need to report to our Board.
- Our chapter is probably not taking full advantage of the available resources.
- Our chorus is getting little to no support from either our District or National officers
- Our district board is terrible, unimagnative, and generally self-serving.
- Small chapters dont get much attention at the district level. Help is out there but you have to go out of your way to get it and are on your own to figure out whats available. My chapter has benefitted but these benefits didn't start until after i developed my network of associations. District could be better at chapter outreach.
- Smaller, weaker chapters might benefit from more hands on direct help.
- The Director started this Chapter. The BHS kit is all we have seen from Nashville.
- The District Does What?
- The last 2 Q's are the same, though I answered them differently. The Director search has proved less than helpful for a small chapter with limited funds, we search on. Some of your Nationwide programs are of some value but most miss the mark for a small local group who are trying to reassert ourselves to encourage new, younger, singer... by younger I mean everyone below 68.
- There has been obvious improvement in District and Foundation services over the past three years.
- There seems to be little direct support for building membership. What seems to be needed is practical, "how to" guidance for chapters.
- Very little interaction with either the Society or District.
- We are new and have not used the programs to their fullest but have taken out the insurance
- We have begun to explore MAD resources for a director search, which we are just beginning. MAD leadership have been very helpful and responsive in this. Have had no experience yet with Society's contribution in this area.
- We see much larger cities making great strides in building their chapters but those of us in smaller communities with access to less local talent have more difficulty doing this.
- We would encourage more information about building a strong local chapter.
- when you are not a money producing chapter, both society and district expenses are driving us bankrupt.
- With respect to "helping our own efforts to build a strong local chapter" the intent and encouragement is strong but the he;p for our struggling chapter, with membership at the barely critical mass level, haven't proved helpful.

Q3 In 2015, what activities did your chapter participate in? Check off all applicable options.

Answered: 226 Skipped: 8



Answer Choices	Responses
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Chapter "Gut Check" Survey

Performed in community	96.02%	217
Visited the website	92.04%	208
Ordered music from the Marketplace	88.50%	200
Received copyright clearances for songs	73.01%	165
Collaborated with other chapters	68.14%	154
Collaborated with other community arts organizations	65.04%	147
Contact BHS staff to answer questions	64.16%	145
Contacted customer service center	51.77%	117
Ordered merchandise from the Marketplace	49.12%	111
Sent your chapter front line director or musical leadership to Harmony University	34.07%	77
Attended International Convention	31.42%	71
Discussed the 2014 Annual Report with your Board	23.01%	52
Attended Midwinter Convention	21.24%	48
Applied for a 2015 Society Direct Grant	12.39%	28
Applied for a 2015 Society Vision Grant	2.21%	5
Applied for a 2015 Society Innovation Grant	0.44%	1
Total Respondents: 226		

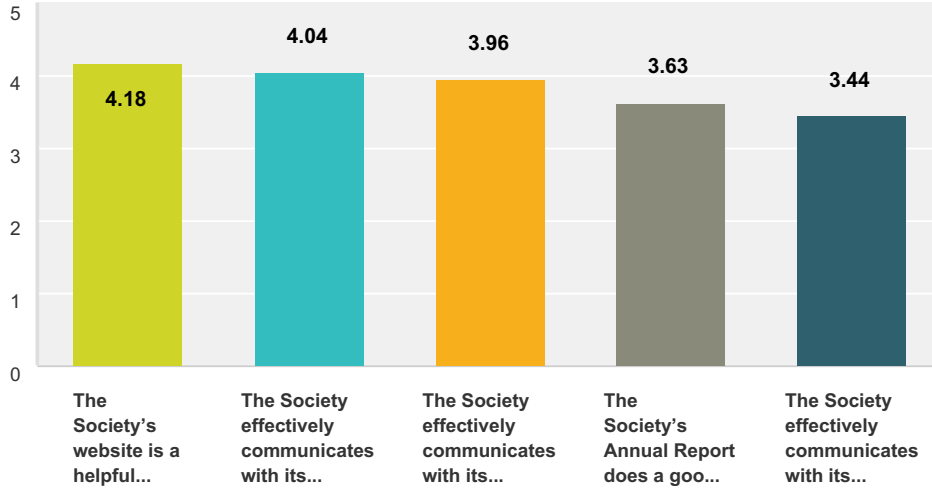
Question 3: PARTICIPATION: Participated in the following activities

- *Applied for a 2015 Society Direct Grant*
 - *Applied for a 2015 Society Innovation Grant*
 - *Applied for a 2015 Society Vision Grant*
 - *Attended International Convention*
 - *Attended Midwinter Convention*
 - *Collaborated with other chapters*
 - *Collaborated with other community arts organizations*
 - *Contact BHS staff to answer questions*
 - *Contacted customer service center*
 - *Discussed the 2014 Annual Report with your Board*
 - *Ordered merchandise from the Marketplace*
 - *Ordered music from the Marketplace*
 - *Performed in community*
 - *Received copyright clearances for songs*
 - *Sent your chapter front line director or musical leadership to Harmony University*
 - *Visited the website*
-
- Again, in Canada, Sing Canada supports us.
 - Again, no one has been able to answer our questions about the insurance coverage and liability
 - Attended international convention was by individuals, not chorus.
 - BHS Staff and Customer Service was outstanding
 - Chapter sponsors any interested member to attend MAD's Harmony College East. Director himself has not taken advantage of any educational opportunities offered by the chapter in the last 10+ years.
 - Convention attendance by individual chapter members, but not as a chapter function
 - Copyright clearance has been utilized by one of our members who is an arranger. This has been a wonderful asset.
 - Doing a great job.
 - Don Gray with contestability and other staff for membership payment issues.
 - Excellent responses from Don Rose and Amy Rose to our questions on outreach and youth workshop
 - I tried to get a Certificate or other form of recognition for William (Bill) Grumbley upon his completion of 70 years as a member of the Society. The lady doing it left her position as Secretary to the President and it was not completed. Still waiting.
 - Music was very slow to get sent out to us. It really put us behind in getting our show music in the hands of our members. It would be nice to have more learning tracks available through the society. They are a great learning tool for members and a very good tool to use in recruitment for those unsure of their music abilities.
 - One member attended convention. A few individuals visit the website and customer service center.
 - our chapter is floundering....help
 - Received conflicting answers on the same question from different individuals in customer service area.
 - Received District Grant. Attended District schools
 - Regarding Ordering Music from the Marketplace, though i left that blank I would caution that may be the wrong response..... I would have to ask the music VP and others as to exactly when and if we did that most recently. Rather than delay this questionnaire, I decided to handle this matter with a note here under "comments"
-
- Sent Chapter leaders to Leadership Academy. Sent an assisting Director to a District Training. Many in our chapter went to our JAD AppleCorp event.

- Some grants are out of our reach because we are so active in performing to keep our chapter funded. Yes we performed approximately 58 performances last year. We are a performing group and we compete as well, but lack the quality voices (based on judging assessments) to really be active in contests. We are again planning some interceptor activities, but many of our best singers have left us to join the Seneca Land Upstate Harmonizers, which now rehearses, alternately, within our region (for the convenience of NED members) and has solicited our best singers. We are like the smaller of two nearby stars, being sucked dry by their force for contest excellence.
- We could certainly be more engaged as a Chapter as well, but these activities reflect our current needs.
- We have not been aware of some of these programs, in particular the Grant programs. It may be on the website, but perhaps others (as well as us) would benefit from some promotional information/activities.
- We participated in division contest and had members attend and quartets compete at district.
- We would suggest that music searching could be improved if the society U-Tube was tied directly into the music index along with the learning track availability, particularly "Tim Tracks", so the full song could be heard to evaluate it's appropriateness for the chorus and the relevant resources available from the society.

