



# CONNECT. ENRICH. SING. ENRICH. SING.



AN ANNUAL REPORT

TO OUR SUPPORTERS
FISCAL YEAR 2018

**Harmony Foundation International (HFI)** believes in the transformative power of singing. Raising your voice in song as an individual provides many physical and emotional benefits with regular practice and exercise and has been linked to medical therapies and healing. Even alone, singing stirs your spirit and heals emotion. Those who experience the joy of singing do better in school, their jobs, and family and social relationships. Harmony Foundation donors financially enable programs that share, nurture and perpetuate the love of singing, particularly in a group.

Blending your voice with others deepens the experience to a much more intimate level. The act of human beings singing together breaks down barriers including economic, racial, cultural and gender demographic differences that may have otherwise hindered interaction.

#### CONNECT. ENRICH. SING.

#### CONNECT.

As proud ambassadors for philanthropy, we link those who desire to be financial catalysts for singing programs directly to the impact partners providing programs that enrich lives through singing. We present facts and stories about the physical and emotional benefits singing does for individuals and their families, especially when harmonies are created within singing communities. By use of multiple mediums of communication, including personal visits to singing communities all across the country, we boast about programs that make true differences in the lives of participants and then solicit financial support to perpetuate singing for generations to come.

#### ENRICH.

Harmony Foundation supports sharing the gift of singing as an extraordinary means of self-expression and self-actualization, making lives more enjoyable, satisfying, meaningful and purposeful. Even in times of dire circumstances in someone's life, singing can help provide strength, hope and inspiration to persevere. Our goal is to be the most powerful influencer of singing in the entire world with hopes to grow stronger communities.

#### SING.

With the investments made by gracious donors, we are able to provide grant funding for singing education programs to students in middle school, high school, and college, as well as outreach programs throughout the country that promote, develop and advance opportunities for lifelong singing to people of all ages.

**Our mission** is to connect people through charitable giving to enrich lives through singing.

Our vision is to be the premier international agent through which individuals and organizations invest in the lifelong benefits of singing.

#### SINGING CHANGES LIVES. JOIN THE CAUSE.

We fulfill our mission
by partnering with
singing organizations
and funding programs
that enable, encourage
and enhance singing
experiences for all ages
ensuring everyone has
access to the life-changing
power of singing.

#### WE PROVIDE PROGRAMS THAT:

- educate audiences about the benefits of singing
- inspire and collect donations, then grant to singing programs
- maximize investment potential

#### **WE FUND PROGRAMS THAT:**

- provide singing and training opportunities to middle school through college-age youth
- provide singing and training opportunities to choral directors and singing educators
- provide support and resources to communities of singers and their leaders
- provide support and resources for health and wellness through singing

#### ANNUAL FUND SUPPORT

One-time and auto-recurring donations

By joining as a donor, you are directly impacting lives RIGHT NOW!

- President's Council Annual leadership giving starting at only \$84 per month
- ► Ambassador of Song

  Annual giving starting at only \$10 per month
- ► **Key Voices**Gifts up to \$119 annually

#### LEGACY OF HARMONY

#### **Planned Giving**

Even after life, leave your legacy on the singing community in perpetuity.

- Designate HFI as full or partial beneficiary on cash accounts and insurance policies
- Leave a bequest or estate gift in your will to HFI
- Contact Harmony Foundation for more complex arrangements that will benefit your loved ones and the singing community

#### **KEEP A MELODY RINGING**

#### **Memorial Giving**

When cherished friends pass away, memorial gifts recognize a life enriched by singing and create opportunities for others to experience its impact.

Once memorial gifts for an individual total at least \$1,000, their name is forever honored on our Keep A Melody Ringing Memorial Wall.

