

Final Report to the Society Board

Membership Growth Task Force

The Membership Growth Task Force originated from a call by Society President Bill Biffle for all Society members, far and wide, to share their thoughts and concerns about membership growth and retention. The response was considerable, with over 600 members contacting President Biffle. This strong response, coupled with the obvious concern created by the continuing loss of overall Society members, resulted in President Biffle calling for a Membership Summit.

The Summit was held in Nashville, TN on April 4-5, 2009 with 28 invitees from among those who had submitted thoughts, concerns, and ideas about membership. The CEO and key members of the staff also were present. The two-day Summit examined barriers to membership growth and retention, and possible solutions. One clear conclusion from the Summit was that both the size of the problem and the number of good thinkers and ideas required more focus than could be achieved through a large group. The larger group was helpful in creating multiple ideas, but was less effective in carving out ways to address the identified concerns.

President Biffle appointed Immediate Past President Noah Funderburg as chair of a seven person Membership Growth Task Force. The initial charge and list of members for the MGTF is found at Appendix A. After multiple teleconferences and one in-person meeting, the MGTF determined that meaningful solutions to membership growth and retention issues needed to be addressed through a strategic plan that identified existing strengths and weaknesses, and mapped out a strategic plan for meeting the membership challenges. The initial MGTF issued a report that is found at Appendix B. This report identified seven areas for which strategic plans needed to be developed to meet the Society's membership challenges.

President Biffle appointed four mini-task forces of the MGTF, each chaired by a Society Board member, and whose members included a staff liaison as well as

other Society members, and whose efforts were coordinated by MGTF chair Funderburg. The charge of each sub-group is found at Appendix C. Each mini-task force has worked via teleconference primarily, and meetings at Society conventions, to produce reports attached as Appendices D-G.

The Delivery Methods Task Force (DMTF) chaired by Alan Lamson, is attached as Appendix D. The All Ages Task Force (AATF), chaired by Shannon Elswick, is attached as Appendix E. The External Focus Task Force (EFTF) is attached as Appendix F, and the New Chapter Task Force (NCTF) is attached as Appendix G.

WHAT HAVE WE LEARNED

- 1. Membership growth and retention efforts can be supported from the Society level, but the most successful efforts will occur because of efforts at the local chapter level.**

The initial MGTF report noted, and subsequent work by the mini-task forces substantiates, that the keystone to membership growth and retention depends on the efforts and successes of local chapters. The Society and districts can, and do, play a significant role in providing support for chapters, but recruitment of members primarily occurs as a result of actions by chapters or their members, and although member retention can be affected by Society or district actions, members primarily remain in the Society because of satisfaction with their local chapter and how well it meets the needs of individual members.

- 2. A large number of Society members are interested in finding solutions to membership growth and retention.**

The initial response to President Biffle's call for ideas to meet the membership challenges exceeded 600 responses. Those who attended the Membership Summit continue to work on local projects, and to provide input. Many members are interested in membership issues and are willing to

devote energy to find and implement solutions. The biggest concerns seem to be communication, appropriate tools, and ongoing support.

3. **The task force method of gathering information and creating documents and systems to aid in membership growth and retention, is effective and should be continued, provided that there is a sufficiently narrow focus to the work of the task force to ensure the greatest likelihood for success.**

The work of these various mini-task forces already has created work products that are being implemented by the Society, and have provided guidance for some changes, such as Society website improvements, increases in the Live Wire email address list, and the social Media for Barbershop Choruses and Quartets document now posted on the Society website, that are steps in the right direction. As each mini-task force report makes clear, however, more work needs to be done and existing staff and committees are insufficient to make gains in implementing recommendations or further studying the issues identified as needing additional work. A conclusion also may be drawn from the reports about the advisability of maintaining a narrow focus for any task force to ensure that the assigned objectives clearly are met and thus become another step on the pathway towards ultimate success in membership growth and retention.

4. **Many of the suggestions of the mini-task forces pre-suppose or depend upon additional financial resources for implementation. As examples:**

1. Four on the Road and Teams for Accelerated Growth – NCTF
2. Webinars, video library, “train the trainers” – DMTF
3. Support for a standing committee on communications – AATF
4. SING! electronic data gathering based marketing plans - EFTF

5. **Membership growth in chapters and sustained retention usually is associated with chapters with successful administrative and music leadership teams.**

6. **The Society already has created many effective tools, but their availability or the manner in which they are delivered has prevented those resources from being fully utilized and realized.**

Content and organization on the Society website has improved, but a good bit more needs to be and can be done. A part of this work will be identifying and developing an organizational plan for how these resources best can be displayed on the website, and in some cases developing resources into new media delivery such as video or webinars, and then devoting necessary staff time to add the resources to the website.

7. **Communication is extremely important. We have many new means of communication, yet we do not seem to be more adept at communicating.**

The Society, like many organizations adapting to changing technologies, still is learning how to use various technologies to further our membership Aims and to better communicate with our members. The “Social Media for Barbershop Quartets and Choruses Things to Consider” guide developed by Society members and shared via the Society website now is attached as Appendix E-2. This integrated approach to a particular means of communication is the type of forward thinking that the Society must implement at all levels to produce communications that are effective.

RECOMMENDATIONS

1. **We should constantly say, and mean what we say, that membership growth is our number one priority. If decisions have to be made between competing interests, membership should win out for the foreseeable future. Every Society member needs to continually place membership growth and retention at the top of our priorities for EVERY decision we make regarding our activities.**

- a. **Every member, every chapter leader, and every district leader, along with the Society staff, comprises the “we” in this statement.**

While we are first and foremost a music-based organization, the success of perpetuating the barbershop style is less likely to occur if membership continues to dwindle. As membership declines in chapters, often the quality of musical performance also declines. This makes it harder to rebuild a chapter or to build favorable relationships and attitudes about barbershop harmony in that community.

- b. **Membership growth and retention should be the most important function of Society staff, meaning all programs and staff planning should relate to membership growth in meaningful ways.**

The Society Aims already make membership the key Aim, but the resulting conclusions of the mini-task force reports suggests that current staffing levels are insufficient to meet the demands, and while volunteers, task forces, and committees can provide valuable contributions, designing and implementing a strategic plan will require absolute commitment and focus by staff. Membership cannot be just a tangential portion of other staff members' duties; membership support must begin with dedicated staff support, and each staff member's contributions towards membership growth and retention should be specifically outlined and success or not in fulfilling those duties should be measured by specific, not general, metrics.

- 2. While every effort should continue to identify and secure new funding to support the Society and membership efforts, the Society must implement effective strategies immediately irrespective of the availability of additional funding.**

The role of Harmony Foundation Inc. (HFI) is important in the overall approach to expanding membership growth efforts. Early and substantial success in HFI's fund-raising efforts would make possible near-term programs and activities to impact membership growth and retention. Yet we cannot wait for such funding to materialize since the timing or even the inevitability of such funding is uncertain. We should not lessen our efforts through HFI, but our future cannot solely hinge on the HFI fundraising effort.

- 3. The President should appoint a strategic plan task force, comprised of Board members and staff members, to jointly develop a membership strategic plan for the Society using the data gained from the mini-task force reports, and future information gathering efforts. The objective of the Membership Strategic Plan Task Force is to plan how the Society can best utilize available resources in a reasoned and strategic manner to secure the greatest results at the fastest pace possible.**

Since needs are greater than resources, the manner and schedule by which new steps are taken to overcome the membership growth and retention barriers will most effectively be accomplished through a strategic plan. The strategic plan should be a living document that changes as successes are realized, resources located, or new challenges identified. Development of a strategic plan is a substantial undertaking, and should be delegated to a relatively small working group of Board and staff members (approximately 3-5 total), and the work of the strategic plan task force most likely would be more effectively accomplished by a series of meetings with all members in attendance. Although teleconferences can be effective to a point, in-person meetings likely would be more effective for creating a work product in the shortest possible timeframe.

4. Membership growth and retention strategies should focus on educating, empowering, and assisting chapters in their membership growth and retention efforts.

Since membership growth and retention occurs at the chapter level, the primary and continuing focus of any adopted strategy needs to determine the best methods for supporting chapters engaged in membership growth and retention activities, and engaging and empowering other chapters to develop and implement growth and retention strategies.

5. The following task forces should be continued, with members appointed by the President, with new charges as follows:

- a. New Chapter Task Force** – the initial focus of this Task Force should be to implement that portion of the NCTF report to establish criteria of minimum requirements for a viable and successful chapter, and, secondarily, to develop demographical information to help identify the best geographic candidates for planting and maintaining new chapters.
- b. External Focus Task Force.** – the initial focus should be on developing all means of short-term external focus initiatives with the lowest possible cost. The second focus should be on prioritizing a longer-term external focus strategy that does not depend upon substantial funding for success.
- c. Delivery Mechanism Task Force** – The initial focus should be on fully developing a system to provide a solid foundation for cost/benefit analysis for all new membership programs proposed. The secondary focus should be to develop a methodology of making available contemporary training tools for chapters to use in pursuing membership growth programs at the local level.
- d. All Ages Task Force** – the initial focus should be in collecting ideas and proven strategies used by chapters to appeal to and support singers at various ages. The secondary focus should be to develop and add to the Society website all materials that have an age-specific focus with sufficient background and instructions for use by chapters.

6. As recommended by the All Ages Task Force, the Society should form a standing committee to formulate and implement aggressive communication policies.

Appendix A – MGTF Final Report

Membership Task Force Charge and Progress

1. Solicit input from pertinent sources within and without the Barbershop harmony Society concerning the issue of membership growth.
2. Survey societal and cultural changes that affect BHS membership growth.
3. Review barriers to membership growth and recommend strategies for the elimination of those barriers.
4. Study past Society efforts at affecting membership growth and determine what worked, what did not, and why.
5. Survey the existing condition of BHS chapters, determining which are growing and which are not, and identify the reasons for both.
6. Recommend new programs and policies necessary to achieve sustained membership growth.
7. Recommend changes to existing programs and policies necessary to achieve sustained membership growth.
8. Recommend changes in current staff resources and alignments, if necessary, to sustain membership growth.
9. Suggest measurements, goals, and milestones for assessing progress and success in sustaining membership growth.
10. Estimate budgetary requirements of proposed policies and programs and suggest possible revenue streams, if needed.
11. Report its activities and progress to the Society President monthly.
12. Report its activities and progress to the Society Board of Directors at every meeting of the Board.
13. Report its activities and progress, through all practicable means of communication, quarterly to the membership.
14. Deliver a final report to the Society Board, staff, and membership.

The MGTF members were Noah Funderburg (chair), Gary Parker, Drew Ellis, Steve Morris, Tom Metzger, John Donehower, and Brooks Harkey.

Appendix B – MGTf Initial Report

INITIAL REPORT OF THE MEMBERSHIP GROWTH TASK FORCE BARBERSHOP HARMONY SOCIETY September 22, 2009

The Membership Growth Task Force (MGTf) submits the following as its initial report to the Society Board as required in the charge to the MGTf. The task force consists Noah Funderburg (chair), Gary Parker, Drew Ellis (appointed as staff but continues on the committee), Steve Morris, Tom Metzger, John Donehower, and Brooks Harkey. The charge of the Task Force is attached as Appendix A. Following this report, at Appendix B, is an overview or explanation for each of the seven strategic points set out in this report. We assume that some aspects of our initial report will invite questions that we hope Appendix B will help answer.

The MGTf membership was chosen from attendees of the Membership Summit called by President Biffle for April 4-5, 2009. The initial discussion by the MGTf followed many of the discussion points raised at the Summit meeting. We realized this was too broad a scope, and President Biffle reduced our charge to the attached Appendix A. Subsequently, the MGTf determined that even this charge is overly broad, though each component of the charge has merit. Task Force members also felt that a clear, initial conclusion was so obvious that proceeding with that conclusion, rather than conducting quite as exhaustive review as the charge might suggest, was reasonable. We also felt that knowledge about membership decline would be meaningless if we were not committed to translating the gained knowledge into a clear strategic plan. Thus, our initial report is presented in terms of developing a series of strategic plans. The MGTf is prepared to work on developing language for these strategic plans, but we felt that (1) it would be prudent to obtain feedback from the Board before proceeding, and (2) that we need guidance of when and how to engage the staff and others in the development of some or all of the proposed strategic plans.

This report envisions a strategic analysis process that addresses the larger issues of which we are aware, and provides a roadmap for how we might address the most significant issues first, and other issues, as we are able. Without question, there is some overlap to these proposals. To the extent we have the capacity to work on several different strategic proposals simultaneously, we should endeavor to do so. Time is definitely of the essence. Depending on the comments received from the Board, President Biffle may want to create some sub-committees or special task forces to work on the component parts of this plan.

Respectfully submitted,
J. Noah Funderburg, Chair
For the MGTf

I. The overall strategic plan for increasing membership in the Barbershop Harmony Society must be based on helping chapters become successful, in whatever way they choose to enjoy barbershop harmony, in providing a consistent, high-quality experience each and every week.

1. There may be numerous types of chapters: competitive, recreational, performance, social, quartet, day-time, etc.
2. Although each type of chapter may have different needs, every chapter needs to have a plan, and execute that plan, in order to be continuously successful over time.
3. Membership growth will occur if chapter members feel fulfilled and satisfied on a regular basis over time by their chapter experience.

II. The Society should implement a plan that would systematically provide direct support to all chapters desiring support, rather than promoting a Society-wide membership program or drive.

1. Society-driven themed membership drives have not proven over time to prevent membership decline.
2. Society-wide membership programs have not differentiated between types of chapters, and therefore probably did not appeal to some chapters.
3. Not all chapters will desire direct support.
4. Programs such as Leadership Academy and Harmony University/mini-HEP schools, are not adequately available to, or used by, chapters to help chapters achieve higher levels of chapter experience success.
5. The Chapter Counselor program through CSLT has met with some success, but has not proven to be a universal solution.

III. The Society should implement a plan for providing the strongest possible support mechanisms for individual chapters. A systematic review should be conducted of how this best could be achieved either within the current district configuration or by creating new subdivisions or districts.

1. A strategy should be developed on how best to measure chapter health, and through what means, and on what cycle of repeated measurements, chapter health is measured.
2. A strategic plan should be developed to determine the priority in which chapters needing the most support will be assisted given that the Society does not have unlimited resources.
3. In developing methodologies for implementing Proposal II, consideration should be given to how or whether changing chapter alignments within districts would provide better chapter support.

IV. The Society should develop a strategic plan for developing new chapters. This plan should include:

1. How to determine potential sites for new chapters;

2. What minimum requirements are needed to ensure a new chapter will have the best chance to be successful;
3. Methods to provide continuing support to new chapters;

V. The Society should develop specific plans for how to appeal to and attract members of all ages, and how to serve them better to increase retention.

1. The expectations of men of various ages will be different. Baby Boomers, Gen Xers, Gen Yers, and Millennials have some common characteristics that are identifiable, and that directly affect whether they will join and remain in chapters.
2. It is possible to have a chapter type that can appeal to most, if not all, ages of men.
3. We need to understand these age-based differences in expectations in order that we can develop tools to assist chapters in fulfilling the expectations of the largest possible number of men in each chapter.
4. We need to identify a specific strategy for each age group that relates to the overall mission and vision of the Society, but that also supports our desire to grow membership.
5. Age groups for which some specific understanding, and specific tools/concepts, may be needed are roughly defined as *:
 - a. Late career/retired - men born before 1946
 - b. Baby Boomers - men born 1946-1964
 - c. Generation X - men born 1965 – 1977
 - d. Generation Y - men born 1978-1990
 - e. Millennials - men born after 1991

* The division into groups is based on the work of author Bruce Tulgan, a consultant whose books include *Managing Generation X* and *Not Everyone Gets a Trophy – How to Manage Generation Y*. Different commentators use different age brackets, and we could sub-divide in any meaningful manner that would help drive our strategies more successfully.

VI. The Society should implement a clear strategy with an external focus. This strategy should include at least the following:

1. A marketing strategy to enhance the overall reputation of barbershop harmony and the Barbershop Harmony Society;
2. Development of ideas for providing services and products to other music organizations;
3. A plan for developing partnerships with other musical organizations;
4. A plan for creating affinity sub-groups within the Barbershop Harmony Society to support and encourage non-traditional barbershop singing;
 - a. A cappella singers;
 - b. Gospel quartets;
 - c. Mixed-group singers;

- d. College-aged barbershop quartets;
 - e. High school-aged barbershop quartets;
 - f. Others??
5. A plan regarding affiliates that gives vision for them and the Society regarding their involvement, and possible integration, with the Society.

VII. The Society should examine whether changes to the contest system might enhance membership growth.

- 1. Are there ways to change the contest structure that might promote chapter strength, and therefore enhance membership growth?
- 2. Are there ways to change the judging system that might promote chapter strength, and therefore enhance membership growth?

Appendix C – MGTF Final Report

The overarching strategic plan for increasing membership in the Barbershop Harmony Society must be based on helping chapters become successful, in whatever way they choose to enjoy barbershop harmony, by providing a consistent, high-quality experience for every member each and every week.

To that end, task forces will be established to address the following:

- 1. Develop an effective, sustainable delivery method to systematically and consistently provide support to all chapters that desire support.**
 - a. Review the most effective ways to integrate of staff, Society committees, district leadership teams, and chapters in this process.
 - i. Assess the effectiveness and value of existing programs, including their elements and characteristics that allow them to be effectively delivered and supported.
 - ii. Explore new programs, systems, and methods of delivering effective help to chapters.

Delivery Methods Task Force

John Donehower

Ben Geesa

Alan Lamson (chair)

Steve Morris

Paul Wietlisbach

- 2. Develop a strategic plan to create new chapters, including:**
 - a. How to determine potential sites for new chapters;
 - b. What minimum requirements are needed to ensure a new chapter will have a reasonable chance to be successful;
 - c. Methods to provide continuing support particular to new chapters.

New Chapter Task Force

Drew Ellis

Ev Nau

Rick Spencer

Alan Wile (chair)

- 3. Develop strategies to attract and retain members of all ages and exploring elements of chapter programming that will appeal to:**
 - a. Identifiable age groups:

- i. Late career/retired - born before 1946
 - ii. Baby Boomers - born between 1946-1964
 - iii. Generation X - born between 1965 – 1977
 - iv. Generation Y - born between 1978-1990
 - v. Millennials - born after 1991
- b. Explore strategies to allow a chapter to attract and retain men of more than one age group.

All Ages Task Force

Shannon Elswick (chair)

John “Montana Jack” Fitzpatrick

Casey Parsons

James Estes

4. **Develop a strategy for effective external focus, including:**
 - a. A marketing strategy to enhance the overall reputation of barbershop harmony and the Barbershop Harmony Society in the outside world;
 - b. Development of ideas for providing services and products to other music organizations;
 - c. A plan for creating and supporting sub-groups within the Barbershop Harmony Society to encourage non-traditional barbershop singing;
 - i. A cappella
 - ii. Gospel
 - iii. Mixed-group
 - iv. College-aged barbershop quartets
 - v. High school-aged barbershop quartets
 - vi. Others
 - d. Coordinate with the Society Board Task Force on Affiliates to develop a plan to encourage and facilitate their involvement, and possible integration, with the Society.

External Focus Task Force

Roger Lewis

Tom Metzger

Gary Parker (chair)

Rick Spencer

Appendix D – MGTF Final Report

Delivery Methods Task Force (Greg Caetano, John Donehower, Ben Geesa, Alan Lamson [Chair], Steve Morris, Paul Wietlisbach)

Date: June 7, 2010

In December 2009, President Biffle created the Delivery Methods Task Force and issued this charge: *“Develop effective, sustainable delivery methods to systematically and consistently provide support to all chapters that desire support. Review the most effective ways to integrate staff, Society committees, district leadership teams, and chapters in this process. Assess the value of existing programs, including their elements and characteristics that allow them to be effectively delivered and supported as well as any impediments to their success. Explore new programs, systems, and methods of delivering effective help to chapters”*.

The task force started with a global view of how programs of all types and genres have been promulgated within the Society over the last couple of decades, which programs were successful and which were not, whether it appeared that delivery of the program and supporting information had an impact on the success or failure of those programs, and what inhibited the success of these programs. It became clear from the historic data that there was a series of common threads that had an effect on all of these programs. We were also able to provide a good summary of the historical delivery methods that have been used in the recent past for delivering information and programs of all description to every segment of the Society. (See Appendix 1) It must be remembered that the focus of the task force was on membership issues and although many other programs have used delivery methods, it was necessary to determine which and how any of the previous delivery methods might be applicable to the membership issues.

Historically used delivery methods that we have identified are summarized below. While this list shows unidirectional flow of information, there is nothing to say that these same methods have not been used or could not be used for any communication need.