Q4 Society Communications: How much do you agree or disagree with the following statements?

Answered: 225 Skipped: 9



	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree	Total	Weighted Average
The Society's website is a helpful resource for all things barbershop.	35.91% 79	48.18% 106	13.64% 30	2.27% 5	0.00% 0	220	4.18
The Society effectively communicates with its members through the Harmonizer.	24.44% 55	58.67% 132	13.78% 31	3.11% 7	0.00% 0	225	4.04
The Society effectively communicates with its members through the LiveWire weekly email.	25.23% 56	51.35% 114	18.47% 41	4.50% 10	0.45% 1	222	3.96
The Society's Annual Report does a good job of informing the chapters and members of its direction, priorities and programs	13.64% 30	42.73% 94	37.27% 82	5.45% 12	0.91% 2	220	3.63
The Society effectively communicates with its members through social media (Facebook, Twitter, YouTube).	13.96% 31	26.13% 58	52.70% 117	4.50% 10	2.70% 6	222	3.44

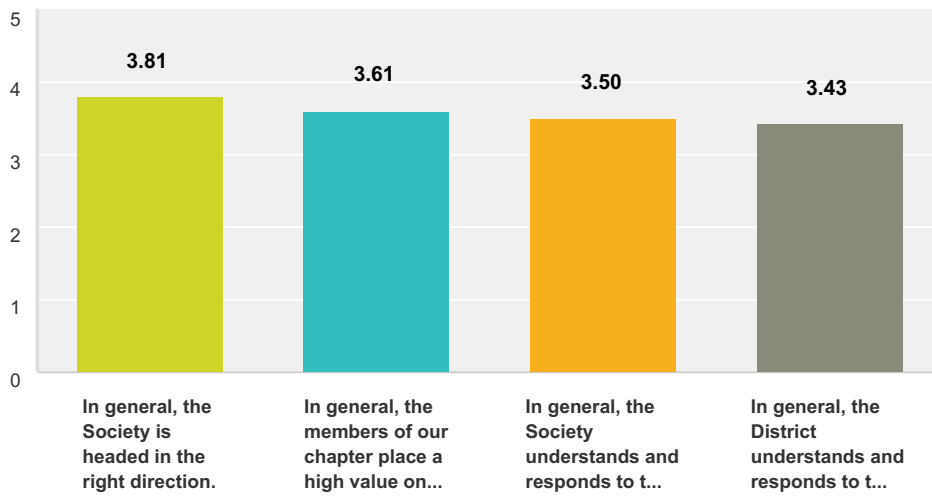
Question 4: SOCIETY COMMUNICATIONS: Agree or disagree with the following statements:

- *The Society effectively communicates with its members through social media (Facebook, Twitter, YouTube).*
 - *The Society effectively communicates with its members through the Harmonizer.*
 - *The Society effectively communicates with its members through the LiveWire weekly email.*
 - *The Society's Annual Report does a good job of informing the chapters and members of its direction, priorities and programs*
 - *The Society's website is a helpful resource for all things barbershop.*
-
- "Effectively" is a relative term/ I think the Society does these means of communication, however, it is difficult to quantify just how effective those methods are.
 - 1. "Annual Report" is a misnomer. It should be called a mission report or an activities report or something to show it is not a financial report but a report of activities. 2. Website is not user friendly. It is impossible to log out, except from home page.
 - Annual report is a bit of a marketing piece. It could include more financial data.
 - At our age, most of us are not interested in Facebook, You Tube, etc.
 - Communication is a two-way street. I think there are some members who enjoy singing but are not otherwise well informed and they seem to like it that way. For those who want to know, much information is available
 - For all these questions, you need a "no opinion" checkbox. For example, I rarely use social media, so I have no way to evaluate the society's communication through that medium. That is true for most of our board and membership too.
 - Got to read the report to make it work. Good that BHS provides the resource.
 - Great tools that can reach ALL members if they use them.
 - Huge improvements here over the past 2-3 years. Big kudos!
 - I do not use Facebook, Twitter or any other social media site
 - I do not use social media so I cannot tell if the society is doing a good job.
 - I downgraded social media only because I do not use it.
 - I find Harmony Marketplace difficult to use. I buy lots of things on-line and never have as much difficulty as I do with this site
 - I think we might do well as a society to make available to schools some of our society owned pieces as a free download (for example, part or all of the Barberpole Cat songbook). In my industry I am willing to give product away to get people to try it.
 - Info may be on web site, but at times difficult to locate.
 - Keeping us informed is a difficult issue to overcome as there is a cacophony of advertisements, emails and other things vying for our attention.
 - Live Wire is an excellent venue of communication. The videos and selected articles are great for new members especially.
 - Most members of my chapter do not subscribe to social media or LiveWire. Few members of my chapter consult the Society's web site.
 - Not all members have on line access.
 - Not many members read or discuss this report.
 - Our chapter only has three members who are involved with Facebook, Twitter, etc
 - See previous comment.
 - Some members feel communication is lacking or poor overall.
 - The Harmonizer does seem to focus on the big/competing chapters a lot.
 - The harmonizer magazine has accessibility issues for those of us using screen reading software, and the mobile app is horrible. Orders still get lost, and ordering often takes much longer than it should. That being said, worker bees at the society are very friendly, and do their best. There must be back end issues.

- The social media communications (Facebook, YouTube, etc.) borders on being overwhelming. When we get several messages a week, each message becomes less important. We are not aware of how the annual report is disseminated to membership.
- The way the website is set up is confusing and hard to navigate
- There seems to be almost nothing in any of the Society communications that is targeted toward small choruses or either choruses or quartets that are just interested in performing, NOT competing
- These are all excellent vehicles, but you have to either be conversant with the information or a faithful reader to use the information. Too many of our members do not read all of this because it lacks personal relevance to them, and, there may just be too much???. It is all I can do to get them to read our weekly newsletter The RCC TuneUP before rehearsals.
- very little dissemination
- We discussed the annual report, but it got a lukewarm reception.
- We see a lot of things that are relevant in the U.S. and even Scandinavia more so than in Canada and particularly in the smaller centres.
- What happened to livewire, I am not receiving it anymore, and I can't find it.
- What is the Society doing to promote Barbershop Singing in High Schools?
- While there are many ways of offering communications to Chapters and Members, I think a small percentage takes advantage of the offering.
- Yep - it's all there and done extremely well. I'm quite impressed, actually.

