

BGES 2019 Investor's Report

December 6, 2019

From Len Riedel, Executive Director

I am honored to have this opportunity to share my perspective on the state of the Blue and Gray Education Society after more than 25 years of operations. This is a marvelous ride and I appreciate each person who has made the run with me. I believe that our accomplishments speak for themselves and we continue to make a difference in this community. The Civil War community has changed in dramatic ways and we need to adapt to that new reality if we are to remain relevant. Additionally we need to pool our resources to ensure that the BGES has the means to continue what it does best.

This package is important not just for this letter, that you can read at your leisure, but for the included items that ask for action on your part so that we can better serve you. Please take the time to look them over and respond as you feel inclined.

BGES is an educational organization and it is appropriate to start there. In the past year we expanded our programming to 35 tours—in the first half of the year it looked like we had made a mistake. With so many great options it affected our cash flow—people wanted to do multiple programs but had to look over their own schedules to see what they could fit in and what they had to pass on. A weak first half of the year was counter balanced by an unexpected surge from September onwards and then right sized by late cancellations that drew more than \$11,000 back out of the revenue pot at a vulnerable time—sigh, he gives and he takes away.

This is important because the historic revenue stream for a number of years past had front loaded seminar funds that we were not sure we were going to get until the end of year surge and adjustment. This coincided with a dip in membership to less than 250 current members in May making revenue our greatest concern. BGES is a pocket to mouth organization that spends on average \$25,000 a month—cash flow is important. A concentrated focus on past due memberships restored us to around 360 current members while repatriating a number of people whose memberships had long ago lapsed.

We went to school on the seminar numbers and realized that 35 were too many tours and so we cut back to 25 for 2020. I have included a survey for the upcoming 2020 year that I hope you will fill out and return. We realize that maybe 100 people constitute our touring cohort—most go to one program a year whereas others are fully involved in getting to the sites while they have the means, mobility and interest. We know that participation in our tours is a key component of our organizational finances—if we fill the tours we will have a good year financially, if not....

This issue of tour participation was the subject of a BGES Board of Directors evaluation and template to maintain the high standards of our “Field University Programs” while still offering a wide variety of options to appeal to people with less time or money, differing levels of expertise and as an opening venue for people who have wanted to tour but have yet to take the plunge. The coming season reflects that variety. Of particular note is the endless challenge of running symposiums that might appeal to the less mobile members of our organization. The overhead associated with such events is significant and at this point unrealistic. We are making an effort to see if we can handle that with a program in late January at Amelia Island and Fort Clinch near Jacksonville, Florida. We are going to see if we can draw 32 people on a carefully controlled script. If it works we will build out from it.

Another hard fact we need to face is membership support. What we have works for us—kind ah, at approximately 375 people we are not as large as some of the larger Civil War Round Tables and while we have an exceptionally generous budget from that group I am also a full time employee with 6 or 7 part timers, each has an important support function but the collective expense is a bit more than we take in. Again our Board of Directors has taken this under advisement as we look at what our future may be and the consensus opinion is that if we do not grow our membership numbers dramatically in the next few years we will not have the means to fund an office with multiple employees when I retire in the next 3 or 4 years.

In the interest of full disclosure we are expanding this discussion to you because while you are the converted—certainly not any part of the problem, you may also and almost certainly will be part of the solution. Thus it is important to discuss it with you albeit in a couple of paragraphs here and now.

The good news is that BGES as composed has a solid and loyal constituency. You are generous and responsive. You renew often above the basic level and often with increases as I ask you to consider. In terms of responsiveness you are as close to an eight cylinder engine as it is possible for an organization to run on—and you generally fire on all cylinders. You renew your memberships, you attend tours and you fund BGES’ projects. If I would compare you to any like group I would say you are like a loyal alumni association for a small college—personal, responsive and engaged. Your dues reflect the characteristics of an Annual Fund. Your

responsiveness to projects is akin to funding a new scholarship or building on a campus—that is you and it is a wonderful place for me as the leader to be.

What we face though is how do we bring those others into our orbit—no alumni association no matter how loyal is able to entice all its graduates into supporting the school. Many take things for granted and others just aren't that interested. The Civil War continues to have widespread interest—for many it is a hobby, sadly for others it is a no more than a way to make a living and for fewer still it is an obligation of citizenship. I like to place us in the later category. Indeed with the news events of the past few years targeting monuments and southerners we have moved from a tag line of "Revealing Our Past for Our Future" to "Saving America's Civil War History." Given that the NPS is not replacing Civil War historians; land preservation, memorial and museum organizations are dropping anything Confederate or the terms Civil War from their names, monuments are being defaced or torn down and great names in American history are being denigrated, it is little wonder that generations of our progeny do not know American history in context. That scares me as I hope it affects you.