1. Face to face discussion/meeting. It was agreed that this appeared, from empirical data, to be the most expensive, most difficult and, at the same time, most effective training method. More ‘train the trainer’ programs will make the training opportunities broader and more geographically distributed to allow more ‘one on one’ training.
2. Educational forums
3. E-mail
4. Websites
5. Telephone
6. Publications
7. International services and conventions
8. District services and conventions

9. Social media. This is relatively new but has been used for the past year or two and its popularity is growing.

It was also apparent that there are several factors that negatively impact any communication effort or the delivery of programs to our chapters/members. Those factors identified by the task force include:

1. Lack of commitment within the delivery chain
2. Lack of follow through and consistency in delivery. This is, perhaps, best evidenced by the multitude of membership programs that were only worked for one year and then replaced by another program because of lack of response, change in leadership, etc.
3. Selection of the wrong delivery vehicle for the message or type of message that is being sent
4. Selection of the wrong people to deliver the message
5. Filters in the delivery system that either do not forward all of the information or that alter that information as it passes through. It is imperative that a solution to getting through these filters be found.
6. The fact that a volunteer society does not always take the time to study all of the materials available to them and look for the 'bulleted' synopsis that will provide the silver bullet.

The Task Force spend a significant amount of time discussing ways that programs and information can be directly delivered to our chapters and members that have not been used in the past or that are used now but do not appear to be providing a benefit that is comparable to its potential. There was considerable discussion about whether critical information supplied to members, chapter officers and/or district officers should be done so on an 'opt-in' or 'opt-out' basis. There was some concern whether presenting a lot of the available information to the general membership was good policy even though such delivery could be set up with an opt-out option. This was due to concern for information overload to the point where the member (or members) will completely opt-out of the process and then receive no information. A good example is "Live Wire" which is an opt-in selection. The Task Force was quite surprised that only 5,000 members (less than 20%) were receiving the information that is contained in this valuable and concise document weekly. It would be a very effective tool for delivering information on membership issues but only if the readership was increased significantly. Staff did issue a new invitation to the entire membership electronically to subscribe to the document and the readership increased in just one or two weeks by more than 40%.

The Task Force also discussed this type of delivery to chapter officers and district officers. It was unanimous that information distributed to these people could be and should be on an opt-out basis only. These officers did stand for election and in doing so agreed to serve their members, chapters and districts. They should be willing and anxious to get all information that will help them perform their elected duties.

Other delivery methods that were discussed that must be explored and implemented:

1. Live one-hour webinars on membership topics with internet connection capability and the ability for questions and answers at the end. Issues that need to be studied include: adequate band width, use of an outside commercial service to present them, use initially for small groups such as district presidents or district membership vice-presidents/managers, cost of development and implementation, determining what 'tools' to develop first that are need most for membership growth by local chapters, and a policy regarding the trade off of sort term financial costs versus long term benefits.
2. Train the trainers. This methodology is currently in use in several areas and should be explored for use in membership development and growth. It was agreed that this is an extremely effective and efficient deliver method but also very costly. High quality is very important and must be provided.
3. Establishment of a 'video library'. The focus of the library should be on membership issues for the near future. For any particular major topic, there should be several videos to keep the viewing time to a reasonable amount such as an hour. It is understood that there are other topics that could also use this concept but the agreed focus from the Task Force was that the effort should be with membership issues. It is anticipated that the video library would be accessible electronically on a demand basis and that there could be a "lending library" for those members without electronic access. Although we anticipate this segment to be small (and growing continually smaller) we cannot ignore the members who are internet challenged. Creation of a 'user friendly' index is critical to the effectiveness of this library. Webinars should be free to our membership as a service of their dues and should be placed on the 'Members Only' side of the website. This will bring more value to the Society website and provide a series of educational opportunities.
4. Document library should be organized by topic that matches and parallels the video library. It may require an update of all or most of the current documents and there is an issue of what is currently available and should any of it be brought back to current use. Again, the creation of a better index is critical to the effectiveness of this library.
5. Expansion of information through Harmony Marketplace. There is a great opportunity to add materials and resources from outside of the Barbershop Harmony Society in recruiting methods and technologies as well as many other topics such as marketing, event planning, and leadership growth. There was a discussion of 'partnering' with some organization such as Amazon.com to make more resources available to our membership through development of working relationships and links with these organizations. This opportunity to deliver additional services to the membership has already been discussed with the staff and they are exploring the possibilities. It is low risk to the Society and potentially a high value to the membership. It also holds the possibility of making our barbershop material available to potential members who are currently outside of

- our Society. The appearance of barbershop material as part of a search result will increase our brand awareness.
6. Modifications to the Society website to provide more timely information that would be available to all members and keep them current by reading “news” on the website about membership issues as they arise including successes and programs by other chapters and districts. It was also clear that the website should be reorganized to make the membership resources that we now have more easily accessible – even if that only means a ‘membership resource index’ that would direct our members to documents currently existing on the website.
 7. Develop a position of training ombudsman to whom members can go for individual concerns and needs. This position should be at the staff level and not the director level.
 8. Develop an electronic membership newsletter (not dissimilar to “Live Wire” or “On the QT”) with membership tips and ‘secrets’. It should be generated every two weeks on a regular schedule so that the membership can learn to expect it. It should go to all district presidents, district membership officers, chapter presidents, the chapter contact persons, and chapter membership development officers. It needs to be concise and short with one or two new items every other week. Further it should not require ‘opt-in’ action by the recipients. The list above is selective, they were all elected or appointed to serve in this capacity with membership as their singular or main focus, and they should all care. This newsletter would serve as 26 reminders every year that they are supposed to be doing something with the membership issue.
 9. Visitations to districts and chapters should be increased. This could be staff members, Society Board members, or Society trained/selected contacts. It would allow interface more in line with the Task Force’s recommendations for increasing one on one training. There is also the possibility of leveraging the existing visits that we provide now to get more out of them. This responsibility is squarely on the shoulders of the district leadership to maximize opportunities when such visits are scheduled. Additionally, if some of the visits are within a reasonable distance from members of more than one district, then the use of cross-boundary publicity and promotion should be employed by all involved districts.
 10. Although being discussed by one of the other task forces, the burgeoning use of social media will have an ever increasing impact on how we deliver programs and information in the future (and not too distant future at that). Younger people have no problem with sorting and rationalizing that is involved with social media. It may not be faster but a whole generation now expects to get their information that way. Therefore, it is recommended that social media use be significantly increased over the current level of use. The use of social media is accepted and more readily identified as a delivery method by the target population that we are seeking as new members.

The Task Force also developed an outline set of metrics that could be used to measure the potential and realized effectiveness of a particular deliver method for a

specific program. It has been developed only to an infancy stage but should be further studied so that it can be used as the basis for creation of a system to select what is felt to be the correct delivery method for a program and to evaluate that effectiveness as the program is distributed. The following is a general outline of that concept for metrics:

A. Format (includes active and/or passive interaction):

- a. Physical hardcopy deliver (manuals, DVDs, CDs, etc.)
- b. Online:
 - i. OnDemand (archived – previously recorded)
 - ii. “Live” (example is Webex)
 - 1. Presentation broadcast only
 - 2. Collaborative/interactive Q&A (can be recorded for rebroadcast later)
- c. OnSite
 - i. Classroom/presenter/facilitator

B. Cost to Implement

- a. Initial Setup/Production Cost
 - i. Produce Hard/Soft copy materials (such as manuals, powerpoints, etc.)
 - ii. If a digital media conversion is involved, what is the conversion cost?
 - 1. Sent out to a service?
 - 2. Done by BHS staff
 - 3. Done by BHS volunteers
 - iii. Software acquisition to deliver content (Webex, etc.)
 - 1. Number of simultaneous users (question is will it be required and does it change depending on the number of users)
 - iv. Train the Trainer ramp up/certification

b. Ongoing Delivery Cost:

i. Physical Hardcopy Delivery

1. Mailing
2. Storage of Inventory
3. Printing additional copies

ii. OnLine Content

1. Service Availability
2. Storage Cost - aka disk space on a server
3. Bandwidth for X number of simultaneous users
4. Ongoing Software Licensing or Deliver charges

iii. OnSite

1. Facility Costs
2. Facilitator Costs: Room/Board/Transportation
3. Attendee Costs: Tuition/Room/Board/Transportation
4. What is the break even point
 - a. Number of attendees tuition
 - b. Partial program funded
5. Cost to 'train/retrain' facilitators

C. Efficiency:

- a. How many serviced at a given instance (1 to 1 or 1 to many)
- b. Can it be delivered in one session
 - i. Multiple days
 - ii. Multiple modules
- c. How many 'filters' must it go through to reach the intended audience

D. Reach

- a. Accessible to all members?
 - b. Accessible to potential members?
 - c. If online deliver only, how do those not connected participate?
 - i. What population are we trying to reach and what is the most relevant and appropriate method for that population?
- E. Applicable task force goals supported:
- a. Could be the result or outcome of applying all the above metrics
 - b. If the service is current and 'hot' what is the issue it addresses or solves
 - c. Can take this out if we know the goal and are trying to decide how to deliver it the most effectively
 - d. Can apply metrics to two or more programs to determine the program that would be most effective
 - e. Need to define what the delivery method is and for whom before the metrics are applied
 - f. This is not a solution looking for a problem. The metrics would prevent the Society from doing something that has no point

Neither the metrics nor enumerated delivery methods are an end to themselves. The most important thing that the BHS can do is to identify the start of a process. The process(es) must continually assess the effectiveness of ongoing mechanisms and new mechanisms as they occur. One of the real issues is continuity. It has been suggested that a permanent structure be organized and formed to keep the membership programs going regardless of leadership changes at the Board or staff level, changes in staff members, or changes in district leadership.

Appendix D-1 – MGTFF Final Report

- I) Preliminary Summary of Historical Delivery Methods
- II) District Communications Survey Cover Letter
- III) District Communications Survey Compilation

I) PRELIMINARY SUMMARY OF HISTORICAL DELIVERY METHODS
(Updated by Donehower: 5/16/10)
(Lamson/Donehower lists combined)
BARBERSHOP HARMONY SOCIETY
Membership Task Force 2: Delivery Methods

Delivery Methods from “Society Level” to “District Level”

- 1) FACE to FACE
 - a. Visits by Society staff (music/membership) to larger sub-district gatherings
 - b. Communication from Society committees directly to aligned district vice-presidents/managers/etc.
 - c. Visits by Society Board members to HOD and district BOD meetings
- 2) EDUCATION FORUMS
 - a. Leadership Forum- Society staff and committees to district officers
 - b. Judging Program
 - BHS trains and certifies the members of the contest judging community
 - Districts select the judges for contests
- 3) E-MAIL (Members with registered Email: 22,000)
 - a. One to one
 - b. Distribution Lists
 - c. Mass distribution
- 4) WEB-SITES
 - a. WWW.BARBERSHOP.COM
 - Available 24/7
 - Distribution of information
 - Resource material
 - Administrative Tools (example: Contest entry)
 - Website usage: visits in 2009: 535,000 // Page views: 1.7 Mil // Dwell time: 4 minutes // 35% of web visits 1st time visitors // #1 page hit in 2009: Anaheim Contest results

Delivery Methods from “Society Level” to “Chapter Level”
--

- 1) FACE to FACE
 - a. Staff Visits/Road-shows (Discontinued)
 - b. ‘Unofficial’ visits by staff in a coaching role
 - c. Communication from Society committees directly to aligned

- chapter vice-presidents/managers/etc.
- d. Leadership Academy (to the extent invited by district leadership)

2) EDUCATION SERVICES

- a. Leadership Academy/Cots/OIF/CDWI
 - BHS trains and certifies the trainers
- b. Area Counselors (pre-1990)
- c. Chapter Counselors
 - BHS trained at weekend sessions
- d. Musical Coaches/services
 - BHS developed roster of 'approved' musical coaches (music, singing, presentation)

3) E-MAIL (Members with registered Email: 22,000)

- a. One to one
- b. Distribution Lists
- c. Mass distribution
 - Example: In early March, 2010, a mass distribution email was sent out to all members with registered Email address to promote LIVEWIRE resulting in an almost immediate 1,000 subscriber increase despite some problems with the execution of the mass email.

4) WEB-SITES

- a. WWW.BARBERSHOP.COM
 - Available 24/7
 - Distribution of information
 - Resource material
 - Administrative Tools (example: Chorus registration tool for contest entry) --- -Website usage: visits in 2009: 535,000 // Page views: 1.7 Mil // Dwell time: 4 minutes // 35% of web visits 1st time visitors // #1 page hit in 2009: Anaheim Contest results

Delivery Methods from "Society Level" to "Member Level"

1) FACE to FACE

- a. Personal Interactions (One on One)
- b. Staff Visits/Road-shows (Discontinued)
- c. 'Unofficial' visits by staff in a coaching role

2) PHONE (1-800 Toll-free)

3) E-MAIL (Members with registered Email: 22,000)

- a. One to One
- b. Distribution Lists

-“Livewire”- Current subscribers- 7128 (Opt-in)
NOTE: As a result of a “mass” email invitation to Society members with known e-mail addresses to “opt-in” to Livewire, subscribership increase 30% (from 4500 to 7128) in a little over a month. Very effective!
-“On the QT” -Limited circulation– ‘registered’ quartets only.
-“Directly Yours”- Limited circulation- Chapter Musical Directors

c. Mass distribution

4) WEB-SITES

a. WWW.BARBERSHOP.ORG

- Distribution of information
- Resource material
- Administrative Tools (Ex. Quartet/Chorus registration tool for contest entry)
- Available 24/7 to members and public
- Website usage: visits in 2009: 535,000 // Page views: 1.7 Mil // Dwell time: 4 minutes // 35% of web visits 1st time visitors // #1 page hit in 2009: Anaheim Contest results

b. www.barbershophq.org

- Moderated Discussion group
- 100 visitors per day avg.

c. FACEBOOK: Official BHS Fanpage

- 4000 “friends” of BHS

5) PUBLICATIONS

a. Harmonizer Magazine

- Published 6x annually
- Online “teaser” Harmonizer now available on Website to general public.
- Online “Full” Harmonizer now available to members in “members only” documents section.
- BHS in process of building Digital Harmonizer archive
- Full Harmonizer has limited availability to Public

b. Harmony Marketplace Catalog

- Published 1x annually
- Available to all members
- Available on-line 24/7

6) EDUCATION SERVICES

a. Harmony University

- Attended by 400-600 singers annually.
- High return rate
- Available to anyone (Primarily attended by BHS barbershoppers and Music Educators)

b. Outstanding in Front (OIF)
-BHS trains the trainers to perform locally held schools for Chorus Directors/Youth/Music Educators.

c. Chorus Director Workshop Intensive (CDWI)
-BHS trains the trainers to perform locally held schools for Chorus Directors/Youth/Music Educators.

7) INTERNATIONAL SERVICES & CONVENTIONS

a. Invoicing of dues
-Primarily exist to inform members of online renewal of dues information and programs such as “EZ dues”.

b. International Conventions/Contests
-Held annually.

Delivery Methods from “District Level” to “Chapter/Member Level”
--

1) FACE to FACE

- a. Personal Interactions (One on One)
- b. Chapter Visits or Multi-Chapter events
- c. ‘Unofficial’ visits by District Leaders in a coaching role
- d. Chapter Counselors

2) E-MAIL

-Members with registered Email: 22,000

a. Distribution Lists

Survey conducted of all Districts by MGTf-Delivery Methods: 9 responses

For specifics, see: “III) District Communications Survey Compilation”.

6 of 9 Districts use mass email distribution with all members.

-3 of 6 Districts which use mass email distribution rate effectiveness as “neutral”.

-2 of 6 Districts which use mass email distribution rate effectiveness as “somewhat successful”.

-1 of 5 Districts which use mass email distribution rate effectiveness as “very successful”

7 of 9 Districts use targeted email distribution to communicate with Chapter Office holders, Quartets, Committees, etc.

-2 of 7 Districts which use targeted email distribution rate effectiveness as “neutral”.

-3 of 7 Districts which use targeted email distribution rate effectiveness as “somewhat successful”.

-2 of 7 Districts which use targeted email distribution rate effectiveness as “very successful”.

3) WEB-SITES

a. District Webpage

-Distribution of information

-Resource material

-Administrative Tools (example: Convention registration tool

for contest entry)

-Available 24/7 to members and public

Survey conducted of all Districts by MGTf-Delivery Methods: 9 responses.

For specifics, see: "(III) District Communications Survey Compilation".

-9 of 9 Districts have web-site

-3 of 9 Districts were able to report web-usage data.

4) PUBLICATIONS

a. District Bulletin (Published or On-line)

Survey conducted of all Districts by MGTf-Delivery Methods: 9 responses.

For specifics, see: "(III) District Communications Survey Compilation".

9 of 9 Districts have a Bulletin or Newsletter

-6 of 9 publish quarterly (1 is currently without Editor)

-2 of 9 publish bi-monthly

-1 of 9 publish monthly

-4 of 9 are published and available on-line

-4 of 9 are available only on-line

-1 of 9 is published and not available on-line

5) EDUCATION SERVICES

a. Leadership Academy

b. Top Gun or Quartet Schools

b. Outstanding in Front (OIF)

-Using BHS trained trainers

c. Chorus Director Workshop Intensive (CDWI)

-Using BHS trained trainers

6) DISTRICT SERVICES & CONVENTIONS

a. District & Preliminary Contests using BHS trained judges/administrators.

II) DISTRICT COMMUNICATIONS SURVEY COVER LETTER

(The following was sent to all Districts on March 10, 2010 by Alan Lamson)

BARBERSHOP HARMONY SOCIETY

Membership Task Force 2: Delivery Methods

Greetings!

We could use your help....

As a subcommittee of the Membership Growth Task Force of the Barbershop Harmony Society, we are tasked to “Develop effective, sustainable delivery methods to systematically and consistently provide support to all chapters that desire support “. As a foundational aspect of that charge, we are collecting information regarding the current methods that are being used today at the Society and District level and basic measures of the effectiveness of those methods. To catalog and measure communications channels at the District level we'd appreciate some basic information from each District. These questions pertain to the usage of email, websites and bulletins.

Please, to the best of your ability, answer each of the following questions and send your replies to Task Force member John Donehower who is collecting the replies for this survey. John's email address is donehower3@mchsi.com . We'd appreciate a fast turn-around on this survey as our work is time sensitive. Questions regarding this survey can be forwarded to John or Alan Lamson at janlam314@cox.net .

The survey is provided below and in the body of the Email you received. Please feel free to use either to respond.

Regards,

Alan F. Lamson

Alan Lamson
BHS Leadership Growth Task Force 2: Effective Delivery Methods
Janlam314@cox.net

**III) DISTRICT COMMUNICATIONS SURVEY COMPILATION OF
RESPONSES**

(Updated by Donehower: 5/16/10)

BARBERSHOP HARMONY SOCIETY

Membership Task Force 2: Delivery Methods

1) DISTRICT NAME:

Districts which responded:

PIO

EVG

FWD

RMD

SWD

NED

MAD

DIX

JAD

2) Does your District use mass email distribution to communicate with all members of the District?

PIO: No, our best bet at mass communication is PIONET and CPRS Group.

EVG: No

FWD: Yes

RMD: No

SWD: YES. Through our Constant Contact account. We also have chapter group email aliases - updated every other month.

NED: Yes

MAD: Yes

DIX: YES All members is YES for all members that have email addresses and have signed up for our all member group

JAD: Yes.

2a) If yes, in general terms, what is the purpose of these emails?

PIO: Announce worthwhile info added to the website or any announcements we care to get out.

EVG: No

FWD: Our eNews newsletter is sent at the first of every month to everyone with email (89% of our members). Its focus is on future events and does not include articles or editorials.

RMD: Not applicable

SWD: district newsletter, convention updates & surveys, district officer generated communications to related chapter officer

NED: Announcements of district events, show announcements, general interest etc. Not used as a discussion group.

MAD: We try not to abuse the email channel as everyone gets so many – but for specific special projects (such as sponsoring music educators to attend International in Philly) we use this channel. Also, if a situation comes up that is time-critical we would consider using this channel for communication. Our web site and quarterly publication to all members contain a lot of information and we use those for non-critical information transmission. To my knowledge, we have not used emails for mass surveys.

DIX-

JAD: Communication of events.

2b) If yes, how would you rate the general effectiveness of these e-mails? (Are questions garnering responses? Are tasks being completed? Are invitations being accepted, declined, ignored?)

SCALE: -1- (Failure) -2- -3- -4- -5- (Very Successful)

PIO: 3- Somewhat successful

EVG: Not applicable.

FWD: 5- Very Successful

RMD: Not applicable

SWD: Through CC. The membership is getting to be more and more responsive.

Newsletters - 5 - Through CC. The open rate is averaging 40% over the past two years.

Click-through rate is at 31% over the past three years. The bounce rate was close to 15% at first but has come down to around 10%.

NED: 3

MAD: I would rate the emails as a 3 in effectiveness. As noted above, I can't recall us using them for survey purposes.

DIX: 4-Successful

JAD: 4

2c) Does your District use targeted email distribution to communicate information to specific Chapter Office Holders, Quartets, Committees, individuals?

PIO: No

EVG: Yes, to HOD delegates.