Q5 Overall, how much do you or agree or disagree with the following statements:

Answered: 224 Skipped: 10



	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree	Total	Weighted Average
In general, the Society is headed in the right direction.	19.28% 43	48.43% 108	27.80% 62	3.14% 7	1.35% 3	223	3.81
In general, the members of our chapter place a high value on Society membership.	12.50% 28	47.77% 107	29.02% 65	9.82% 22	0.89% 2	224	3.61
In general, the Society understands and responds to the needs of its chapters.	11.16% 25	45.54% 102	28.57% 64	11.61% 26	3.13% 7	224	3.50
In general, the District understands and responds to the needs of its chapters.	10.27% 23	43.75% 98	28.57% 64	13.39% 30	4.02% 9	224	3.43

Question 5: OVERALL SOCIETY EFFECTIVENESS: Agree or disagree with the following statements:

- *In general, the District understands and responds to the needs of its chapters.*
- *In general, the members of our chapter place a high value on Society membership.*
- *In general, the Society understands and responds to the needs of its chapters.*
- *In general, the Society is headed in the right direction.*

- "Needs of its chapters": Neither the Society nor my District has responded effectively to the needs of my chapter. I see very little inter-chapter cooperation, even though the smaller chapters in my area have worked to develop some joint activities. Contest performance is still the only universally-agreed-on measure of chapter and quartet quality. We are developing an elite class of performers and coaches that travel the world in direct service of the star chapters and quartets.
- Activities are visible to members, but the general public still does not seem to have a favorable opinion of Barbershop in general. There does not seem to be a particular value placed on the Barbershop art form by the general public. Results from activities seem to be lagging.
- As a Barbershopper with 55 plus years I have seen many changes. In my opinion some have been good and some not so good. However, once again it is up to the local Chapter to sort out and try those options best to fit their needs. Visitation by Staff, such as Marty Monson's visit to our District's Fall Convention helps all members to see and hear what our hobby is all about.
- As a small chapter separated from the larger population centers of the district, the personal contact and interaction necessary to assess and serve the needs of the chapter is very difficult and rarely happens.
- As a small Chapter, we have not had a visit or Contact with an area counselor in a long time??!! We have had an annual coaching session provided by the District. We do attend the Districts Chord College/ Leadership Academy and that is helpful. We do try to encourage our members to attend the Fall District Convention, but only a few of them do- perhaps because our Chorus never qualifies at the Division level to compete and competition has become a less attractive element of our Chapter life.
- As I spoke with our members, I was surprised at the degree of alienation from and indifference to the efforts of the society. Several questioned the value received for their Society dues.
- Competition has become a joke. No way can an adjudicator make an educated decision on the ability of a chorus in the format that is now in place. Suggestions: 1) Have all Tier 1, Tier 2, Tier 3 contestants perform in groups. Place those groups competing for score wherever you want them. Having a 35 to 45 member chorus perform just before a 16 to 20 member chorus is a detriment to the 16-20 member chorus when it comes to scoring. Scoring 15 choruses and trying to pick 1-15 without some way to relistening and seeing them to make a final decision is also difficult if not wrong. 2. A video is taken of each competing chorus. Use these video copies to reevaluate the competing choruses before you make your final evaluation. 3. Have your two/three top picks in each tier compete for final evaluation.
- I believe Marty's and the society's commitment to quartet singing is very important.....
- I feel that the society realizes that preserving barbershop and involving youth are equally important. I hope the continue to realize that changing or watering down the music will make us sound like everyone else and not solve our problems. Grass roots involvement with educators and young people are the only things that can ultimately see us into the future.
- I have found that BHS staff are responsive, generally (thanks, especially, to Caki!). But sometimes when it takes a while to get a response to a question, or when a new member is delayed in getting their membership cert. because more paper is being ordered, it gives the impression of being under-resourced, in staff and funding... but I'm not sure what you can do about that, if such is the case.
- I have to trust you on this. As an old guy, from a small and even older chapter, whose taste in music is older yet, and for whom traditional barbershop is heaven, I feel, rightly or wrongly, that the focus of the society is more toward musical excellence and away from guys like us. That said, we're old enough to know we have to come to terms with things like that. So, for me, it's enough to hope for a good year, next year.

- I think the Society has turned to an outward focus, being one that interacts with outside organizations more than an inward organization, interacting with the local District and Chapters. For the most part I believe the Society is heading in the right direction, but needs to focus more on the Chapters and Districts than it currently is.
- I think there is still a disconnect for the average chapter which is nothing like the top 20 choruses. Our current District Board are all good men, but they have all but stopped Chapter Visitations and they are more task focused than they are serving the District Chapters focused.
- In recent times, we see good ideas surfacing and being tried but could not agree with the sense that the society is "headed" in the right direction.
- Many in the core of our chapter are now over age 70 and they are not interested in much beyond the chapter rehearsals (fellowship) and community performances. Although the members of the Carolina Vocal Express are members (dual memberships), usually these singers do not participate in our local chapter activities, so even though the "chapter" is one of the largest in our District, the core participation is usually around 15 singers on a weekly basis.
- Many of our members are elderly and have never agreed with the society's changing its name from "Society for the Preservation and Encouragement of Barbershop Quartet Singing in America" to "Barbershop Harmony Society", although younger members seem to have no problem with the society's new name.
- Many smaller chapters are failing.
- Membership is a key issue and we are not growing as we should. There needs to be an increased emphasis upon membership and recruiting new members. We are dwindling and see nothing happening to reverse this.
- One more time, the hardest to address is the smaller, older, just holding on or slowly dieing chapter (Winona, MN is a recent example). These are the biggest challenge, yet don't appear to have much return on investment. It's hard to disagree with that.
- Our needs primary needs come down to having a director who is willing to do the job for minimal recompense on the night we are available to rehearse and recruitment of new members. We will do our best to harness some of the available resources on the former, but the bag of tricks on the latter does not seem to have the ones we need.
- Our needs, goals are not a consideration.
- Out with a lot of the older Songs and bring in more modern. Last 20 years
- Some value the Society; others have little connection with anything beyond the local chapter
- Somehow we need to get out of the old thinking mode and keep moving forward with more modern music, but in a chapter with more older members that is hard to do unless the society as a whole promotes moving in that direction. We don't want to lose the golden oldies, but we can't live there or we will not survive.
- The "right" direction is a debatable topic. Again, we (our members) are so busy with other things that most members don't keep track or want to keep track what is happening at the Society level. We likely need more interaction by the district to do that.
- The District needs to allow for the fact that Sunrise Division is so far away geographically: i.e. events such as LA and HC could be located closer, such as Portland Me.
- The majority of our chapter members agree with the direction we are going, however some felt we should stick with the "old songs" regardless of what that meant to membership. No amount of persuasion could change them.
- The Society needs to take a look at the membership dues. If we want to continue increasing our membership then the Society need to make it affordable for new , and old members a like. It is way to expensive for our members, and the Society need to do something about it.
- The Society seems to be more interested in preserving itself than in preserving barbershop, and designs and conducts programs guided by that philosophy.

- The Sunshine District Board is mainly symbolic. It provides the means to compete, period. There is no one on that board that understands the problems of our chapters. The district membership is declining and nothing is done as an example, the District VP of Chapter Development has and continues to fail. If nothing is done, the Sunshine district will disappear. Please, please get involved and dig below the surface/appearance of district programs.
- The trend toward Broadway type performances in competitions is somewhat exclusionary to the choruses in areas unlike large metropolises like Los Angeles, Atlanta, Dallas, etc.
- The Youth initiatives are fine, but, sometimes a little over done!
- This is appropriate for large , urban, chapters, and, I think, less so for smaller ones.
- Time will tell on values and direction.
- Too much empathis on competition.
- while chapter a member of BHS, feel disconnected as we do not have BHS designated contact - idea: assign BHS reps to chapters

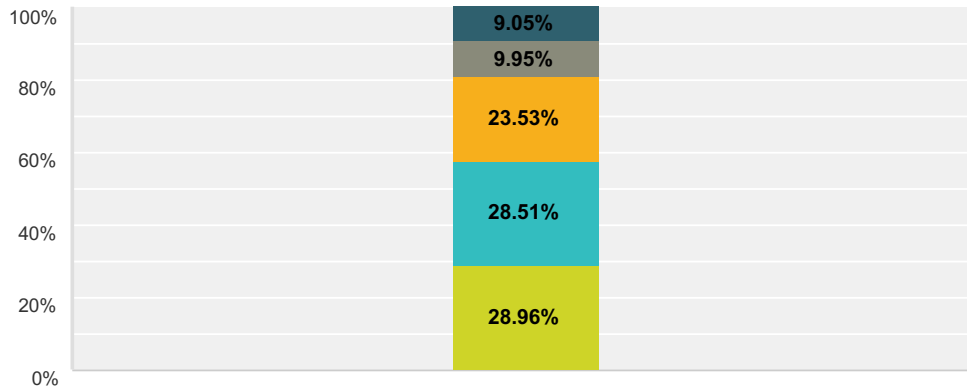
Question 6:

Chapter Classification

(Data not included due to flaw in
tabulation methodology)

Q7 How would you describe your chapter?