I am sorry to report that there is no concerted effort to reverse these trends what was once the Civil War Preservation Trust is not—it is now the American Battlefield Trust and while a noble expansion of its original mission of saving Civil War Land it reflects the organizational dynamic of getting larger to avoid getting smaller—the vast indeed overwhelming impact of its work has been in the Civil War and yet that is not a part of its name any longer.

Interestingly when in doubt go back to your roots and I am encouraged to see that the Civil War Roundtable Congress has been resurrected. Its creator, Jerry Russell passed long ago and with his death the synergy that brought numerous round tables together spun apart. Recently under the leadership of Mike Movius (Puget Sound), John Bamberl (Scottsdale), Jay Jorgenson (Robert E. Lee) and Wally Reukel (Brunswick) the Congress has reconvened and we had the opportunity to interact with more than 50 delegates in St. Louis in September. The next Congress is in Philadelphia in 2020.

It is intuitively obvious that grassroots activism is necessary to reverse adverse trends in local communities. While many CWRT attendees are merely attending for entertainment value within each Roundtable are the seeds for renewal within the community. That is the vehicle for bringing youth into the discipline. That is how local projects get identified and problems fixed. **IF YOU ARE NOT A PART OF A CWRT (AND WE ARE ASKING YOU IN ONE OF THE ATTACHMENTS) THEN YOU SHOULD JOIN OR START ONE.** If you are a member of the local Round Table you should ask them if they are part of the Congress and if not then motion that they should be a part and push for them to engage.

In watching and now interacting with the leadership of the Congress, I am encouraged that they are providing proven techniques for growing those

organizations and improving their effectiveness. Many roundtables have huge followings—a couple of years ago I spoke in front of more than 400 people at the Augusta CWRT and more than 50 people lined up for more than an hour to have me sign books for them. BGES will do everything it can to encourage the growth of the CWRT movement and the centralization of a governing body to bond those who are interested in the war to a responsible organization.

At the same time I am encouraged to tell you to look around—the Civil War is a self rejuvenating discipline. Many of us grew up with a genre of historians that dominated the past 30 years—while so many of them are retiring or dying off they have been replaced by a new cluster of historians—The Emerging Civil War is an organization of that next generation of which some of our friends and members such as Bert Dunkerly, Lee White, Chris Kolakowski and Wade Solokowsky are all arising. They are leading tours, writing and congregating to dominate the next 30 years. Excellent books continue to be produced by people outside academia with Ted Savas’s publishing company leading the way. There are still excellent booksellers such as Broadfoot Books and Owens-Ramsey that primarily deal in Civil War titles.

Those organizations are the seed corn of BGES’s survival. We must grow our numbers to create the operating revenue we need to conduct field tours and execute projects—the staple of our reason for existing. Before you shake your head or laugh, we need to grow BGES by a factor of 10 over the next 10 years—that is approximately 4,000 people, and we must move dramatically toward a doubling in size in 2020—at this time next year we need to land somewhere around 700 members with dramatic growth towards 2,500 by 2024. If we don’t get there there will not be enough revenue to hire and sustain the staff needed to run this organization beyond my retirement in or around the end of 2023.

Our board of directors has determined a payroll in the range of \$250,000 a year is needed to support a staff of 4 or 5 people dedicated to the components of what makes us work as the nation’s only national nonprofit Civil War educational organization.

I asked you not to laugh or shake your head. Over 100,000 people subscribe to Civil War Times Illustrated, 25,000 people a year donate to the American Battlefields Trust and more than 10,000 people subscribed to the old Blue and Gray Magazine. The folks are there—given our legal status as a nonprofit educational organization and our very solid and respectable body of work in the educational field the real complaint that most people had never heard of us is very real and it is job one. In the movie “Field of Dreams” the take away line was “Build it and they will come...”

I cannot make this happen—time and money are real limitations. I can provide quality tools and avenues for recruitment efforts but as members of the BGES you too will have to decide if BGES is your organization or if you are just affiliated. I am sure there are degrees of commitment to our purpose—whether you are “Revealing Our Past for Our Future” or committed to “Helping Save America’s Civil War

history.” The degree of your commitment will determine how much you are willing to do.