FWD: YES. Every district and chapter leader has access to a web tool where they choose job positions and the web tool looks up the persons holding those jobs and sends to their current email address.

RMD: Yes.

SWD: Yes

NED: NO, not generally, although we do have that capability. Some astute board members have harnessed the technology (e-biz), but it is not widely used to target mailings.

MAD: Yes

DIX: Yes

JAD: Yes

2d) If yes, how would you rate the effectiveness of these e-mails?

SCALE: -1- (Failure) -2- -3- -4- -5- (Very Successful)

PIO: Not applicable

EVG: 3 (Questions not always answered; Tasks occasionally being completed; Invitations generally ignored.)

FWD: 5- Very successful

RMD: 5- very successful

SWD: 4 - WE STILL HAVE MANY CHAPTER OFFICERS WHO DON'T HAVE EMAIL ADDRESSES. This utility is through the district website. We can also target to separate divisions

NED: Not applicable.

MAD: 3 When we use them in this fashion they seem to work. For example, if we are advertizing/promoting a director roundtable we can target directors in a specific geographic area and this usually works.

DIX: 4- Successful

JAD: 4

3) Does your District have a Bulletin or Newsletter?

PIO: Yes, in theory- however it is without an editor at the moment.

EVG: Yes

FWD: Yes, Westunes

RMD: Yes

SWD: Yes

NED: Yes

MAD: Yes

DIX: Yes- Rebel Rouser

JAD: Yes

3a) If yes, how frequently is bulletin published?

PIO: Quarterly (when published)

EVG: Monthly

FWD: Quarterly

RMD: 6

SWD: Four to five editions yearly

NED: 6

MAD: Quarterly

DIX: Quarterly

JAD: Quarterly

3b) If yes, what is the format of the Bulletins?

PIO: 2 Print and periodic electronic edition but at least quarterly.

EVG: Online only.

FWD: Currently mailed to all district members and all Society Associates resident in the FWD.

RMD: 4 electronic, 2 physical

SWD: Online / HTML / Constant Contact. Used to be a pdf file for several years. No measurable means to track readership.

NED: Electronic, no printed version available.

MAD: Primary distribution is via snail mail. An on-line version is also posted and available via the web site

DIX: Online

JAD: Online

3c) If Bulletin is an online publication, how many hits/downloads does the typical edition receive?

PIO: No idea.

EVG: Not sure we can count accurately. We are working on this.

FWD: Number of hits: Copies are online, but hits are not counted.

RMD: Do not have counter for this information.

SWD: 2007 average 672 “opens”

NED: Don’t Know.

MAD: As our bulletin is distributed as a print/mail issue this may not be all that relevant. However, in the last year 960 hits were recorded against the page where on-line versions are stored and made available. We are looking at converting to mostly on-line in an effort to further reduce operating costs, but no decision has been made on that possibility at this time.

DIX: Don’t know

JAD: Don’t know.

3d) If Bulletin is an online publication, are members notified when a new edition is available and if yes, how?

PIO: Yes, they used to be notified when a new edition was online.

EVG: Yes, via email and the EVERNET.

FWD: YES, a color version is added to our main website which announces each posting of a new edition

RMD: Notification goes out by the RMD Weekly that goes to each chapter president.

SWD: DIRECT EMAILS - Chapter leadership is encouraged to print out the newsletter for those who don't have email. WEBSITE - posted on homepage. FACEBOOK - Group email.

NED: Yes, via Yahoogroups.

MAD: Not applicable

DIX: Yes, via Yahoogroups.

JAD: Yes, sort of, Homepage of our website is updated with a link.

3e) If District does not have a regular Bulletin, in general terms, why?

PIO: Editor got behind, caught up with “brigades”, then resigned.

EVG: Not applicable.

FWD: Not applicable.

RMD: Not applicable.

SWD: They can't find an individual with the time and determination to do the job.

The perception (IMHO) is that the job is daunting and takes too much time. The Editor is not charged to "locate" and "develops" the stories. The district leadership need to be the ones who should gather these stories and supply them to the Editor. Constant

Contact, Vertical Response, Chimp Monkey, and others offer affordable options for any organization. There really is no excuse.

NED: Not applicable.

MAD: Not applicable.

DIX: Not applicable.

JAD: I wanted to provide a “Livewire” type of communication but it has been on the back burner for several years. Reason - More important issues take priority.

4) Does District have a Web-page?

PIO: Yes

EVG: Yes

FWD: YES, a very extensive website with a separate area for YIH. The members only area has several automated tools to assist district operations. We have a second website that features conventions and contests.

RMD: Yes.

SWD: The SWD has a fully functional, interactive, database driven website. It contains a complete convention management system, chapter reporting system, and other district/chapter applications

NED: Yes.

MAD: Yes

DIX: Yes

JAD: Yes

6a) If information on website usage is available, how many visits did the site receive in 2009?

PIO: Don't Know.

EVG: Don't Know. That is something we are working on now.

FWD: Statistics are not maintained other than logins to the members only area which is getting 10-15 each day.

RMD: Not available.

SWD: 2007 Average Monthly visits: 25,839

NED: Don't know.

MAD: 2009 Average 881 avg/day

DIX: Don't Know.

JAD: Sep-Dec, 2009 Average 2317 Visitors per month.

6b) If information on website usage is available, what was the “dwell time” on the site in 2009?

PIO: Don't know.

EVG: Don't know.

FWD: Don't know.

RMD: Not available.

SWD: 2007 Average length of visit: 76 seconds

NED: Will try to find out.

MAD: Not available.

DIX: Don't know.

JAD: Sep-Dec, 2009- 50% of all visits less than 30 seconds.

6c) If information on website usage is available, what percentage of visitors were 1st-time users?

PIO: Don't know.

EVG: Don't know.

FWD: Don't know

RMD: Not available.

SWD: 2007 Average Monthly "Unique Visitors": 4420

NED: Will try to find out.

MAD: 2009- 1123 "Unique Visitors"

DIX: Don't know.

JAD: Sep-Dec, 2009- Average of 1321 "Unique Visitors" per month

7) Additional Comments: (Attach additional sheets if necessary)

PIO: None.

EVG: WE DID A FACE LIFT IN 2009 AND IN THE PROCESS SEVERAL LINKS TO INFORMATION WERE NOT RE-CONNECTED. GREAT FRUSTRATION AS DOCUMENTS COULD ALSO NOT BE LOCATED. WORKING ON FIXING THIS NOW.

FWD: None.

RMD: None.

SWD: I'd like the results of this survey furnished to the Society's Marketing & PR Committee for review. During our last meeting in November, the Communications Technology Sub-Committee was discussing doing a survey like this among our committee members.

NED: We have used yahoo groups to fill the need while we were going through the awkward and long transition to ebiz. We hand entered every member and put everyone "in". A few have asked to be removed, but by and large most have been ok with it. We use it for announcements, but it is monitored and not used for discussion or for dealing with awkward or inflammatory subjects. It is strictly news. I suspect that as our comfort with ebiz grows the yahoo groups will become obsolete.

MAD: None

DIX: We would really like to abandon our yahoo groups because there are too many issues with the unfriendly nature of using them and extensive maintenance involved in keeping them current. It would be far better for us to use the BHS member database to maintain group addresses based on official roles assigned to members which are already there in the chapter and district officer roles. I was told that this would be a by-product of the Aptify system but so far they haven't found a way to link email addresses and roles with the group addresses for electronic updates and all the BHS group addresses are maintained manually. Solving this problem I think would go a long way toward member satisfaction.

JAD: None

Appendix E - MGTFF Final Report

All Ages Task Force

The Charge:

The overarching strategic plan for increasing membership in the Barbershop Harmony Society must be based on helping chapters become successful, in whatever way they choose to enjoy barbershop harmony, by providing a consistent, high-quality experience for every member each and every week.

To that end, a task force is hereby established to:

1. Develop strategies to attract and retain members of All Ages and explore elements of chapter programming that will appeal to:
 - a. Identifiable age groups:
 1. Late career/retired - born before 1946
 2. Baby Boomers - born between 1946-1964
 3. Generation X - born between 1965 – 1977
 4. Generation Y - born between 1978-1990
 5. Millennials - born after 1991
 - b. Explore strategies to allow a chapter to attract and retain men of more than one age group.

The Members:

Shannon Elswick, Chair
"Montana" Jack Fitzpatrick
Casey Parsons
James Estes
Noah Funderburg, MGTFF Chair & AATF Advisor
Don Fuson, special consultant

Process:

The group met by teleconference with one face-to-face breakfast meeting in Tampa. Meetings were held at 9:00 pm (Eastern) on Sunday evenings and generally lasted an hour or less. A total of 12 meetings were conducted over a five and one half month period starting med December 2009. Across all meetings, attendance exceeded 95% for the appointed members.

Research Methodology:

The gathering of empirical data took several forms including:

- Telephone calls to randomly selected small chapters
- Comments gleaned from several on line surveys
- Personal observations and experiences of the Task Force members
- A great number of personal conversations with active members and officers at every level
- Significant data and input provided by Don Fuson

Findings:

The following are generalizations which have been drawn from all sources. The members of the AATF did not undergo thoroughly exhaustive research as the preponderance of the input seemed clear enough to move relatively quickly into discussions about possible action items. In no particular order, here are the major assumptions at the completion of the research phase of the work flow:

- The most consistent opportunity which came through in nearly every interview, survey and conversation was the need to improve communications. This was almost universal and seems to apply across all ages groups.
- All age groups want to be affiliated with quality organizations but there are some notable differences as indicated below:
 - Younger members learn music and other performance elements at an exponentially faster pace. Failure to recognize this difference can create significant issues within chapters.
 - Younger members are attracted primarily to the performance aspect of the music and are not driven by the same social aspects of the chapter meetings and rehearsals as their older counterparts. The mix of significant performances to required rehearsal and chapter meeting encounters needs to be properly balance for the various age groups and one performance size/type does not necessarily fit all.
 - Millennial and late Gen Y'ers have economic situations which often make normal dues more of a hurdle but input from many of our younger members indicates that members in these age groups will find the money if the draw is there. After the first year dues incentive for those under 25, members in these age groups might need assistance and encouragement to balance the financial equation.
 - Gen X'ers and early Gen Y'ers are generally capable of meeting the financial commitments but are often too busy with family responsibilities to participate fully. Members in these age groups most often need flexibility in their schedules and should not, as a rule, be pressed to take on additional responsibilities. On occasion, however, members from this age group emerge as significant musical

leaders and adding stipends and/or director fees to the equation can make a big difference.

- Baby Boomers are often the target for recruiting by many chapters and that is not, in and of itself, a bad thing. Boomers tend to be pre-retirement career men who have the financial ability to support the society in more ways than just dues and they also tend to have a good deal of flexibility over their schedules.
 - Late Career individuals are not often the target of our recruiting efforts but they are, in many cases, the backbone of chapter infrastructure. They often have decades of experience in barbershop or in other organizations and can be strong and effective leaders. In this group, retention and motivation is often the primary focus.
- An unscientific study conducted on the Harmonet eliciting data from chapters of all sizes, in all locations, discovered that approximately 42% of dues paying members do not participate in any chapter activities. This was a shocking revelation and certainly should be cause for some serious soul searching by leadership and members at every level!
 - There is a very real subset of our chapters which does not recognize the need for anything more than they have now (or simply do not want outside interference). Conversely, there is an equally large subset of chapters which are vital and healthy and do not “need” additional assistance from the districts or the society. A detailed analysis done in the Sunshine district several years ago indicated that approximately two thirds of the chapters both wanted and needed additional resources and that is consistent with the overall experiences of the members of the AATF as well.
 - There are a significant number of ideas and tactics which have been generated from various sources over the years. It seems that many were discarded too quickly because they were replaced by a new array of “good ideas” and others were simply not communicated effectively to the wider audience. Many of these ideas seem to have great promise and are worthy of revisiting and revising to make them more contemporary.

Significant Initiatives and deliverables:

The vast majority of our research, not to mention our collective sensibilities, took us back repeatedly to the importance of the quality of the weekly experience at chapter meetings and rehearsals. The topic came up at nearly every meeting or teleconference and it seemed obvious that the issue transcended all demographics. In the midst of our discussions, MGTF Chairman Noah Funderburg challenged us to make sure we at least had that one “big idea” to hang the hat of our final report upon. As we reviewed existing programs and talked to some of the key stakeholders

in several areas, we began to form a consensus around a program which could directly touch many of the 60% to 65% of our chapters who want and need help. It is important to note that the concept is not complicated and we believe it can be very cost-effective. As it turns out, it closely mirrors a staff-based initiative which is moving into the pilot phase as this document is being prepared. This “big idea” is not something which could or should replace any existing programs. Rather, it is intended to provide a vehicle for the society to supplement existing society and district resources by infusing talented and energetic volunteers directly into the chapter environment. The members of the AATF intentionally did not develop this concept beyond the basic framework to make sure other key stakeholders are engaged input and support. ***“A Plan for Chapter Visitation and Assistance by Volunteers”*** is attached as part of our final report as Appendix E-1.

Along the same lines as above, the input strongly suggested that traditional methods of marketing and advertising our chapters were becoming less and less effective. The world around us was changing rapidly and social media was already the new order, and not just for the younger age groups. Grandfathers and even Great Grandfathers are now logging onto *Facebook* in droves to access pictures and videos of their extended families. It was determined that *Facebook*, *Twitter* and *Youtube* were the prevailing social media outlets which were best positioned in the marketplace for endurance and relevance. “Montana” Jack Fitzpatrick conducted a search for those who might possibly help tackle this significant issue. Jack worked with Mike Lietke and Bob Fichtner to brainstorm ways to use social media as a recruiting tool. Bob Fichtner volunteered to author the primary document and his work has now been widely distributed by society, district and chapter distribution lines. ***“Social Media for Barbershop Quartets and Choruses”*** is attached as part of our final report as Appendix E-2.

Communication was almost universally identified as an issue for all elements of our organization. It is thought to be something highly successful chapters do well and a significant challenge for those which are struggling. It is also perceived to present the most significant challenges from a management perspective related to the various age groups. It became obvious that a greater understanding of the issues related to communication would be vital in the discussion of age group specific recommendations. To that end, a post-graduate administrative fellow from University of Central Florida, Megan McLendon, and a communications specialist for a large non-profit (14,000 employees), Bree Balchunas, were commissioned by Shannon Elswick to complete a study for Orlando Health. After the initial research was complete, Megan McLendon worked with Don Fuson, Montana Jack and Casey Parsons to complete a parallel document for the All Ages Task Force. ***“Communication Considerations for the Barbershop Harmony Society”*** is attached as Appendix E-3 and contains a very important recommendation for the society which is restated in our concluding remarks below.

Given all the input from the various sources, especially from surveying and discussion on the Harmonet, "Montana" Jack Fitzpatrick assembled a description of a successful chapter which clearly identifies the elements which seem to be consistently present in the most successful chapters. "***The Successful Chapter***" has been abstracted for inclusion in a future *Harmonizer* and is attached as Appendix E-4.

The first direction of the committee, in accordance with the charge to explore elements of chapter programming, was to assemble and review an extensive list of tactics, most of which had been proposed in the past. As stated above, there is evidence of extensive work which has been done by others and the committee began to collect and attempt to organize the content by attractiveness and/or perceived draw for various age groups. In discussions with Chairman Funderburg and the other task force members in March, it was agreed that this type of information is being revived and reorganized by staff as part of upgrading the web site to be more user friendly for our members, chapters and districts. The final outcome of this initiative will be for the list of useful recruiting and retention tactics to be available on the society web site; clearly visible and easily accessible for all. Provision will be made for easy, regular and frequent updates to include new ideas and fresh content.

Concluding Remarks:

The All Ages Task Force, in this final report, is pleased to forward the results of our research and deliberations. The process has been informative and rewarding. We have been honored to encounter so many dedicated and ardent men of good harmony in our journey.

The task force members have become keenly aware that there is no panacea for successful recruiting and retention. Also the members have become acutely aware that, regardless of the dosage, no medicine will cure if it is not taken. Several good ideas which could be used profitably for both recruiting and retention are attached. Those elements that seem to be present in the chapters that have achieved some measure of success and individual member satisfaction are also described in some detail. However, these become nothing more than another infertile document, in a long line of similar offerings, absent two foundational attitudes.

First, no problem can be solved until those responsible for the solution are convinced, beyond all doubt, that the problem is theirs. If the individual member does not accept the membership and retention problems as his own, he will never be persuaded to invest his personal efforts in the solutions. Therefore, it becomes the problem of leadership at every level to persuade each and every society member that there is a problem and the problem can only be solved by individual members acting together for the common good and survival of our society. Persuasion from leadership is vital for success. No opportunity for propaganda should be overlooked or missed. Every meeting, convention, gathering and missive should have this as the first item on the agenda. As the Ford Motor Co. has stated: **Quality is Job 1!** Until the

problem is solved, no other attitude is appropriate. For the leaders of the barbershop harmony society, **Membership is Job 1.**

Secondly, if membership is Job 1, then **Communications is Job 2.** Effective, reliable and verifiable communications are the lifeblood of any organization. As stated in *"Communication Considerations for the Barbershop Harmony Society"*, it is the recommendation of the AATF that the Barbershop Harmony Society form a standing committee to formulate and implement aggressive communication policies. It should be the duty of this committee to ensure that messages intended for the general membership are disseminated effectively utilizing the most appropriate forms of communication. Attendant with this duty should be an ongoing process of verification to ensure that members receive communications sent to them and the authority and resources needed to correct issues when distribution breeches occur. The committee should have representation from all levels of leadership to be most effective.

In all that we have presented, the solutions will only be successful with inspired and dedicated leadership at the forefront. Given the incredible amount of time and energy he brought to the work of the AATF, we close with these words from our own "Montana" Jack. "It is the Sergeant who leads the charge, not the Private. The Private will follow the Sergeant - providing he remains out in front carrying the banner."

Appendix E-1 – MGTFF Final Report

A Plan for Chapter Visitation and Assistance by Volunteers

Concept:

Approximately 20 volunteers would be carefully selected by nominations submitted by HQ staff members, IBOD members and District Presidents. Final selections for the program should be made with due regard for adequate geographic coverage.

These volunteers would each visit approximately four chapters per year (One every three months). Ideally, they would visit one every two months---or six per year. Their mission would be to develop rapport with the chapter officers and members for the purpose of observing and noting any particular needs that the chapter might have. The visitors would provide as much help as possible while on site (and therefore should be very knowledgeable and competent) and arrange for more in depth assistance (and therefore must be excellent observers), as needed, from the appropriate provider (International Staff or District personnel). During the visit, the volunteers would provide information on programs, available assistance, news and events. Additionally, they should have sufficient musical knowledge to teach a tag or provide a little coaching, if asked.

The chapter visitor should use every opportunity to reinforce chapter new member recruitment efforts. Prior to the chapter meeting, the visitor should meet with chapter leadership to review the chapter recruitment plan and the results of their efforts. The visitor should be prepared to provide assistance in updating and strengthening the recruitment methods, strategies and tactics for maximum effectiveness. Later, during the chapter meeting, new member recruitment should be made a part of the presentation to the chapter. This matter should be followed up by one or more telephone calls over the course of the next year.

Criteria for selection should include: Willingness to participate with a known track record for completing assigned tasks, dynamic, charismatic and affable personality, discretion, carefulness and empathy, among others. Good musical ability and knowledge are particularly desirable assets. Those who are able and willing to pay their expenses should be strongly considered.

Volunteers will be trained by HQ staff members and other knowledgeable and respected barbershoppers providing expertise as needed and appropriate. Training in the basic knowledge of programs and techniques will be accomplished, as much as possible by utilizing internet transmittal with periodic self monitored exams on information and data that has been covered. Upon completion of training, those certified should be completely conversant on all society resources available to help chapters as well as a broad knowledge of who to contact for assistance—and be able to demonstrate these abilities.

Details of the complete syllabus would be defined by appropriate staff members and a hand selected training committee.

Final training and certification would be provided at some central site over a long weekend. It might be desirable to invite more than 20 to the first class and not certify everyone—only the best. Those not certified could be provided more training and certified at a later date.

Appendix E-2 – MGTFF Final Report

I. SOCIAL MEDIA FOR BARBERSHOP QUARTETS AND CHORUSES

II. THINGS TO CONSIDER

Social media and social networking can be powerful tools for communicating with your audiences, fans and the communities where you perform. With a little effort up front and some ongoing efforts throughout the year, your quartet or chorus can leverage the power of social media and social networking to your benefit.

For those of you old enough to remember the old Faberge shampoo commercial about “...and they told two friends,” you should immediately grasp the power of social media and social networking. For those of you not old enough to remember - look it up on YouTube.

Why does this matter? Social media and social networking is a very cost-effective way for you to reach a large number of people. Rather than sending mailings to a list of people, or maintaining an email list and sending things out, you “publish” information on your site or send “updates” to your fans that opt-in to receive information from you. Using freely available (and free!) tools, you can send information to hundreds or thousands of people with a few mouse clicks.

