

FAR WESTERN DISTRICT
Board of Directors Minutes
June 16, 2018
Holiday Inn
2932 Nutwood Ave. Fullerton, CA

President Craig Hughes called the meeting to order at 9:04 a.m.

The Old Songs was led by Nick Papageorge.

Bill Rosica offered the Invocation.

Secretary Jim Maass called the roll. All Board Members were present. The following members of the Management team were also present—Royce Ferguson, David Melville, Bryan Forbes and Steve Salmon.

President Craig welcomed the group to the meeting and gave a few brief opening remarks.

Approval of Agenda: The agenda was approved by unanimous consent.

Approval of minutes: Board minutes for March 15, 2018 were approved as presented. Minutes for the electronic meeting of April 30, 2018 were approved as presented.

Vice President Reports

Division 1 Southwest -- Brent Anderson

Brent gave a brief summary from his written report which appears in the printed Board Packet. He also mentioned that after the board meeting he and a few other board members are going to the South Bay Show. Also there was some discussion about lack of participation of some chapters in contests in the southwest division and generally throughout the FWD. Craig Ewing brought up the old “pretention points challenge” which was a chapter activity reporting system encouraging chapters to be active by reporting their activity to the district. There was some discussion regarding encouraging chapters to participate in divisional and district conventions.

Division 2 Southeast -- Nick Papageorge

Nick reports that a couple of his chapters are “bouncing back.” His division qualified eight choruses and the one that missed it by a few points is being invited to participate in the Fall contest. He visited the South Orange County show and reports that it is a real model for a struggling chorus to get new members. He said chapters need to sing out and to be seen. Also chapters need to get involved with local High School choral directors offering to help out his/her program. The chapter did this and got three or four choral groups from the school to perform on their show.

Division 3 Northwest -- Dick Whitten

Chapters are doing really well. The Santa Rosa chapter has been learning lots of music including Polecat Two, but the new director is leaving in October moving to Oregon, so Santa Rosa will be

looking for a new director. Marin chapter is also looking for a new director. Fremont is ready to give up its charter but have not yet surrendered it. President Craig asked if the FWD wanted to keep the charter for use for a future chapter. Rich Owen suggested to keep the charter so as to make it easier to form a new chapter. He also said that all the paperwork needs to be kept in order to maintain a “shell corporation” and a “district chapter.” There is the need to assure that all IRS forms and State of California forms are filed to keep the charter “in the bank” for future use. A new group can form a new chapter easier than from “scratch.” There was general discussion.

Pres. Craig called for a motion. It was moved and seconded to retain the Fremont/Hayward Chapter charter and corporate chapter shell to be held by the FWD for any further new chapter. Motion Adopted.

Division 4 Northeast -- Chuck Roots

Pres. Craig welcomed Chuck to the Board. Chuck said it is “fun stepping into the shoes” of Ron Black and Richard Lund, two previous DVP NE.

Chuck reported on the *Somewhat Serious Quartet and Bean Feed* competition hosted by the Auburn Sierranaders. It was a very successful event with 60+ guys attending. Eight area chapters were represented. The Sacramento Capitalaires are looking for a new director. Chuck met with “Mongo” to discuss revitalization of Chico chapter. He also talked about the Golden Valley Chorus, his current chapter, and how it is doing well under the direction of Bruce Sellnow. He suggested the Merced area as a possible new chapter. He also raised the issue of finding new directors. Chuck brought up some ideas he had regarding assisting areas in producing a show for the community in an effort to expose barbershop singing to the community and hopefully it could result in a membership increase. There was a wide-ranging discussion on this topic. There was additional discussion on the FWD October convention and the hosting issue. Richard Lund is working on this with the Fresno chapter.

Division 5 Arizona -- Adam Kaufman

Adam reported that things are going well. Mesa is going to district for the first time in a long time. White Mountain has a new (female) director who is a local choral director. They are providing barbershop training for her. He discussed A Capella Syndicate Chorus and Phoenix issues. Suit Up quartet is setting up go for gold show including other quartets and female groups. A Capella Syndicate assisting. Also discussed the need to get more attendance to division contests. He is looking for a youth program as part of the convention during the free time. Discussed having youth from the area participate in a special program. He is working with Lori Lyford’s high school chorus and she will get him together with other music educators in the area as well. He’s hoping to get 100+ kids involved. He also mentioned the August Bash is set and that inter-chapter visits are taking place. Lots of good things going on in AZ division.

Contest & Judging -- Brett Littlefield

Brett reported on a number of issues relating to contests during this past spring season. There were two quartets with the same guys singing the same parts in the reg contest and senior contest in NE division. There is no rule against it but he indicated that the rules may be changed. He mentioned that one of the biggest issue is the evaluations—they take lots of time. He would like to get back to the time when there were more chapter hospitality rooms but that has disappeared since quartets are in evaluations right after the contest. Need to look at this issue. He also made a proposal that quartets can “op out” of evals or have judges give written evals. He is thinking of ways to make contest/convention efficient yet still meet the needs of the quartets. He offered

compliments to all DVPs for their hard work. Regarding the upcoming FWD convention and contest in Fresno, Brett is encouraging all the invited competitors to get their commitment back to him ASAP.

A mixed group is coming from Stockton. He is also looking to bringing more mixed groups to spring contest. There was also some discussing of outgoing district champs and how many comp tickets they get. It was determined that past practice provided eight comp VIP tickets, plus two rooms to the quartet.

Mixed Harmony Report – He’s looking to put this all together for the spring contest season. Both quartet and choruses will be able to perform. A trophy for winning mixed quartet has been approved but there is a need to get a trophy or plaques for the winning mixed chorus. He raised the issue should at least one member of the group be a BHS member. Steve Salmon brought up issue of mixed groups for YIH (Youth in Harmony) in the spring. There was some discussion. This was put over for more discussion later to include Bruce Sellnow. Continued discussion regarding contests and winners. A number of issue were raised. Pres. Craig suggested this topic be moved to the committee of Littlefield, Salmon & Sellnow.

Music & Performance -- Craig Ewing

Chorus coaching program financial help is in the FWD budget, but Craig reports there has been no request for money for that. The Standing Ovation program has no coaching scheduled. Craig mentioned that it is the DVPs responsibility to hand out plaques to the winners at the Divisional contests. He is always looking for more performance opportunity for choruses at contest. The Fresno hotel set up nicely for such a performance in the atrium at the buffet. There was some discussion. The outgoing quartet champs could be the headliner for a buffet chorus show—just some thoughts. Educational programs: SoCal Close Harmony program for September 8th. Not yet finalized as they are looking for a location. There was discussion of the Harmony College Northwest -- BHS and SAI which has been quite successful over the years. Ron Black has worked with the group. Craig would like to attend the event and will look to put funds in to the budget for next year. Craig will be at HU this year and will be looking around to scope out future faculty for district education events.

District Management Team

Membership -- Bill Rosica

There was some discussion regarding the membership issue. President Craig pointed out his discussion which is attached to the packet as Appendix A.

Chorus Director Development -- Royce Ferguson

Pres. Craig brought up a Bakersfield chapter request from Rich Owen (President of the Bakersfield Chapter) for assistance to send director to HU’s director school. There was some discussion on this issue.

It was moved and seconded that the FWD match up to \$250 match with what Bakersfield will spend on this scholarship request. Motion Passed, Rich Owen abstaining.

Events -- Bryan Forbes

Several issues were brought up by Bryan for discussion:

- Convention Manual—Bryan reported that it will be done by July and distributed to the BOD DMT.
- Financing—Pres. Craig brought up the issue since the SOP requires HOD approval. There is a need to move these SOP issues into the manual so BOD can act.

Distribution Convention Income issue. Pres. Craig read the issues regarding distribution. 10.1.4.1 in SOP. A question presented: Should this be moved out of SOP and to the Convention Manual?

It was moved and seconded that SOP section 10.1.4.1 – Distribution of Convention Income - be removed from the SOP and added to the convention manual with updated the distribution figures to reflect current practices and presented to the HOD for approval in October. Motion Adopted.

Dues Increase Issue. President Craig read from an email from Brent Anderson below.

Forwarded email. **From:** Brent Anderson <brent@andersonfs.com>
Date: June 15, 2018 at 9:57:11 PM PDT
To: Bryan Forbes <events@farwesterndistrict.org>, Craig Hughes <cbhughes48@gmail.com>, Rich Owen <richowen@bak.rr.com>, Bill Rossica <brosica@sbcglobal.net>
Subject: the great sales job...

Everyone is aware that costs of business and costs of life have gone up and continue to increase. We have to raise the FWD portion of your dues, by \$20. This is the first increase since 1992! This increased cost is necessary to continue the operations of the FWD.

However, this dues increase will allow us to *significantly* lower the cost of conventions and contests which will make it easier for you and your family to attend our conventions and contests. For example, if you typically attend a Divisional as well as Fall convention, you'll save \$50 or more

There was discussion on the issue of increasing FWD dues looking at the information provided in Bryan's report.

It was moved and seconded to raise district dues by \$20 and present it to the HOD for approval in October. Motion Adopted.

- Harmony Platoon (*Bill Kane email*) Appendix B in the brochure. Question: Will FWD support them with a place to hold the event. There is a cost to the rooms for their rehearsal. There was some discussion. Is the platoon attracting enough participants to cover cost of rehearsal rooms? By consensus BOD supports the Platoon event.
- Honorary VIP status for seating (*David Melville email*) Appendix C. There was general discussion regarding VIP seating. David can handle this VIP seating. No action needed.
- Convention at Sea: Bill Rosica/Donna Heisley

CARNIVAL CRUISE PROPOSAL for FWD district contest October 2020.

Donna Hisey from Carnival and Chris Meyer from Expedia Travel made a presentation. Preliminary thought is to try to book at least 1000 barbershop participants for the Fall 2020 Convention. However, if there are 2000 registrants, the FWD will “own the ship.” If it is not a “sell-out,” the cruise can accommodate other non barbershoppers working around FWD events. Price, which is all inclusive with the exception of the FWD Convention registration fee, will begin at \$360 per person up to \$961 person (depending on category). The three-day cruise includes all food, entertainment, tips and taxes. Parking at the port is an additional cost. Departing Thursday from Long Beach, Friday in port at Ensenada, at sea on Saturday and returning to Long Beach on Sunday. There are about 800 inside rooms at lowest rate. So everyone will be encouraged to “book early.”

President Craig appointed Bill Rosica, Brett Littlefield, Bryan Forbes, and Nick Papageorge to a committee to study the Carnival Cruise FWD 2020 Convention and bring it back to the board in one month.



Marketing & Public Relations – David Melville

David Melville brought up getting subscription to *Go To Meeting*. It’s \$29 Month for up to 150 members with recording capabilities. There would be a need for one person to be the monitor. Pres Craig directed David to develop a proposal. He also offered to help with individual business cards. He brought up show clearance issue and he is working with the secretary to place his address onto the show clearance form.

There was some discussion regarding AHSOW room. David suggested that the ASOW being contacted regarding their intention for this coming convention and what are your needs. Bryan will contact them.