#### **PRINCIPAL GIFTS**

#### Large-scale program catalysts

Each year, there are a number of funding opportunities for campaigns that act as catalysts for greater good now and to come. **In addition to your annual fund support**, please consider:

- Matching gift challenge campaigns boost participation in first-time gifts and gift level increases to annual fund support
- Next Generation Barbershop Chorus Invitational Program: \$10,000 Sponsorship
- Next Generation Barbershop Quartet Contest Program: \$2,500 Sponsorship

#### **ENDOWMENT FUNDING**

#### **Invested Giving**

Through the power of endowment, your invested gift principal can grow over time while dividends provide income accomplishing good things now and for years.

- The Harmony Foundation Endowment exists to support Harmony Foundation's mission. This enables an income stream that supports current programs and operating activities today and into the future.
- Program, or restricted, Endowment Funds exist to fund donor specified programs such as providing scholarships to singing educational and engagement programs like Harmony University.
- Associate Endowment Funds exist to provide income to singing organizations, such as Barbershop Harmony Society, its districts and chapters, and other subsidiaries. Harmony Foundation's partnership provides resources that further the impact exponentially.

## FROM THE PRESIDENT AND CEO

One behalf of the management and staff of Harmony Foundation International (HFI), I am pleased to present our Annual Report to Shareholders for our fiscal year ended September 30, 2018.

Our "Boots-on-the-ground" strategy to connect with the community has continued to prove effective for HFI. The increase of visits to communities of singers is yielding positive results for participation in giving. We are pleased to welcome nearly 780 new donor households to our family of supporters during fiscal year 2018 and nearly 80% retention of donors from prior year.

We would like to thank all our donors for the achievement of increasing overall contributions to HFI 19% over last year. Plus, being charged with the best stewardship of our donor dollars as possible, our staff was able to decrease operating costs 14% while maintaining what is raised and distributed through Donor Choice and increasing the grant amount to Barbershop Harmony

Looking ahead to next fiscal year and beyond, be on the lookout for information on the importance Society over previous year. of endowment growth. We find ourselves discussing the ratio of donation to program vs operations quite often and we welcome the conversation as it opens up the opportunity to educate about our dire need for a much larger endowment fund to offset operations with dividend income from endowment. HFI is truly a unique and wonderful organization that is in total agreement striving for 100% of annual fund donations to go directly to singing programs. To reach that goal, we need to work in harmony with our donors to achieve and celebrate the success of stronger communities

Thank you all for your generosity in advocacy, donations and promotion of our mission to enrich lives through singing.



Perry D. White

By A. White

## FROM THE BOARD OF TRUSTEES

For the past year I have had the distinct honor of serving as Board Chair for Harmony Foundation International. I made many a trip to Nashville for meetings and staff retreats and was, and continue to be, impressed by the hard work of the office and field staff working for HFI. They are all impassioned and professional in their approach to their work on behalf of HFI and

The work of the Board of Trustees is equally impressive. They and the staff have fully embraced the Mission of HFI, which is: Connect people through charitable giving to enrich lives through singing. Connect. Enrich. Sing. The Trustees work very hard on multiple committees and during meetings to understand and assist the work HFI does to support their mission and meet the

The lifelong benefits of singing touch nearly every person on the planet, be it through being a singer themselves, either singly or in a group, or through sitting in an audience enjoying the music made by others, or by listening on the radio or electronic device. Music is a great unifier in life and breaks down barriers which would otherwise be more difficult to surmount. It is healthy for body and mind and encourages collaboration and harmony in relationship. Harmony Foundation is poised to be a model foundation with a donor-centric focus and creativity in meeting the needs of communities and donors. I am grateful to turn over the helm of this wonderful organization to the incoming Board Chair, Gary Plaag. The Trustees are capable and enthusiastic about the coming years for HFI and its staff and will carry on with the

I encourage all singers to join with the Foundation to support our Mission and, if you are already a donor, Thank You!! If you are not yet a donor, consider becoming one. Every gift matters and goes toward preserving and encouraging singing in our communities.