The real power of social media and social networking comes when people to whom you send information share it with their friends. One post to one person might be shared with their friends. If their friends like it, they may pass it on to their friends. If you start with 500 fans and only 1% share the information, it still has the potential to reach thousands of people. It is similar to putting up a show flyer at the entrance to the grocery store – lots of people walking by every day. Some will notice it and some won't. But given the costs of getting involved with social media and social networking are nominal, besides someone's time, your quartet or chapter doesn't have much to lose.

Where Do We Start?

There are many flavors of social media and social networking, with hundreds of sites offering services. Just Google “social networking sites” and see for yourself. However, the most popular ones include Facebook and Twitter.

Before you dive in and start setting things up in any of these sites, there are several important questions to which you should know the answers:

1. What do we want to accomplish with social networking?
 - a. Raise awareness of our quartet/chorus?
 - b. Sell tickets?
 - c. Recruit new members?
2. Who is going to set it all up?
3. Who will manage the content over time?

Before We Get Started – Copyright Laws

I am not a lawyer and I don't play one on TV. But I do know that the Barbershop Society has been very forthright in communications about copyright laws. Be sure you are familiar with these laws before you start uploading videos, MP3s or other audio files to the Internet, whether your web site, a social media site, YouTube or other publicly accessible location. If you haven't done so already, click on the links below for information from the Society on how to handle these and other matters related to copyright laws.

<http://www.barbershop.org/document-center/category/8-copyright-legal.html?download=68%3Acopyright-basics-for-barbershoppers>
<http://www.barbershophq.com/?p=1278#more-1278>

Facebook

Facebook is the current king of social networking sites. If I had to choose one site and one site only for social media and social networking, this would be it. What started out as a way for college students to stay in touch with one another – both in school and out of school – has turned into a site with a broad base of consumers using it regularly. Hardcore users are on the site daily, if not more often.

First Steps

THE ACCOUNT

One of the first decisions you will have to make regarding setting up on Facebook is whether you will create a “business account” on Facebook that is not associated with a particular individual or if you will create the site using a member's personal account. On the surface, that seems easy – but it really isn't. Facebook started out as a way for individuals to stay in touch, not a way for businesses or music groups to communicate with fans or followers. Everything about Facebook is geared towards individuals, so while Facebook allows for business accounts, there are some downsides to going this route. Click on the link below and read for yourself just what they are. Personally, I would lean towards using a personal account, but you have to make that decision for your quartet/chorus.

<http://www.facebook.com/help/?page=721>

GROUP OR PAGE?

The next decision you'll need to make with regard to Facebook is whether to create a group, set up a page or both. Just keep in mind that if you set up both, you will need to update and manage content at both of these places, essentially doubling the amount of work you have to do.

Once again, there are pros and cons to each of these. People “join” a group, but become “fans” of pages. Which sounds better?

The links below are all good resources for understanding the differences and benefits that each offers.

<http://www.searchenginejournal.com/facebook-group-vs-facebook-fan-page-whats-better/7761/>

<http://mashable.com/2009/05/27/facebook-page-vs-group/>

<http://www.allfacebook.com/2010/02/facebook-groups-pages/>

Again, if I had to pick one of these, I would opt to create a fan page.

THE FAN PAGE “ADMIN”

The Fan Page Admin is a Facebook user who manages the content on the site and has the ability to edit the page. It is probably best to have more than one person in your quartet/chorus designated as an admin of your page. Why? People come and go. If the person who is managing your social media sites leaves and they were the only person with access to your pages, your sites become boat anchors.

CREATE YOUR PAGE/GROUP

One of your designated admins will actually create the page. The steps are fairly straightforward and can be found at <http://www.facebook.com/pages/create.php> **IMPORTANT** – click on the box that says “Do not make Page publicly visible at this time. (You will be able to edit and publish later.)” This will allow you to set up and customize your page and create some content for your page before you open it up to the world. If you don’t, people will come to your page and there won’t be anything for them to do there.

GET YOUR VANITY URL

When you first set up your fan page, Facebook will give it a URL like this - <http://www.facebook.com/pages/MidwestVocalExpress/409635288331?ref=mf> Not very easy to remember or to tell people so they can visit your site.

Go to <http://www.facebook.com/username> and you should be able to create a more memorable name, like <http://www.facebook.com/MidwestVocalExpress>

You may have to wait until you have 25 fans , but do it as soon as you can.

CONTENT

There is a lot that can go into setting up a fan page and you need to decide how much effort you want to put into it.

At a minimum, you may want to consider the Wall, Photos, Videos (copyright legal only!), Events and Discussion. The more content you have, the more people will want to visit your page or receive updates from you. If you build a page and never post any content, fans will become bored and you’ll have wasted your time and effort.

Add candid photos from rehearsals and retreats showing your members having a good time. Have any CDs? Add a “discography” tab and enter them, along with a link to where they can buy them. Did you just raise money for a local charity? Post that on your page and link to the charity’s web site. Did your quartet get on the radio to promote Singing Valentines? Ask the station director if you can post the audio file on your fan page with a link to their web site or if they will post the audio on their web site and then link to it.

The possibilities are endless. Be creative. Be genuine. Be prodigious!

PUBLISH

Now that you have at least some content on your page instead of a blank wall, go ahead and publish it. Put it out there for the whole world to see. After all, that's why you did all that work, right?

PROMOTE YOUR PAGE

The corollary to "If a tree falls in a forest..." is "If you create a Fan Page in Facebook and don't tell anyone about it, how will you get any fans?"

Your admins should become the first fans. This will then show up on their Facebook wall. Then ask every member in your chorus who is on Facebook to become a fan. Don't force them to sign up for Facebook if they don't want to. The whole premise of social media and social networking is built upon people opting in and giving you permission to reach out to them.

There are many ways you can promote your page. Below are just a few of the things you can do:

- "Suggest" the page to your family and friends. Ask your fans to do the same.
- Add the page to your "favorites." Ask your fans to do the same.
- Post a note on the Harmonet inviting everyone to become a fan.
- Add the URL for you fan page to your letterhead, show flyers, mailings, emails, web site, show programs, etc. Anything you publish should automatically include the link.
- Add a "fan badge" to your web site. http://www.facebook.com/facebook-widgets/fanbox.php?page_id=88926183463

PROMOTE OTHER PAGES & CONTENT

You are not the only fish in the sea. If you see something that someone else posted and think your fans would want to see it, share it with them. Give proper credit to the original author, but by all means share it.

- Post links to interesting pages, even if it isn't barbershop. Think choral, a cappella, singing, music – chances are your fans may find those topics just as interesting
- Post links to the Society, Sweet Ads and Harmony Inc
- Post links to (legal) videos on YouTube, such as Crossroads at International
- Link to your District fan page, if there is one
- Link to quartets in your chapter - fan pages, web sites or both
- Link to other chapters in your area

Chances are, they will link back to you or become a fan of your site. Be generous and your generosity will be returned.

ENCOURAGE YOUR FANS TO GET INVOLVED

Another important aspect of social media is that it allows for two-way interaction. TV and radio (excluding talk radio) are one-way broadcasts. They publish and you watch/listen. Social media breaks down those walls.

Ask your fans questions. What is their favorite song of all time? What is their favorite song that they've seen you perform?

Invite them to post things on your wall (if you want this and have set this up). Instead of you dominating the conversation, people will see others posting and may feel like chiming in as well.

Keep it fun and interesting and they will be more likely to want to promote or share your page with their friends. It takes time, but once the snowball starts rolling downhill, you'll be surprised by how quickly it can pick up speed. It may take a month to get 100 fans and another month to get 200. It may take three more months to get to 300. Be patient. Keep at it and the fans will come.

RECYCLE CONTENT

One of the downsides of social media is that with a billion+ channels of information available on the Internet nowadays, it is easy for your content to get "lost" in the vast ocean of information that is out there. Don't be afraid to publish the same information over the course of several days or weeks. Just because you posted that awesome video of Crossroads two months ago doesn't mean that everyone who is a fan saw it. And guess what – people who are new fans within the past two months likely haven't seen it either. So post it again. And again in another three months. Obviously you don't want to post the same information on an hourly basis and be considered a "spammer." Respect your fans time and they will respect you for it.

ADVERTISE!

In some respects, a Facebook fan page in and of itself is a form of advertising. However, you can also place paid ads on Facebook (<http://www.facebook.com/ads/create/>). The costs are very reasonable and you have the ability to target what types of Facebook users will see your ads. You can target by:

- Geography – country, state or city (including cities within an 'x' mile radius)
- Age
- Gender
- Relationship – single, married, or ??
- Language
- Likes and Interest – e.g. "singing" or "chorus" or "choral" or music
- Friends of your current fans

As you make targeting selections, Facebook will tell you how many people it can potentially "reach" with your ad. Unless you have an unlimited advertising budget, it is likely you won't reach all of them. But you can see if you go overboard in your targeting if Facebook says it can only reach 10 people based on your criteria. Play around with it

The costs are fairly nominal and you can pay by the impression (how many people "see" your ad) or by the click (how many people click on your ad). You can set a daily budget and the minimum is only \$1.00 per day. If you have a show coming up

in a few weeks, you could tell Facebook that you would like to spend \$20 a day for two weeks. Or \$5. It's all to you.

Keep in mind that clicks will cost more than impressions and other people are bidding to have their ads placed on the walls of the same people you might be targeting.

Above all, track your advertising efforts. Have the person handling your tickets ask people how they heard of you. Maybe offer a special promotion for your Facebook fans – mention code “123” and get \$10 off an order of four or more tickets. If you don't track this, you won't know if the money you spent on the ad resulted in any ticket sales.

RECRUIT!

You can also use Facebook to recruit new members. Post information about an upcoming guest night on your page and ask your fans to share it with their friends. They may not be interested, but might know someone who could be.

And similar to promoting a show, you could place an ad to recruit new members. The Nashville Singers successfully recruited a number of members using Facebook ads. Use the targeting abilities available in Facebook ads to have ads displayed on the walls of people who might be looking for an outlet for their talents. Start small and try something. If it doesn't work, change the target and try again. Keep at it until you find something that works.

NEXT STEPS FOR FACEBOOK

This manual has only begun to scratch the surface of what you can do on Facebook. Try things. Experiment. Visit the fan pages of other barbershop choruses. Visit the fan pages of other non-BBS choruses in your area. See what do and then try it using your own group's style. After all, we are a society founded upon “preserving” things.

Twitter

Twitter is a “micro-blogging” site. You create an account and try to attract followers – people who will see what you write. It's called a micro-blogging site because unlike regular blogs, where you can post as much text as you want, on Twitter, you are limited to 140 characters. You might think that it is hard to communicate in just 140 characters and you would be right. But you can just as easily post a message (called a “tweet”) with a link to a much longer message on your web site, Facebook page, Facebook event, or any other place on the Internet.

A great resource for learning more about Twitter is

<http://mashable.com/guidebook/twitter/>

Steps to Setting Up a Twitter Account

Decide what you want your Twitter name to be and see if it is available. One caveat is that you are limited to 15 characters in your name. You may need to be a little creative. You'll also need to provide an email account. If your quartet or chorus has

its own domain and email accounts, you could use something like twitter@chorus.org. Otherwise, a the personal email address of a chorus member will do. Maybe the same person who is managing your Facebook page(s)?

OK – I HAVE AN ACCOUNT – NOW WHAT?

Once you have an account, you should find people you know who are already on Twitter. Fortunately, Twitter has some tools built into it to make this easy. Similar to Facebook, you need to promote your Twitter account. Again, tell chorus members and ask them to tell their family and friends. Publish it everywhere – web site, flyers, programs, etc. Send an email to the Harmonet. Post it on your Facebook page.

FOLLOWING VS. BEING FOLLOWED

Just ask you invited people to become a “fan” on Facebook, you will want to invite people to “follow” you on Twitter. You will also want to follow other people back. Use the tools in Twitter to find people. Search on Twitter (<http://search.twitter.com>) using keyword like barbershop or quartet to find other barbershoppers on Twitter and follow them. Chances are, they will follow you back. Then, when you post information (“tweet” something), they might “re-tweet” it, which means all of their followers might see it.

TWEETING

As I mentioned before, tweets are limited to 140 characters. You have to be interesting, yet concise, when posting information. Learn about URL shorteners (Google it). Don’t be afraid to cut words out, just as long as people can still understand the gist of your comment.

What should you tweet? Anything and everything. Information about upcoming shows. Information about a great rehearsal or coaching session you just had. Links to great videos on YouTube. Links to your fan page on Facebook. Links to buy tickets to your next show. Links to information about other groups’ shows – both barbershop and non-barbershop.

Remember – it is a conversation . Don’t dominate the discussion. Ask questions. Read what others are saying and reply to them. Be genuine.

YouTube

Some people don’t consider YouTube a social networking site, but since the whole purpose is to share videos, and barbershopping can be experienced via both audio and video media, it can be an important part of your social networking plan. You could decide to set up a “channel” on YouTube for your chorus or quartet and upload all your video there and then link to it via Twitter, Facebook, etc. Or you could upload your videos straight to Facebook, then link to them via Twitter. Or just do Facebook.

On Facebook, there is no limit for the number of videos you upload as long as each video is under 1024 MB and under 20 minutes. On YouTube, your videos can be up

to 2GB in size and 10 minutes long. These should be more than enough for most barbershoppers. You obviously can't upload your two-hour Christmas show, but you could load snippets of those shows as teasers.

Above all – keep it legal! Don't post a video of your quartet that an audience member made during your recent contest unless you have secured the proper licensing for it.

Additional Reading

There are tons of sites out there that you can read to get additional information about how to use social media and social networking to your advantage.

[http://h30187.www3.hp.com/articles/viewArticle/p/courseId/38749/Facebook and Twitter getting started quick lesson .htm?courseSessionId=249157&campusId=11260&webPageId=1000012&hplcpsession.id=60fafaed074fc059e387edd8192b](http://h30187.www3.hp.com/articles/viewArticle/p/courseId/38749/Facebook_and_Twitter_getting_started_quick_lesson_.htm?courseSessionId=249157&campusId=11260&webPageId=1000012&hplcpsession.id=60fafaed074fc059e387edd8192b)

Social Media Examiner is a blog with tons of info, including tips on how to promote your shows/events on Facebook.

<http://www.socialmediaexaminer.com/getting-started/>

<http://www.socialmediaexaminer.com/10-tips-for-creating-buzz-with-facebook-events/>

There are also many books available, including:

FACEBOOK FOR DUMMIES BY LEAH PEARLMAN AND CAROLYN ABRAM

FACEBOOK MARKETING FOR DUMMIES BY PAUL DUNAY AND RICHARD KRUEGER

SOCIAL MEDIA MARKETING FOR DUMMIES BY SHIV SINGH

Keep in touch with what others are doing. Join the BBS Marketing discussion group on Yahoo (<http://launch.groups.yahoo.com/group/bbsmarketing/>)

Appendix E-3 – MGTf Final Report

**Communication Considerations for the
Barbershop Harmony Society**

Shannon Elswick
“Montana” Jack Fitzpatrick
Don Fuson
Casey Parsons
Bree Balchunas
Megan McLendon

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I. EXECUTIVE SUMMARY

Communication across a large and diverse organization such as the Barbershop Harmony Society is a complex task and it is the goal of the researchers to determine how to best position the organization to communicate effectively with each of its members.

Background

While there are several approaches to communication (informative, persuasive, two-way) and several types of communication (verbal, non-verbal and written), the primary goal remains the same: to transfer information from one entity to another. According to Larissa Grunig's research, excellence in communication involves several key elements, including:

- **Strategic Management:** Excellent programs are managed strategically.
- **Two-Way Symmetrical Model:** Excellent programs stress two-way dialogue and interaction with key audiences.
- **Top Management Support:** Excellent programs are supported and valued by senior leadership.

Effective communication should not be what leaders within the organization do *to* members. Effective communication is a "two-way or even multi-directional process" (Smith, 2005). Two-way communication is how to sustain knowledge and provide a higher level of understanding. It opens the lines of communication and encourages feedback.

Communication and Age

The presence of a multigenerational membership may further complicate communication in organizations. Generational preferences in how communication is delivered are often blamed for miscommunication and further generational divides. However, studies have shown that preferences in the delivery of communication are not based fully on age, but rather on the role that technology plays in that person's life. A person who is a frequent user of technology may prefer its use in communication to the use of other formats, regardless of that person's age.

Recommendations

It is the recommendation of the AATF that the Barbershop Harmony Society form a standing committee to formulate and implement aggressive communication policies to ensure that messages intended for the general membership are disseminated effectively utilizing the most appropriate forms of communication.

II. BACKGROUND

Considering the axiom that effective, reliable and verifiable communications are the lifeblood of any organization, one can easily conclude that any lesser quality of communications would cause an organization to be less effective even to the point of failure. Consequently, one would think that establishing an effective communications system would top the list of tasks for leadership.

With such great emphasis on communications, it seems that communicating effectively may be an easy task that can be completed quickly and, once established, always be reliable.

However, consider the impediments that any communication system faces in today's world. Rather than being a completed work, an effective communications system needs careful and thoughtful establishment and constant monitoring if it is to continue reaching its target audience.

A vast range of difficulties faces today's communication specialist. A partial list includes these obstacles:

- The vast array of communication systems and methods available
- The constantly changing preferences of the target audience of how they would like to receive communication
- The size, composition, location, and dispersal of the target audience
- The ever increasing requirement for timely communications
- The assurance that communicated information is accurate and received with the intent originally desired

The Barbershop Harmony Society

The Barbershop Harmony Society, also known as the Society for the Preservation and Encouragement of Barbershop Quartet Singing in America Incorporated, is an organization devoted to the promotion and preservation of barbershop music as an art form. This international organization consists of 17 Districts containing 807 Chapters and over 25,000 members.

When discussing challenges in communication, the mere size of the organization creates an environment with the potential for difficulty in communication. It is for this reason that communication must be a priority of the leadership and members of the Barbershop Harmony Society.

Communication across such a large and diverse organization is a complex task and it is the goal of the researchers to determine how to best position the Barbershop Harmony Society to communicate effectively with each of its team members.

Why is Communication Important?

Communication is an essential part of creating and maintaining a solid organizational culture (Daft, 1998). It is intermingled with all daily functions and activities. Whether oral, auditory, written, electronic, non-verbal or any other means, the communication process is repeated many times daily (Makenzie & Svecz, 2010). The lack of effective communication could lead to misunderstandings, lack of information, decrease in performance and increase in turnover (Kondrat, 2009). Therefore, effective communication can eliminate those misunderstandings and provide members with a clear understanding of what is expected from them.

While there are several approaches to communication (informative, persuasive, two-way) and several types of communication (verbal, non-verbal and written), the primary goal remains the same: to transfer information from one entity to another. While the methods may vary, there are guidelines that are generally accepted in the communication field as most effective. According to Larissa Grunig's research, excellence in communication includes several key elements,

- **Strategic Management:** Excellent programs are managed strategically.
- **Two-Way Symmetrical Model:** Excellent programs stress two-way dialogue and interaction with key audiences.
- **Top Management Support:** Excellent programs are supported and valued by senior leadership.

Effective communication should not be what leaders within the organization do *to* members. Effective communication is a "two-way or even multi-directional process" (Smith, 2005). Two-way communication is how to sustain knowledge and provide a higher level of understanding. It opens the lines of communication and encourages feedback.

Effective communications programs must directly align with members of an organization. The communication plan must meet each audience's needs, and deliver the right message in the right way (Smith, 2002).

III. COMMUNICATION AND AGE

When considering the number of members in the Barbershop Harmony Society, it is reasonable to assume that the ages of these members vary greatly. From youth just beginning in the Society to members tallying decades with the organization, age is just one factor that can contribute to the complication of communication. Deloitte (2010), an international consulting firm, has researched age as a potential barrier to communication in organizations and across industries; they attempt to provide answers to the question of how to communicate across age divides.

Generation Groups

The ranges and definitions of generational age groups, according to Deloitte, are as follows:

- **Generation Y (or “Millennials”)**: This group is believed to be the youngest in the workforce. Members of “Generation Y” were born between 1982 and 1995.
- **Generation X**: This generation was born between 1965 and 1981.
- **Boomers**: This group was born between 1945 and 1964. Deloitte notes that most current executives and world leaders are in this group.
- **Traditionalists**: This group, born prior to 1945, is most-likely retired. They were instrumental in laying the foundation for how the workforce operates today.

A publication by Gravett and Throckmorton (2007) which tackles the subject of generation groups in the workforce identifies a further sub-set of the “Traditionalists” and names them “Radio Babies”.

- **Radio Babies**: This group is a sub-set of the Traditionalist group identified by Deloitte. They were born between 1930 and 1945, and are believed to be conservative, fiscally prudent and loyal.

Consultants Meister and Willyerd (2007) include an even younger generation, **Generation 2020**. While the idea of this generation in organizations is used primarily for forecasting purposes, other organizations may see participation from members in Generation 2020 more frequently.