FWD Webcast. David reported costs and income for the past year. Question presented: Is it worth the webcast being provided? There was some discussion. Chuck Roots mentioned that some of the guys use the webcast and questioned whether to discontinue it. The issue discussed was the cost versus the income. David will report back to the board.

- Forum & Member Center Communication--- At the conclusion of the Management Team meeting on Friday night, June 15, David conducted an “on-line” presentation on how to use the FWD Form and Member Center communications.

Youth in Harmony -- Steve Salmon

- Endowment Funds update Appendix D and E.

President Craig discussed these two funds. Details can be found in Appendix D and E

Old Business

Insurance for FWD owned property -- Gordon “Mongo” Bergthold

Mongo reported the various insurance elements outlined in Appendix F in the brochure. He discussed what is covered and not covered. There was general discussion regarding what is covered. It was determined that there needs to be an inventory done of FWD owned property. The issue of who owns the Doug Maddox microphones was brought. They are being used by several of the local chapters. After some discussion it was **MSA that the Doug Maddox microphones are owned by the FWD.**

District Officer Blazer Patches -- Brett Littlefield

Brett was wearing a blue blazer with a FWD Patch for board members. He led a discussion regarding patch and blue blazer for all board members for identification at conventions or chapter visitations as well as other FWD functions. By consensus: The board agreed to go with the patch and Navy Blue blazer for all board members (at board member expense). The patch cost \$20 for the patch payable to Brett and each board member is on his own to purchase the blazer.

Directors’ Guild -- Nick Papageorge/Royce Ferguson/Craig Ewing

Nick clarified that the Guild was not for looking for directors for chapters but for classes for current front-line directors.

New Business

Nominating Committee -- Gordon Bergthold

Mongo reported for the committee—Bernard Priceman and Russ Young. The Board accepted the slate as presented and will be referred to the HOD in October for action.

President	Craig Hughes
EVP	Bill Rosica
Secretary	Jim Maass
Treasurer	Rich Owen
Contest & Judging	Brett Littlefield
Music & Performance	Craig Ewing

VP Division 1, Southwest	Brent Anderson
VP Division 2, Southeast	Nick Papageorge
VP Division 3, Northwest	Dick Whitten
VP Division 4, Northeast	Chuck Roots
VP Division 5, Arizona	Adam Kaufman
Immediate Past President	Gordon Bergthold

Harmony Foundation – Donor’s Choice -- Craig Hughes

Pres. Craig read from the Appendix G report (attached) summarizing the numbers.

He mentioned that donors should consider designating some of their donation to the FWD as well as their chapter. President Craig urged BOD-DMT members to consider making FWD a part of the 30% donation.

Endowment Fund Descriptions -- Craig Hughes

District Outreach Endowment Fund was briefly discussed. A proposed change outlined in Appendix H is as follows: DELETE following words—"expected income (donations/interest/capital gains" and replace with "prior year’s net realized gain (including interest and dividends)... **It was MSA to amend the SOP as outlined in Appendix H clarifying wording. This will be referred HOD in October.**

Lloyd Steinkamp Endowment Fund for FWD Harmony Camps. **It was MSA to add Section 113.13.3 to the SOP as outlined in Appendix H. This will be referred to the HOD in October.**

Reimbursement for per diem expenses -- Rich Owen

Possible SOP Change—receipts for per diem issue in Appendix I. Suggested change. Rich Owen discussed the need for receipts to justify expenses within the guide line of meal expenses. There was general discussion on the issue of per diem or out of pocket expense and the definition of each. Conclusion we are not doing per diem but doing out of pocket.

MSA Out of pocket expenses for meals may be reimbursed for daily amount not to exceed \$50. Receipts must be attached to the expense report. To be referred to HOD in October.

Financial Review -- Rich Owen

Treasurer Rich Owen discussed profit and loss statements as outlined in his reports (attached). After some discussion regarding payment to Mesa chapter for hosting, **it was MSA that the hosting fee for the AZ contest to Mesa will be \$1500.**

Leadership Academy/ Harmony College West -- Bill Rosica/Craig Ewing

Bill Rosica reported on the *Leadership Academy* and suggested renaming it to *Leadership Summit* where the emphasis would be on educating the guys as to how to be leaders. This would change the focus from specific chapter roll classes to a focus on how to be leaders within their

respective roles. It was suggested that this concept could be taught in break out sessions. There was general discussion on how to approach the instruction issues. EVP Bill will meet with DVPs to work out the details of how to approach this training.

Craig Ewing on Harmony College West. Change in focus: It will be a Close Harmony Seminar. Fullerton. Sept. 8th

Various issues -- Craig Hughes

David Melville brought up issue of changing the name in section 4.3.2.5 of the SOP to Communication and Technology changing from Marketing and PR position. Pres. Craig asked David Melville to review SOP description and get back to him.

2019 Budget Planning -- Rich Owen & Board

Treasurer Rich Owen reviewed the Budget documents which were in the Board packet. There was general discussion.

Under Rich's guidance, the board spend considerable time reviewing the proposed 2019 budget, category by category making corrections and changes as needed.

MSA Budget for 2019 be approved and submitted to HOD in October.

A copy of the board adopted 2019 budget is attached.

For the good of the order – All

Keep the Whole World Singing was directed by Brett Littlefield.-3-

The meeting was adjourned at 5:35 PM

Respectfully submitted,

**Jim Maass
FWD Secretary**

Secretary Note: The following action items are from the minutes above compiled here for a quick and easy reference.

Pres. Craig called for a motion. It was moved and seconded to retain the Fremont/Hayward Chapter charter and corporate chapter shell to be held by the FWD for any further new chapter. Motion Adopted.

RE: Mixed chorus and quartet convention participation: Pres Craig suggested this topic be moved to the committee of Littlefield, Salmon & Sellnow.

RE: HU Director School request from Bakersfield: It was moved and seconded that the FWD match up to \$250 match with what Bakersfield will spend on this scholarship request. Motion Passed, Rich Owen abstaining.

It was moved and seconded that SOP section 10.1.4.1 – Distribution of Convention Income - be removed from the SOP and added to the convention manual with updated the distribution figures to reflect current practices and presented to the HOD for approval in October. Motion Adopted.

It was moved and seconded to raise district dues by \$20 and present to the HOD for approval in October. Motion Adopted.

President Craig appointed Bill Rosica, Brett Littlefield, Bryan Forbes, and Nick Papageorge to a committee to study the Carnival Cruise FWD 2020 Convention and bring it back to the board in one month.
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Pres. Craig directed David Melville to develop a proposal for a subscription to “Go to Meeting” for district use.

David will report back to the board regarding District Webcast.

Bryan Forbes will contact AHSOW regarding room needs at district conventions.

MSA that the Doug Maddox microphones are owned by the FWD.

By consensus: The board agreed to go with the patch and Navy Blue blazer for all board members (at board member expense).

District Outreach Endowment Fund: It was MSA to amend the SOP as outlined in Appendix H clarifying wording. This will be referred HOD in October.

Lloyd Steinkamp Endowment Fund for FWD Harmony Camps. It was MSA to add Section 113.13.3 to the SOP as outlined in Appendix H. This will be referred to the HOD in October.

MSA Out of pocket expenses for meals may be reimbursed for daily amount not to exceed \$50. Receipts must be attached to the expense report. To be referred to HOD in October.

MSA that the hosting fee for the AZ contest to Mesa will be \$1500.

David Melville brought up issue of changing the name in section 4.3.2.5 of the SOP to Communication and Technology changing from Marketing and PR position. Pres. Craig asked David Melville to review SOP description and get back to him.

MSA Budget for 2019 be approved and submitted to HOD in October.

The following is attached support documents.

Attachments: Appendix A-I

Attachment: Bryan Forbes Report as it was not in the Board Packet.

Attachment: Final Board Approved 2019 Budget

Appendix Attachments

Appendix A: Chapter Development (Membership) Chair

Far Western District Chapter Development (Membership) Chair
BOD-DMT:

Let's start a conversation about Membership and Chapter Development. I would like to get the discussion going and then put it on the Summer Board Meeting Agenda.

Here's a statistic. The FWD member count is down 10.12% over prior year. We have 2033 members. Membership is a top issue for all our Chapters. We have wonderful Barbershoppers that love our hobby but are having a difficult time bringing in members. Many of our chapters are starting to age out and don't know how to reverse the trend. The members are scratching their heads and trying to hang on. They expect help from the District with their decline in membership but it is mostly a local issue not a global one.

I have been critical of our past District Membership Chairs because they didn't get "anything done". They had very little success reversing our downward membership trend. After some experience I have determined that the good ones were doing the best they could to encourage action by the Chapters. Bill Rosica shared the lack of response from the Chapters, even when contacted directly. That's a big problem. These same members corner us at conventions and installations and ask what we are doing about membership. It is a classic sales management conundrum. The manager usually doesn't close the sale. ***Finding the one guy in each chapter that will is going to be one of the keys.*** Our chapters need encouragement and actionable ideas. The District Team can encourage and give the Chapters the tools to do it themselves.

I think we need a District Chapter Development Team that combines Membership with Programs to help provide a blueprint for the local chapter to build an attractive weekly meeting and target new members. The team would also track and publish membership statistics by Chapter using the new reporting tools from the Member Center. This could be accomplished using the Newsletter application David Melville has up and running.

Here are some suggested tasks for the Chapter Development Team:

- Monthly Chapter Development Newsletter:

- Membership
 - Monthly Recruitment Idea (i.e. Singing Valentines handouts, Church Choir summer replacements, Pop-up sing-outs, Facebook Campaign, etc.) Make it actionable - cut and paste - to include:
 - Suggested time line
 - Suggested requirements.
 - Suggested outcomes
 - Suggested handouts and materials.
 - (There are ideas on the web and we can draw from other districts. Our Chapters can be tasked to publish what's worked for them as the ball starts rolling.)
 - Stats – Simple total members with year to date change by Chapter.
 - Highlight a success.
- Programs
 - Have you tried?
 - Fun idea to make the meeting fresh and compelling.
 - Suggested time line
 - Suggested requirements.
 - Suggested outcomes
 - Suggested handouts and materials.
 - (There are ideas on the web and we can draw from other districts. Our Chapters can be tasked to publish what's worked for them as the ball starts rolling.)
 - Guest Night Ideas.
 - Inter-Chapter Celebrations
 - Include Sweet Adelines, Harmony, Inc & Mixed Barbershop
 - Include Family
- Contact Chapter Teams as needed.

- Solicit help from other District Teams. i.e. Marketing and Public Relations to help with Chapter Social Media & Division VP's for Inter-Chapter regional events.

I would like your thoughts and, if you agree, help identifying the right person for the District Membership & Chapter Development job. It could be a guy with a passion for Barbershop that likes to collect and share information. A little crazy (out of the box) couldn't hurt.