We are an information-driven society and the wealth of information transfer is occurring over the Internet. BGES’s presence is in the form of a website, www.blueandgrayeducation.org, email and Facebook. We have dabbled with Instagram but it hasn’t taken root yet. We subscribe to a bulk email service that allows us to deliver information about BGES to thousands of people simultaneously. Snail mail, such as this, is still the most reliable means of information delivery since it is a paper record but it is time consuming, expensive and slower. The vast majority of our membership is on line—although many do not actively use computers. I suspect many of you get email on smart phones but are not deeply in the Internet beyond that. The enclosed survey asks you to revalidate your habits so we can improve information delivery to you.

As we have moved to having a worthy and interesting electronic product we have focused some of our resources to creating an informative and effective educational and administrative on line presence. We parlayed our partnership with National Geographic (four books) to hire some of their communications experts to help us produce a timely and informative on line product. Barbara Kennedy, a seasoned travel writer and senior editor for Nat Geo Books, is our communications coordinator and she produces our monthly on line electronic newsletter. She works with subcontractors to help her produce the BGES blog which is found on our website. I commend both to your examination if you are on line. Feel free to share the newsletter with your friends.

The BGES electronic email list is about 2,500 people—when we send an email about 20-23% of the addressees open it. Some read and click through, others ignore and others delete but very few ask to “Opt Out.” There is a first target for membership—600 open our emails but at most 300 are active members. We will approach them and seek their support. How can you help? If you are receiving—if you like what you read or you know someone who would like it—forward the email to them! It is quick and costs you nothing but a few moments of your time.

Our real initiative is to create an international online network and we have entrusted BGES member Burford Smith and board member Norm Dasinger to build a list—they did, nearly 4,500 names and organizations—that increases our list to 7,000. Our intention is to create a network that communicates and realizes that BGES is a central element of that conversation. We realize that most organizations have a webmaster or gate keeper who protects their own subscribers—our diamond drill bit is a twice a week transmission known as the Blue and Gray Dispatch which will go out on Tuesday and Friday. Gloria Swift has been moved to the role of BGES Historian and she is responsible for getting those prepared, lined up and released. We currently have 14 contributing historians. I have included a couple early Dispatches so you can be aware.

We initially sent out 8 releases and were so impressed by the quality of the content that we are changing our mode of operation to send these to you as well—another perk of your membership and a product of your organization. We take a very low profile but at the end of each dispatch there is a click through opportunity to get to the BGES website. Our objective in this is to increase our name recognition and to entice the gatekeepers to share these transmissions with their email lists. Our hope is that a number of those people will add to our email list of 2,500. Again you can use the transmissions to share with friends you believe would be interested.

The other area where we have a presence is Facebook. We really communicate in two areas the first is the Blue and Gray Education Society page. Over the years we have acquired nearly 1,500 people who follow what we do. Collateral to that is my own page in which I strongly support BGES and raise funds for it on the site—now I have to warn you that it is my personal site and I discuss politics of which my orientation is conservative—if you want to avoid that by all means just follow the Blue and Gray Education Society page.

The Facebook page provides you three sugar plums: Gloria posts a history note 4 or 5 times a week. The variety is good and often you get to click through to an interesting story. The second is that you often get real time updates from tours that may include video clips up to 10 minutes in length from a field lecture. Finally, BGES uses Facebook to raise money—more than \$10,000 to date over the past few years.

You can do several things for BGES relative to Facebook. If you are on FB then Like and Follow us. As I look at the list of those following I do not see nearly enough BGES members. I find that the vast majority of BGES members are listed as “Friends” but of the nearly 1,000 friends I have only 400 like or are following the Blue and Gray Education Society page. Several hundred of my “Friends” are BGES members but are not following Blue and Gray—interesting anomaly that I really wish you would rectify if you are part of that group.

If you are on Facebook you have another remarkable opportunity to compound the promotional efforts of the BGES. The term used is “Going Viral.” There are two ways you can compound our efforts. First, if you see our post “Like it” that simple action spins all sorts of Civil War related buttons that you cannot see. Facebook generates links to other Civil War folks and pages that you can take or leave but it also puts us into that matrix for others who do not know us. The more likes a posting gets the more likely it is to find its way to others seeking Civil War information. Your like goes a long ways to helping BGES rise up the search engine matrix and puts us and our postings in front of many strangers. The second thing that you can do is “Share” the posting within your own network. When you share you get to do two things. First you can offer an encouraging note about the posting and BGES within your own Facebook Universe. By sharing and encouraging your Friends to share with their friends—that is what we mean by going Viral. The

second thing you can do is post it to pages that you have administrative control over. None of that costs you anything—it just makes you a good citizen of BGES.

We are going to ask you to do other things to help us with membership but I want to take this opportunity to address how we Fundraise outside of direct snail mail. We have found a very receptive and generous donor base in Social media. Two hundred and fifty of my 1000 friends have donated on line either to us or another cause. It is increasingly obvious how you can use your influence to multiply our fundraising efforts.

