



Chapter Presidents Zoom Call

May 11, 2022 | 2 pm ET

Chapters Represented –Chattanooga, Dallas, Greater Cincinnati, Mary Ball Washington, Los Angeles, Sacramento, and Utah

Special Guests – David Harmer, CEO and Diane Deshong, Board Member and Los Angeles County Chapter Member

Welcome

Carolyn welcomed everyone on the meeting and thanked all on the call for making time for this non-regularly scheduled meeting. Carolyn mentioned briefly all the good things taking place including the great spring Spirit of America seasons. Thank you to all the chapters for sending some wonderful students. Soon we will be announcing the dates for 2023. Please look for an email shortly to you and your education teams. To continue on the good news front, Carolyn turned the meeting over to CEO, David Harmer.

Remarks from David Harmer

I highly recommend everyone listen to David Harmer's remarks. The link to the meeting recording is below, followed by just a brief summary of those remarks and the questions and comments that followed.

Link to meeting recording: <https://youtu.be/x26VFuTm4Ko>

David started his remarks by thanking all the chapter presidents for all they do for Freedoms Foundation. The chapters are the heart of Freedoms Foundation at Valley Forge. We rely on you for recruiting and sponsoring students and teachers to our programs. Please know that you are recognized and appreciated.

We have some fantastic news to share that will soon be made more generally known, but we wanted to announce first to those of you who are on the front line. You deserve to hear it live and in advance. We will have time in the days and weeks ahead to share comments, concerns, and questions,

Our programs are transformative. The consistent feedback we get is that Spirit of America is the most meaningful education experience attendees have had in their lives. The good news is we do what we do really well. The bad news is it is barely a drop in the bucket. There are 4 million high school juniors in the country. In a good year, we get 1,600 on campus. We are reaching only a tiny fraction. Those we do reach are blessed. Because of this concern, our board went through a strategic planning exercise this past year. We looked at ourselves and asked what do we need to do to take us to the next level. We need to be more visible and we need to care of our old campus that has exceeded its lifespan in terms of the infrastructure. Bottom line is we need to reach more people and maintain our campus. That caused the board to take a hard look at finances. The estimated cost to bring the campus into shape was 26 million before inflation and supply chain issues. We expect that number to double. It also takes funds to expand our recruitment efforts. We need to think outside the box. During this hard look, we received an unsolicited offer from one of

our long time partners asking if we would be interested in joining forces. This organization has sent students to Spirit of America for 20 plus years and we help them with their Good Citizens Day program. The Freedoms Foundation Board agreed unanimously to look into this offer.

I am announcing we are exploring a merger with [The Union League Legacy Foundation](#).

The Union League is a Philadelphia based organization established in 1862. It was founded to help President Lincoln preserve the Union. The Union League has an in house 501(c)(3) that it sponsors – The Legacy Foundation. The Legacy Foundation gives Philadelphia students exposure to civics education. The Legacy Foundation at the same time our board was doing a strategic plan was doing its own. The Legacy Foundation discovered it had to get much bigger in civics education. It needed to reach more students and be national and not regional. Before they started to tackle that issue independently, their board said wait our partners at Freedoms Foundation are already doing this. Let us join forces.

The Legacy Foundation sees in us a great network of chapters and partners with a beautiful campus, and superb programs. What we see in the Legacy Foundation is a much broader and deeper pool of donors. We have seen support already with people eager to give if we join both foundations together.

Our finance and audit committee did a deep dive and were impressed. The programs committee also looked at the Legacy Foundation and attended their Good Citizens Day in person. They found similar programing messages.

To be clear--- no decision and no agreement has been made to merge. What there is is an exploration into a merger that has reach the point where we want to let all our constituents know so we can address questions and concerns.

We believe this merger will allow us to continue what we do just on a new level. We do not have a timetable in place, but the next step is the creation of a letter of intent signed by both parties stating their intentions to merge. With that, David turned the call over for questions and answers.

Key Points from Q&A

- We are looking to combine the two organizations into a single organization. They very much like our brand – Freedoms Foundation at Valley Forge. Our name will be retained in some fashion.
- We will be keeping the brand identity.
- The Union League of Philadelphia is a single organization with a single location and serves the greater Philadelphia area. The Legacy Foundation, which is a separate organization they sponsor, is also just a Philadelphia based organization. They will help us reach a stronger presence in Philadelphia and we will help them nationally.
- On a chapter level, nothing will change. You will still work under the same by-laws. The parent organization will just have a better balance sheet and better ability to expand. This includes supporting our existing chapters.
- All donations made to Freedoms Foundation for restricted purposes will remain restricted and used as intended.

Next Steps

- Share with your membership
- An official announcement will be sent via email to all chapter members who have provided us with an email.
- We will be accepting comments, concerns, and questions. You can always reach out to Carolyn with those at csantangelo@ffvf.org or at 610-933-8825 ext. 234.

If you wish to visit The Union League Legacy Foundation website to learn more, please [click here](#).