Answered: 221 Skipped: 13



- We are primarily a community-oriented/service chapter.
- Comments (Optional)
- We are primarily a community arts organization.
- We are primarily a competition-focused chapter.

Answer Choices	Responses	
We are primarily a community-oriented/service chapter.	28.96%	64
Comments (Optional)	28.51%	63
We are primarily a social, fellowship-based chapter.	23.53%	52
We are primarily a community arts organization.	9.95%	22
We are primarily a competition-focused chapter.	9.05%	20
Total		221

Question 7: How would you describe your chapter?

- *We are primarily a community arts organization.*
 - *We are primarily a community-oriented/service chapter.*
 - *We are primarily a competition-focused chapter.*
 - *We are primarily a social, fellowship-based chapter.*
-
- Active in the community, we do annual summer shows and Christmas shows. Christmas shows benefit participating school choirs financially.
 - Amount of dues is excessive for small chapters.
 - Community service and fellowship are very important to the chapter.
 - Early bad experiences with competition caused the chapter to stop attending conventions. In 1980 we began a focused return to competition under an excellent musical director. That period of relative success culminated in 5 consecutive small chorus awards followed by a district quartet championship for a chapter quartet. Key members moved away and the chapter has lost it's skilled singers. The decline has taken several years and each attempt to stop or reverse it have been unsuccessful. We are now a social organization that struggles to attract new members because there isn't enough support or commitment. The chapter would have surrendered it's charter a few years ago if not for the dedication of an excellent music director and a few members that refuse to give up.
 - I don't understand why you can't click more than one button here. We are a Chapter that focuses on competition twice a year (unless we have won the District which allows us to sit out two years of District contest). We also focus on fellowship and social functions making sure our members feel welcomed and enjoy their time with us. We are also actively engaged with our local community and provide services to the local school district, the Chamber of Commerce, of which we are a member, and other organizations within the local community.
 - I think I sent this in before. Our average age is well over 70. We are done competing, even in golf. Most of the articles we receive are not relevant to us. We need to get more members, ways that help us learn music that do not cost an foot and a leg, We would prefer to share, not compete. this is a hobby for us and is not all consuming. Our priorities have changed and some of us are just happy to be singing at all.
 - I'd say we are primarily social, but we are trying hard to put a serious service emphasis as our motivation to sing well.
 - In actually all of the above apply to us but we are balanced in the fact that we do not extensively focus on any one of these items.
 - Not clear cut. We are committed to improving and going to contest is a way to measure that. We are also deeply involved in the Community. Both are important. While the social aspects are important, they pale beside the others
 - Obviously these categories are to rigid to be complete. The Fellowship is important to our success but our largest emphasis is the community arts and service with a lot of music education mixed in.
 - Our chapter began a decline back in the sisties, and we have not been able to turn it around because of the lack of interest on the members part and too much emphasis on contest and singing one o9r twso songs all evening and the thought that the Masters of Harmony are God like.
 - Our chapter has been going in the wrong direction. Membership is down over the past 2 yrs. last show 6/4/14. Not gone to contest in 3 yrs. not sung in community in 3 yrs. We are looking for a new director & are going back to what Barbershop singing is suppose to be.
 - Our chapter has two choruses, one more community/service and the other primarily competition. Many members sing in both. The first meets weekly and is smaller. The second meets biweekly and is larger. Performances may or may not include both choruses.

- Our chapter is a music-based organization. We like to sing well, but we value the social and fellowship aspect of our chapter. We also compete routinely and have an active calendar of singing in and for the community. It is difficult to put our chapter into one of the four "boxes" provided.
- Our chapter is more complex than can be described with one phrase: We have a social, fellowship, "club" aspect. We also have strong community- oriented focus. At the very center of our chapter is the love for men' BBSshop harmony.
- Our Chapter is really all of the above without having a singular purpose. By definition we are a social, fellowship-based, community-oriented/service arts organization that focuses on competition to confirm that we are ever improving. Our Vision Statement, "Harbourtown Sound will be a continuously improving chorus, bringing high quality a cappella music and performance to the greater Hamilton community".
- Our chapter is struggling. Membership attrition slightly exceeds recruitment. Attendance is down at our shows. Performance quality has declined. Members are mostly older than 70 and some are discouraged and/or complacent. Only 3 members under 50, so It's hard to recruit young people. Next nearest chapter is over 100 miles away and many members feel isolated and out of touch with the movers and shakers. Some of our members enjoy going to see the Ambassadors of Harmony but the contrast with our own chapter is stark.
- Our chapter is VERY active singing at a variety of community events and I believe our members value the fellowship we share.
- Primarily interested in learning to sing as a chorus better but also interested in community service
- Right now just a few guys getting together, nothing organized just to keep our charter. we need help
- The average age of our chapter is 74 years old. We hold our weekly meetings in the afternoon as many of our members are unable to drive at night. this makes recruiting difficult to get younger members (55-65) to join as many at that age still work. We put on an annual show and do what we can with what we've got. The annual show is the main source of our income.
- The best program I ever spearheaded as combining Maumee Valley and State Line. We made money on our 50s show and are having a ball
- This chapter has aged and I have taken over in hopes of doing an extreme makeover to keep the chapter alive. Despite the troubles, I don't see anything that the Society or District could have done much differently. In the end, it was Chapter leadership that has brought us to this point, with the exception of the fact that the members were stuck in a competition paradigm, and didn't see any other way to behave when it was clear they couldn't play in that game any longer.
- This question does not allow me to check one of the boxes AND to write comments, so I've chosen to write comments. Our chapter performs in the community 20-25 times per year. We currently have 3 registered quartets. We produce an annual show for which we sell about 350 tickets. Most members value adjudication for the purpose of improving our quality. We have not attended adjudication the last few years because of discontent with the director, and (last year) because of the distance (5 hours). We have asked our 40-year director to step aside over the next year, and are actively seeking a new director.
- Three fourths of Members are retiree Snowbirds (USA /Canadian). Many have allegiances to home chapters and full participation is limited to about 6 months. Our group is primarily focused on having fun.
- Trying to move into a community-oriented/competitive chapter without losing the fellowship.
- We are a combination of these choices. We are a community arts organization that is trying to improve and likes to compete. We support our district, and are hosting the division contest next year. We are hanging in there and trying to grow and raise our standards in a very difficult environment, and we will attend harmony university as a chapter next year.
- We are a growing chorus that has gone through a lot of change. We had 18 active members in July and with a refocus of the MLT and a new director the energy and enjoyment has increased a lot. We do a lot of community and service oriented performances and are now considering a second audition level for District Contests. We have 5 active guests at this time and all have indicated they will be doing their final auditions in December and hope to have 40 on the risers for Division Contest. This is something we have not done in over 10 years.