Facebook is proving to be an increasingly potent force in the nonprofit community. Using its Network for Good any person or organization can organize a fundraiser for the BGES or any other nonprofit organization with 100% of the donation going to the designated Charity about six weeks after the fundraiser ends. Over about 10 fundraisers for BGES I have not found any glitches that cause me to pause in recommending this for you. However let me offer a few guidelines to help you help us if you are so inclined.

First, Facebook will let you conduct a Birthday Fundraiser—they typically seed it with the first \$5 and let it run about two weeks—just before until a few days after. They have default text associated with each charity and default amounts—usually a goal of \$200. All of this can and should be customized to make the effort successful. It is a campaign and it is targeted at your friends—for my last birthday, my “Friends” donated nearly \$3,000 to accomplish a BGES project—last year they donated nearly \$1,500 to buy the BGES a riding lawn mower. If you plan to run a campaign contact me and let’s talk. We can provide you with text, photos and a purpose for the fundraiser. As it opens and runs we can help you with updates and encouragements to successfully complete the effort. In the past month two BGES Friends raised just at \$1,000 for BGES. It adds up.

Fundraisers can be held at any time (BGES’s Birthday is in April) to support BGES projects or the general revenue fund. In addition they are integral in an international fundraising festival known as “Giving Tuesday.” That event is held on the Tuesday following Black Friday and Cyber Monday. This event is growing in importance in the Social media world. It is an event that BGES members can participate in along with BGES.

All of this is to show you how you can help BGES grow in influence and reputation. By becoming an Ambassador for our organization you can help us grow and flourish doing nothing more than knowing of us and speaking well in your Civil War discussions and your own social media communities.

While on the subject of maximizing support, we just received our first check from AmazonSmile, the charitable arm of Amazon. It is estimated some 42% of all on line shopping this year will be with Amazon. By registering your support of BGES and encouraging your friends to do the same through Amazon Smile a portion of

everything you buy comes back to BGES in the form of a check semiannually. The \$100 check we just got is found money and it came from folks that care. If you would like to register for AmazonSmile and make us the beneficiary we would be most happy to help—let us know.

I have spent a lot of time talking about growth and how you can help us achieve it. This will be a front burner issue over the next few years. I appreciate your consideration of your role as a member of BGES—you can make a bigger difference. Why? Well here is why.

BGES continues to execute a robust itinerary of programs. We just finished our 13th season of Wounded Warrior tours—Gettysburg closed with 15 participants and it followed 6 other tours we conducted throughout the year. We have planned 7 more for 2020.

We printed 1,000 full color brochures, from a small dedicated fund for Indian Wars Interpretation, for the Deer Medicine Rocks site. I have enclosed the brochure for your information and review. We are also in consultation with NPS officials and Western National to bring the Little Big Horn Guide Book back to print as an exclusive vendor. Discussions continue in early January.

We stepped in to fund an orphan interpretative sign in the town square at Raymond, Mississippi that is being installed this month.

We are partnering with Pamplin Historical Park to replace the gun carriage on the 12 pounder howitzer that we helped initially buy for their Adventure Camp some 10 years ago. We believe we have identified the funding for our 40% share of the \$15,000 project. We expect that to be completed by March 2020.

Gloria is finishing the text for the interpretative signage for Fort Branch, North Carolina and we hope and expect to install in 2020.

We are preparing a gift proposal letter for the restoration of the Lincoln Conspirators' Courtroom and the interpretation of the execution site on the grounds of Fort McNair in Washington DC.

We are editing and preparing to print our 20th monograph on the Historic Grand Gulf-Raymond Scenic Byway.

We are preparing and posting the registrations for the 26 BGES 2020 Seminar and Tour programs. We will have conducted some 33 tours in 2019.

Last but not least, we have had productive discussions with the Kansas City Barbecue Society CEO to partner American history and BBQ as the quintessential American experience. We will provide historical opportunities for their 26,000 associate members and corporate partners while they will bring us together with

the nation's best BBQ purveyors and competitors for fellowship and education. You will have opportunities to learn how to prepare award winning BBQ, rubs and ribs with an opportunity to meet and learn from award winning and legendary pit masters. Some of you may even become certified competition BBQ Judges.

All this promises a very expansive and trail blazing leadership role for BGES and our members as we complete the first year our second quarter century.

This is what all the fundraising and fuss is all about—it is BGES the nation's longest serving unchanged Civil War Education or preservation group.

Thank you for your support,

Len Riedel
Executive Director and Founder