Appendix B: Harmony Platoon



Craig Hughes
<cbhughes48@gmail.com>

Convention Registration for Platooners

Bill Kane <BillKaneVIP@msn.com> Sun, Mar 11,
2018 at 11:30 AM To: "chughes2@cox.net" <chughes2@cox.net>, David Melville
<registrar@farwesterndistrict.org>, "a.kaufman@yahoo.com"
<a.kaufman@yahoo.com>

Craig -

In order to conduct the Arizona Division Platoon on April 13 I will need a one-time waiver of the requirement that participants must register for the convention. I also need you to consider whether we should continue with the Platoon program at future FWD conventions, given decline in participation relative to room costs.

Discussion

A balance of parts is necessary for an effective Platoon operation. With this mix of AZ Division BHS members that had signed up for AZ Division Platoon, it just wouldn't work:

4- Bass
3- Bari
4- Lead
0- Tenor

I have convinced one Tenor to come over from CA and two Sweet Adelines to sing with us (Tenor and Bari). None of them can afford the time or money to participate in the Saturday convention. Having convinced Division VP Lead

Adam Kaufman to do Tenor and another Tenor to participate if his "On Call" work doesn't call, we now have a balance:

4-Bass
4-Bari
4- Lead
4- Tenor

The group has had one rehearsal so far to prepare for the Platoon, and there are three more scheduled.

Please advise.

Bill Kane
FWD Quartet Activity Chairman

Appendix C. Honorary VIPs

1 [BOD-DMT] Honorary VIPs

David Melville <webmaster@farwesterndistrict.org> Mon, Mar 12,
2018 at 3:30 PM To: BOD-DMT <bod-dmt@farwesterndistrict.org>

**Far Western District - Board of Directors & District
Management Team** From: David Melville
(webmaster@farwesterndistrict.org)
Date: 12.03.2018 15:27:00

Gents,

I forgot to include this in my recent addendum.

I would like to offer the recommendation that a motion be made to grant
“Honorary VIP” status to the following individuals:

Judy Steinkamp
Jill Steinkamp-Henderson
Joanne Newman

This would entitle them to VIP seating at all convention where reserved seating is
offered. I usually manage to get them up front and center anyway, but this would
make it “official”.

I think the names speak for themselves, but if anyone would like to hear more
about why I think this is an appropriate thing to do, I’ll be glad to discuss it.

2 David Melville,
Webmaster
Marketing
Director
Far Western
District
webmaster@farwesterndistrict.org
marketing@farwesterndistrict.org

3 [BOD-DMT] Honorary VIPs

David Melville <webmaster@farwesterndistrict.org>
2018 at 4:17 PM To: Craig Hughes <cbhughes48@gmail.com>

Mon, Mar 12,

Joanne Newman is one of our most dedicated convention goers. He is usually one of the first people to register, because she loves to be down front and center. She always buys 5-6 registrations, and brings her friends, including Norma Feenstra, who is currently gravely ill and won't be with us much longer.

Joanne is a Sweet Adeline from WAY back, and she was one of the key people who spearheaded the movement that led the Society to establish Associate Memberships, which paved the way for choruses to have female directors — such as Sun Harbor — was well as becoming certified judges.

4 **David Melville,**

Webmaster

Marketing

Director

Far Western

District

webmaster@farwesterndistrict.org

marketing@farwesterndistrict.org

Appendix D: Lloyd Steinkamp Endowment Fund Statement



SACRAMENTO REGION
COMMUNITY
FOUNDATION
YOUR PARTNER IN GIVING

February 8, 2018

Dear Friend of the Foundation,

Enclosed is the 2017 statement of activity for your charitable fund. If your fund is an endowment, this statement also includes the amount available for granting in 2018. If your fund is expendable, please note the insert on buff colored paper describing the process for changing your 2018 investment pool. *No action is required unless you are making a change to your investment pool.*

As we all know, 2017 was a stellar year for investments, and our donor portfolios were no exception. Both our endowed and long-term expendable pools earned double-digit returns of 16.0 % and 17.4% respectively. The Sacramento Region Community Foundation's Investment Committee and Board of Directors continue to actively evaluate our portfolio to support our objective of long-term asset growth. Our endowment continues to exceed its blended benchmark for the 7- and 10-year periods, and the expendable pools continue to perform within expectations.

In 2017, the Foundation funded efforts to address implicit bias and pressing immediate needs, convened around compelling community issues as part of our inaugural Summer Salons series for fundholders, and sponsored funder sessions on how to more effectively support our region's food and arts nonprofits.

Additionally, our four Strategic Initiatives gained momentum as we continued our focus on expanding generosity and building nonprofit capacity, addressing the gender and race gap in access to higher education, streamlining the emergency food distribution system, and working to see that our region's diverse cultural and arts amenities are accessible to all. Highlights include:

- Big Day of Giving was successfully relaunched on a new online platform, breaking another record by raising over \$7 million for 600 nonprofits.
- With wrap-around services and scholarships working in tandem, more than 45% of our 2017 Capital Area Promise Scholars are young men of color.
- Thanks to improvements resulting from the findings of Foundation-funded research, more than 100,000 of our food insecure neighbors have greater access to food.
- The Foundation partnered with the City of Sacramento on the development of a Cultural Plan that will help chart the course for future arts and culture investments.

In 2017, including contributions from Big Day of Giving, we received nearly \$14 million in gifts and, largely due to your generosity, the Foundation awarded more than \$11 million in grants and scholarships. We also welcomed some impressive new talent. Kerry Wood is our new Chief Marketing and Donor Engagement Officer and Chelsea Fahr has joined us as Director, Donor Engagement. They are both seasoned professionals and are committed to stellar fundholder service. I know you will enjoy working with them both.

All of us are profoundly grateful for your continued confidence and support as we work together to transform this region through expanding philanthropy and strengthening our nonprofit sector. I look forward to even more interaction in 2018. We have lots of gatherings planned, so please try to join us and, as always, we welcome your feedback on how we can enhance our role as your strategic partner in giving.

With my thanks and best wishes,

Linda Beech Cutler
Chief Executive Officer

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Sacramento, CA 95825
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Appendix E: FWD Outreach Endowment Fund Statement

Harmony Foundation

Endowment Fund Year End

Report Period: January -

December 2017

Far Western District Outreach Fund

<u>Description</u>	<u>Date</u>	<u>Amount</u>
<i>Beginning Fund Balance</i>	1/1/2017	\$31,933.06)
<i>Contributions</i>		\$0.00)
<i>Interest and Dividend Income</i>		\$851.07)
<i>Realized Gains and Losses</i>		\$5,966.58)
<i>UnRealized Gains and Losses</i>		(\$1,327.22)
<i>Withdrawals</i>		\$0.00)
<i>Administrative/Bank Fees</i>		(\$616.09)
<i>Ending Fund Balance</i>	12/31/2017	\$36,807.40)
<i>Allowable Withdrawal 2018</i>		\$851.07)

*Allowable Withdrawal 2018 is lessor of 5% Beginning Fund Balance or 2017 Interest and Dividends.

Appendix F:

FWD Insurance Policy

Barbershop Harmony Society Chapter/District Owned Property Enrollment Form Policy Term January 1, 2018 – January 1, 2019



Please return this form by December 20, 2017.

Chapter/District Name: Far Western

Chapter/District Code: (i.e. Z-000 or FHT) FWD

Date of Request: 11/30/17

Secretary Name: Bob Gray

Member ID#: 276526

Treasurer Name: Rich Owen

Member ID#: 248698

Please select your choice (if higher limits are required, please contact Jama Clinard, BHS Controller)

- Our Chapter or District is **already enrolled** with BHS with property coverage and would like to **renew with the same coverage**, attached is our payment.
- Our Chapter or District **denies** property coverage for the policy term annotated above.
- Our Chapter or District is **already enrolled** with BHS with property coverage and would like to **renew but change our coverage amount**, have checked the new coverage amount below, and attached is our payment.
- Our Chapter or District **wishes to enroll in property coverage** for the policy term annotated above with the coverage amount checked below, and attached is our payment.

Personal Property Coverage (Replacement Cost)	Annual Cost (In USD) U.S. & Canadian Chapter/District
<input checked="" type="checkbox"/> \$10,000 USD	\$180 USD
<input type="checkbox"/> \$15,000 USD	\$210 USD
<input type="checkbox"/> \$20,000 USD	\$240 USD
<input type="checkbox"/> \$25,000 USD	\$270 USD
<input type="checkbox"/> \$30,000 USD	\$300 USD

Signature of Secretary or Treasurer: Bob Gray Secretary 11-30-17

Printed Name of Secretary or Treasurer: Bob Gray

RETURN TO BY MAIL:

Barbershop Harmony Society
% Property Insurance
110 7th Avenue North
Nashville, TN 37203

RETURN TO BY EMAIL:

Chapters: chapters@barbershop.org or
Districts: districts@barbershop.org

Appendix G: Harmony Foundation Donors' Choice Program

Harmony Foundation – Far Western District gives the gift of song.

We have a lot to be proud of in the Far Western District: International Champions, outstanding Chapters and the best Barbershoppers in the World. One measure of all Barbershoppers is their heart. None are bigger than those in the Far West. The contributions given to support and expand vocal music have been incredible.

We sponsor youth camps and workshops all over the west. We invite other groups to sing on our shows. We reach out to educators to help with their programs. We give generously of our time and money.

The Harmony Foundation is one way to share and the Far Western District leads the way.

We were the only District Sponsor for the Youth Festival in Costa Mesa this year. Half of our \$10,000 sponsorship came directly from our chapters with the rest from our general funds.

Bakersfield	The Golden Empire Chorus	D-005	SW	\$500.00
Palo Alto-Mountain View	Peninsulares	D-022	NW	\$450.00
San Diego	Sun Harbor Chorus	D-023	SE	\$303.07
Visalia	The Mighty Oak Chorus	D-029	NE	\$500.00
Santa Fe Springs	Masters of Harmony	D-046	SW	\$364.00
Fullerton	Orange Empire Chorus	D-056	SE	\$1,804.09
Jeff Freeman - President, El Cajon	Music Masters Chorus	D-086	SE	\$100.00
Rincon Beach	Pacific Sound	D-103	SW	\$500.00
Salt River Valley	A Capella Syndicate	D-125	AZ	\$260.00
TOTAL				\$4,781.16

*I want to give special recognition to **Jay Campbell** from the Fullerton Chapter. Jay used a Corporate Matching program to double the large donation from the Chapter.*

We also lead the Society in donations to the Harmony Foundation. Here is a three year average:

- Total # of FWD Donors: **504** (out of 2,063 current members)
- Total Annual Giving from FWD Donors: **\$646,142.00 per year**

One exciting aspect of giving through the Foundation is the ability to direct up to 30% of your donation to your Chapter(s) and the District. That's 30% total so a split could be 15% Chapter and 15% District or 15% Chapter A and 10% Chapter B and 5% District. You get the idea.

This opportunity to target some of you donations to local programs is under utilized.