- We are a mix of social, fellow-ship-oriented and performance in community-oriented guys. Some of us want to compete, but our growth/renewal process, under way, needs to go further first.
- We are a old chapter (Member ages) and are in a economically depressed area of Michigan, so we are having trouble recruiting and keeping new members . . .
- We are a performing chorus in our local area that competes for the coaching and tips that make us better singers.
- We are a social chapter with a focus on the community and performing to a higher level of standard
- We are a strong fellowship chapter with a high commitment to community service!
- We are competition AND community-arts focused
- We are dying so fast that we have moved from a competition chorus to a performance chorus to a social gathering to a waste of gas and time all in one year
- We are dying. I can sometimes only get 8 guys to practice. Many old members don't (can't) come. A great pity because Salisbury was a thriving chapter. I get no help within the chapter.
- We are mostly here for the music. All else is important, though secondary.
- We are now producing an annual show and attending competitions and looking forward to both every year. This is a recent development. For several years neither were possible
- We are seriously worried about our aging membership and our failure to attract younger and newer members. We are a community oriented service chapter whose fraternalism is diminishing.
- We are social and competitors
- We compete every Spring and most Falls.
- We compete regularly, but have never done what's needed to excell at the highest level (world-class director, contest auditions, financial commitments).
- We compete, sing valentines, perform in local retirement communities, perform with local park band annually, perform annually in park with visiting (by invitation) chapters, perform in local events during Christmas holiday season.
- We consider our chapter to be a blend of most of the above: social = 30%, community oriented = 25%, competition focused = 10%, community arts = 35%. (approximate)
- We consistently perform in more than 100 venues yearly. Thanks for mention in the Harmonizer. Jack Teuber President Pontiac-Waterford Big chief chorus
- We do all of the above. We have members who do not care to compete and sing in our money making activities ie. sing valentines, singout, plays etc.) Some just enjoy a beer and a song. We have members who go through the rigors of preparing for competition. (memorizing music, singing in quartets, listening to past judges, going to training sessions, working long hours on their music)
- We do compete, but our empatis is on entertaining our local audience.
- We do participate in competitions but it is not priority#1
- We expect to eventually become a more competitively focused chapter
- We had a lot of good community singing opportunities this year.
- We have discussed this fairly recently in our chorus. We are a mix of all but we are primarily divided between a fellowship based chapter and a competition based chapter.
- We hired a new director in December 2014. We are placing a new emphasis on musical excellence and being a competitive chorus. While the fellowship/social element will always be important, we are focusing on recruiting new members who are committed to improvement and developing a professional stage presence. A new music learning process has been introduced which is showing results and we have relocated our rehearsal venue to a more convenient and central location.
- We perform a show and singing Valentines as fund raisers, then perform for anyone who desires our services throughout the year. I members enjoy the fellowship we get from singing together and generally do not put a priority on competing. We do seek to be better performers, and do enjoy performing for fun and/or charity.

- We put on a Annual Show.... poorly... poor attendance. Most of chapter has minimal interest in it - believe the day of the Barbershop is past - public has little interest in it - we cannot stage an interesting and entertaining show to compete with the local chorale - TV.... other competition for entertainment. etc. Average age of members is 70+. Difficult to attract younger - better singers. Within months... will lose 6 more members - delinquent now. Expense to sustain chapter is more than we can raise most of the time and have been deficit spending for many years. Now: \$ in...\$ out. To survive we have lived off Singing Valentines and a program I devised - Christmas Singers - mini chorus/quartets marketed to Assisted Living Centers. Next year: no one to run/organize Valentines or C. Singers or the Annual Show. Could only find 3 that would agree to be Officers. Others declined or otherwise not capable. Young and talented Director -with choral/voice degree - pay him \$4,000/yr plus dues. He has repeatedly declined to attend HU- seems to feel that HU could not teach him anything. New , young Asst. MD....college student.... got him a HU scholarship and chapter scraped up (personal donations) a plane ticket for him. He's on fire for BBS... now also in Denver SOR as well: Asst. Section Leader there.....over committed...in a comp. qt....accepted a time consuming job from RMD.....headed for burnout. Chapter may not be able to make the budget this year unless someone really takes hold of SV's - 2015 = \$1900..... Christmas Singers 2015 = \$1100. Not much hope of making significant \$\$ on a Spring Show : 2015= \$900 which included some personal donations and some personal absorbing of expense - so basically - few plus \$\$ net for 6 months of pounding on show music. Not much personal return out of that to put on a minimal, if not embarrassing performance, to mostly our friends and family who could not find a way to say no to tickets. (Or...we bought them ourselves) 2016 Pres. very reluctantly accepted only because no one else would. He and I have each been Pres. at least 5 times over the past 30 years and we agree that 2016 is the ' make or break' year for this chapter. Will enter 2016 with enough \$ to make it to late spring without some infusion of \$\$\$. In past years there has been significant and anonymous personal contributions to keep the chapter afloat. Doubt that will happen again. There is increasing ' rumbling and grumbling' about remaining a chapter of BHS.
- We seek community events to perform at
- We sing out at a average of 15-20 a year this year have already sang 137 song in front of audiences this year. Have at least on active quartet who has sang at least twice a month and one or two more in the works this year. I think as a society needs to help with ways to encourage to quartet.
- We struggle (as do other Chapters) with retaining and increasing membership and participation.
- We used to be a competition-based chapter, but declining numbers prevent that.
- We wish to be a chapter that strives to continually improve our singing in an atmosphere that is conducive to good fellowship. Communityservice is also important to us.
- We work to have a balance between social/fellowship and community arts organization striving to perform well but to maintain a good social fabric.
- We're focused on our annual show and spring competition.

Question 8:

Is there anything else you'd like us to know about how the Barbershop Harmony Society is performing on behalf of its chapters?

Question 8: Is there anything else you'd like us to know about how the Barbershop Harmony Society is performing on behalf of its chapters?

- After 54 years of membership I feel the BHS is on the right track with the planning & execution!
- After attending the Leadership Training, I realized we are not alone in our challenges and struggles.
- Any and all effort is greatly appreciated.
- As a chapter, we feel Society leadership is excellent, and moving in the right direction. You'll never please all the people all the time!!
- As I discussed with Marty Monson at Estes Park in Feb. of this year --- BHS should devise some way of tracking members who move into another chapter's locale.... let the local chapter know so contact can be made. We have had a few that we learn about accidentally..... or they just wander in on their own. New members are so hard to acquire - and an existing and experienced member is a treasure. We just need to know about them....somehow. ? Forwarding addresses for the Harmonizer.... updates on eBiz.... asking the former chapter to send info. on new location(if known) to BHS ??? Never track all of those who move but any would be better than we are doing now.
- basically, it's non-responsive
- Help the small chapters.
- Help! We need assistance in membership, marketing, and how to grow our chapter.
- I am only speaking for myself, not necessarily the chapter.
- I believe that the Society needs to step up and promote that Barbershop singing is alive and well and would like men to join them, Most of us are untrained voices trying to entertain
- I feel that dues for new members are a bit high, especially for younger guys. Ease them in gradually. I know that when I was a young family man in the late 70's I would not have joined at today's prices. I know incomes have changed, but so have other family costs.
- I have been a 30 year member, and it very discouraging that our District (JAD) officers does not come to our annual shows, and support our chapters. We need to get back to supporting each other.
- I must do research before asking
- I remember when all I needed (or wanted) to know was, your name and what part you sang. That somehow has changed, and not for the best.
- I think national means well but has no idea of small community challenges.
- I understand, love, and support the youth movement, but the US is about to have the largest population of men over the age of 60 than it has ever had before. There needs to be some attention addressed to handling aging chapter members and appealing to that segment of the population. It is an entirely different set of needs. Otherwise, thank you. The work is hard, and you are all making a difference.
- I'm not as negative as I may have sounded earlier. I do recognize that 'you' are succeeding in ways I do not fully appreciate. But, I applaud your goals, your, efforts, and your successes on 'my' behalf. The future, after all, is for younger generations to come, whose circumstances, tastes, and aspirations I cannot fully understand. They will 'inherit the earth', to include our beloved Barbershop hobby.
- It IS GREAT to be a barbershopper
- It would be a great moral booster if one of the Society leaders would drop in on a rehearsal night. We've had several director changes in the past three years and chorus moral is down. I think it would be the shot in the arm that we need.
- Keep offering educational opportunities and arrangements of modern music which can be performed by mid-level choruses
- Keep up the good work. Don't forget us little guys.
- Need to use the Internet more effectively.
- Needs to be more cognizant of chapters that are long time community groups who want to entertain NOT compete. Get them help through advertising and promotional products and staff visits. If you continue to focus on competition, you will not have a society in a very short time.