A successful communication strategy will not only focus on communication *to* each of these groups, but should also focus on communication *between* these age groups as well. The idea of a multigenerational organization is more evident now than ever before and communication considerations must be made that reflect this environment.

In her article, *A Multigenerational Perspective on Employee Communications*, Patricia Quinn (2010) identifies the differing attitudes of the generations toward different scenarios and simplifies these attitudes in the table below (See Table 1).

TABLE 1: GENERATION ATTITUDES TOWARD WORKPLACE SCENARIOS

	Traditionalist	Boomers	Generation X	Generation Y
Behavior	Follow the rules	Challenge the rules	Change the rules	Create the rules
Training	Learn the hard way	Preferred in moderation	Required to keep me	Continuous and expected
Learning Style	Classroom	Facilitated	Independent	Collaborative
Communication Style	<i>Top-down</i>	<i>Guarded</i>	<i>Hub and Spoke</i>	<i>Collaborative</i>
Problem Solving	Hierarchical	Horizontal	Independent	Collaborative
Decision making	Seeks approval	Team informed	Team included	Team decided
Leadership Styles	Command and control	Unilateral	Coach	Partner
Feedback	No news is good news	During an annual review	Weekly/Daily	On-demand

Communication and Generation Groups

The basing of a person’s communication needs and desires on only their generational grouping may be an over-simplification, however, consideration of these groupings is necessary because of what Quinn (2010) describes as a “collective lens, shaped by shared experiences, through which its members view the world”. For example, the “technological age”, with which Generation Y is most closely identified, represents immediate access to information. This may fuel a member of this group’s need for immediate communication in the form of updates or feedback. In the same vein, both Deloitte and Quinn discuss the affects of the optimism of the Post-war era on the need of Boomers to assess value primarily by specific achievements and additional opportunities.

Generational Differences

In another work by Deloitte, Stanton Smith (2008) works to “decode generational differences” by focusing primarily on the relationship between Boomers (because of their presence and positions in many organizations) and Generation Y-ers (because of their recent introduction into many of these organizations). He identifies what he terms “the three divides” between members of Generation Y and Boomers, which are:

- Technology
- Attitude toward business
- Consumer attitude mindset

The technology “divide” is perhaps most closely related to communication, and contrary to more common beliefs, Smith is quick to point out that technological

preferences are not generationally based, but rather, are based on the difference in those who see technology as “a tool or a toy” and those who view it as an integral part of their communication and way of life. This view is not often echoed as it is often perceived that those in Generation Y are more adaptive to technological changes than Boomers, and thus Boomers are not agreeable to technology as a communicative mechanism.

Smith also provides guidelines as to what Generation Y or “Millennials” need from leaders in regards to communication. He states that Millennials want communication to be:

- Positive
- Respectful
- Motivational
- Electronic
- In person, if the message is really important
- Timely

It is interesting to see that electronic communication is preferred, except in instances of extreme importance, when Millennials prefer to be spoken with directly.

Use of Technology vs. Generation Groups

Another Deloitte study (2009) looks at multigenerational communications from a global perspective. While this study focused on employee communications, the results may be generalized to any multigenerational organization where a hierarchy exists.

Members of Generation Y and the Boomer generation were surveyed as to the frequency of their use of technology; they were then questioned as to the importance of communication from leaders in various areas. The results of the survey showed that more frequent users of technology also desired more overall communications from their organizations. It was their use of technology that was the determination for their communication needs, not necessarily their age. For the graphical representation of these results, see Figure 1 in Appendix A.

Because the focus of this particular study was global communication needs, the results included six countries: Brazil, Canada, China, India, the United Kingdom and the United States. Perhaps the most interesting findings are the ones in which all categories preferred the same methods of communication. All areas determined events should be communicated via email, and all areas would prefer to interact with other members in person. Another noteworthy trend was the desire for leadership communications to be made in person by all groups except one. See Figures 2 and 3 in Appendix A.

Both age groups prefer communication to be in person if it is coming from leadership; they also prefer in person communication between members.

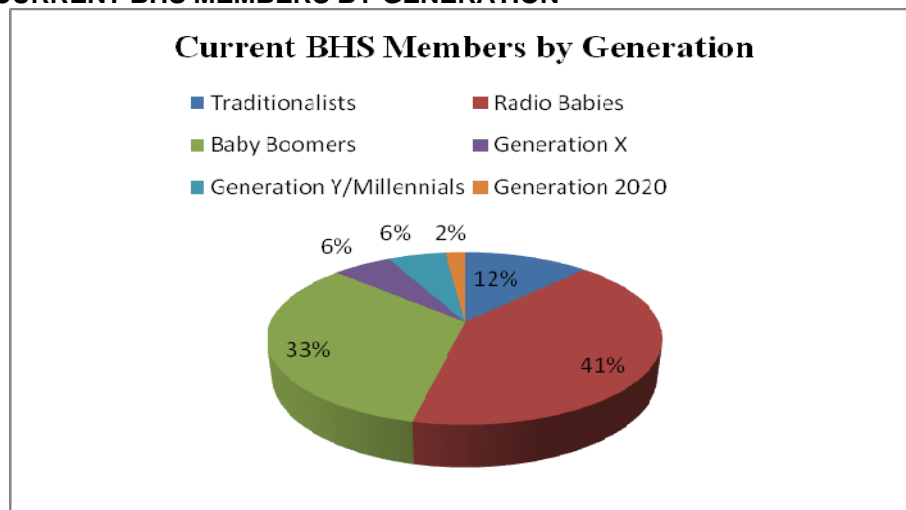
Preference similarities are also found in the communication of benefits or events, which members prefer to receive via printed materials and email respectively.

Email is preferred by younger members in the areas of organizational news and updates, whereas older members prefer to receive this information via Intranet, printed materials or in person. The final differing opinion is found in the communication of organizational goals, which the younger population would prefer to receive via Intranet or in person. The older population preferred this information via Intranet only.

Generation Groups within the Barbershop Harmony Society

Based on the research conducted by Deloitte over the past several years, it is clear that generational groups play a key role in how to effectively communicate. The following section lends itself to a better understanding of the generational makeup of the Barbershop Harmony Society, after which, one can better evaluate the need for various forms of communication. Figure 4 highlights the actual division of generation groups within the Barbershop Harmony Society when considering current members.

FIGURE 4: CURRENT BHS MEMBERS BY GENERATION



As clearly represented in the figure, the generation with the largest presence in the Barbershop Harmony Society is the “Radio Babies”, those born from 1930 to 1944. The generation with the lowest representation is “Generation 2020”, with only 473 current members, or 2% of the total population.

Another interesting view is the analysis of generations by the decade in which they joined the Barbershop Harmony Society. See Figures 5-10 in Appendix B for this information. Interestingly enough, in every generation for which more than one decade’s membership is observable, membership increases as that generation ages. For the Baby Boomers, Generation X, and Generation Y (Millennials) the membership numbers have, at least, doubled for each observable decade. This is a significant trend to consider when discussing communication among members, and how this communication might promote new members or further involve them with

the Society.

Leadership within Chapters, Districts and the overall Society by generation may also help to provide some basis to the generational involvement, rather than just the generational membership. Leadership roles within the Barbershop Harmony Society are dominated by those in the Radio Baby and Boomer generations. Figures 11 and 12 in Appendix B show the graphical representation of this data.

IV. CASE STUDIES

To understand best practices in communication, a literature review was conducted of several award-winning campaigns as noted by the International Association of Business Communicators and Public Relations Society of America. A case study was also developed concerning the communication preferences of employees at a large, metropolitan healthcare organization. These communication strategies offer many innovative options for organizations seeking to strengthen communication among their members. The details of these case studies are available in Appendix D.

V. CONCLUSIONS

Leadership communication and timely access to information are keys to communication success. Therefore, it should be the goal of any organization to develop a comprehensive, integrated communication plan based on best practices in one-on-one communication by leaders, the use of technology and various “out-of-the-box” tools such as:

- **Communication Training:** Develop a training program that instructs leadership and members in the importance of effective communication. This should also include specific examples of how to better communicate.
- **Chapter Visitation:** The AATF has developed a chapter visitation concept to, not only observe various BHS chapters, but also to provide information on programs, available assistance, news and events using a preferred face-to-face method. The details of this concept can be found in Appendix C.
- **Communication Summits:** Encourage districts and chapters to implement a quarterly communication summit in their groups to ensure members receive pertinent information from Barbershop Harmony Society leadership. These can be supplemented by video-conferencing or pre-recorded video messages from Society leadership.
- **Grassroots Initiatives:** Offer guidance to those districts or chapters with innovative communication concepts. Share these ideas with other districts or chapters for their implementation, and request that Society leadership take part in new concepts.
- **Integrate Technology:** Bring technology into the mix, but in an organized and meaningful manner. Some recommendations may take additional time, and would be a long-term recommendation.
 - **Website/Intranet:** Provide a centralized location, maintained by BHS leadership, where all members can access necessary information immediately. The BHS website acts as this location

now, but may require some education for members as to its wealth of information.

- **Webinars:** Provide opportunities for online meetings, training courses, etc. These could be accessed at all times for members who may not be able to attend meetings or events.
- **Video:** Post, email, or make available short, informational video clips. Videos could be focused on announcements, updates or merely informational. Simple submissions from various groups should also be a priority.

VI. RECOMMENDATIONS

Research about generation groups highlighted that there is a slight difference in communicating to age groups; however, the more frequent of a user of technology the more likely the user will be comfortable and willing to use technology as a communication tool. Yet, no matter the age group, face-to-face communication was universally accepted as a primary communication tool.

There is not a “one size fit all” solution when it comes to communicating effectively. However, communication should still be strategic, thought-through and creative, when the opportunity presents itself. It should also be transparent, two-way and meaningful. Finally, each strategy should work in unison together, rather than in silos.

Communication is an individual preference, which can be based on age, position, daily interaction with technology, personal needs and the willingness to obtain information. As an organization, the Barbershop Harmony Society should strive to meet members’ individual needs and should do so by adopting various communication strategies.

It is the recommendation of the AATF that the Barbershop Harmony Society form a standing committee to formulate and implement aggressive communication policies. It should be the duty of this committee to ensure that messages intended for the general membership are disseminated effectively utilizing the most appropriate forms of communication. Attendant with this duty should be an ongoing process of verification to ensure that members receive communications sent to them and the authority and resources needed to correct issues when distribution breeches occur. The committee should have representation from all levels of leadership to be most effective.

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VIII. APPENDIX A

Graphical Representations Found in Deloitte Studies

FIGURE 1: COMMUNICATION VALUES BY AGE GROUP AND TECHNOLOGY USE.

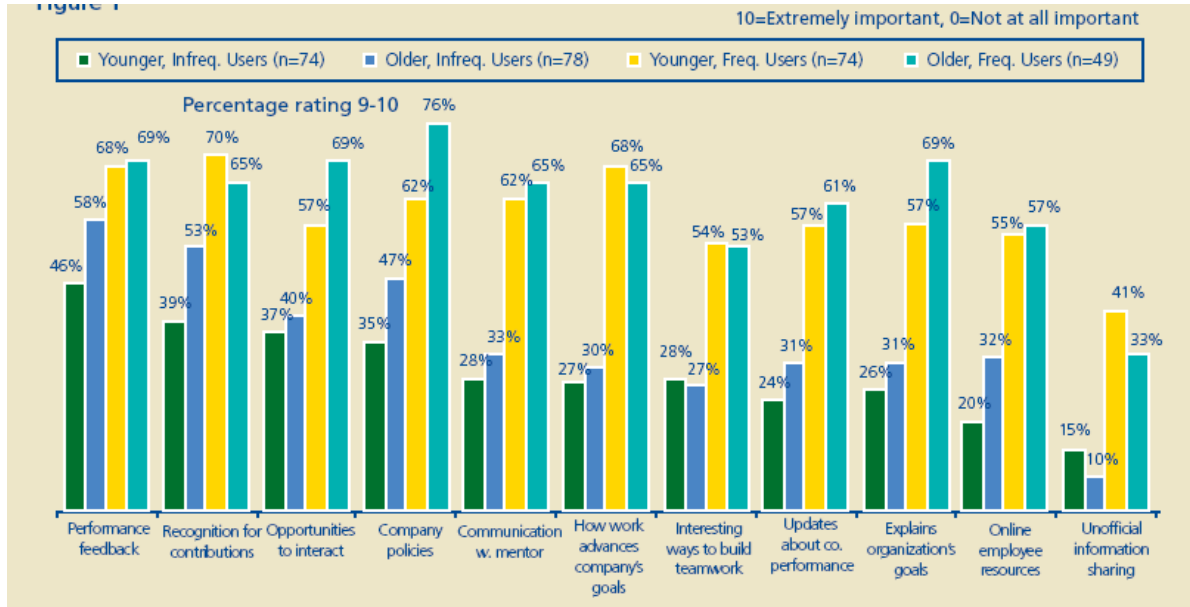
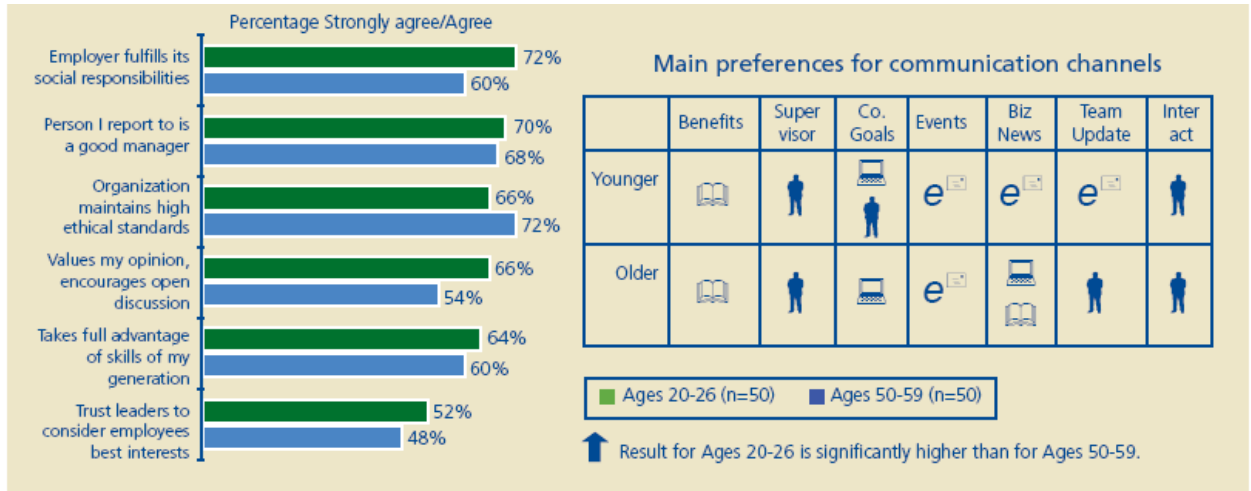


FIGURE 2: COMMUNICATION PREFERENCES

	Benefits	Supervisor	Company Goals	Events	Biz News	Team Updates	Interact
Younger - Non-industrialized country Less freq. users of technology More freq. users of technology		e		e		e	
Older - Non-industrialized country Less freq. users of technology More freq. users of technology				e		e	
Younger - Industrialized country Less freq. users of technology More freq. users of technology				e	e		
Older - Industrialized country Less freq. users of technology More freq. users of technology				e			

Legend: print in person email intranet

FIGURE 3: COMMUNICATION PREFERENCES (RESULTS FOR THE UNITED STATES)