With gratitude for the opportunity,

## CONNECT

## This is the "how" of our mission statement.

How does Harmony Foundation enrich lives through singing? By the actual work, activity and tasks we perform.

Our professional staff is dedicated to educating and inspiring people all over the country about the benefits of singing and how they can make an impact in the lives of others through their donations. We present our case in front of communities of singers and singing appreciators alike and encourage contributions to enable our grants program, SING. We are the conduit between need and philanthropy by connecting the generosity of others to the best programs that provide solutions to the problems our mission is set to fulfill.

#### **DONOR HOUSEHOLDS**

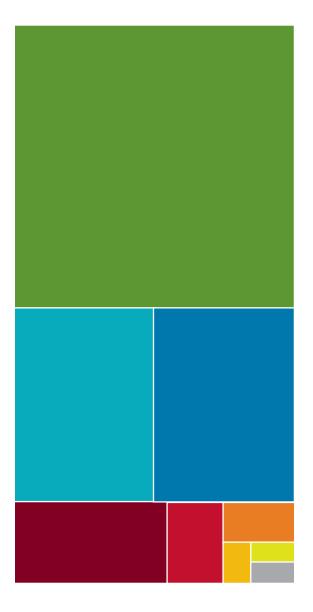
#### TOTAL DONOR HOUSEHOLDS: 4,476

\$25K+:	13
\$10k-\$24,999:	31
\$5k-\$9,999:	31
\$2500-\$4999:	85
\$1k-\$2499:	760
\$600-\$999:	136
\$360-\$599:	372
\$120-\$359:	2231
\$1-\$119:	817

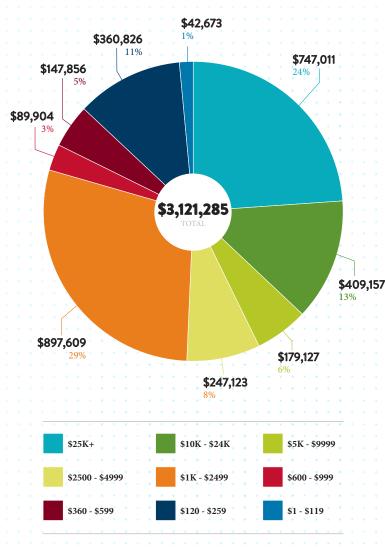
779 New Donors in FY18
78% FY17 Donor Retention into FY18

Complete donor listing can be found at:

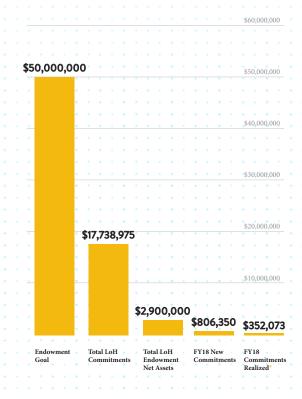
Harmonyfoundation.org/community/our-donors/



#### **FY18 GROSS CONTRIBUTIONS**



#### **LEGACY OF HARMONY**





Harner - \$69,550; Orloff - \$254,406; Courts - \$10,000; Watson - \$10,000; Hohl - \$987.18;



#### 80TH BIRTHDAY -\$80,000 FUNDRAISING CHALLENGE

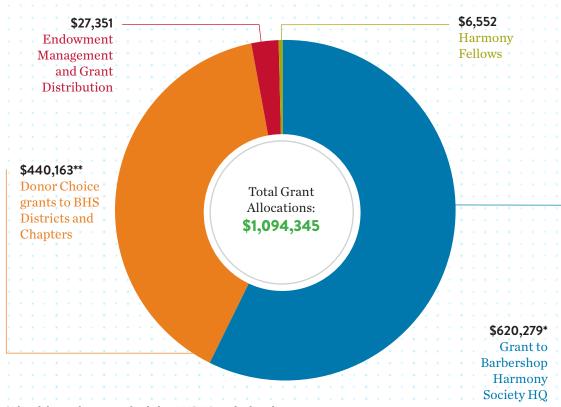
Carl & Kami Youngblood had been watching the impact Harmony Foundation giving created at all levels - local, regional, national, international, for young & old, men & women. He was so moved he chose to challenge the entire Barbershop Harmony Society membership as well as the current HFI donor base with an \$80,000 Giving Challenge in honor of BHS's 80th Birthday. Donors, both current & new, met that challenge in only 3 short months. The Youngbloods' generosity created \$160,000 in new giving to HFI in 2018.