- No, I think you have put together a number of very effective vehicles for communication... very easy to keep apprised or get caught up on what BHS is doing. Thank you for all that you do.
- No.
- Nope
- Not at this time
- Structure is great. I still believe it would be great if the Society would hire the new international champs for a year to do nothing but cross the country singing and promoting our hobby. My dues money would be better spent doing this than anything else!
- Support for youth is necessary to insure the future of this wonderful hobby. Please remember that the music that attracts youth is difficult to sing and is not ear singing as old members fell and love with.
- Thanks for the new polcat books and music. They have infused energy, and given all of us more music to learn at a very low cost. They have really added some excitement this year. Thanks for continuing to focus on inclusion and adding diversity to barbershop. Thanks for encouraging people with all types of disabilities to step forward and participate, and for keeping the music standards high, and for continuing to produce challenging materials at an affordable cost. Even more emphasis may need to be put on reaching out to other ethnic groups in the future, and helping us to get women involved in our chapters. Thanks for supporting your members, districts, and chapters. The network of conventions, contests, and educational opportunities like singing camps are doing their job of getting folks excited about participating in the society and preserving our legacy for future generations.
- The amount of service provided to the chapters is not communicated well in regard to the volume of work being performed by so few personnel. Too many of our members do not take note that with thousands of guys out there, wanting to have their needs and concerns met at the drop of a hat, don't know how few staff are available to do the work that quickly. From my perspective they do a super job, but, it is not well known. Without being seen as blowing their own horn, there should be some way to show how much they do.
- The BHS market provides the most resources to our chapter We have had a lot of singing opportunities this year and are growing again.
- The most important thing for us would be to find a way to recruit young people. It might also help if there were a women's chorus in the area. There is a lot of interest in music in this region and Carbondale has a vibrant music scene but we haven't been able to tap into it.
- The smaller chapters are being forgotten, and pretty much left to fend for themselves. Especially those chapters such as ours that are off the beaten path.
- The society could do a much better job promoting our society to the general public to reduce or eliminate the stereotype of this great singing hobby. We tend to attract old retired men instead of a variety of ages and I would like to see our median age reduced by at least 10 years. The society should try (through PR and advertising) to change our image of being just an old men's singing club. Perhaps create two sub-societies, 55 and under and over 55, would interest more men.
- The Society needs to take MUCH more involvement with small Chapters like ours that are rapidly disappearing across the country- some that are ageing out , having trouble finding Music Directors, or surviving financially. Affording Quality Guest Quartets for your Annual Show that you rely on for your financial stability has become a major hurdle.
- There's only so much that Society leadership can do and you're doing it well. There just seems to be something - maybe generational change - that is taking away from the enthusiasm for our hobby.
- Videos that can help small chapters on the day to day operation of a chapter. What is required. What resources are available. Multimedia is a huge part of running a chapter. Keeping mailing lists. Websites. Etc
- We appreciate the Customer service depts efforts to be responsive
- We are a small , aging group struggling to stay alive
- We are about to fold. We have had very little contact from the society or district level.

- We are also hosting the Evergreen Division One Conest in 2016 , calling it Celebrating the Journey, which has been my catch phrase since becoming President and now Director, and will be including a non-sanctioned mixed chorus and quartet contest in conjunction with the the regular contest. We have two organized choruses with a third just starting to form in our Divisioin and feel now is the time to include them under the Division One umbrella...thereby celebrating everyones journey.
- We believe that International should be doing nationwide marketing about the hobby. It would position the hobby as a major activity and it would help each chapter by increasing general awareness with the public. This, in conjunction with local chapter activity, would significantly support the growth of the society. We believe 1/3 of the total budget and effort should be allocated to such marketing/promotion activity.
- We have fun singing well and working hard to get new singers. Chapter is healthy and enjoying what we do.
- We love and enjoy our hobby, but the older singer is ignored.
- We must continue to find new ways to "cut through" all the other things vying for our time and attention-- impactful storytelling and service in the community is the best way to motivate chapters to continue to grow.
- We need the BHS's help in finding a way to provide dues subsidies for impoverished members.
- We respect the efforts of BHS international and remain committed to help our chapter at the local level.
- We think more effort can be made to include Canadian small areas, and ask that you listen to ideas and interests of Canadian chapters.
- We utilize society coaches 3-4 times per year, and they are all excellent.
- Yes! What can I do to help you to upgrade the District Competition. We put in a lot of work and time to prepare for competition only to have our abilities nullified by a poorly run District organization. Cut out some of the poorly attended aspects of the program and lengthen the chorus competition. See below.
- Your guidance keeps our Board of Directors on track throughout the year.

February 2, 2016

To: Rich Hansen, Illinois District President
Board of Directors Illinois District
Members of the House of Delegates

From: Terry Ludwig and Tim Pashon, Co-VP Music and Performance

Gentlemen,

With our new “Spring Jamboree” on the horizon we have been busy putting together classes and coaches for the event. Although IDAH is no longer, this new event will have many of the same aspects. Here is what we have planned:

Classes

Basic Arranging – Eric Ruthenburg
Advanced Arranging- Eric Ruthenburg
Care of the Senior Voice- Jim DeBusman
Social Media and the Internet- Kevin McClelland and Linda Gross
Vocal Production- Jim DeBusman
Vocal Production- TBA
Directing Techniques- Ben Harding
Show and Presentation ideas- Mike Leitke

Coaches

Members of Boardwalk, members of Four Bettys, John Davis, Oliver Merrill, Mark Keever, Jeremy Conover, Raymond Schwarzkopf and Mike Leitke.

We will only be able to take 12 quartets and 4 choruses. At this time all of the chorus spots are full.