IX. APPENDIX B

Generational Analysis of the Barbershop Harmony Society

FIGURE 5: TRADITIONALIST GENERATION PRESENCE BY DECADE

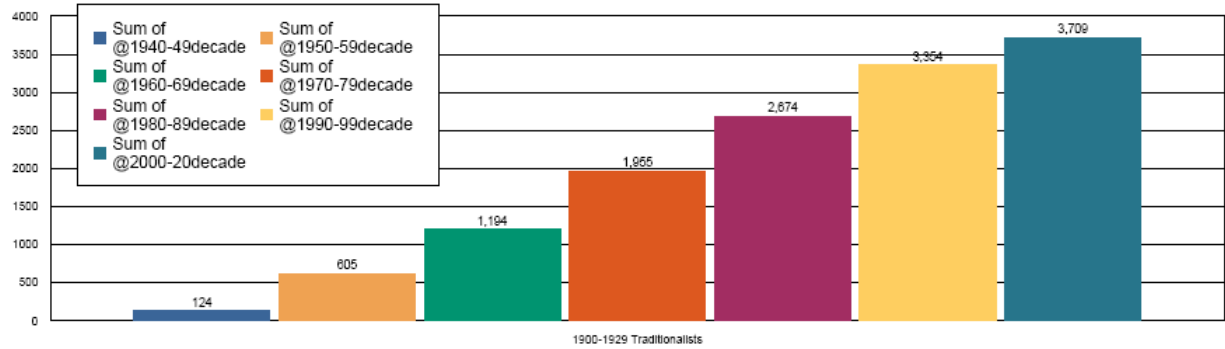


FIGURE 6: RADIO BABIES GENERATION PRESENCE BY DECADE

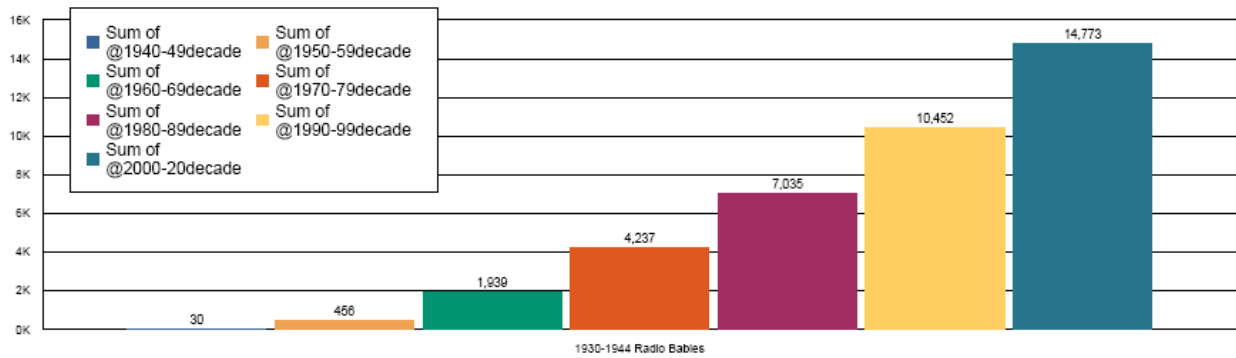


FIGURE 7: BABY BOOMERS GENERATION PRESENCE BY DECADE

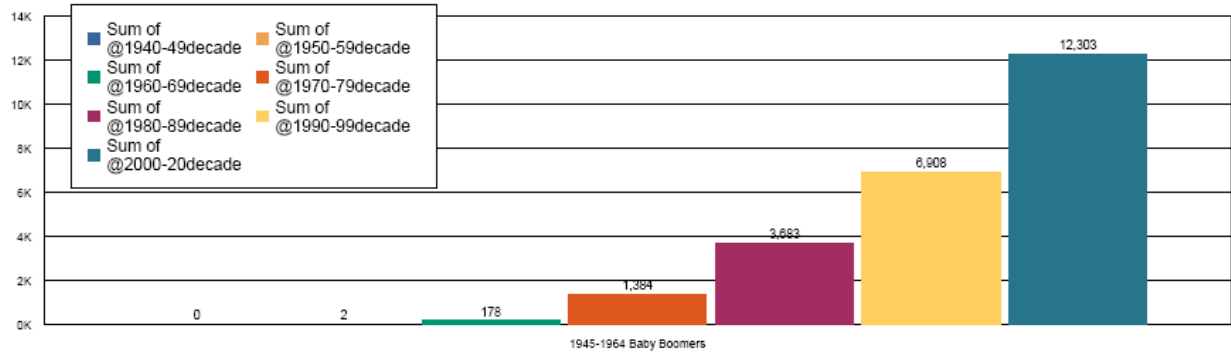


FIGURE 8: GENERATION X PRESENCE BY DECADE

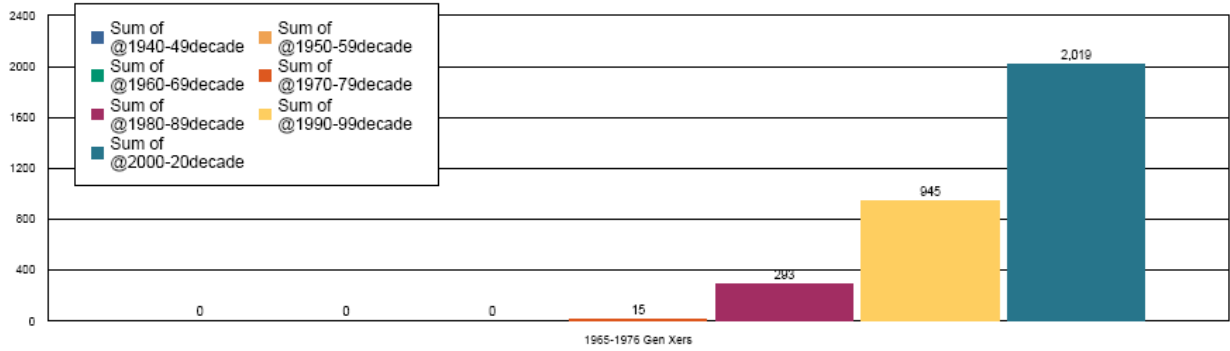


FIGURE 9: GENERATION Y(MELLINIALS) PRESENCE BY DECADE

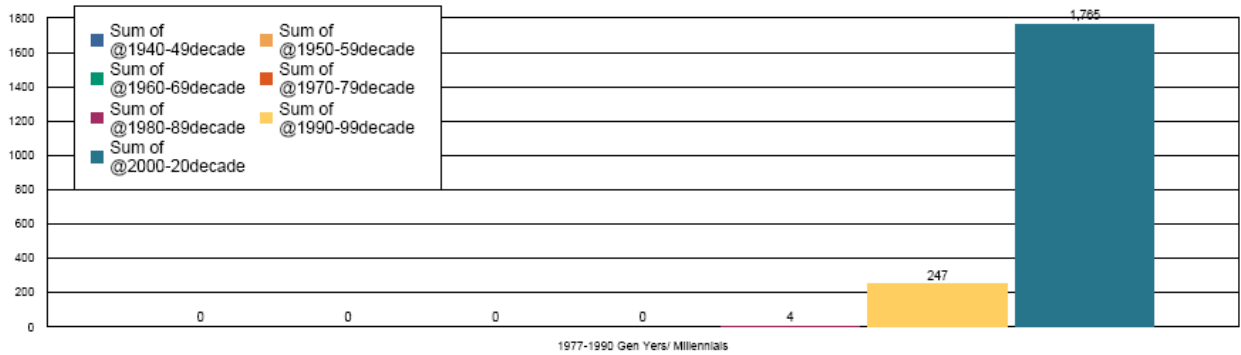


FIGURE 10: GENERATION 2020 PRESENCE BY DECADE

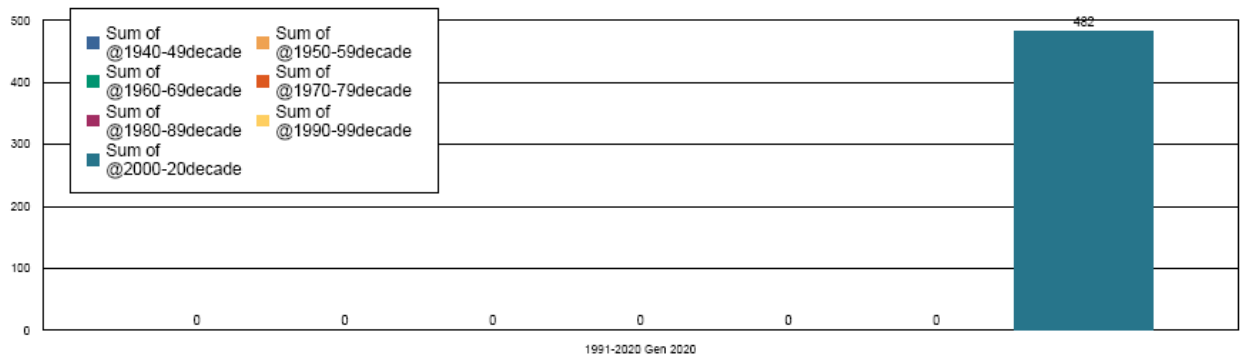


FIGURE 11: LEADERSHIP ROLES BY LEVEL

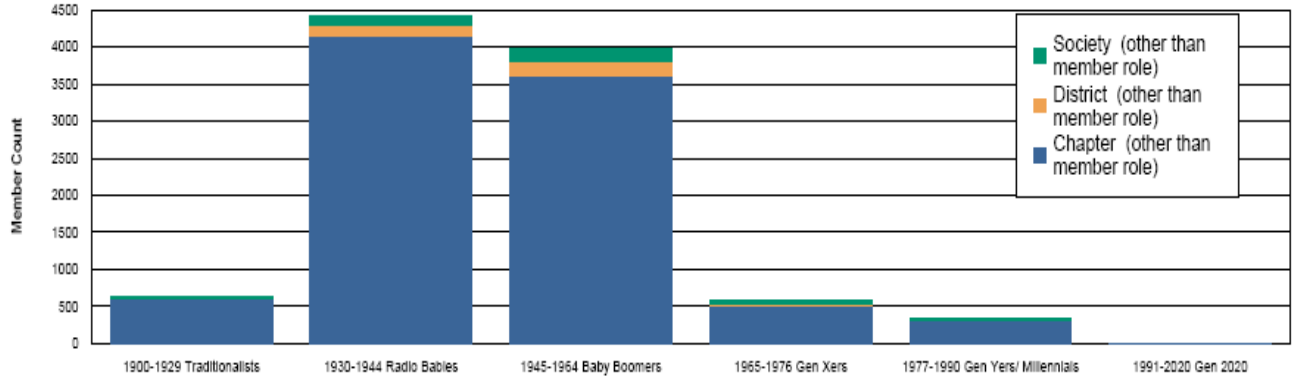
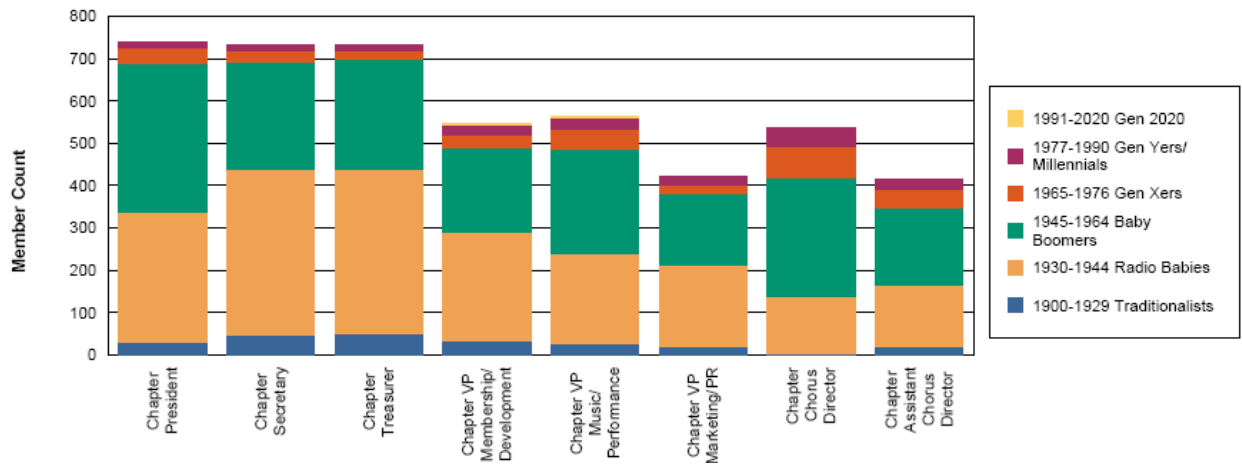


FIGURE 12:

Count of Selected ChapterRoleTypes by Generation (Current Members)



X. APPENDIX C

A Plan for Chapter Visitation and Assistance by Volunteers

Concept:

Approximately 20 volunteers would be carefully selected by nominations submitted by HQ staff members, IBOD members and District Presidents. Final selections for the program should be made with due regard for adequate geographic coverage.

These volunteers would each visit approximately four chapters per year (One every three months). Ideally, they would visit one every two months----or six per year. Their mission would be to develop rapport with the chapter officers and members for the purpose of observing and noting any particular needs that the chapter might have. The visitors would provide as much help as possible while on site (and therefore should be very knowledgeable and competent) and arrange for more in depth assistance (and therefore must be excellent observers), as needed, from the appropriate provider (International Staff or District personnel). During the visit, the volunteers would provide information on programs, available assistance, news and events. Additionally, they should have sufficient musical knowledge to teach a tag or provide a little coaching, if asked.

The chapter visitor should use every opportunity to reinforce chapter new member recruitment efforts. Prior to the chapter meeting, the visitor should meet with chapter leadership to review the chapter recruitment plan and the results of their efforts. The visitor should be prepared to provide assistance in updating and strengthening the recruitment methods, strategies and tactics for maximum effectiveness. Later, during the chapter meeting, new member recruitment should be made a part of the presentation to the chapter. This matter should be followed up by one or more telephone calls over the course of the next year.

Criteria for selection should include: Willingness to participate with a known track record for completing assigned tasks, dynamic, charismatic and affable personality, discretion, carefulness and empathy, among others. Good musical ability and knowledge are particularly desirable assets. Those who are able and willing to pay their expenses should be strongly considered.

Volunteers will be trained by HQ staff members and other knowledgeable and respected barbershoppers providing expertise as needed and appropriate.

Training in the basic knowledge of programs and techniques will be accomplished, as much as possible by utilizing internet transmittal with periodic self monitored exams on information and data. that has been covered. Upon completion of training, those certified should be completely conversant on all society resources available to help chapters as well as a broad knowledge of who to contact for assistance—and be able to demonstrate these abilities.

Details of the complete syllabus would be defined by appropriate staff members and a hand selected training committee.

Final training and certification would be provided at some central site over a long weekend. It might be desirable to invite more than 20 to the first class and not certify everyone—only the best. Those not certified could be provided more training and certified at a later date.

XI. APPENDIX D

Case Studies

The International Association of Business Communicators is a professional association founded in 1970 that awards greatness in communication to organizations in all industries who exhibit best practices in multiple areas of communication. The *Gold Quill Award* recognizes outstanding achievement in communication. The Public Relations Society of America is the world's largest organization for public relations professionals. The *Silver Anvil* award is the highest level of achievement and is iconic of the "best of the best" in public relations. Awards were provided to the following organizations for their innovative methods of communication from which other organizations, like the Barbershop Harmony Society, can learn.

Tillamook County Creamery Association and Conkling Fiskum & McCormick

Internal Association of Business Communication: Gold Quill Award, Social Media, Communication Management

The Tillamook company desired to expand distribution and brand recognition using a method that many organizations would not consider innovative or modern. They wanted to use the "word of mouth" advertising of existing product fans to promote the addition of new enthusiasts.

The company found that comments and opinions about Tillamook were already present at various locations on the internet—at this time there were over 400 Facebook members that were participants in Tillamook fan sites. They determined that the greatest contribution of the company would be to create a centralized space for these opinions to be housed, monitored and utilized to the fullest by Tillamook.

The overarching goal of the communication endeavor was to "build a community around the Tillamook brand that would allow its most loyal customers to know it better, expand their relationship with the company, provide open and honest feedback, and credibly spread the word about the brand to energize sales." And the objectives as stated by Tillamook were:

- Building an official club with 500 members or more by January 2009
- Growing attendance at Tillamook events.
- Using the fan base to launch an online store and gross US\$25,000 or more in its first month.
- Convincing self-professed fans to share their information and stories of love for Tillamook.

- Increasing positive blog mentions about Tillamook.
- Receiving timely feedback from customers about products and issues of concern.

The establishment of a Fan Club was the desire of the organization for the accomplishment of these goals and objectives. However, many social media aspects were used in the implementation phases of this goal, namely, Facebook, blogger relations, Twitter, and a dedicated fan club website.

- **Facebook:** As previously stated, fans of Tillamook were already exhibiting their opinions of the company and product thorough fan-led initiatives on Facebook. Tillamook formally launched their own “fan” page as a prelude to the dedicated Fan Club site. This allowed them to test theories about the number of interested fans who would potentially be visitors or members of the site and also to promote the Fan Club through an already-existing forum.
- **Blogger Relations:** As a result of the potential influence of bloggers on consumers, Tillamook found an opportunity in the inclusion of independent bloggers into their strategy. Positive and well-liked “blogs” related to the company and product would be highlighted on the Fan Club page in an attempt to encourage both positive comments and additional Fan Club members through the advertisement of bloggers not directly related to the company.
- **Twitter:** In the same way that Facebook was originally used to promote traffic to the official Fan Club site, Twitter was used in this manner as well. During the construction of the Fan Club site, Twitter was applied to advertise news and events related to the product. However, as a result of the success of Twitter and the number of Tillamook “followers”, a permanent Twitter feed was added to the Fan Club webpage.
- **Dedicated Fan Club Website Phase One:** Phase one of the dedicated website was primarily informational with aspects like:
 - Fans of the month
 - Highlights of employees of the company

- Recipes using Tillamook products
 - Product of the month information (which linked to the new online store)
 - News and Events
 - “Share with a Friend” option
 - “Post of the Day” to encourage frequent content updates
- ***Dedicated Fan Club Website Phase Two:*** Phase two of the site encouraged additional communication between visitors and members as well as more functionality:
 - Sharing and rating of fan recipes
 - Search function for restaurants using Tillamook products
 - Surveys allowing Tillamook to conduct inexpensive research on products, features, and overall customer satisfaction.

Findings

One of the many lessons learned from Tillamook regarding their communication initiatives was that they attempted to **reach consumers through methods that the consumers were already using**. Tillamook’s presence in social media was largely consumer-driven, and Tillamook simply joined the conversation. While the Fan Club, with its accompanying dedicated website, was a new concept to the organization, the members were largely driven to the site through the methods of Facebook and Twitter. Those formats allowed for a “testing ground” for the growth of a communication strategy, and Tillamook did not ignore or abandon those formats in an attempt to build their own.

Also, while the idea of “word of mouth” advertising is anything but new, it is still one of the most successful methods of communication. The communication of consumers and employees can be used to the benefit of the organization or against it, and sometimes creating a format for “peer to peer” communication, and responding to it will achieve more than stifling it or attempting to create a “top down” communication strategy.

Nova Scotia Liquor Corporation: “Jonzed”

Internal Association of Business Communication: Gold Quill Award, Audiovisual, Communication Skills

The Nova Scotia Liquor Corporation (NSLC) is the fourth largest business in Nova Scotia and one that takes its goal of the promotion of social responsibility seriously. This was evidenced by the creation of a socially responsible advertising campaign by the organization titled “Jonzed”. The origin of the “Jonzed” campaign came from research into drinking behaviors through which the NSLC determined that those most likely to participate in binge drinking had not been successfully reached with an effective communication strategy to which they could identify.

The intended audience of the campaign was college students age 19-26 and the goals for the campaign as stated by the NSLC were to:

- Discourage binge drinking among university students in Nova Scotia.
- Encourage conversation and “viral pass-around.”
- Enable university students to recognize the social stigmas and serious consequences associated with consuming excessive amounts of alcohol.

Further research into the intended audience led the NSLC to believe that members of this age group were infrequent consumers of “mass media” and did not respond well to traditional lecturing on subjects of this matter. The NSLC decided to use a humor and relatable character to convey its message, but were cautious in their use of advertising, corporate sponsorship or anything else that may have been off-putting to the intended audience.

Over the course of 5 months the “Jonzed” short film was created, along with two movie trailers, which were shown in local theaters. Three 15-second “teasers” were also used to build anticipation for the short film release and designated website launch. The finalized film was also distributed to 1000 members of the target audience through the use of USB bracelets. Through these methods and the measurements of their use, the Nova Scotia Liquor Corporation was convinced that it had reached its goal of engaging 25% of university students in Nova Scotia with the film and its message.

Since the release of the award-winning “Jonzed” campaign the NSLC has

continued its tradition of promoting socially responsible messages in entertaining manner with its recruitment of the Grim Reaper for campaigns using the tagline, “When you drink responsibly, he’s only killing time”. These campaign short-films show the life of a formerly successful Grim Reaper now that people have chosen to avoid irresponsible alcohol consumption. The title character can even be followed on twitter.

Findings

The knowledge of the target audience was integral to the success of the Nova Scotia Liquor Corporation’s “Jonzed” campaign. The NSLC knew how their audience liked to receive their messages, and they used that format. They did not attempt to conform the audience to a campaign method with which they were not comfortable.

The research performed beforehand also helped to shape the campaign from one that was immediately labeled “agenda-driven” or educational by the audience, to one that was simply entertaining. This is a lesson that organizations can duplicate when attempting to convey a message that may be considered “dry” or uninteresting. The entertaining message was conveyed, and people were more willing to listen and “pass it on” than if it had remained simply a public service announcement.

Eli Lilly and Company: Jamming Our Way into the Future

Public Relations Society of America: Silver Anvil Award of Excellence in Internal Communications

Eli Lilly and Company, a pharmaceutical company, developed a new vision for the company in 2007. During the vision rollout, the company wanted to engage employees in a meaningful discussion of how the vision could become a reality. With an integrated and comprehensive internal communication program, Lilly educated its employees on the new vision and engaged them in online discussions.

To begin engaging their employees, the company developed an online “jam session” that allowed employees worldwide to share ideas and make connections with the company. The vision jam was the largest project ever undertaken by the company, creating a 76-hour online communication forum to discuss new ideas, collaborate on developing ideas, and to drive new kinds of business innovation. The “Lilly Vision Jam” had several communication objectives, including:

- Create awareness about the jam, drive registration and create excitement
- Break through the “noise” by using novel communications and marketing approaches in combination with traditional tools
- Ensure employees are well prepared to participate in the jam

The company used an integrated approach, including online, print and face-to-face communications tactics to share the vision, promote the jam and get employees to participate. The most notable tactics included:

- **Global Communication Toolkit:** Template materials for communicators to get started in their own markets. The toolkit included a communications plan, list of top 10 ideas for leveraging the jam, series of posters, presentation materials and visuals, and e-card invitation.
- **Web Site:** The internal website served as “communication central”—the destination for learning more about the vision, the four main jam topics and the process for jamming.
- **E-Communications:** Use of several online tools further informed employees. Examples include an e-card invitation, online articles that provided in-depth information on the four main jam topics, and video commentary from leaders.
- **Video:** Before the jam, an education and compelling video was distributed to ensure employees understood the challenges facing the industry and Lilly, which ultimately made a case for the jam and making Lilly’s vision a reality.
- **Giveaways:** To generate excitement, employees who registered for the jam were entered into a weekly drawing for giveaway items such as iPods.
- **Town Hall Meetings:** Group meetings were set up across the organization to provide open forums and more in-depth information for employees.

Findings

The key to success for this program was the integrated use of various internal communications tools to promote and engage employees. Each tool was selected with a strategic intent to ensure the Lilly Vision Jam was successfully promoted to all employees. The communication toolkit also provided front-line managers templates and materials to directly communicate with employees at their sites. The toolkit became an integral part of the plan, as it provided additional opportunities for face-to-face communications between managers and employees.

Communication Preferences within a Large, Metropolitan Healthcare Organization

Nursing Communication Survey

In January and February of 2010, an Internal Communications department, in collaboration with Market Research, conducted a survey at all locations of a large, metropolitan healthcare organization with the aim of understanding and enhancing communication processes within nursing. In total, 18 meetings were completed with more than 300 nurses participating. During the assessment, those in attendance at several nursing meetings were asked to evaluate the effectiveness of 19 communication tools and methods currently in place within the organization, as well as suggestions to improve these tools and ideas for new tools.

After the completion of the surveys, dialog sessions were held to provide team members an opportunity to explain further their survey answers. The topics discussed were:

- *What is working well with the current communication with nurses? Why?*
- *What is not working with the current communication with nurses? Why? How can it be improved?*
- *What are the biggest obstacles to providing better communication to nurses? How can we change this?*
- *What other tools would you like to see available?*

The tools and methods listed on the survey were: Nursing Forum (Town Hall), Nursing Connection Newsletter, Nurse Portal (a nurse-specific informational site available on the organization's intranet), Manager Huddle, Hospital Town Hall Meeting, CAM Alert, Staff Mail Boxes, Bulletin Boards, Coaching Plans, Manager One-on-One, Communication/Education Book, Unit/Department meeting, Posters/Flyers, Individual e-mail, Ascom portable phones, Vocera (a hands-free, wearable, voice controlled communication unit), Administrative Rounding, In-Touch (the corporate-wide employee newsletter), Unit/Department Newsletter. The top three most effective methods rated by nurses were: Manager one-on-one, Unit/Department Meetings, and Manager Huddles.