## SING

Singing is the tool, or the "what" of our mission, through which our grants program is able to enrich lives.

By funding quality singing programs, there is a ripple effect into the lives of the individuals able to participate as well as their familes, friends and communities.

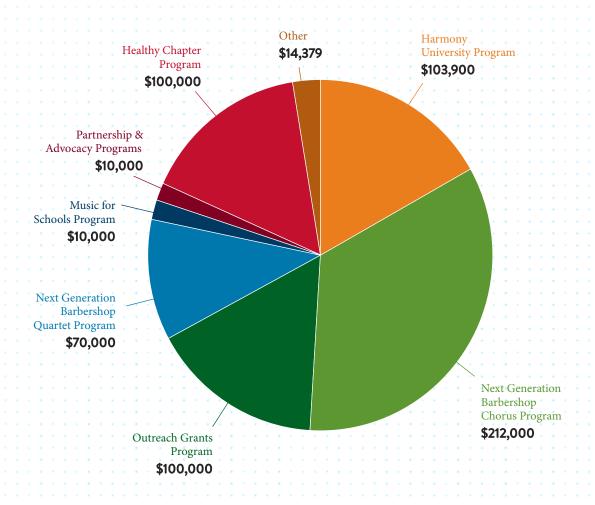
#### SING PROGRAM SERVICES



<sup>\*</sup>A breakdown of programs funded at BHS HQ can be found on page 9.

<sup>\*\*</sup>A breakdown of Donor Choice distribution can be found on our website at Harmonyfoundation.org/ways-to-give/give-today/

#### **GRANTS TO BARBERSHOP HARMONY SOCIETY HQ**



#### 2018 Next Generation Barbershop Chorus Program Sponsors:

Anonymous Dan Bell Mike and Sheila Deputy Far Western District Darryl and Meredith Flinn Marlin Fors and Nancy Kraus Rick and Nancy Haines In Memory of Chuck Harner In Memory of Jack Heller Joe Jenkins and Barbara Bruning Ross Johnson and Susan Williams Don and Lynn Lambert Randy and Jolene Loos John and Sharon Miller Mike and Lee Moisio Joseph and Jackie Palmquist Dave and Barbara Riches Erik and Nelleke Roffelsen Doug and Lynn Weaver Reese Williams Bill and Maxine Windnagle

#### HARMONY FOUNDATION INTERNATIONAL FUNDED PROGRAM INFORMATION

#### **Harmony Fellows**

When a member of the Barbershop Harmony Society reaches 50 membership years, they enter a fraternity known as the Harmony Fellows. In recognition of this significant milestone of loyalty and service, BHS no longer charges membership dues and Harmony Foundation produces a recognition event to honor their living example of a life enriched by singing and encourage Legacy of Harmony planned giving participation.

### Endowment Management & Grant Distribution

Harmony Foundation International has established several endowment funds to perpetuate the love of singing, expand access to programs that provide community singing, and educate society on the benefits of lifelong singing. Endowment management and distribution is a mission critical program existing to distribute financial support to programs such as scholarships to singing education opportunities, youth and community programs, and iconic institutional preservation initiatives. The endowment program exists in perpetuity, thus helps us fulfill our mission to current and future generations of singers and those touched by their song.