- Total Annual Sum of Donor Choice Checks to FWD Chapters: **~\$48,000 per year**
- Total Annual Donor Choice Distribution to FWDistrict: **~\$7,154 per year**
- Average FWD Individual Donor Choice Allocation to Chapter: **7%**
- Average FWD Individual Donor Choice Allocation to District: **1%**

What if...?

- Chapter Donor Choice Allocations averaged **15%**?
 - Over **\$96,900** would come back to FWD Chapters Annually

- District Donor Choice Allocations averaged **5%**
 - Over **\$35,700** would come back to District Annually

Here's a list of the members that directed a portion of their Harmony Foundation contributions to the **District** in 2017:

Shreyas Amin	Robert Gray	Kevin Palmer
Rog & Linda Anderson	Shelley Herman	David & Barbara Plum
Bob & Bobbi Apple	Craig & Barbara Hughes	Ray & Sandy Rhoads
Max Bates	Grace Hughes	Ray & Sandy Rhymer
Jamie Bedford	Steve Hunt	Joe Salz
Pete & Shirley Bennett	Cliff Johnson	Kevin & Karen Smith
Gordon & Elizabeth Bergthold	Ray Johnson	Austin Snow
Gary & Bridget Bolles	Ken Klein	G & Diane Spence
Dave Briner	James & Marlene Kline	David & Christine Starceвич
Jim & Patricia Browne	John & Kay Krizek	Sam & Carol Ann Stimple
Richard Burch	Chuck & Kynn Leavitt	Rofer Stoddard
Joey Buss	Ron Leutbecher	Dale Summer
Jay Ciccotti	Wally Mees	Dave & Cathy Tautkus
Les Cudworth	John & Kim Mertens	Mark Travis
Jim & Delain DeChaine	Donald Miller	Jim Turnmire
Fair Weather Quartet	Terry & Edith Moore	Tom Wallis
Norma Feenstra	James Nelson	Edward Warner
Dominick Finetti	Jim & Janice Newlove	David Weatherford
Marlin & Nancy Fors	Joanne Newman	Al & Donna Wolter
Max & Judy Frickey	Victor Onufrieff	

Thank you!

Your generosity helps the District provide the programs and services we all enjoy.

I encourage everyone to take advantage of this opportunity. Please consider giving to the **Harmony Foundation** at any level. Click the link to get started. It's easy and don't forget to use the Donor Choice Program option to support your Chapter(s) and the District.

If you are a current Harmony Foundation donor but not designating a Chapter or the District for a portion of your funds please consider contacting the Foundation at **615-523-3040** or sogiba@harmonyfoundation.org to make an adjustment.

Thank you for everything you do to support our vision: *Everyone in Harmony!*



President
Far Western District
Barbershop Harmony Society

Appendix H: Possible SOP Change re: Endowment Fund Descriptions

Proposed changes and additions to FWD SOP: District Outreach and Steinkamp Endowment Funds.

NOTE: Additions are **BOLD** and deletions are ~~STRUCK THROUGH~~.

=====

Section 113.13.2 of the SOP should be changed to read:

ARTICLE XIII: EDUCATIONAL PROGRAMS

113. 13.2. DISTRICT OUTREACH ENDOWMENT FUND

The Far Western District Outreach Endowment Fund is established for the purpose of supporting outreach and educational activities in the Far Western District.

The Fund is derived from voluntary contributions by members, chapters and friends of the district, as well as by initial seed money from the Far Western District treasury. The Fund is maintained by Harmony Foundation on behalf of the Far Western District, with proceeds from the Fund's income used to fund outreach and educational activities.

Monies from the Fund are to be spent on projects as recommended by the District Board. These projects may include, but are not limited to: youth camps, scholarships, seminars for music educators, audio-visual materials, manuals and educational materials,

Augmentation of district outreach budget items such as high school quartet scholarship awards and Collegiate Barbershop Quartet travel, new chapter startup activities, adult outreach programs to potential members by existing chapters, and other projects as may be appropriate.

Where these projects are offered to minors, such as youths attending FWD youth camps, The Society's Youth Protection Policy and Youth Activity Forms will be provided to and executed by the parent or guardian providing for appropriate release for medical and/or accident circumstances and will also contain a "hold harmless" clause against the sponsors, FWD and SPEBSQSA, Inc.

Applications for project funding for outreach activities should be made through the appropriate committee chairmen: YIH Chair for youth activities, Membership Chair for new chapter startups, CDD Chair for Chorus Director Development, etc. For any requests which don't appear to fit under an existing committee chair, contact the Executive Vice President.

The annual budget of the Far Western District may include projected grant distributions from the fund, provided that such distributions do not exceed the **expected income (donations/interest/capital gains) prior year's net realized gain (including interest and dividends)** or 5% of the Fund, whichever is the lesser amount. To the extent that those numbers change during the budget year, expanded mid or late year grants may be accommodated if the financial state of the Fund allows for it.

The intention behind this funding/spending model is to allow for the Outreach Endowment Fund to always be in a state of growth, and eventually be large enough to fund substantial outreach programs entirely from the interest/capital gains of the Fund's investments."

For the purposes of establishing the initial balance of the fund, the phrase "initial seed money from the Far Western District treasury" above is defined as the amount necessary to bring the balance of the fund to \$30k as of Jan. 1, 2015, after rolling over the current Youth Outreach Fund balance (~\$4k) and adding in the 2014 donation total (estimated ~\$6k), which would require an estimated ~\$20k from our bank account to accomplish. The first year (2015) we would therefore begin with a total grant limit of 5% (\$1500, approximately what our District grant activity was in 2014), but could adjust upwards during the course of the year if the financial state of the fund grows enough. Given that we usually show about \$6k worth of donation income per year (which we hope to increase), the fund should grow relatively quickly over the next several years and allow us to budget for increasing amounts of grants for various outreach activities.

Section 113.13.3 should be added to the SOP:

113. 13.3. LLOYD STEINKAMP ENDOWMENT FUND FOR FWD HARMONY CAMPS

The Lloyd Steinkamp Endowment Fund for Far Western District Harmony Camps (LSEF) is established for the purpose of supporting Harmony Camps within the Far Western District.

The LSEF Fund is derived from voluntary contributions by members, chapters and friends of Harmony Camps.

The Lloyd Steinkamp Endowment Fund is maintained by the Sacramento Region Community Foundation (SRCF) on behalf of the Far Western District, with proceeds from the Fund's income used to fund Harmony Camps within the District. The SRCF is a Sacramento Foundation with total funds in excess of one hundred twenty million dollars. The SRCF board of directors determines each year a percentage that can be withdrawn in any given year. In 2017, that number was four percent. In subsequent years the percent number voted on by the SRCF board will depend primarily on the growth of the overall SRCF invested funds. The SRCF board is committed to continued growth of the fund.

As a part of the larger SRCF Fund, the LSEF is structured to grow from contributions and investment growth with no withdrawals until a level of two hundred thousand dollars is reached, at which point allowable withdrawals may be made in support of the FWD Harmony Camp.

When the LSEF reaches a level of four hundred thousand dollars, the Far Western District becomes the executor of the funds and the allowable withdrawal funds are overseen and directed by the Far Western District Board of Directors.

When the LSEF fund level exceeds two hundred thousand dollars but is less than four hundred thousand dollars, the director of the FWD Harmony Camp is the executor of the LSEF withdrawal funds and may use those funds in support of the FWD Harmony Camp.

Also, when the LSEF fund level exceeds four hundred thousand dollars and the executor of the LSEF becomes the FWD Board of Directors, the allowable withdrawal funds are no longer limited to the FWD Harmony Camp. The funds are intended, but not limited, to be used for Harmony Camps throughout the Far Western District.

The LSEF was created by an agreement signed on April 1, 2015 between the president of the Far Western District, the Treasurer of the District and the coordinator of the FWD Harmony Camp and the Sacramento Region Community Foundation.

Policies of the SRCF are available from the director of the FWD Harmony Camp and the Sacramento Region Community Foundation.

Appendix I: Possible SOP Change re: Per Diem Reimbursement

10.4 EXPENSES OF DISTRICT OFFICIALS

c) Meals, when required, at a per diem amount approved by the FWD BOD. Actual Expense **with receipts** for meals not to exceed \$10 Breakfast, \$15.00 Lunch, \$25 Dinner. Adpoted 6/7/2017 BOD Meeting.



Bryan Forbes Attachment



Date: May 14, 2018
 Title: **Proposed Revenue Model – Annual Conventions & Contests**
 Objective: Restructure the revenue rates and sources for Division and District Conventions to improve attendance, enjoyment and net income.

Background

Attendance at Division and District contests has been in decline for over a decade. Historical registration data for these contests reach back to FY 2000. There is no known database of registration information prior to that time. At the 2000 Fall Convention a total of 2,263 competitors and non-competitors registered to attend. The most recent Fall Convention in Bakersfield, CA saw just 929 registrations. The same trend exists for the SE/SW, NE/NW and AZ Division contests.

**Table No. 1
 (Convention/Contest Registration Trends¹)**

Year	Contest	Reg. Count
2017	District	929
2016	District	1,113
2015	District	1,154
2014	District	1,380
2013	District	1,520
2012	District	1,457
2011	District	1,432
2010	District	1,560
2009	District	1,160
2008	District	1,285
2007	District	1,745
2006	District	1,764
2005	District	1,850
2004	District	2,055
2003	District	2,081
2002	District	1,729
2001	District	1,750
2000	District	2,263

Year	Contest	Reg. Count
2017	Arizona	224
2016	Arizona	275
2015	Arizona	244
2014	Arizona	308
2013	Arizona	288
2012	Arizona	365
2011	Arizona	389
2010	Arizona	379
2009	Arizona	325
2008	Arizona	553
2007	Arizona	517
2006	Arizona	609
2005	Arizona	613
2004	Arizona	749
2003	Arizona	614
2002	Arizona	454
2001	Arizona	704
2000	Arizona	566

Year	Contest	Reg. Count
2017	NE/NW/Prelims	592
2017	SE/SW	574
2016	NE/NW	470
2016	SE/SW/Prelims	546
2015	NE/NW/Prelims	711
2015	SE/SW	615
2014	NE/NW	542
2014	SE/SW/Prelims	808
2013	NE/NW/Prelims	746
2013	SE/SW	776
2012	SE/SW/Prelims	914
2009	NE/NW	517
2009	SE/SW	433
2008	NE/NW	719
2008	SE/SW	363
2007	SE/SW	750
2002	NE/NW	703
2001	NE/NW	1,073
2000	NE/NW	1,024

Over the last 2 to 3 years it has become increasingly difficult to deliver state of the art theaters at which to hold our contests due to both availability and the cost associated with these facilities. In addition, hotel costs are increasing across the board for guest rooms, banquet rooms and meeting rooms. The combination of lower attendance and higher cost creates a challenging environment. The FWD has, for the most part, continued to create positive annual net income from these contests and conventions and has done so by steadily increasing registration rates. Registration for a Division Contest now ranges from

¹ The current practice of combining division contests with the international quartet prelims does not date back to year 2000 so there are gaps in the historical record since, during some years, contests were held separately.