Survey Results: Most Effective Tools

Based on the research, face-to-face methods of communication were rated as the most effective way to communicate with nurses because of ease in the distribution of information and the ability to disseminate the same information to a large group at one time, ensuring they all received the same message. Four out of the five top rated tools were all face-to-face methods. The top five most effective

tools rated were:

1. Manager one-on-one
2. Unit or department meetings
3. Manager huddle
4. Individual e-mail
5. Coaching plans

Survey Results: Least Effective Tools

The least effective tools for communication, identified by nurses, varied slightly by group and site. The methods most commonly mentioned included:

1. Communication / education book
2. Vocera
3. Nursing Connection newsletter
4. Staff mailboxes
5. Nurse Portal

Communication Barriers

While face-to-face communication was described by the nurses as the most effective communication tool, they noted several barriers including the ability to schedule meetings in a timely manner. Another barrier to communication identified was the amount of information distributed, and the time involved in collecting and reading it. The top three suggestions made by nurses to improve the overall communication process were:

1. Streamline the amount of information distributed
2. Reduce the total number of sources in which to find information
3. Provide e-mail access to all nurses

Ancillary Communication Survey

As a result of the success of the nursing communication survey, and in an attempt to better understand communications across the spectrum of team members, a similar survey was conducted in March of 2010. The Ancillary Communication Survey, which used the same methodology and survey format, was conducted using team members from one location within the organization as a representative sample. Two survey and dialog sessions were held, and managers of ancillary departments were asked to send three to four team members to one of the sessions.

Survey Results: Most Effective Tools

The highest-rated method of communication identified by ancillary team members was email. This differed somewhat from nursing; most likely a result of the number of ancillary team members with frequent access to email as compared to the number of nurses with frequent access. The ancillary team members cited convenience as the main benefit of email, but also were aware of the potential hindrances of “mass” emails that do not pertain to a particular person or area as delaying them from more important messages.

The other top rated communication tools were all face-to-face communication methods. The reasons stated for the preference of face-to-face or personalized communication involved the assurance that the information was coming from a reliable source and the ability to ask and have questions answered immediately. The top five most effective tools, rated by the ancillary staff were:

1. Individual email
2. Unit or department meeting
3. Manager one-on-one
4. Manger huddle
5. Hospital Town Hall

The main drawback to face-to-face communication expressed was the “lack of consistent meetings and/or information being presented to them in a timely fashion”.

Survey Results: Least Effective Tools

The ancillary team members were similar to the nursing team members in the least effective category. The tools mentioned as least effective for communication as identified by the ancillary staff included:

1. Communication / education books
2. Administrative rounding
3. Staff mailboxes
4. Unit / department mailboxes
5. CAM Alerts

Communication Barriers

The team member perspective of the difficulty of obtaining information was also interesting. When asked what the obstacles to obtaining information included, the answers were:

- **Staff Accountability:** Staff do not take the time to read information because they are not being held accountable.
- **Time:** Lack of time to read all information presented to them.
- **Poor Inter-department Communication:** Departments implement changes that may affect many other departments but do not communicate it.
- **New Policies /Procedures:** Policy changes occur often and information regarding the change is not communicated before the new policy takes effect.
- **Manager Lag Time:** Information is sent to managers but inconsistent department meetings creates a 'gap' in communication.

Survey Observations

There are many team members within this organization that have limited access to certain communication resources because of their responsibilities. For example, team members in the areas of Food and Nutrition and Transportation. These team members rely heavily on management and team leaders, coupled with centralized bulletin boards to receive their information. While they do have the benefit of face-to-face methods, it is reasonable to assume they may experience some of the same barriers as expressed by nurses and other ancillary team members of the timeliness of information received in this manner.

Combined Survey Results

The following results combine responses from both the corporate-wide nursing communications assessment and the ancillary communications assessment. Nursing and Ancillary team members' results were similar. The top five most preferred communication methods were:

1. Manager one-on-one
2. Department / unit meeting
3. Email
4. Manager huddle
5. Coaching plans

Conclusions from Surveys and Observations

The conclusions drawn from the Nursing Communication Survey and dialog sessions suggest that while many methods of communication are available, nurses desire a communication format that is personal, and perhaps face-to-face when possible. They also appear to prefer a message that is nursing-specific, and possibly unit-specific as well. These preferences should be considered when attempting to communicate a message within the nursing population.

The conclusions drawn from the Ancillary Communication Survey and the dialog sessions that followed are similar to those of the Nursing Communication Survey in that both groups prefer face-to-face communication methods. However, the use of email is seen as more convenient and more widely-used by ancillary team members than by nurses. This could be the result of the limitations of email access to nurses, or by the position requirements of nursing team members versus those of ancillary team members.

Therefore, it is safe to say that there are two key themes evident among the top five communication methods identified by nursing and ancillary team members:

1. **Manager communication:** Four of five of the top five communication methods team members prefer are related to manager communication.
2. **Timely access to pertinent information:** Email is the third most preferred method of communication. Email represents timely access to needed communication, with team members in consistent need of immediate access to critical information.

Both groups also prefer a message that is position-specific or unit-specific, and view “mass” messaging as a barrier to receiving essential information. The time required in the collection and evaluation of information was also an issue that was common to both groups. This is potentially the result of the amount of information attempting to be communicated. Perhaps if the audience in need of particular information is more clearly defined, the time to collect necessary information will also decrease.

Application to the Barbershop Harmony Society

The conclusions from the surveys performed in the above case study can be generalized to other large organizations with a hierarchy through which communication takes place. The themes of manager communication and timely access to pertinent information can be easily translated into communication throughout the Barbershop Harmony Society.

Communication from the leadership in a Chapter or District is seen as the most valuable. When at all possible, communication should come from leadership, and be face-to-face in meetings if possible. The specificity of the message is important to the hearer. Communicators should attempt to apply the message to the hearer as closely as possible, perhaps limiting frequent communication to information pertaining only to one’s chapter.

Appendix E-4 – MGTf

THE SUCCESSFUL CHAPTER

First, it was necessary to define success in terms that would not be divisive. Just to give some perspective to the problem of divisiveness, another on-line survey discovered in 131 comments that there were 131 different ideas on what was necessary for the respondent to have a satisfying experience at a chapter meeting. However, several, what could be considered successful chapters were encountered and observed. Each of these chapters had some clearly identifiable characteristics (hallmarks), which engendered their success.

Taking careful note of the hallmarks found in these chapters, it is quite possible to compile a list and to define success in these terms:

A successful chapter should be an organic, vibrant and coherent organization exhibiting a oneness of purpose, achievable and measurable goals, an atmosphere that fosters individual and group excellence, is proactive in the community, includes families in many activities and has a membership that is devoted to the welfare and enjoyment of their fellow members.

The successful chapter has an effective and responsive communication system using all possible means to ensure that each member is kept well informed. An effective communication system will also reach out into the community promoting both awareness of the chapter as well as publicizing significant chapter events. The successful chapter is always looking for new members. In the most successful recruiting chapters, each member is a recruiter. They are always seeking an opportunity to talk about the barbershop hobby and inviting guests to visit the chapter meetings. The successful chapter looks like and acts like a large and happy family. With all the problems inherent in family life, the members work them out and keep moving forward together. The successful chapter often has one person (a sparkplug) who acts as the emotional center of the chapter and assists the director in keeping the mood light, productive and the atmosphere enjoyable. The adhesive holding the successful chapter together and ensuring continuing success is a universal adoption of an attitude for success.

NB: In the absence of this fundamental principle, anything that appears to be successful will, eventually prove to be ephemeral, engendering a never ending cycle of unsupported short lived programs designed to “turn things around”. What unfailingly results is a downward spiral into failure, listlessness, apathy and eventual implosion.

A Closer Look at Success

ATTITUDE: An attitude for success begins with a corporate examination. The entire chapter must sit down together and look very carefully at their corporate attitudes about everything that is fundamental to the chapter—everything. As a first element of the process, the chapter must define what they see as being successful. The list should be long and all inclusive. A disinterested facilitator could help this process. Any attitude which is not conducive to success must be exposed, examined and abandoned.

Any idea, and there should be many, that will aid the chapter in their quest for success should be discussed and, when all can agree, adopted.

At the end of the meeting, a statement should be prepared detailing all the steps that all members of the chapter agree to and are willing to proactively support immediately. A copy of the statement should be provided to every member and one person should be assigned to ensure that the resolve of the chapter members becomes part of the organic structure of the chapter.

GOALS: The successful chapter must have reasonable, achievable and measurable goals. Generally, these goals should be set by the chapter board of directors and ratified by the entire chapter. Goals should be established for short, intermediate and long terms. They should involve every aspect of chapter life. Some chapters have set goals in the following areas: Membership, Sing Outs, Singing Excellence, Media mentions, Singing Valentine Deliveries, numbers of members attending district and International events and classes. All goals should be established to keep the chapter moving in the direction it has chosen by universal agreement.

COMMUNITY OUTREACH: The successful chapter will take steps to become an integral part of the community structure. This can be accomplished by seeking opportunities to serve the community not only by singing but by active participation in other community events requiring volunteer assistance. The main idea is to create and maintain visibility of the chapter and to create a pervasive atmosphere of willingness to help and serve. A good first step might be to join the local and nearby chambers of commerce.

FAMILY INVOLVEMENT: The successful chapter will seek out and take every available opportunity to involve family members in the various chapter events. The more that family members are involved, the greater the desire to participate in every event. An active ladies auxiliary is certainly basic to eliciting the assistance and support of members' families. Some family events might include: A family recognition and thank you night, chapter picnics, night out parties with wives, Founders night dinner dance, and an installation banquet. Smaller family groups should evolve from the larger group. Smaller groups will gather for dinners, picnics, game nights and other small group events. Every opportunity to involve family members should focus great attention on the kids.

SINGING EXCELLENCE (ENSEMBLE): The successful chapter will seek to bring each individual member to his own best level of vocal production. A high level of overall excellence will serve to promote an atmosphere of chapter pride. There is no greater achievement for chapter members than to look out and see pleasure and admiration reflected in the faces of their audiences. Techniques for the improvement of singing excellence should include: a focused warm-up prior to every rehearsal or performance. This warm-up should serve, not only to prepare the vocal apparatus for a quality performance, but also to teach, exercise and reinforce good singing techniques. No warm-up should ever be conducted without including these elements.

Chapters should ensure that at least one member attends some Harmony Education program to learn correct and good singing techniques and shares this knowledge with the chapter on a regular and continuing basis through chapter craft classes. The director and the chapter board should insist that time is set aside for this most foundational activity. Chapters should invite an outside, knowledgeable barbershopper to visit the chapter periodically to evaluate them and to provide coaching on vocal improvement techniques. Depending on the chapter level of performance and desires to compete in contests, coaches should be invited that will help to improve the singing at any level.

PERSONAL EXCELLENCE: The goal of personal excellence within the chapter family is to allow the member to effectively participate in the creation and maintenance of a singing ensemble that performs at the highest possible level. Each member should be accorded the opportunity to have his singing technique privately evaluated by the director, his section leader or a coach. An individual program for vocal excellence should be established and agreed to by the member. This program should include private and group coaching on good singing techniques with regular evaluations and frequent encouragement.

N.B. The successful chapter excludes no one. The successful chapter will use every method to help the individual singer improve and flourish. Of primary importance in any vocal improvement program is to encourage the individual and applaud his growth. All performing chapters are encouraged to voice test prospective members only to ensure that the guest is seated or standing in the proper section. The guest should be carefully observed as long as he is a guest. Careful note should be taken of how well he listens to instructions and adapts his singing to them. Prior to considering the individual for membership, a more definitive voice test should be conducted. During this test, not only should the guest's current level of singing be considered but also his observed propensity for future growth.

THE CHAPTER "SPARKPLUG": Each chapter has some central member who seems to be the soul of the chapter. He is affable, witty, perceptive and has a high degree of personal leadership and magnetism. The successful chapter will identify this person and bring him to the forefront. He should participate actively in the development of

the plan for each chapter meeting. The chapter sparkplug should, throughout the chapter meeting, be attuned to the mood of the chapter and work closely with the director to vary the program, as necessary, to maintain interest, attention and to ensure that, everyone is having fun. In order to accomplish this effectively, the chapter sparkplug should be “out in front” as much as possible in order to complement and assist the director in keeping things flowing.

When he senses that the mood of the chorus is sagging, he should, in concert with the director, take some action to return the chapter to a more relaxed posture. Some actions he might take would be to suggest a rest break, teach a tag, tell a joke, or otherwise change the program “on the fly”, as it were, to maintain a high level of interest and participation. Each chapter should make an exceptional effort to identify their own sparkplug and, over some time, allow him to find his niche.

COMMUNICATIONS: Effective, reliable and verifiable communications are the linchpin and lifeblood of a successful chapter. It is essential that every chapter member be well informed about all aspects of chapter life. Additionally, it should be the duty of chapter leadership to keep abreast of news from other chapters, the district and from International Headquarters. Communications must be a multi media effort which utilizes all current methods of social communication including (but not limited to): Chapter bulletins and newsletters, a chapter E-Mail distribution list, Facebook, Tweets, Twitters, telephone calls and a chapter web site. Random checks should be conducted to ensure that chapter communications are reaching all members. The chapter must always be alert for, and quick to use, new methods of communication which are constantly being developed. Communications about the chapter must always have the aspect of informing the local community about chapter membership opportunities and events. Many local media outlets provide time and space for community organizations to keep the community informed. These opportunities must be identified and used on a regular and consistent basis. Good communication with the community is one of the best methods of locating and recruiting new members.

RECRUITMENT: The successful chapter fosters a climate where every member is an active recruiter. Successful recruitment begins with a personal pride in the chapter. This sense of personal pride should be a palpable and pervasive feeling that will surround the guest (as well as the member) from the very first moment he enters the meeting place. Every member should always be alert for opportunities to talk about the barbershop hobby and art form. Anywhere a member is should be considered a place for recruiting new members. All members should be comfortable with talking with all age groups about the hobby. It isn't necessary to be young to invite a young man to visit your chapter.

The key to recruitment is the warmth and genuine interest that the guest is shown from the first moment he arrives at the chapter meeting—which must continue throughout their visit. Even if no guests arrive on a particular night, there should be an established procedure for greeting them at the door, signing them in on the guest

book (be certain to collect all contact data), having a simple, private voice placement test and assigning them a “buddy” for the entire evening—including any after meeting afterglows. The chapter escort should never, ever leave the guest alone. If there are any after meeting events such as afterglows, the guest should be actively encouraged to participate. Never give him the impression that there is some secret society that meets after the chapter and that he is not invited. Easy to access music guest books should be provided and some basic instruction on how to read the music should be provided. The chapter should never give the appearance of not being ready for guests and having to scramble around looking for the guest books, someone to act as an escort, or for the guest music books.

All guests should be provided the opportunity to sing in a quartet and to sing with the chorus. If you miss doing this, you have failed your guest and your responsibility. Every guest singing for the first time in a quartet should have someone standing by to assist them. Every attempt to sing in an ensemble, of any kind, should be an excellent opportunity for encouragement. When the evening is over and the guest has departed, the follow up procedure begins. The follow up is a process of indeterminate length. It is intended to bring a first time guest into membership, to ensure his growth and development both as a singer and as an integral and important fully functioning member of the chapter. Ideally, as soon as is reasonable, the new member should be assigned some significant duty within the chapter—usually as an apprentice to someone who has been doing the job for some time. Careful observation of the new member will allow chapter leadership how quickly to assign greater duties to the new member.

One chapter assists the new member for (up to) the first three years of his membership. Someone is assigned to answer any questions that the new member might have. Assistance is often needed in understanding the competitive tracks, with getting the proper uniforms and music and a myriad of other little details many of us have grown used to and take for granted. One district actually has a newer member who is a District VP. He has been a member for only two years and on the district board for 4 months—as this is being written. It took some rather keen perception to see the potential this young man had and to move him quickly into leadership. At all reports, he is not only fulfilling but exceeding the expectations of those around him in leadership. The first year is the very most critical in the retention of a new member. We have an extremely high attrition rate after that first year. Members who did not renew their membership have stated that they were never made to feel a part of things and some were never even asked to renew their membership. It is a required duty of leadership and of every chapter member to ensure that this never happens to a guest who visits your chapter. The very next day, after the first visit, the guest should be contacted and thanked for coming to the meeting. Appreciation for his attendance should be warm and profuse. Prior to the next meeting, he should be contacted again and invited to return. If necessary, someone should endeavor to provide transportation as a courtesy. Similarly, the guest should be contacted each week after he visits and once again to be invited to the next meeting. You can never call too many times with thanks and appreciation.

When the guest is asked to become a member, it should be a big production. Perhaps the chapter board can surround him and the President tender the offer to join. This, as previously mentioned should be preceded and contingent upon a successful and reasonable, private voice test. The big gap seems to occur after the guest is accepted and becomes a member. All of the warmth seems to evaporate and he is left on his own in a very strange environment. The chapter must develop a program and strategy to ensure that the warmth and assistance continues until the member is completely assimilated into the chapter and, most importantly, until the chapter is assimilated into his life. Some member of chapter leadership should make contact with the new member at least once during every meeting for, at least the first year. Every district should endeavor to have a district officer call each new member the day after he is accepted as a member. This is an attainable goal and should be a consideration of the highest importance.

Summary

As stated previously, a successful chapter should be an organic, vibrant and coherent organization exhibiting a oneness of purpose, achievable and measurable goals, an atmosphere that fosters individual and group excellence, is proactive in the community, includes families in many activities and has a membership that is devoted to the welfare and enjoyment of their fellow members. Some of the most common and persistent elements of truly successful chapters are as follows:

- Attitude – The chapter has an attitude for success and a willingness to use a structured approach to identify what success means to the members.
- Goals – The chapter agrees upon reasonable, achievable and measurable goals which are designed to move the chapter toward success, as defined per above.
- Community Outreach – The chapter actively seeks opportunities to serve in the community to create and maintain positive visibility.
- Family Involvement – The chapter takes advantage of opportunities to drive a stronger sense of inclusion and build strength into the chapter by involving members' families.
- Singing Excellence (ensemble) – The chapter fuels pride and creates a rewarding of achievement by constantly striving to improve the quality of the ensemble.
- Personal Excellence – The chapter creates and supports some form of member-driven individual vocal performance improvement.
- The Chapter “Sparkplug” – The chapter identifies, develops or recruits a highly engaging and personable individual to ensure energy, variety and fun in group activities of the chapter.
- Communications – The chapter understands that effective, reliable and verifiable communications are the lifeblood of success.

- Recruitment – The chapter members talk with passion about barbershop and the chapter maximizes attention, warmth and inclusion for all who encounter the hobby at any level.

Appendix F – MGTf Final Report

External Focus Task Force (EFTF) – Strategy and Execution Plan

EFTF charges emerging from the Membership Growth Task Force (MGTf) briefly summarized:

1. Formulate a marketing strategy to enhance the overall **reputation** of barbershop harmony and BHS in the outside world.
2. Craft a strategy to provide **services** and products to other music organizations.
3. Build a plan to create and support **sub-groups** within BHS to encourage non-traditional barbershop singing.
4. Coordinate with the **Global** Strategy Development Task Force.

The following statement attempts to consolidate all four charges into a single two-pronged strategy:

Strategy: To aid and contribute to both domestic and global membership growth by

- a. Enhancing barbershop harmony's - and more specifically the Society's - reputation in the outside world, especially with musicians and men of all ages who love to sing, and
- b. Expanding the Society's musical reach by supporting non-barbershop a cappella music both within and outside the Society.

Impacting membership growth, both directly and indirectly, is the driving force behind this strategy. In many ways it cracks the door for the Society to move in the direction of becoming a more inclusive umbrella organization for multiple types of a cappella music, which will in turn expose and attract more singers to the unique harmonic characteristics and physical joy of ringing barbershop chords. At the same time it's not explicitly designed to commit, mandate or force the Society into a formal umbrella organization strategy, that being beyond the scope of this task force and strategy.

Marketing experts estimate that to build even "aided awareness" of a brand with the general population of the U.S. requires an annual advertising budget in the eight figure range for a period of years, which of course is well beyond the Society's financial feasibility in the foreseeable future. While the Society may be somewhat satisfied with existing general population awareness of our brand, enhancing our reputation and image is a greater and more costly challenge. This strategy therefore utilizes economically viable electronic communication and networking tools focused

primarily on demographically attractive and/or musically oriented organizations and groups.

Besides cost efficiency, technology offers the additional advantage of being global in its reach, so even though initiatives may be designed for and targeted at North America they will also be available and accessible to Affiliates and other potential Society relationships throughout the world. The challenge of course is getting our primary customers, local barbershop chapters, to utilize the tools offered electronically. Where possible we need to utilize push vs. pull technology and establish the means, resources and procedures/processes to incent and monitor chapter usage.

The EFTF's first two steps were to complete the following tasks, which were completed and overviewed at the March, 2010 Society Board meeting:

1. Inventory, categorize (relative to charges 1-3) and review existing BHS externally focused initiatives.
2. Develop, categorize and prioritize potential new externally focused initiatives.

We also began the process of distinguishing between short (quick hits) and longer-term initiatives and determining which initiatives can be applied globally, i.e., beyond North America (charge 4).

Below is the list of existing (including planned) and new initiatives, categorized by the first three charges, the new initiatives listed in priority order in each category. We prioritized solely based on perceived benefit. Initiatives having a direct impact on local chapter growth typically carried the most weight in terms of priority. We took into account cost and resource demands as we distinguished between shorter and longer term initiatives.

At the end of each initiative in parenthesis is an expectation as to how soon it could be implemented and reap benefits, also whether it could be applied beyond North America.