#### **Donor Choice**

This partnership program designed specifically for Barbershop Harmony Society membership gives those donors the option to provide financial support to BHS districts and chapters at the local level and the Harmony Foundation's grants program that benefits a better world through singing for everyone. It connects the donor, the Foundation, the district or chapter, and BHS Headquarters without the burden of seeking individual philanthropic financial support independently for local operational needs. This allows the local singing community focus to remain on singing, fellowship, and embracing all the benefits of singing that are at the core of both missions while maximizing Harmony Foundation's fundraising expertise. Twice annually, HFI distributes hundreds of thousands of dollars representing annual fund designations supporting the vital work at the local and regional levels to enrich lives through singing.

To view the breakdown of Donor Choice District and Chapter fund allocations, please visit:

Harmonyfoundation.org/ways-to-give/give-today/

#### BARBERSHOP HARMONY SOCIETY HQ FUNDED PROGRAM INFORMATION

#### Harmony University Belmont

A week-long immersion in singing, for everyone from entry level singers to experienced artists and music educators. During this week, barbershop is taught, skills are built, music leaders and teachers are energized with new rehearsal techniques and so much more.

#### Next Generation Barbershop Quartet Program

A highly visible outreach effort to encourage youth to sing barbershop harmony in quartets and provide a vehicle in which they can learn, compete and be supported by the entire barbershop community.

#### Next Generation Barbershop Chorus Program

A key component for establishing lifelong singing as an asset in communities across the country and the world. This special event is paired with the largest barbershop senior quartet event, truly demonstrating the benefits of lifelong singing while providing the gateway across a generational bridge of positive, supportive and memorable immersion into singing for hundreds of people, young and mature.

#### Outreach Grants Program

Barbershop Harmony Society promotes vocal outreach programs throughout all their districts and chapters across north America, and other choral groups that promote lifelong singing at a grass roots level. There is a stringent application and accountability standard designed and implemented by Barbershop Harmony Society and its outreach team.

## Partnership / Advocacy / Music for Schools Program

This program promotes a deeper connection between barbershop harmony and the broader choral and music community. Music educators are the primary focus because we know that one teacher has an outward reach of thousands under their direct instruction but then exponentially beyond when their students impact others through song. Harmony Foundation provides funding for Barbershop Harmony Society staff and leadership to participate in various programs and opportunities to deepen partnerships with ACDA (the American Choral Directors Association), NAFME (the National Association for Music Educators), and other vocal organizations while distributing free music for classrooms.

#### Healthy Chapter Initiative

The Barbershop Harmony Society believes that the success of their organization rests in large part on the health of their diverse array of chapters. The purpose of the Healthy Chapter Initiative is to develop strategies for strengthening the overall health of the communities of singers that comprise the Barbershop Harmony Society chapter structure. For the majority of their members, the local chapter is the single most significant point of contact with the Barbershop Harmony Society.

## **ENRICH**

Enriching lives is the "why" of our mission and what makes Harmony Foundation such an important organization.

Our donors trust HFI to take their investments and apply them to the most beneficial programs available that impact the most lives through singing and build stronger communities. Although we do not always get to hear about the amazing ripple effects HFI is making, here are a few stories of lives enriched by singing.

#### Legacy From A Leader



For Dr. Richard M. Shaw who has had an amazing singing hobby career as well as personally impacting communities of singers through his many leadership roles with BHS and HFI throughout the years,

what else could he possibly do to further his great work? Make a \$100,000 bequest to Harmony Foundation is exactly what he and Nancy thought best to make sure the activity that has enriched their lives for so many years will continue to be available for generations to come.

## Increase Annual Fund Gift? No Brainer!

When asked why he decided to increase his annual fund contribution to HFI, Ken Bester replied with "Every dollar counts so for me it was a no-brainer knowing HFI is a really worthy cause for an increased investment." Singing has

brought so much joy to Ken's life.
The act of singing in a community has provided so many fantastic new friends and he wanted to dedicate



his philanthropic efforts to ensure the same opportunities could be provided for others. "Every single year I consider if I can afford an increase in my giving to HFI and this year I couldn't see any reason not to help improve people's lives," says Ken. The youth and outreach singing programs HFI funds are the personal inspiration for Ken because they simply get more people singing, making his gifts worthwhile.