\$45 to \$65 whereas registration for the Fall Contest ranges from \$50 to \$70, depending on when that registration occurs.²

As we head into 2018 and 2019, I believe the FWD is nearing a crisis point on attendance and risks incurring significant losses if changes are not made in the way in which conventions and contests are funded. I believe this is particularly true for the Combined Division Contests and the Spring Convention.³ There are many factors involved and may include any or all the following:

1. Decreasing membership at chapters and across the FWD at large.
2. Increasing average age of FWD members.
3. Two major conventions in the same year, every other year, alternating between the NE/NW and SE/SW.
4. Increased registration fees.
5. Increased hotel room rates.
6. A perception that it is impossible to win because of super choruses (so why compete?).
7. Decrease in extra-curricular activities at conventions and decreased enjoyment.
8. Lack of robust afterglows, likely a consequence of keeping top level quartets in evaluations late into the evening (at or near midnight).
9. Barbershop burn-out due to so many events throughout the calendar year (installation banquets, Mid-Winter Convention, Division Contests, Novice Contest, Chapter Shows, International Convention, Fall Convention, among other competing non-barbershop activities).

Potential Funding Alternatives

General Observations

Currently, conventions are funded almost entirely from those attending by way of a structured registration system. Additional revenue often materializes from ad sales for the convention program and from hotel rebates when such contract arrangements are made with assistance from local Visitor Bureaus. Since the latter sources are limited in nature, most of the revenue comes from registrations. The current fee structure is as follows:

² Discount Rate (Early Bird), Standard Rate or On-Site Rate.

³ Combined Division Contests with International Quartet Prelims.



**Table No. 2
(Current FWD Convention Registration Fees)**

REGISTRATION TYPE	Division Contests	Div. Contests w/QT Prelims	FWD Fall Convention	Comments
ALL EVENTS - DISCOUNT RATE	\$45.00	\$50.00	\$50.00	
ALL EVENTS - STANDARD RATE	\$60.00	\$65.00	\$65.00	
ALL EVENTS - ONSITE RATE	\$65.00	\$70.00	\$70.00	
ALL EVENTS - DISCOUNT RATE (UNDER 26)	\$22.50	\$25.00	\$25.00	50% of 1010
ALL EVENTS - STANDARD RATE (UNDER 26)	\$30.00	\$32.50	\$32.50	50% of 1020
ALL EVENTS - ONSITE RATE (UNDER 26)	\$35.00	\$35.00	\$35.00	50% of 1025
SINGLE EVENT - FRI. QUARTET SEMI-FINALS	\$30.00	\$30.00	\$30.00	
SINGLE EVENT - SAT. QUARTET CONTEST	\$30.00	\$30.00	\$30.00	
SINGLE EVENT - SAT. CHORUS CONTEST	\$30.00	\$30.00	\$30.00	
SINGLE EVENT - SAT. CHORUS CONTEST/SHOW	\$30.00	\$30.00	\$30.00	
SINGLE EVENT - SAT. QUARTET FINALS/SHOW	\$30.00	\$30.00	\$30.00	
SINGLE EVENT - ANY SINGLE EVENT (UNDER 26)	\$15.00	\$15.00	\$15.00	50% of Single Event Pricing

As shown in the table, there are numerous rate classifications that are designed, for the most part, to keep registration rates lower for those under 26 years of age and to promote early registration by increasing these rates within 28 days of the contest and at the contest itself. Although well-intentioned, it is cumbersome, challenging to program into our online registration system and insensitive to other geographic markets that do not support these rates, such as the Arizona Division. The top rates are also getting to levels that make them difficult to increase without causing additional negative pressure on attendance.

With an objective to increase revenue at contests and conventions, the following alternatives have been developed and are presented for consideration by the FWD Board of Directors.

Alternative A

Eliminate registration fees altogether and fund the annual cost of contests and conventions from the annual FWD budget, which would require an increase to the FWD dues. Establishing the amount requires and understanding of the annual cost of putting on these contests and conventions and the number of BHS members within the Far Western District. Cost data for each contest type over the last five years is shown below:

**Table No. 3
(FWD Contest Types – Annual Cost)**

Contest Type	2017	2016	2015	2014	2013	5-Yr. Avg
AZ Division	\$9,726	\$8,802	\$6,998	\$6,701	\$7,581	\$7,962
Combined Division	\$18,141	\$14,691	\$17,849	\$17,626	\$18,423	\$17,346
Spring Convention	\$30,441	\$30,497	\$30,693	\$35,407	\$25,447	\$30,497
Fall Convention	\$40,746	\$47,669	\$41,630	\$34,834	\$37,353	\$40,446
	\$99,054	\$101,659	\$97,170	\$94,568	\$88,804	\$96,251

Anomaly, use average



Historical data shows that the average annual cost for all contests and conventions over the last five-year period is \$96,251. For the most recent year (2017), the total annual cost was \$99,054.

The process of developing an increase to the membership dues to determine a break-even scenario is relatively simple and requires an understanding of annual convention costs and the membership rolls within the FWD. Membership data for the FWD shows the following trend since 2010:

**Table No. 4
(FWD Membership Trend)**

Year	2010	2011	2012	2013	2014	2015	2016	2017
Members	2,641	2,531	2,513	2,561	2,386	2,297	2,277	2,117

Using the 5-year average annual cost, the FWD dues would have to increase by approximately \$46 just to break even ($\$96,251 \div 2,117 = \45.47). This approach has multiple problems. They include:

1. The current FWD dues are \$25 a year and tripling them to \$75 (\$25 + \$50) to generate even the most modest of positive margins represents a significant increase to the annual dues.
2. The level of resistance and push-back for such a large dues increase would likely be substantial from the membership and the HOD.
3. Moving in this direction would likely exacerbate the downward trend of FWD membership and attendance at annual contests and conventions.

Based on the above, I do not recommend any further analysis or consideration for this alternative.

Alternative B

Increase revenue based on the following two-tiered approach:

1. Increase attendance at Annual Conventions & Contests.
2. Increase the FWD annual dues.

A discussion follows on both components of Alternative B.

Addressing the numerous factors likely contributing to decreases in attendance at conventions and contests is very challenging and requires an honest and objective look at current practices and relevant trends. Based on my review of available convention data, I have concluded that there are two major factors contributing to substantial decreases in attendance. The first is related to the annual cost to attend two major conventions every other year in the northern and southern regions of California. Our current practice combines two divisions and the international prelims in the same contest, effectively creating two 4-day conventions every other year in the same region. The second major factor points to a possible decrease in enjoyment at these conventions.

Table No. 1 below shows the registration trend for the Fall Convention from 2000 through 2017. The data confirms the following:

1. A significant decrease in total registrations (from 2,263 to 929).



2. A steady decrease in the number of choruses competing in the Fall Convention.
3. A significant decrease in the number of chorus competitors.
4. A steady decrease in the ratio of chorus competitors to total registrations.

Table No. 5
(FWD Registration Data – Fall Convention)

Year	Contest	City	Reg. Count	Chorus Count	Chorus Competitors	Chorus Comp. ÷ Reg. Count
2017	District	Bakersfield	929	18	477	1.9
2016	District	Riverside	1,113	18	553	2.0
2015	District	Mesa	1,154	16	548	2.1
2014	District	Fresno	1,380	20	579	2.4
2013	District	Bakersfield	1,520	24	807	1.9
2012	District	Mesa	1,457	20	659	2.2
2011	District	Fresno	1,432	19	626	2.3
2010	District	Bakersfield	1,560	21	762	2.0
2009	District	Sacramento	1,160	16	487	2.4
2008	District	Bakersfield	1,285	15	518	2.5
2007	District	Phoenix	1,745	18	697	2.5
2006	District	San Jose	1,764	24	797	2.2
2005	District	Pasadena	1,850	25	826	2.2
2004	District	Bakersfield	2,055	23	832	2.5
2003	District	Bakersfield	2,081	23	798	2.6
2002	District	Bakersfield	1,729	17	634	2.7
2001	District	Bakersfield	1,750	23	957	1.8
2000	District	Bakersfield	2,263	24	941	2.4

The trends described above are obvious when summarizing the data into three consecutive 6-year periods, as shown below:



Table No. 6
FWD Registration Data – Fall Convention
(6-Year Consecutive Periods)

Period	Avg. Reg. Count	Avg. Chorus Count	Var. from Prior Per.	Chorus Competitors	Var. from Prior Per.	Avg. Chorus Size	Var. from Prior Per.	Reg. Count per Chorus Competitors	Var. from Prior Per.
1. 2012 - 2017	1,259	19.3	3%	604	-7%	31.2	-9%	2.09	-10%
2. 2006 - 2011	1,491	18.8	-16%	648	-22%	34.4	-7%	2.32	-3%
3. 2000 - 2005	1,955	22.5	N/A	831	N/A	36.9	N/A	2.38	N/A

Close examination of Table No. 6 is quite revealing when looking at data summarized in three consecutive 6-year periods. As previously noted, the average total registration count dropped significantly from period 3 to period 1 (1,955 to 1,259). However, the average chorus count⁴ dropped from period 3 to period 2 but has reversed from period 2 to period 1. Notwithstanding this slight uptick in the number of competing choruses, the total number of chorus competitors continued to drop since chorus sizes steadily decreased over the entire period from 2000 to 2017 (831 to 604). The silver lining is that the trend has flattened from Period 2 to Period 1 so we can only hope that we are finally seeing a reversal in the membership trend and, thus, an eventual increase in the size of competing choruses.

One of the more difficult pieces of data to mine from our registration information is the number of non-BHS registrations at each contest. Operating under the assumption that all competing quartets are part of the registration count of a competing chorus, we can estimate the non-BHS registrations by calculating the ratio of chorus registrations to total registrations. This assumption should be reasonably accurate for the Fall Contest since this event does not include quartets qualifying for the international convention. Thus, the only other registrations that potentially skew this approach originate from quartets who are members of the FWD Frank Thorne chapter, members of a quartet who are from outside the FWD and non-competing BHS members. The first two categories are likely few in number while the last category could have a much larger registration count. This approach accurately reflects the count of non-competitors but may not fully account for the non-BHS registration count. That number will have more importance later in this analysis.

Turning back to Table No. 6, the most significant data point from Period 2 to Period 1 is the ratio of chorus registrations to total registrations (-3% to -10%). This means that the number of non-competitor registrations has significantly decreased from Period 2 to Period 1. To put it succinctly, the average number of non-competitor registrations shrunk from 843 to 655, or a loss of 188 registrations per Fall Contest from Period 2 to the current Period 1. In contrast, the loss of competitor registrations was just 40 per Fall Contest. At the Early Bird registration rate⁵, non-competitor registrations are down \$9,400 per Fall Contest versus \$2,000 for competitors for a combined revenue loss of \$11,850 per Fall Contest. The

⁴ The number of competing choruses per contest.

⁵ Using current registrations rates.