Respectfully Submitted,

Terry Ludwig
Tim Pashon

Chapt_ID Membership Report, IL District, 2016 Spring

Chapt_ID			Members at end of 2013	Members on 2/15	Members on 2/16	Overdue 2/2016	Increase over 2015
9274	E000 Frank Thorne - E	Illinois District	39	37	35	5	-2
7864	E002 Arlington Heights	Arlingtones	39	34	35	0	1
7865	E003 Aurora	Lamplighters Chorus	22	15	13	0	-2
7867	E005 Belleville	Sounds of Harmony	42	37	37	3	0
7869	E007 Bloomington	Sound of Illinois	116	115	118	3	3
7870	E008 Macomb	Prairieland Barbershop Chorus	19	17	14	2	-3
7871	E009 Northbrook	New Tradition	111	101	89	9	-12
*7872	E010 Champaign Urbana	Illini Statesmen	8	10	10	1	0
*7874	E012 Chicago No 1	First In Illinois	4	2	2	0	0
7875	E013 Danville	Danville Barbershop Chorus	21	19	21	1	2
7876	E014 Decatur	Decatur Chordsmen	19	21	21	4	0
*7878	E016 Collinsville	Mississippi Valley Chorus	13	11	8	1	-3
7879	E017 Coles County	Coles County Barbershop Chorus	45	38	33	1	-5
7880	E018 Elgin	Fox Valley Men of Harmony	33	30	38	4	8
9338	E019 Rockford Metro	Second City Chorus	29	25	23	3	-2
9368	E021 Lake County	Brotherhood of Harmony Chorus	30	27	27	1	0
*7883	E024 Bureau County	Covered Bridge Chorus	12	10	10	1	0
*7886	E029 Quincy	Great River Barbershop Chorus	6	3	2	0	-1
7887	E030 Chicagoland West Suburban	West Towns Chorus	91	81	88	5	7
7892	E044 Peoria	Peoria Barbershop Chorus	29	25	25	0	0
7893	E045 Chicago Metro	Chicago Metro Chorus	24	24	22	1	-2
7894	E047 Rockford	Greater Rockford Barbershop	35	38	41	4	3
7895	E048 Rock Island	Bend of the River Chorus	20	21	18	0	-3
7896	E050 Will-Cook	Knights of Harmony Chorus,Will-	45	38	42	1	4
7897	E052 Sterling Rock Falls	Rock River Valley Chorus	53	45	38	3	-7
7898	E054 Waterloo	Kaskaskia Trail Chorus	22	19	21	0	2
7901	E061 Springfield	Land of Lincoln Chorus	47	46	43	2	-3
7902	E066 DuPage Valley	Chorus of Dupage	55	59	60	3	1
*7903	E067 Kishwaukee Valley	Kish-Wau-Keys	10	9	9	0	0
*7905	E073 Sandoval	Okaw Valley	4	3	2	0	-1
295851	E075 Carbondale	The Little Egypt Chorus	28	25	25	0	0
312393	E077 Kankakee	Spirit of Illinois	15	12	11	2	-1
TOTALS			1086	997	981	60	-16

* As was the case a year ago, there are seven chapters with fewer than 12 members. BHS has the criterion that no chapter should persist below 8 members for any length of time. If a chapter's membership were to go below 8 and that circumstance would persist for 12 months after being so noted in HOD minutes, it could be established as a district policy that the Secretary would place an agenda item for the next upcoming HOD meeting to consider revocation of the charter of any or all such chapters that have persisted in having fewer than 8 members (not counting those whose dues might be overdue) at the time the matter would come up for consideration at an HOD meeting 12 or more months later. Chicago Number 1, Quincy and Sandoval chapters presently and persistently had fewer than eight members for more than a year. Unless there is one or more special circumstance to be noted to belay consideration of revocation, the HOD would vote whether or not to make such revocation(s) at that time. The membership VP will make an assessment yearly for potential revocation(s) to be considered and so advise the District Board. Sing-cerely, Hugo Feugen, DVPM



February 2, 2016

To: Rich Hansen, Illinois District President
Board of Directors Illinois District
Members of the House of Delegates

From: Terry Ludwig and Tim Pashon, Co-VP Music and Performance

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We will only be able to take 12 quartets and 4 choruses. At this time all of the chorus spots are full.

Respectfully Submitted,

Terry Ludwig
Tim Pashon

7:45 PM
01/12/15
Cash Basis

IL District Association of Chapters, SPEBSQSA
Balance Sheet
As of December 31, 2014

	Dec 31, 14
ASSETS	
Current Assets	
Checking/Savings	
1010 Checking Account	42,039.21
Total Checking/Savings	42,039.21
Other Current Assets	
1310 Convention Funding Advance	500.00
1320 Pre-Purchased Awards	486.00
Total Other Current Assets	986.00
Total Current Assets	43,025.21
TOTAL ASSETS	43,025.21
LIABILITIES & EQUITY	
Equity	
3000 Unrestricted Funds	
3010 Operating Fund	23,467.07
Total 3000 Unrestricted Funds	23,467.07
3100 Temp. Restricted Funds	
3120 IDAH	6,099.07
Total 3100 Temp. Restricted Funds	6,099.07
3200 Permanent Restricted Funds	
3210 Grants & Contributions	
IDAH	
Scholarships	233.00
IDAH - Other	3,426.00
Total IDAH	3,659.00
YIH	3,943.00
Total 3210 Grants & Contributions	7,602.00
3220 Riser Accrual Account	1,810.04
Total 3200 Permanent Restricted Funds	9,412.04
Net Income	4,047.03
Total Equity	43,025.21
TOTAL LIABILITIES & EQUITY	43,025.21

7:44 PM
 01/12/15
 Cash Basis

IL District Association of Chapters, SPEBSQSA
Profit & Loss Budget vs. Actual
 January through December 2014

	Jan - Dec 14	Budget
Ordinary Income/Expense		
Income		
5100 Event Income		
Hotel Rebates/Comp Room Credits	1,984.00	
Mail Registrations	2,915.00	
Misc - Vendors & Program Ads	625.00	
On Line Registrations	8,420.00	
On Site Registrations	3,020.00	
On Site Single Tickets	3,020.00	
Ticket/Registration Refunds	-75.00	
5100 Event Income - Other	12,032.13	
	<hr/>	<hr/>
Total 5100 Event Income	31,941.13	36,500.00
5210 District Dues (less 4%)	22,859.12	26,000.00
5310 Interest Income	19.24	5.00
5490 Miscellaneous Revenue		
5491 Merchandise		
IL District Pins	55.00	300.00
	<hr/>	<hr/>
Total 5491 Merchandise	55.00	300.00
5490 Miscellaneous Revenue - Other	483.22	0.00
	<hr/>	<hr/>
Total 5490 Miscellaneous Revenue	538.22	300.00
5800 Special Events Revenue		
5810 Non-gift revenue		
CDWI	0.00	1,000.00
COTS/ CSLT	0.00	1,500.00
IDAH	13,257.26	8,000.00
	<hr/>	<hr/>
Total 5810 Non-gift revenue	13,257.26	10,500.00
	<hr/>	<hr/>
Total 5800 Special Events Revenue	13,257.26	10,500.00
5999 Unclassified Income	20.00	400.00
	<hr/>	<hr/>
Total Income	68,634.97	73,705.00
	<hr/>	<hr/>
Gross Profit	68,634.97	73,705.00
	<hr/>	<hr/>
Expense		
7030 Support		
C&J Candidate Support	0.00	500.00
Chorus Support	3,000.00	3,000.00
Quartet Support	1,428.00	2,400.00
	<hr/>	<hr/>
Total 7030 Support	4,428.00	5,900.00
7500 Contract Services Expenses		
7510 Chapter Convention Stipend	750.00	
7540 Judging Expense	11,773.49	14,000.00
7550 Temp Help - Contract	1,202.96	1,500.00
7560 Ticket Processing Fees	1,451.09	
	<hr/>	<hr/>
Total 7500 Contract Services Expenses	15,177.54	15,500.00
8100 Nonpersonnel expenses		
8110 Supplies	462.95	0.00
8120 Awards, Plaques & Pins	1,164.79	1,400.00
8130 Int'l Chorus/Quartet Buttn	0.00	500.00
8140 Postage & Shipping	20.75	60.00
8170 Printing & Copying	1,258.56	190.00
8180 Historian	861.81	1,600.00
8190 Publishing	0.00	800.00
	<hr/>	<hr/>
Total 8100 Nonpersonnel expenses	3,768.86	4,550.00
8200 Facility & Equipment Exp		
8210 Rent, parking, & other	8,646.09	9,000.00
8260 Equipment Rental & Maint	4,114.47	1,000.00
	<hr/>	<hr/>
Total 8200 Facility & Equipment Exp	12,760.56	10,000.00