S = Short term or existing initiative, impact in or before 2010 and beyond

I = Intermediate term initiative, impact expected in 2011 and beyond

L = Longer term initiative, impact in 2012 or later and beyond

G = Global application, i.e., beyond North America

1. Reputation enhancing

a. Existing and planned

- i. Vocus Media Service (S)
- ii. Prerecorded video ads and announcements for chapter use (S)
- iii. Google alerts (S, G)
- iv. YouTube/Facebook ads primarily for our conventions (S, G)

- v. Providing top quartets to local media and community events at international conventions (S)
- vi. Singing for Life (currently 20% of chapters participating) (S)
- vii. MENC and ACDA exposure (S)
- viii. Teams for Accelerated Growth (TAG) program (launching on a pilot basis in 2010 while awaiting funds from HFI) (S, G)
- ix. Four on the Road (launching on a limited basis in 2010 while awaiting funds from HFI) (S, G)
- x. S!NG – an a Cappella Experience (awaiting funding from HFI) (L)

b. New

- i. Formulate electronic data gathering based marketing plans targeted specifically at college choir alumni, 21st century veterans, AARP and/or other demographically attractive organizations. (I, G)
 - 1. Utilize technology savvy member volunteers to develop a program and process to gather and distribute information on attractive groups of potential members to local chapters.
 - 2. Mike Lietke has developed a program and process for his chapter. Perhaps he and/or other technology savvy volunteers could help.
- ii. Explore the reputation enhancing value of an externally focused publication and/or website or blog. (I, G)
 - 1. Certainly a website or blog is more cost efficient and easier to implement than a hard copy publication.
 - 2. A hard copy externally focused publication might be considered at a later date under more favorable financial conditions.
- iii. Build a marketing/recruiting plan to be used in conjunction with chapter shows including how to utilize outside headline quartets, compile with existing chapter marketing collateral/tools into a center/webpage, and provide more effective ways to package, communicate and ensure usage by chapters. (I, G)
 - 1. Most of the collateral and tools exist today, but aren't as easily accessible in one obvious place as they need to be. This could be completed by the Society's Web Developer.

2. A specific overarching marketing and promotion plan and process for chapter shows utilizing tools in the center could be crafted by the Society Marketing and Public Relations Committee.
 3. A plan/process to more effectively utilize headline quartets for show promotion/recruiting could be crafted by the AIC to be included as well.
- iv. Initiate a younger generation grass roots image enhancing campaign substituting “shop” as an informal substitute for “barbershop”. (S, G)
1. Concept write-up in separate document
 2. HD youth chorus in FL utilizing
 3. Vocal Spectrum’s Jonny Moroni interested in supporting with Ambassadors of Harmony youth
 4. Considering t-shirts (‘shop till you drop/’shoppers rule) for Philly to reinforce idea

2. Service and support to other music organizations

- a. Existing and planned
 - i. Harmony Inc. (HI) judging program training and collaboration (S)
 - ii. Hal Leonard music distribution (S, G)
 - iii. MENC and ACDA support (S)
 - iv. Informal collaboration with Sweet Adelines (SAI) on youth programs (S)
 - v. Distribution of CD’s through a cappella catalogues and potentially large retailer (S/I, G)
- b. New
 - i. Provide more active local chapter recruiting support at ACDA and MENC trade show booths. (S)
 1. Staff can step up emphasis at trade shows during 2010 conventions and beyond.
 - ii. Provide more active encouragement and support for district/regional and chapter collaboration with SAI and HI on youth programs, shows, Singing for Life, Singing Valentines, training and spring conventions. (S)
 1. Many districts and chapters are already collaborating in a variety of ways.
 2. More formal and explicit encouragement can be provided at Leadership Academies and other schools and communications.

- iii. Create online music library of both barbershop and non-barbershop arrangements and learning downloads for both members and non-members. (I/L, G)
 - 1. A library of barbershop arrangements is currently being developed at HQ.
 - 2. Expanding songs/arrangements beyond barbershop could be supported by volunteers like Joe Liles.
- iv. Offer online harmony university, including Leadership Academy, Harmony College and other courses that would be attractive to both members and non-members. (I/L, G)
 - 1. Currently in discussions at HQ
 - 2. Technology savvy volunteers could help.

3. Sub-groups within BHS

- a. Existing
 - i. Youth camps (S, G)
 - ii. College quartet contest (S, G)
 - iii. Midwinter convention youth chorus festival (S)
 - iv. International convention gospel sing (S)
- b. New
 - i. Offer a mixed group and/or contemporary a cappella contest at the Midwinter or International convention. (I/L, G)
 - 1. This could expose more nonmember singers to barbershop.
 - 2. To plan, promote and manage effectively, would probably be first offered at a convention in 2012.
 - ii. Create a barbershop harmony fan club for non-members who like our music and want to be connected and informed, but aren't candidates for membership. (I, G)
 - 1. This could be promoted at ACDA/MENC conventions and possibly as an adjunct to 1.b.ii. above.
 - iii. Explore the development of programs to keep Frank Thorne (FT) chapter members interested and active. (I)
 - 1. A task force could be formed to research and understand the makeup of FT membership and to recommend programs to address their needs more effectively and improve their retention.

If the task force had to choose our overall top priorities they would be the proposed new initiatives in the Reputation Enhancing category (1.b.) ranked as they are

above. At the same time we feel all the new ideas have enough value to warrant serious consideration at some point. We recognize that current resources (both human and financial) are at or above capacity, and that is why we ranked the new initiatives list by priority in each category. We also recommend using volunteers working under staff supervision where possible to supplement resource capacity.

External Focus mini-Task Force

Roger Lewis

Tom Metzger

Rick Spencer

Gary Parker, chair

Appendix G – MGTF Final Report

New Chapters Mini-Task Force

In establishing this task force President Biffle reiterated the following statement from the report of the Membership Growth Task Force:

“The overarching strategic plan for increasing membership in the Barbershop Harmony Society must be based on helping chapters become successful, in whatever way they choose to enjoy barbershop harmony, by providing a consistent, high-quality experience for every member each and every week.”

Accordingly, this task force was charged to:

“Develop a strategic plan to create new chapters, including:

- e. How to determine potential sites for new chapters;
- f. What minimum requirements are needed to ensure a new chapter will have a reasonable chance to be successful;
- g. Methods to provide continuing support particular to new chapters.”

The “typical” successful/healthy chapter defies definition as there are so many varieties, any/all of which may consider themselves both successful and healthy with a membership that participates regularly (whether large or small) and is having fun each week. Nonetheless, elements that satisfy, lead or contribute to this perception by individual members include

- Men who love to sing
- Minimum number of active members in each voice part
- Inspired and inspiring musical director
- Successful guest recruiting program(s) that lead to membership
- 100% retention
- Varied chapter meeting program
- Willing volunteers
- Music that's within the capability of the group and fun to sing
- Community involvement (public sing outs, retirement home performances by the chorus/quartets, etc., e.g.)
- Congenial membership -- good fellowship -- social activities
- Distinctive article(s) of clothing with chapter/chorus name/logo
- Recognition by other chapters/district
- Acceptance, support, promotion by and from the community
- Assist visits by local administrative and musical coaches/counselors
- Sing out opportunities
- Enthusiastic leadership team
- Imaginative membership and marketing/PR program/person(s)
- Welcoming meeting location

- Basic equipment (risers/boxes, music library, performance uniforms, etc.)
- Afterglow opportunities following chapter meetings

Prioritizing could lead to a phased/building block approach -- easy to more demanding (resource and/or manpower extensive) or simple to more difficult to adopt/achieve.

For the most part, the Society has focused on recruiting new and serving current members rather than focusing on marketing the organization and growing and grooming new chapters. In some areas where barbershop harmony could thrive, there are no chapters at all. If we are to succeed, it is imperative that new chapters be established in regions where none exist and that alternative chapters be introduced where the population, interests, and support are likely. To accomplish this goal, the Society needs to increase significantly its permanent presence in the field.

Above all other potential actions, and based on historical performance results, increased capacity in the field offers the most promising, positive, and productive capacity for identifying suitable sites for new chapters. Further, those hired/assigned for this purpose will be well-positioned to mentor new chapters through the licensing and chartering processes and beyond, as well as to strengthen existing chapters in need of external assistance and advice.

In this year's letter to chapters attending district House of Delegates meetings Society President Biffle addressed this need, as follows:

"What if there were a "Music Man" who lived in each region of the country? A dedicated, talented, passionate guy who would work every day to bolster existing chapters, create and nurture new chapters, build relationships with music teachers and town leaders, and expose barbershop to the world? Can you imagine the effect this would have on the future of the Society?"

And Society Director of Operations, Rick Spencer, included the following in his keynote address to the Society Board at its winter meeting in January 2010:

"Let's focus on planting new chapters. ... let's focus on planting new chapters that must follow simple guidelines during their chapter life. Guidelines that train and educate their leaders. That identifies new leaders. That gives each member a feeling of satisfaction and fulfillment each week at the chapter meeting. Guidelines designed to teach them the bigger picture of barbershop harmony...that they belong to more than their own chapter...that they are helping to preserve the greatest musical art form in the world!"

Significantly (and simultaneously with the creation of this task force), the Society embarked on a pilot program specifically designed to address this need – TAG ("Teams for Accelerated Growth") teams of two trained and experienced

barbershop operation specialists are serving as field agents to provide customized face-to-face training and coaching to chapters, to focus on chapter development, growth, administration,, etc. and, at the same time, to work to establish new chapters and be visible spokesmen for barbershop harmony. It is strongly recommended that once the three-month “proof of concept” period is over, additional teams be hired, trained, and assigned to live and serve specific areas across the continent, with financial support provided by the Harmony Foundation International, Inc.

While not specifically targeted against the need to establish new chapters, another Society initiative is expected to have a positive collateral effect on this effort. Known as “Four on the Road” (FOTR), this is a permanent, auditioned quartet that will travel the continent visiting communities, schools, colleges, etc., and be available to appear on chapter shows and other events.

Again, quoting Rick Spencer’s keynote address,

“What if we had one, two - or ten - young, personable, exciting, good singing quartets touring high schools, colleges, and communities all across this continent, singing barbershop and spreading the gospel of who we are, what we do, and selling the world on the demonstrable fact that barbershop can be a positive, healing force in today’s fractured world? Showing the world how this music can heal divisions, create community, and inspire people of all ages to keep music in their lives forever?”

As a visible and vocal field presence, FOTR quartets (plural intended/recommended) will provide focus and attention that will be a valuable public relations and recruiting tool in areas not served by a local or reasonably close chapter. Their presence will assist both those with barbershop harmony experience residing in such areas and area TAG teams, advancing their pursuit of new chapter locations. Just as virtually every chapter activity has a vital membership component, FOTR will bring opportunities for identifying and furthering an interest in barbershop harmony and offer the possibility of establishing chapters in/near areas where their presence represent the Barbershop Harmony Society.

An additional actionable program which, once designed and implemented, will serve to identify potential members is recommended for further study. It is a longer-range program that offers significant potential and promise. Adoption, however, would certainly require external financial support. Nonetheless, its adoption is strongly recommended. It should be initiated as soon as possible, at the first available opportunity.

The concept involves the development of a program that will search “people-search” and social network engines (such as WhitePages.com, Google, Facebook, Linked In, Plaxo, MySpace, Classmates.com, Zabasearch, Pipl.com, Wink.com, Plaxo, etc.), voter records, college and high school choral group alumni, established

choruses, church choirs, music educator associations, etc., against specified target criteria and produce a list of names and contact information for those it matched, weighted to exclude all but those in the target group (males with singing experience born during 1965-1975, e.g.) who then become actionable, pre-qualified leads. Paring down the results to areas with several possible contacts would provide the basis for an approach toward chapter creation and/or additional recruiting prospects.

Using the results of such a search would greatly simplify the task of regional Society/district extension staff persons or TAG teams to connect with pre-selected prospects. If even a few of those contacted expressed an interest in becoming charter members of a new barbershop chapter, they and their friends would become the cadre of the new chapter and greatly simplify the task of the extension officer/TAG team. While the program would be particularly useful in an unserved or under served area, it has application as well in areas suitable for the creation of an alternative barbershop experience and avoids competition with existing area chapters.

Similarly, in areas where chapters already exist, they could use the information thus produced as a source of possible guests/members/patrons, using letters, postcards, or (in extreme cases) e-mails and following up with telephone calls from members residing in the same or proximate areas. The process could be enhanced in various ways ... by arranging (where possible) their college, high school, organization alma mater or theme song in four part barbershop harmony, etc., for example, as an additional enticement.

While that is definitely a long-range and possibly costly project, a more easily accomplished program involves identifying healthy chapters in or proximate to areas that appear to be likely to support and sustain the establishment of a new chapter. These could then be approached re their willingness to work to establish a new chapter, accept sponsorship, and provide some continuing mentoring and support. Once initiated, this project should remain active for a period of five years.

Lastly, in the 5-10 year range, recommend that those areas in which there are no chapters be identified together with a recurring member search designed to locate those who have relocated to these areas. These members may be inspired to become the initial contacts and principal organizers for a new chapter. In addition, Barbershoppers intent upon directing choruses of their own and who reside within reasonable commuting distance may be excellent initial contacts in such areas, inasmuch as they will be self-motivated to the task of establishing chapters that will allow them to realize their ambition.

Three lists of actions appear below – each addressing one of the task sub-elements. While the principle key recommendations are identified above, in the aggregate, the following will ensure not only continued growth but will also ensure the strength and viability of new chapters and provide them with the promise of a long, enduring,

and successful existence. In addition, they may assist in reinvigorating stagnant chapters and those in decline.

Included among the recommendations are some specific significant changes to elements of the chartering process and the concomitant expectations placed upon it. It is essential that it become and is perceived as a covenantal agreement between both parties. Once the chartering process itself is better defined and coordinated, the easier the installation process will be and the Barbershop Harmony Society will move toward a more inviting and freer atmosphere for and among men who love to sing.

How to determine potential sites for new chapters:

First and foremost, data must be developed which will enable thoughtful decisions to be made re areas in which new chapters might be established and sustained.

- Determine whether an area would support the establishment of a new chapter (where none currently exists) or an alternative barbershop harmony in the vicinity of an existing chapter. As an example of the type of information available, the “ZIPskinny” site (<http://www.zipskinny.com/index.php?zip=22207>) provides specific information on the following for any selected ZIP code (the last five numbers in the URL):
 - Population/Density
 - Age
 - Race
 - Educational Achievement
 - Marital Status
 - Household Income
 - Occupation
- Identify geographic areas (of, say, 100,000 population and larger) where there is one successful chapter which would be suitable for another in the general vicinity
- Map existing chapters and check for potential sites between flourishing chapters and “put ‘em where they ain’t”
- Target new developing communities (prior to the development of other social/entertainment outlets)
- Identify communities with a strong musical/theatrical/arts focus
- Continue emphasis on youth choruses
- Investigate college a cappella groups, especially in "commuter college" communities
- With district assistance, characterize existing successful chapters as to social/fraternal, competitive, quartet, daytime, etc.
- Direct the creation of an officer in each district charged with new chapter development (an "extension chair," separate and distinct from the "membership" officer)

- Create and dispatch additional TAG Teams (Teams for Accelerated Growth) funded by Harmony Foundation
- Hire a minimum of four staff field representatives each charged with working with some number of district “extension” personnel and TAG Teams to identify potential new chapter locations and following through the steps necessary to result in chartering and continuing contact for at least two years
- Develop an actionable program that will search social network engines, etc. against specified target criteria and produce a list of names and contact information (highlighted supra) to develop a list of actionable, pre-qualified leads
- Invite those identified above with addresses in reasonable geographic proximity to each other to become charter members of a new barbershop chapter
- Identify Society members who relocate in areas distant from established chapters to determine if they would welcome assistance in establishing a new chapter proximate to their new location
- Enliven dying chapters with an influx of a body of new members to take advantage of an existing chapter charter and bypass the licensing and chartering process required when starting from scratch

Minimum requirements needed to ensure a new chapter will have a reasonable chance to be successful:

- Chapter has or is actively working to identify and secure the services of a “qualified,” effective, motivating, inspired, and inspiring musical director (barbershop experience a plus but not required) – Society field staff and/or district assistance may be helpful/necessary
- Although not required, the presence of a backup director would be an added strength
- Membership commitment re purpose (fraternal? competitive?) at the outset
- Develop and review annually, revising as necessary, the chapter mission and vision statements
- Select music appropriate to the abilities of the chorus singers
- Maintain a performance repertoire of not more than 15 songs
- Confirm that four individuals are sufficient to request/receive a license
- Limit the period for which the license is valid to six months, with the option of extending for a maximum of six more months.
- Require that the extension site submit the chapter application within the 12 month licensing period – exceptions possible on a case-by-case basis
- Stipulate that 20 is the minimum number of members needed to charter.
- Eliminate the requirement that at least 50% of the chartering members must be new or out of the Society for X years
- Advertise for "men to learn to sing in harmony" (rather than "voice" or "singing lessons")

- Require that charters be renewed every 10 years (Society maintain tickler file and remind when due)
- Society establish the following requirements/guidelines/expectations for NEW chapters (encourage existing chapters to follow these guidelines but exempt them from the requirement)
 - Member education at least every 3 years - LA, coaching, mini-hep, HU/district school
 - Director education at least every 3 years - CDWI, mini-hep, DC/HU/district school
 - Director pursues certification
 - Assistant directors encouraged/supported to pursue educational and certification tracks
 - Maintain legal documents up-to-date
 - Registered quartets encouraged (minimum of three desirable)
 - Hold at least one show or other public performance annually
 - Engage in community service/outreach (singing Valentines, hospital/senior center singouts, Sing for Life, youth harmony festivals, youth quartet adjudications, school workshops, etc.)
 - Participate in convention/contest at least once every three years (participation need not mean "compete"; sing for score and evaluation is acceptable)
 - Demonstrate membership stability or some growth
- Community service projects are included among the core values of the new chapter
- Dues not returned to chapter or district until/unless requirements met (Society/district assistance should be provided to ensure dues are returned on time)
- Solicit support from local organizations (mayor, JCs, colleges/schools, churches, civic service organizations, etc.)
- Provide financial support to facilitate start-up (HFI, Society, District)
- Solicit loans/donations of risers, simple uniform items, etc. from existing chapters
- Locate a suitable meeting location
- Request/expect local established successful chapter to "loan" some number of individuals (minimum 2) with those skills that will assist in the start-up and early development of the new chapter (experienced secretary, treasurer, president, e.g.)
- Encourage additional Society members of neighboring chapters to assume a two year commitment to become dual members with the new chapter ("chapters helping chapters")
- Society/district establish responsibilities and guidelines for sponsoring chapters
- Require sponsoring chapters to agree to assume and act in accordance with established responsibilities and follow up with regular and continuing contact for at least two years
- Society prepare/create a "starting a barbershop chapter" kit and fund it

- Society Staff review administrative and music programs prior to approving charter applications
- Ensure each board member and functional officers develop a plan for the year and that it is shared with the membership
- To ensure new blood is brought into the leadership team, consider establishing term limits or to the adoption of a similar philosophy
- Engage in succession planning discussion at least annually
- Encourage rotational (or "traditional") inter-chapter singing events
- Maintain and distribute chapter member rosters at least twice/year
- Publicly acknowledge and celebrate significant events in member/member family lives

Methods to provide continuing support particular to new chapters:

- Assist with scheduling charter or other early show, soliciting participation from sponsoring and other chapter choruses/quartets
- Ensure that many of the items covered above and routine contacts continue beyond charter issuance ... for at least two years
- Schedule periodic visits by Society staff, district leadership, and/or other chapter leaders, regional staff, TAG teams, FOTR, etc.
- Reemphasize importance and necessity for the Chapter Counselor program and working-level assignments/commitments
- Ensure the early assignment of a qualified, energetic, responsible Chapter Counselor
- Provide training and education to new members on various aspects of chapter organization, needs, mission, vision, barbershop harmony, responsibilities, requirements, means, methods, BHS history and organization, support available, "who to call" contacts, contest system/cycle, etc.
- Provide marketing and PR support through first two years
- Reward success (individual and chapter recognition at a minimum; determine what other "rewards" resonate with chapter/members)
- Ensure new chapter leadership knows that assistance and advice is readily available from the Society, district and other chapters
- Encourage neighboring chapters (especially the sponsoring chapter) to continue regular contact and support to the new chapter for at least two years
- Provide scholarships for musical directors in their first year (2 years) to DC (HU) or similar district-run schools
- District officers (especially the "extension" and "membership" chairs) receive notification of each new member added to Society rolls from their district AND personally contact them at least twice during the year to assess their progress, determine if their expectations are being met, and to offer to be their "personal" contact at the district level
- Establish district accountability for effective management of the new chapter and for success or failure of the effort

- Provide a financial bonus to new chapters that meet and sustain a membership goal of 30 members within a specified time period (three years, e.g.)
- Provide PR/show appearances of FOTR (“Four on the Road”)

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