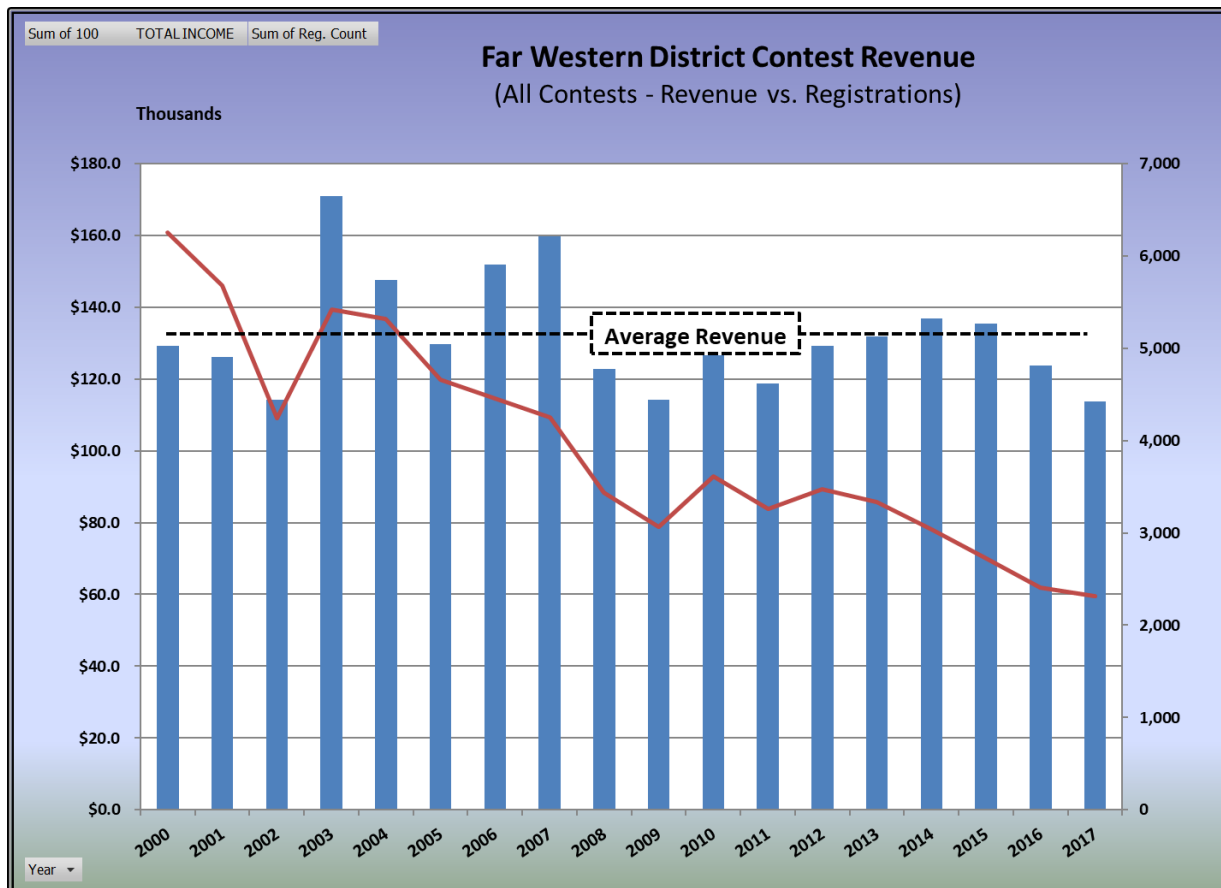


conclusion appears obvious. Non-competitors, which includes non-BHS members, are not attending. The question is, why?

I believe that the total annual cost to participate in contests and conventions is the root cause of the decrease in attendance by competitors and non-competitors followed by a decrease in enjoyment at these events. The steadily increasing “all in” cost to attend conventions has impacted the registration count in the most obvious area. That is, for non-competitors and non-BHS members. During a year that includes both the Spring⁶ and Fall Conventions, a regular member will sustain a 50% to 100% increase in cost to attend both events due to travel and hotel expenses. The cost increases even more if family members attend (i.e., non-BHS members).

Another way to look at this trend is to compare the total annual revenue from conventions contrasted against the total registration count. The following chart includes a histogram of the total annual revenue from conventions with a line graph illustrating the total registration count.

Chart No. 1
(Total Convention Revenue vs Total Registration Count)



⁶ Combined Division Contests with International Quartet Prelims.



A casual observation of this chart reveals that the total annual revenue has not significantly fluctuated off the 18-year average (\$132,347). Yet, the total registration count (red line) has plummeted from 6,250 in 2000 to 2,319 in 2017. The only way to sustain this revenue, of course, was to continually raise registration rates. Computing the revenue per registration in 2000 and 2017 reveals the level of increase.

Table No. 7
(Total Convention Revenue per Total Registrations)

Actual Revenue ÷ Total Registrations

Year	Revenue	Registrations	Rev./Reg.
2000	\$129,273	6,250	\$20.68
2017	\$113,723	2,319	\$49.04

Average Revenue ÷ Total Registrations

Year	Avg. Rev.	Registrations	Rev./Reg.
2000	\$132,347	6,250	\$21.18
2017	\$132,347	2,319	\$57.07

Regardless of how you look at it,⁷ registration rates are approximately 2-½ times greater today than they were in 2000. I don't believe that continually increasing registration rates to account for lower attendance will lead to an increase in total annual registrations at our contests and conventions. So, how do you lower registration rates, increase revenue and achieve an acceptable positive margin?

The answer lies in a two-pronged approach:

1. Decrease registration rates and simplify the current rate structure.
2. Nominally increase the FWD annual dues.

There is likely a point where a nominal increase in FWD dues and a significant decrease in contest registration rates create an increase in attendance at our conventions and contests and a reasonable net income. The basic premise is as follows:

1. Increase FWD dues by \$20 per year (from \$25 to \$45)
 - a. Decrease convention rates as follows:

⁷ Actual revenue and registrations or average revenue and registrations.



Contest Type	BHS Rate		Non-BHS Rate	
	Early Bird	Late	Early Bird	Late
AZ Division	\$25	\$50	\$20	\$20
Combined Division	\$25	\$50	\$20	\$20
Spring Convention	\$30	\$60	\$25	\$25
Fall Convention	\$30	\$60	\$25	\$25

- i. Establish a single rate for all BHS members and non-BHS members ages 13 and above.
- ii. Children up to the age of 12 attend free.
- iii. The "Late" rate applies from the Early Bird Cut-off through the convention.
- iv. No "Late" rates for non-BHS attendees.

Analysis of the above noted recommendations yield the follow summary results for all contests in one year (net income is prior to payment to host chapters):

**Table No. 8
(Proposed Revenue Model - All Contests)**

Description	Current Count	10% Growth	15% Growth	20% Growth
Annual Registration Count	2,759	3,034	3,172	3,310
Gross Revenue	\$114,908	\$122,398	\$126,144	\$129,889
Average Cost (last 5 years)	\$96,251	\$96,251	\$96,251	\$96,251
Net Income	\$18,657	\$26,147	\$29,893	\$33,638

My inquiries to numerous long-term members of the FWD (30 years and longer) regarding the last time dues were increased was met with "I don't remember. They've always been \$25." Although I don't know the last date on which FWD dues were increased, it is clear it was some time ago. FWD dues compare to other Districts as follows:



**Table No. 9
(BHS North American Districts – Annual Dues⁸)**

Annual Dues	No. of Districts	District
\$24.00	1	LOL
\$25.00	7	DIX, FWD , JAD, MAD, NED, NSC, SUN
\$30.00	2	CSD, PIO
\$33.00	1	RMD
\$35.00	1	CAR
\$38.00	1	SLD
\$41.00	1	EVG
\$45.00	2	ILL, SWD
\$50.50	1	ONT

The justification to raise FWD dues is based on the following two conditions:

1. Dues have not been adjusted for an extended period during which the total FWD membership has decreased significantly. The cost of operations has increased significantly during this same period.
2. Convention-goers pay a disproportionate share of the FWD's annual operating expenses.

Conventions and contests are designed to generate a positive net income, which becomes part of the overall operating fund of the FWD. These funds are then used to cover expenses and other needs reflected in the annual budget. Consider the following: The average annual net income over the last 18 years from conventions and contests was \$28,595.⁹ Using an estimate of 1,500 different members attending annually, the convention-goer contributes approximately \$20 from his registration fees plus \$25 in dues to the FWD whereas a non-convention goer contributes just \$25. I believe this to be inequitable in that the non-convention goer receives the same FWD member benefit as a convention-goer but at approximately half the price. Thus, an increase in FWD dues, coupled with a decrease in the cost to attend conventions, should help rectify this imbalance.

The recommended rate adjustments (FWD Dues & Convention Registration Rates) were established based on modelling the following conditions:

1. Registration trends for all conventions per year
2. FWD membership trends
3. Average annual cost of conventions and contests
4. Convention attendance by BHS members versus non-BHS members
5. Achieving a net income for conventions greater than 15%

⁸ ONT is shown in US currency.

⁹ Using net income and after payment to Host Chapters, which removes the cost of the convention from consideration.



As noted earlier in this report, calculating the number of non-competitors at a given contest is a relatively simple process as opposed to calculating the number of non-BHS members in attendance. The purpose of making this distinction centers on the concept of establishing a lower registration rate for non-BHS members who attend our conventions. The objective is to increase this group of convention goers since this registration category has decreased over the last 5 years.

The model begins by observing the membership trend in the FWD to calculate the revenue generated from a \$20 increase to the annual dues. The next step involved establishing the current count of BHS members and non-BHS members in attendance at each of the four contests held each year in the FWD. The ratio of non-BHS members to BHS members at a contest was determined by comparing actual registration data. Finally, using a trial and error application of varying registration rates provided the necessary information on where to establish new rates for contest types and convention goers.

The following table summarizes the total revenue generation and then computes the net income after deducting the 5-year average of the annual cost to put on these conventions and contests. I believe this model is conservative and understates net income due to the following two conditions:

1. No consideration is given to the number of registrations that occur after the Early Bird cut-off and the additional revenue generated by higher registration rates.
2. The number of non-BHS members in this model is likely overstated since this figure also includes non-competing BHS members who attend conventions. Thus, revenue will be understated since the model has a lower registration rate for non-BHS members.

**Table No. 10.1
(Proposed Revenue Model – Current Attendance)**

Current Registration Data

Contest Type	BHS Count	Non-BHS Ratio	Non-BHS Count	Proj. Total	Reg. Avg.	BHS Rate	Non-BHS Rate	BHS Rev.	Non-BHS Rev.	Total Rev.
AZ Division	190	40%	76	266	268	\$25	\$20	\$4,750	\$1,520	\$6,270
Combined Division	450	30%	135	585	595	\$25	\$20	\$11,250	\$2,700	\$13,950
Intl Quartet Prelims	525	30%	158	683	681	\$30	\$25	\$15,750	\$3,938	\$19,688
Fall Contest	875	40%	350	1,225	1,219	\$30	\$25	\$26,250	\$8,750	\$35,000
Total	2,040		719	2,759	2,763			\$58,000	\$16,908	\$74,908

Proposed Dues Increase	2,000	\$20	\$40,000		
Revenue from Registrations			\$74,908		
Total Annual Revenue			\$114,908		
Average Annual Cost			\$96,251		
Net Income			\$18,657	16.2%	

As seen in Table No. 10.1, based on our current registration data and annual cost data, this model produces a net income of \$18,657, or 16.2%. Since the objective is to increase attendance, the same model was run with a 10%, 15% and 20% increase in attendance.