#### New Next Generation Barbershop Chorus Program Sponsor

President's Council member, Dan Bell, became a Chorus Program Sponsor in January, 2017, after watching the Midwinter Youth Festival in San Antonio. That year, he discovered one of the new Youth Choruses was from Anna High School, minutes from Dan's house. He attended their concerts & rehearsals, watched them grow spectacularly from 2018 to 2019, and continues to be a Chorus Festival Sponsor today. All because he witnessed the impact the festival had in 2017.





#### Super-Music-Educator

When Darin Drown's Supermen's & Superwomen's choruses were invited to Midwinter Costa Mesa, 2018, some of the student's parents approached Darin to let him know they couldn't afford to send their kids on such a trip. However, when Darin told them that because of HFI Sponsors, the major portion of the costs were covered, the parents broke into tears. Some of their kids had never even traveled out of state, let alone gotten to participate in a festival like Midwinter.

#### Next Generation Barbershop -Fulfilled

"Hey, Dad. I just signed up six new members of the Barbershop Harmony Society. Can you come down here and take a picture?" Grandview High



School Supermen's chorus member, Simon Clark, got six of his chorusmates to join BHS at Midwinter Costa Mesa. The story doesn't end there. Through the encouragement of one boy, six others joined BHS and because of their experience at Midwinter, they have worn their BHS and Midwinter Chorus pins to school on their coats and backpacks every day since. They were so energized about barbershop, they joined the Colorado Springs Pike's Peak Chapter and competed in the Rocky Mountain District 2018 Fall Contest. Due to their Pike's Peak Chapter experience, four of them plan to compete in the Denver Area Youth Quartet Contest and attend the Rocky Mountain District Summer Harmony Camp in July, 2019. And none of it would have happened without HFI donors making the Costa Mesa Festival possible.

#### NEW Endowment Funds for Harmony University Scholarships

Rich and Peggy both know first hand the power of music, especially singing in harmony with others. For them, Barbershop Harmony is THE art form and community that has impacted their lives in immeasurable ways and they want to

see that impact on future singers and communities. That's why they each created an endowment fund specifically to provide perpetual scholarships to hopeful Harmony University participants. Through these endowment funds, which they hope to grow, now their legacies will continue to help musical

leaders long after they are gone.



## Peggy Leon "Women in Barbershop" Scholarship

Education for women who are musical leaders and want to grow in their understanding of Barbershop, teaching and directing skills.



## Rich Knight "LEAD The Way" Scholarship

Education for future quartet leads to grow musically.

#### Harmony Foundation Financial Statements / OCTOBER 1, 2017 - SEPTEMBER 30, 2018

#### **Statement of Activities**

SEPTEMBER 30, 2018

	<u> </u>		
	REVENUE AND SUPPORT		
A	Contributions, Net	\$	3,004,517
В	Investment Income		176,989
С	Other Revenue		4,005
	TOTAL REVENUE AND SUPPORT	\$	3,185,511
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	EXPENSES		
D	Program Services	\$	1,443,977
Е	Fundraising		953,821
F	Management and Administration		386,711
	TOTAL EXPENSES	\$	2,784,509
	CHANGE IN NET ASSETS	\$	401,002