7:44 PM
 01/12/15
 Cash Basis

IL District Association of Chapters, SPEBSQSA
Profit & Loss Budget vs. Actual
 January through December 2014

	Jan - Dec 14	Budget
8300 Travel & Meetings Expenses		
8310 Travel	97.20	
8320 Board Meet. & Conventions		
BOD Meetings	545.48	800.00
EVP Meetings	1,055.71	2,400.00
President Meetings	3,219.25	2,800.00
VP C&J Meetings	202.68	1,400.00
8320 Board Meet. & Conventions - Other	3,432.92	1,500.00
Total 8320 Board Meet. & Conventions	8,456.04	8,900.00
8330 Hospitality	681.06	
Total 8300 Travel & Meetings Expenses	9,234.30	8,900.00
8400 Education Programs		
8410 C&J Cat/Cand Schools	0.00	1,000.00
8420 CDWI	247.00	1,500.00
8430 COTS/CSLT	235.00	1,500.00
8440 IDAH	7,842.37	8,000.00
8450 Recordings of Contestants	1,842.50	3,000.00
8480 YIH Program		
Contest Prizes	300.00	1,000.00
8480 YIH Program - Other	4,500.00	4,500.00
Total 8480 YIH Program	4,800.00	5,500.00
8490 BHS Mini-Forum	2,382.64	3,000.00
Total 8400 Education Programs	17,349.51	23,500.00
8500 Other Expenses		
8505 Gov Board		
President	0.00	400.00
Treasurer	94.66	
Total 8505 Gov Board	94.66	400.00
8510 VPs & Committees		
Committee Chairs	59.92	
VP Membership	0.00	250.00
VP Mkt & PR	0.00	250.00
VP YIH	0.00	250.00
Total 8510 VPs & Committees	59.92	750.00
8550 Credit Card Fees	1,560.30	1,000.00
8590 Miscellaneous	144.29	400.00
Total 8500 Other Expenses	1,859.17	2,550.00
8600 Business Expenses		
8610 - Corporation Filing Fees	10.00	
Total 8600 Business Expenses	10.00	
Total Expense	64,587.94	70,900.00
Net Ordinary Income	4,047.03	2,805.00
Net Income	4,047.03	2,805.00

7:44 PM
 01/12/15
 Cash Basis

IL District Association of Chapters, SPEBSQSA
Profit & Loss Budget vs. Actual
 January through December 2014

	\$ Over Budget	% of Budget
Ordinary Income/Expense		
Income		
5100 Event Income		
Hotel Rebates/Comp Room Credits		
Mail Registrations		
Misc - Vendors & Program Ads		
On Line Registrations		
On Site Registrations		
On Site Single Tickets		
Ticket/Registration Refunds		
5100 Event Income - Other	-24,467.87	33.0%
Total 5100 Event Income	-4,558.87	87.5%
5210 District Dues (less 4%)	-3,140.88	87.9%
5310 Interest Income	14.24	384.8%
5490 Miscellaneous Revenue		
5491 Merchandise		
IL District Pins	-245.00	18.3%
Total 5491 Merchandise	-245.00	18.3%
5490 Miscellaneous Revenue - Other	483.22	100.0%
Total 5490 Miscellaneous Revenue	238.22	179.4%
5800 Special Events Revenue		
5810 Non-gift revenue		
CDWI	-1,000.00	0.0%
COTS/ CSLT	-1,500.00	0.0%
IDAH	5,257.26	165.7%
Total 5810 Non-gift revenue	2,757.26	126.3%
Total 5800 Special Events Revenue	2,757.26	126.3%
5999 Unclassified Income	-380.00	5.0%
Total Income	-5,070.03	93.1%
Gross Profit	-5,070.03	93.1%
Expense		
7030 Support		
C&J Candidate Support	-500.00	0.0%
Chorus Support	0.00	100.0%
Quartet Support	-972.00	59.5%
Total 7030 Support	-1,472.00	75.1%
7500 Contract Services Expenses		
7510 Chapter Convention Stipend		
7540 Judging Expense	-2,226.51	84.1%
7550 Temp Help - Contract	-297.04	80.2%
7560 Ticket Processing Fees		
Total 7500 Contract Services Expenses	-322.46	97.9%
8100 Nonpersonnel expenses		
8110 Supplies	462.95	100.0%
8120 Awards, Plaques & Pins	-235.21	83.2%
8130 Int'l Chorus/Quartet Buttn	-500.00	0.0%
8140 Postage & Shipping	-39.25	34.6%
8170 Printing & Copying	1,068.56	662.4%
8180 Historian	-738.19	53.9%
8190 Publishing	-800.00	0.0%
Total 8100 Nonpersonnel expenses	-781.14	82.8%
8200 Facility & Equipment Exp		
8210 Rent, parking, & other	-353.91	96.1%
8260 Equipment Rental & Maint	3,114.47	411.4%
Total 8200 Facility & Equipment Exp	2,760.56	127.6%

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 01/12/15
 Cash Basis

IL District Association of Chapters, SPEBSQSA
Profit & Loss Budget vs. Actual
 January through December 2014

	\$ Over Budget	% of Budget
8300 Travel & Meetings Expenses		
8310 Travel		
8320 Board Meet. & Conventions		
BOD Meetings	-254.52	68.2%
EVP Meetings	-1,344.29	44.0%
President Meetings	419.25	115.0%
VP C&J Meetings	-1,197.32	14.5%
8320 Board Meet. & Conventions - Other	1,932.92	228.9%
Total 8320 Board Meet. & Conventions	-443.96	95.0%
8330 Hospitality		
Total 8300 Travel & Meetings Expenses	334.30	103.8%
8400 Education Programs		
8410 C&J Cat/Cand Schools	-1,000.00	0.0%
8420 CDWI	-1,253.00	16.5%
8430 COTS/CSLT	-1,265.00	15.7%
8440 IDAH	-157.63	98.0%
8450 Recordings of Contestants	-1,157.50	61.4%
8480 YIH Program		
Contest Prizes	-700.00	30.0%
8480 YIH Program - Other	0.00	100.0%
Total 8480 YIH Program	-700.00	87.3%
8490 BHS Mini-Forum	-617.36	79.4%
Total 8400 Education Programs	-6,150.49	73.8%
8500 Other Expenses		
8505 Gov Board		
President	-400.00	0.0%
Treasurer		
Total 8505 Gov Board	-305.34	23.7%
8510 VPs & Committees		
Committee Chairs		
VP Membership	-250.00	0.0%
VP Mkt & PR	-250.00	0.0%
VP YIH	-250.00	0.0%
Total 8510 VPs & Committees	-690.08	8.0%
8550 Credit Card Fees	560.30	156.0%
8590 Miscellaneous	-255.71	36.1%
Total 8500 Other Expenses	-690.83	72.9%
8600 Business Expenses		
8610 - Corporation Filing Fees		
Total 8600 Business Expenses		
Total Expense	-6,312.06	91.1%
Net Ordinary Income	1,242.03	144.3%
Net Income	1,242.03	144.3%