Table No. 10.2
(Proposed Revenue Model – 10% Increase in Attendance)

Projected Registration Data		110%								
Contest Type	BHS Count	Non-BHS Ratio	Non-BHS Count	Proj. Total	Reg. Avg.	BHS Rate	Non-BHS Rate	BHS Rev.	Non-BHS Rev.	Total Rev.
AZ Division	209	40%	84	293	268	\$25	\$20	\$5,225	\$1,672	\$6,897
Combined Division	495	30%	149	644	595	\$25	\$20	\$12,375	\$2,970	\$15,345
Intl Quartet Prelims	578	30%	173	751	681	\$30	\$25	\$17,325	\$4,331	\$21,656
Fall Contest	963	40%	385	1,348	1,219	\$30	\$25	\$28,875	\$9,625	\$38,500
	2,244		790	3,034	2,763			\$63,800	\$18,598	\$82,398
Proposed Dues Increase	2,000	\$20		\$40,000						
Revenue from Registrations				82,398						
Total Annual Revenue				\$122,398						
Average Annual Cost				\$96,251						
Net Income				\$26,147	21.4%					

Table No. 10.3
(Proposed Revenue Model – 15% Increase in Attendance)

Projected Registration Data		115%								
Contest Type	BHS Count	Non-BHS Ratio	Non-BHS Count	Proj. Total	Reg. Avg.	BHS Rate	Non-BHS Rate	BHS Rev.	Non-BHS Rev.	Total Rev.
AZ Division	219	40%	87	306	268	\$25	\$20	\$5,463	\$1,748	\$7,211
Combined Division	518	30%	155	673	595	\$25	\$20	\$12,938	\$3,105	\$16,043
Intl Quartet Prelims	604	30%	181	785	681	\$30	\$25	\$18,113	\$4,528	\$22,641
Fall Contest	1,006	40%	403	1,409	1,219	\$30	\$25	\$30,188	\$10,063	\$40,250
	2,346		826	3,172	2,763			\$66,700	\$19,444	\$86,144
Proposed Dues Increase	2,000	\$20		\$40,000						
Revenue from Registrations				\$86,144						
Total Annual Revenue				\$126,144						
Average Annual Cost				\$96,251						
Net Income				\$29,893	23.7%					



Table No. 10.4
(Proposed Revenue Model – 20% Increase in Attendance)

Projected Registration Data		120%								
Contest Type	BHS Count	Non-BHS Ratio	Non-BHS Count	Proj. Total	Reg. Avg.	BHS Rate	Non-BHS Rate	BHS Rev.	Non-BHS Rev.	Total Rev.
AZ Division	228	40%	91	319	268	\$25	\$20	\$5,700	\$1,824	\$7,524
Combined Division	540	30%	162	702	595	\$25	\$20	\$13,500	\$3,240	\$16,740
Intl Quartet Prelims	630	30%	189	819	681	\$30	\$25	\$18,900	\$4,725	\$23,625
Fall Contest	1,050	40%	420	1,470	1,219	\$30	\$25	\$31,500	\$10,500	\$42,000
	2,448		862	3,310	2,763			\$69,600	\$20,289	\$89,889
Dues Increase	2,000	\$20		\$40,000						
Membership				\$89,889						
Total Revenue				\$129,889						
Average Cost				\$96,251						
Net Income				\$33,638	25.9%					

Given the amount of data in the four iterations of this model, the table that summarizes and compares the results is shown again for the reader's convenience.

Table No. 8
(Proposed Revenue Model - All Contests)

Description	Current Count	10% Growth	15% Growth	20% Growth
Annual Registration Count	2,759	3,034	3,172	3,310
Gross Revenue	\$114,908	\$122,398	\$126,144	\$129,889
Average Cost (last 5 years)	\$96,251	\$96,251	\$96,251	\$96,251
Net Income	\$18,657	\$26,147	\$29,893	\$33,638

I believe this reduction in the convention/contest registration rates will spur an increase in attendance from both BHS members and non-BHS members. The benefit to the convention-goer is summarized in the following table.

Table No. 11
(Annual Savings to Convention-Goers)

Description	BHS Member		non-BHS Member	
	Division & Fall Conv.	Spring & Fall Conv.	Division & Fall Conv.	Spring & Fall Conv.
Current Early Bird Cost	\$95	\$100	\$95	\$100
Proposed Early Bird Cost	\$55	\$60	\$45	\$50
Annual Savings	\$40	\$40	\$50	\$50
Proposed Dues Increase	\$20	\$20	\$0	\$0
Net Annual Cost Reduction	\$20	\$20	\$50	\$50



A BHS member attending both contests each year will experience a \$20 reduction in the annual cost to attend despite the proposed FWD dues increase of \$20. If one member of his family attends, the cost savings will increase to \$70 when compared to current registration rates.

Based on the above, I recommend that the FWD Board approve this change in operations for Conventions and Contests and prepare a presentation to be given to the HOD during the 2018 Fall Convention. Should the FWD Board of Directors and HOD approve this model, or some variation of it, I recommend that the revenue derived from the \$20 dues increase be specifically allocated to a convention income account so the combined net income of all annual conventions and contests can be properly monitored.

Far Western District Budget - 2019

	2013	2014	2015	2016	2017	Proposed 2019 Budget
Revenue						
500.00 - DUES	44,669.50	44,689.87	43,912.81	45,339.74	32,186.16	\$45,000.00
501.00 - INTERN. PRELIMS						
501.00 - INTERN. PRELIMS - Other	4,075.19	4,970.50	32,468.71	25,867.50	27,245.00	\$25,000.00
501.05 - Program ads					850.00	
501.10 - Coaching deposit					20.00	
Total 501.00 - INTERN. PRELIMS	4,075.19	4,970.50	32,468.71	25,867.50	28,115.00	\$25,000.00
502.00 - FALL CONVENTION						
502.30 Last Year	384.95	-			3,435.45	
502.00 - FALL CONVENTION - Other	17,865.83	16,021.24	60,827.50	52,365.00	51,195.00	\$55,000.00
Total 502.00 - FALL CONVENTION	18,250.78	16,021.24	60,827.50	52,365.00	54,630.45	\$55,000.00
503.00 - DIVISIONAL CONV						
503.10 - AZ-NV	1,297.86	1,433.20	9,561.94	11,132.50	8,677.50	\$10,150.00
503.20 - SO CAL EAST	0.00	-	-	-	-	
503.30 - SO CAL WEST	4,068.59	-	22,830.00	-	25,495.00	\$25,150.00
503.40 - NOR CAL WEST	0.00			21,289.25	-	
503.50 - NOR CAL EAST	0.00	2,158.13		-	-	
Total 503.00 - DIVISIONAL CONV	5,366.45	3,591.33	32,391.94	32,421.75	34,172.50	\$35,300.00
504.00 - WESTUNES						
504.01 - ADS	310.00	230.00	-	150.00	50.00	\$600.00
504.02 - SUBS	0.00		-		-	
Total 504.00 - WESTUNES	310.00	230.00	-	150.00	50.00	\$600.00
506.00 - OTHER						
506.00 - OTHER - Other	0.00	-	-	-	0.13	
Total 506.00 - OTHER	0.00	-	-	-	0.13	
506.02 - INTEREST	125.36	56.35	26.00	6.49	0.00	
506.03 - WEBCAST	1,290.00	664.40	842.40	1,900.00	587.00	
510 - Donations						
510.01 Donations Awards	40.00	40.00	-	40.00		
510.02 Donations Youth Educatio	0.00	-		-		
510.03 Donations NoCal Youth Ca	14,208.00	10,202.00	12,915.00	12,057.00	14,076.17	\$12,000.00
510.31 - Donation LSEF Youth Camp		2,700.00	200.00	-	2,000.00	\$2,000.00
510.04 Donors Choice	3,997.62	4,078.40	11,023.11	6,858.10	2,826.22	\$5,000.00
510.05 Donations-Harmony Found	4,235.70	1,000.00	150.00		2,619.07	\$0.00
510 - Donations - Other	2,000.00	-	2,000.00	2,000.00	3,500.00	\$0.00
Total 510 - Donations	24,481.32	18,020.40	26,288.11	20,955.10	25,021.46	\$19,000.00
520.00 - Fees						
520.01 - NorCal Youth Camp	5,520.00	85.00	3,395.00	6,065.00	7,302.00	\$8,000.00
520.02 - HCW	13,000.00	-	5,190.00	6,885.00	318.81	
520.04 - Leadership Academy	9,009.00	-	870.00	1,121.53	3,270.00	\$2,500.00
520.05 Director Devolopment	1,570.00	-			-	
Total 520.00 - Fees	29,099.00	85.00	9,455.00	14,071.53	10,890.81	\$10,500.00
Total Revenue	127,667.60	88,329.09	206,212.47	193,077.11	185,653.51	\$190,400.00