#### **Statement of Financial Position**

SEPTEMBER 30, 2018

Cash		\$ 212,037	
Contributions Receivable, Net		\$ 1,316,951	
Prepaid expenses and other assets		\$ 57,509	
Property and equipment, Net		\$ 21,689	
Investments		\$ 3,073,536	
Beneficial interests in estate gifts		\$ 554,600	
TOTAL ASSETS		\$ 5,236,322	
LIABILITIES			
Payables and other liabilities		\$ 78,780	
Donor Choice payable, due March 31		90,972	
Investments held, BHS Managed Fund		345,618	
TOTAL LIABILITIES		\$ 515,370	
NET ASSETS			
Unrestricted		\$ 985,200	
Temporarily restricted		952,788	
Permanently restricted		2,782,964	
TOTAL NET ASSETS		\$ 4,720,952	
4			
TOTAL LIABILITIES AND NET ASSE	TS	\$ 5,236,322	
			_

#### **CORPORATE MATCH**

Did you know that many companies like Microsoft, IBM, Chevron and others will double employee donations? Some will even match gifts from spouses and retirees. Matching gifts help HFI provide additional support to further our mission. Call us today to see if your company offers a corporate giving program.

#### **CHORUS VISITS**

Give us a call to talk about scheduling an HFI staff member for a chapter meeting or event. It is one of the great joys of our staff to meet the singing community, quartets and choruses, see you in action, learn where donor support is needed, and share the impact made by the donors to HFI. And, of course, we love to sing with you as well!

#### **SHARE THE NEWS**

You don't have to share the amount you give, but let your friends know that you support HFI and the reasons why singing has enriched your life.

Maybe your story will inspire them to match your gift to impact others. Gifts of all sizes matter, and if you have friends who value singing in their lives, their donations will help spread that joy.

### Participate with Harmony Foundation International

#### **TELL US YOUR STORY**

We love to hear from our donors, whether you've given for years or have made your first contribution. Your story can and will inspire others. Why do you sing? Why do you give? Tell us so we can tell others.

#### **FUNDRAISE ON OUR BEHALF**

Organize your own crowd-funding effort. We can help you run your own Facebook fundraiser or broadcast email campaign with online giving links. Dedicate your birthday, anniversary or singing milestone event to get your friends and family involved in supporting Harmony Foundation.

#### **SHOP FOR A CAUSE**

Many organizations donate portions of every day purchases to registered non-profits. Simply link your account to Harmony Foundation as the beneficiary and shop like normal. Kroger stores, Amazon Smile program, Southwest and American Express rewards are just a few examples.

#### **SET A REMINDER**

Are you a member of the Barbershop Harmony
Society? When it is time to renew your
membership dues, set that as the perfect time to
make your annual gift to Harmony Foundation
as well. If you renew by phone, BHS Customer
Service can connect you with a member of the
HFI Donor Care Center. If you renew online, click
on over to the HFI giving page and make a quick
gift securely.

#### **VOLUNTEER**

We need help at conventions and events, and representation at chapters throughout the country. Contact us to find out what volunteer opportunities will fit into your schedule and lifestyle.

SING! SING! SING!

#### **OUR STAFF**

Perry White, D.M.A.
PRESIDENT AND CEO

Carolyn Faulkenberry CHIEF FINANCIAL OFFICER

Jim Johnson
DIRECTOR OF
COMMUNICATIONS

Dixie Semich, bCRE-Prodevelopment operations manager

Jim Clark
WESTERN REGIONAL DIRECTOR

Sean Devine
PLANNED GIVING MANAGER
LEGACY OF HARMONY

JJ Hawkins donor care center associate Matt Hopper donor care center associate

Brian Nelson donor care center associate

Sarah Ogiba DONOR CARE CENTER MANAGER

Kyle Snook
CENTRAL REGIONAL DIRECTOR

Jan Stinson Finance assistant

Rick Taylor
NATIONAL
DEVELOPMENT MANAGER

#### **2018 BOARD OF TRUSTEES**

Lynn Weaver Mike Moisio

Gary Plaag Casey Parsons

Don Laursen Brian Sagrestano

Jim Warner

Jeff Selano

GENERAL COUNCIL

Mike Deputy

Marty Monson

IMMEDIATE PAST CHAIR EX-OFFICIO

Debbie Cleveland Perry White

Don Lambert Ex-officio