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Expense						
601.00 - HCW/LA EXPENSE	0.00			14,528.04	3,183.82	\$2,500.00
601.01 - ConvExp.SoCalWest	0.00			-	-	
601.10 - DS - District Spring			30,275.00	53,302.86	30,435.46	\$35,350.00
601.20 - AZ - AZ Div Exp			7,965.00	10,301.88	11,141.36	\$10,725.00
601.30 - SC - SoCal Div Exp			19,625.74	-	21,138.88	\$22,300.00
601.40 - DF - District Fall			46,025.00	44,435.00	33,789.40	\$45,500.00
601.50 - NC - NorCal Div Exp				17,989.96	-	
602.00 - Fall Convention Exp				-	-	
602.10 - Conv Exp Webmaster		795.27	237.16	-	-	
602.23 Supplies	0.00			-	97.23	
602.00 - Fall Convention Exp - Other	197.60	343.99		-	21,022.70	
Total 602.00 - Event Expense	197.60	1,139.26	104,127.90	140,557.74	120,808.85	\$116,375.00
603.00 - Webcast	1,115.10	1,374.20	590.20	906.00	632.60	
604.00 - BD MEETING						
604.01 - TRAVEL	6,833.98	6,911.27	9,425.54	6,807.25	6,089.94	\$7,000.00
604.02 - MEALS	1,786.96	1,673.00	2,112.23	2,361.20	1,768.48	\$2,000.00
604.03 - LODGING	8,571.16	7,011.17	8,928.61	10,149.49	6,929.13	\$7,500.00
604.04 BD Meeting - Supplies	360.74	97.24	25.16		721.07	\$250.00
604.00 - BD MEETING - Other	1,097.94	1,846.60	-	1,370.85	-	\$500.00
Total 604.00 - BD MEETING	18,650.78	17,539.28	20,491.54	20,688.79	15,508.62	\$17,250.00
607.01 - DIR DEVELOP						
607.012 - SEMINAR	2,173.34			-	-	
607.01 - DIR DEVELOP - Other	1,062.68	96.31		1,145.20	-	\$500.00
607.21 - Director Scholarship	0.00	-	689.28	-	-	
Total 607.01 - DIR DEVELOP	3,236.02	96.31	689.28	1,145.20	-	\$500.00
607.04 - FINANCIAL DEVEL CHR	0.00	-	-	-	-	
607.08 - C&J						
607.081 - SUPPLIES	0.00	71.41	383.42	-	195.68	\$200.00
607.083 - Postage		30.62	-	-	-	
607.084 - TRAVEL	2,731.05	2,380.27	2,221.24	2,154.36	1,990.68	\$2,000.00
607.085 - C&J CAT SCH	3,150.00	320.00		6,930.00	-	\$7,000.00
607.08 - C&J - Other	0.00			-	-	
Total 607.08 - C&J	5,881.05	2,802.30	2,604.66	9,084.36	2,186.36	\$9,200.00
607.09 - YMIH						
607.090 - Youth Lodging Exp	0.00	110.89	-	-	-	
607.091 - SUPPLIES	205.80			-	-	
607.093 - TRAVEL	345.30	311.50		-	-	
607.094 - POSTAGE	0.00			-	-	
607.095 - AWARDS	1,100.00	1,305.80	1,100.00	1,329.96	1,395.40	\$1,500.00
607.096 - NoCal Youth Camp	16,105.50	5,508.36	17,046.04	19,197.69	20,683.27	\$20,000.00
607.096 Youth Festival Grants	1,000.00	500.00	500.00	500.00	1,000.00	\$500.00
607.09 - YMIH - Other	0.00		500.00	405.00	-	
Total 607.09 - YMIH	18,756.60	7,736.55	19,146.04	21,432.65	23,078.67	\$22,000.00
Total 607.098 - LSEF - FWD YIH Camps	0.00	-	10,200.00	-	-	
607.10 - EVENTS						
607.101 - SUPPLIES	327.39	165.60	127.90	537.26	-	\$500.00
607.102 - TRAVEL	3,009.15	320.20	29.50	-	545.17	
607.105 - POSTAGE	9.24			-	-	
607.10 - EVENTS - Other	84.62	100.00		1,809.01	-	
Total 607.10 - EVENTS	3,430.40	585.80	157.40	2,346.27	545.17	\$500.00

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607.11 - MUSIC & PERF						
607.110 - CHAPT COACHING	435.65	-	-	525.10	0.00	\$500.00
607.113 - TRAVEL	351.40	-	162.92	-	-	\$250.00
607.117 - HARMONY COLLEGE WEST	13,836.48	-	15,791.59	-	-	
607.11 - MUSIC & PERF - Other	0.00	120.95	-	-	-	
Total 607.11 - MUSIC & PERF	14,623.53	120.95	15,954.51	525.10	-	\$750.00
607.12 - MKTG & PR						
607.123 - PROMO MATERIALS	0.00	-	-	-	-	
607.124 - WEB EXPENSES	2,949.13	1,894.37	2,286.32	3,423.85	1,310.05	\$4,200.00
607.127 - Travel	394.70	-	-	484.96	233.97	
708.00 - WESTUNES						
708.01 - TELEPHONE	703.53	600.38	704.20	656.76	694.56	\$750.00
708.02 - POSTAGE	0.00	-	-	-	-	
708.03 - TRAVEL	439.08	1,819.27	67.00	924.00	-	\$750.00
708.05 - SUPPLIES	0.00	-	-	373.00	-	
708.06 - PRINTING	0.00	-	-	-	-	
708.07 - MAILING LIST	0.00	-	-	-	-	
708.00 - WESTUNES - Other	0.00	-	-	96.20	-	\$900.00
Total 708.00 - WESTUNES	1,142.61	2,419.65	771.20	5,958.77	2,238.58	\$2,400.00
607.12 - MKTG & PR - Other	0.00	-	-	-	-	
Total 607.12 - MKTG & PR	4,486.44	4,314.02	3,057.52	5,958.77	2,238.58	\$6,600.00
607.18 - MEMBERSHIP						
607.17 - SUNSHINE	0.00	-	-	-	-	
607.181 - SUPPLIES	46.01	-	-	-	-	
607.184 - TRAVEL	651.58	-	-	-	-	
607.185 - Learn to Sing	143.30	-	-	-	-	
607.18 - MEMBERSHIP - Other	0.00	-	-	-	-	
Total 607.18 - MEMBERSHIP	840.89	-	-	-	-	\$0.00
607.20 - LEADERSHIP FORUM - BHS	2,539.81	4,557.00	2,834.20	1,978.42	880.00	\$0.00
607.99 - MISC COMMITTEES						
607.99 - MISC COMMITTEES	0.00	-	-	-	-	\$0.00
608.00 - Donations						
608.01 Harmony Foundation	10,000.00	-	20,000.00	-	10,000.00	
608.10 - FWD Outreach Endow	0.00	-	31,500.00	-	-	
Total 608.00 - Donations	10,000.00	-	51,500.00	1,978.42	10,000.00	\$0.00
609.00 - MISC EXP						
609.00 - MISC EXP	0.00	-	-	-	-	
609.01 - Dues Collection Fees	1,786.78	1,787.50	1,750.92	1,811.59	1,287.45	\$1,500.00
609.02 - Merchant Acct Fees	517.04	606.55	3,363.43	3,890.55	3,397.26	\$3,750.00
610.00 - INTERN. QT TRAVEL	2,425.15	2,410.20	2,462.79	2,462.85	2,033.20	\$2,500.00
611.00 - INTERN CH TRAVEL	5,596.50	5,562.00	5,508.07	5,683.50	4,692.10	\$5,000.00
612.00 - COLLEGE QT TRAVEL	450.00	-	-	-	-	
617.01 - CONV ACT CHAIRMAN	445.68	-	-	-	-	
622.00 - Gov't Fees	80.00	60.00	70.50	60.00	40.50	\$50.00
Total Misc Expense					11,450.51	\$12,800.00
700.00 - PRESIDENT						
600.00 - AWARDS						
607.02 - COMMITTEE	239.04	862.54	-	507.23	679.65	
600.00 - AWARDS - Other	761.88	1,207.06	793.44	492.57	679.12	\$500.00
Total 600.00 - AWARDS	1,000.92	2,069.60	793.44	999.80	1,358.77	\$500.00
607.03 - NOMINATING						
607.03 - NOMINATING	0.00	-	-	-	-	
607.07 - LONG RANGE PLANNING						
607.07 - LONG RANGE PLANNING	0.00	-	-	-	-	
607.16 - HALL OF FAME						
607.16 - HALL OF FAME	0.00	297.46	181.82	411.09	-	
700.03 - TRAVEL	385.50	-	-	-	1,301.49	\$1,500.00
700.04 - INTERNATIONAL EXP	2,750.33	1,050.90	3,664.36	2,145.59	-	\$2,500.00
700.05 - PRES MID-WINTER EXP	0.00	-	1,461.46	-	-	\$1,500.00
700.00 - PRESIDENT - Other	122.07	-	-	729.97	528.04	\$500.00
Total 700.00 - PRESIDENT	4,258.82	3,417.96	6,101.08	4,286.45	3,188.30	\$6,500.00

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701.00 - Immeidate Past Pres	156.49	50.00	-	-	\$250.00
703.00 - EVP					
703.03-Tri & Meals	4,037.10	1,804.21	2,308.83	339.96	909.40
703.07 - Lodging					\$1,500.00
703.06 - EVP Mid-Winter		1,457.02	1,954.15	1,162.05	1,483.58
703.00 - EVP - Other	59.03			2,010.06	264.26
Total 703.00 - EVP	4,096.13	3,261.23	4,262.98	3,512.07	2,657.24
					\$4,250.00
704.00 - DVP					
704.10 - DVP AZ					
704.12-POSTAGE	0.00	-	-	-	-
704.13-TRAVEL	79.80	-	244.41	-	-
704.10 - DVP AZ - Other	0.00	-	-	-	-
Total 704.10 - DVP AZ	79.80	-	244.41	-	-
					\$500.00
704.20-DVP So Cal East					
704.23-TRAVEL	262.20	107.10	245.20	-	215.10
704.24-SUPPLIES	44.79			-	-
704.20-DVP So Cal East - Other	0.00			-	-
Total 704.20-DVP So Cal East	306.99	107.10	245.20	-	215.10
					\$500.00
704.30-DVP SO CAL W					
704.33-TRAVEL	83.40	-	-	-	-
704.30-DVP SO CAL W - Other	0.00	-	-	-	-
Total 704.30-DVP SO CAL W	83.40	-	0.00	-	-
					\$0.00
704.40-DVP NOR CAL W					
704.40-DVP NOR CAL W - Other	0.00	-	-	-	-
Total 704.40-DVP NOR CAL W	0.00	-	0.00	-	-
					\$0.00
704.50-DVP NOR CAL EAST					
704.52-POSTAGE	0.00	-	-	-	-
704.53-TRAVEL	0.00	-	-	343.02	273.00
704.54 - SUPPLIES	0.00	-	-	-	-
704.50-DVP NOR CAL EAST - Other	0.00	-	-	-	-
Total 704.50-DVP NOR CAL EAST	0.00	0.00	0.00	343.02	273.00
					\$350.00
Total 704.00 - DVP	470.19	107.10	489.61	343.02	488.10
					\$1,350.00
705.00 - SECRETARY					
705.01 - TELEPHONE	0.00				
705.02 - POSTAGE	0.00	54.50	48.75	46.75	20.10
705.03 - SUPPLIES	154.56	77.58	165.41	74.40	205.81
705.00 - SECRETARY - Other	0.00		170.92	-	-
Total 705.00 - SECRETARY	154.56	132.08	385.08	121.15	225.91
					\$200.00
706.00 - TREASURER					
706.02 - POSTAGE	0.00	38.06	87.45	64.34	111.05
706.03 - SUPPLIES	43.47	38.78	79.72	252.53	23.75
706.00 - TREASURER - Other	0.00		25.00	-	208.00
Total 706.00 - TREASURER	43.47	76.84	192.17	316.87	342.80
					\$200.00
709.00 - CHAPTER SUPPORT					
606.00 - Leadership Academy	6,315.62	-	1,825.04	-	-
707.00 - Coaching Exp		150.00	30.00	-	-
709.4 - TRAVEL	414.70			-	-
709.00 - CHAPTER SUPPORT - Other	640.54		251.80	75.00	-
Total 709.00 - CHAPTER SUPPORT	7,370.86	150.00	2,106.84	75.00	-
					\$0.00
Total Expense	111,453.40	57,993.84	258,096.72	227,186.35	195,590.48
					\$199,225.00
	16,214.20	30,335.25	(51,884.25)	(34,109.24)	(9,936.97)
					-\$8,825.00