

# HEALING STORY ALLIANCE ANNUAL REPORT

2022

### **OVERVIEW OF OUR YEAR**

It was a moving year for the Healing Story Alliance; both figuratively and literally! As the year began, we recognized with concern the early signs that NSN was in major transition, with the very real possibility that NSN's long tenure as a nonprofit organization serving the storytelling community might come to a conclusion. In response, HSA began a deep reflection and examination of its strengths, its vulnerability in continuing under the fiscal umbrella of NSN, and its unwavering commitment to sustain itself long into the future. Having begun as the first Special Interest Group for NSN more than 20 years ago, members of HSA leadership have spent years building a committed membership, responsive and supportive programming, a vital listserve, an invaluable archive of stories, teleconferences, videos, and articles. With our stored funds and website both dependent on the viability of NSN, we made the difficult decision that it was time to move towards independence. Still caring deeply for the future of NSN, we thought we could support their own sustainability efforts better from a position of external strength rather than internal concern.

In the spring of 2022, members of the Executive Committee, including Heather Forest, Lani Peterson, Elisa Pearmain, Sara deBeer, Galen Brandt, Joe Doolittle, Mike Seliger and Karianna Rosenberg, voted unanimously to begin the process of seeking independent status as our own 501 (c) 3 non-profit organization. Equally momentous, we made the important decision to no longer be a member-based organization requiring dues. As an alliance, we welcome anyone into our circle who is interested in the healing power of story to bring about positive change. We planned to provide some ticketed programming, but many of our offerings such as *OARS in the Water* and *Kind Stories in Concert* will continue to be offered freely with a request for donations when people feel so moved. Anyone who wishes to know of our services and offerings is welcome to join our mailing list. We will encourage our affiliates to become or continue to be members of NSN, as so many of us already are and value what NSN does.

In order to fulfill the requirements of filing a certificate of incorporation as a non-profit corporation in New York State, we created a new statement of purpose: *The Corporation is formed for the charitable purpose of educating the general public about the applied use of* 

# storytelling in the healing arts and professions through live and virtual public cultural programs and literary resources.

To enable the move forward into our new vision, Heather Forest graciously offered her own nonprofit, Story Arts Inc, to serve as a temporary fiscal umbrella until HSA could complete the application process to stand on its own. Below is an overview of the multiple steps taken over the course of 2022 to move towards our new vision of sustainability as an independent nonprofit organization.

# TASKS UNDERTAKEN TO COMPLETE HSA'S MOVE TO INDEPENDENCE

# **Transition structure**

- New fiscal umbrella established under Story Arts Inc July 2022
  - HSA signed a Memorandum of Understanding with the Board of Directors of Story Arts Inc. providing HSA with a short term fiscal umbrella under Story Arts Inc. This agreement made HSA a special project of Story Arts Inc. and provided HSA with immediate 501 (c) 3 rights and privileges, allowed HSA to legally accept donations, and provided HSA with Story Arts' administrative services and fiscal oversight in exchange for 5% of all income. This financial arrangement replaced the 30% being charged by NSN for administrative services and fiscal oversight.
  - Story Arts' Executive Director Heather Forest was contracted to serve as HSA's interim executive director for the transition period to independent nonprofit status at a rate of \$25 per hour paid directly to Story Arts. In essence Story Arts leased Heather to HSA to provide administrative services.

Heather Forest, as HSA's Interim Executive Director worked closely with HSA's liaison to Story Arts, Lani Peterson, to design and shepherd the following series of steps towards HSA's independence as a not for profit.

# **Financial Start**

- Story Arts filed a DBA as Healing Story Alliance under Story Arts Federal ID# 51-0173675
- With a DBA in place, Story Arts established a separate checking account for HSA.
  - \$15,500 of HSA funds that were in NSN's coffers were transferred to the new HSA checking account. This was done via an HSA invoice to NSN requesting funds for Administrative Consulting by Story Arts to establish HSA as an independent 501 (c) 3 nonprofit corporation. Our intention to separate from NSN was made clear with this invoice. We offered full transparency. The NSN staff was helpful, supportive, and collegial throughout the transition

process which also included migrating our portion of the NSN website to an independent server.

## Website migration

- Heather and Lani researched several CRM (Customer Relations Management) providers beyond the open source CiviCRM program used by NSN for event registration and donation management. We needed to ascertain the most affordable and sustainable system to support our independent programming needs. Since we found NSN's CiviCRM program to be problematic and costly to tailor to our needs, we chose to simplify the new HSA website and utilize offsite, economical, ala cart applications for our event registration, donation, and mailing list needs.
- A new domain name of <u>www.healingstoryalliance.org</u> was purchased
- A new web hosting service was selected and a web hosting package was purchased from Kinsta.com
- Tadpole Developers who managed the large NSN site were contracted to migrate the HSA content from the main NSN website to become an independent WordPress website under our own new domain name.
- Since Tadpole Developers charges \$135 per hour for website repair work, in the interest of frugality, Heather repaired all broken links on the new HSA website and organized the overall content for ease of navigation. She also added a video archive of *Kind Stories in Concert* and was able to resurrect the archival HSA Teleconferences
- While the new HSA site was being migrated, Heather maintained an interim landing page on the NSN website which included listings of independent HSA events with registration and donation opportunities linked to the new Story Arts dba HSA checking account.

### **Independent Tools set up**

In order to replace NSN's CiviCRM program registration services, mailing list maintenance, and donation management, new independent tools were researched, learned, and implemented:

- Event registration (by Simpletix.com)
- Donation and fees (by Square.com)
- Mailing list (by Mail Chimp)
- Promotional graphics (Canva)
- Zoom Platform (Zoom)

With HSA's ability to self-produce sustainable events in place, Heather began facilitating the steps towards filing for recognition of not for profit status with the IRS.

- On Jan 4<sup>th,</sup> a Certificate of Incorporation for Healing Story Alliance Inc. as a not for profit corporation was filed with the New York Department of State. A Filing Receipt was recorded in NYS on Jan 10<sup>th</sup>.
- On Jan 17<sup>th</sup> a Federal SS-4 form was filed for an EIN (employer identification number) **Our EIN is 92-1774340**

Heather & Lani researched templates provided by the Internal Revenue Service and created initial bylaws and articles of incorporation which included all legal requirements for recognition of not for profit status by IRS.

- An IRS Form 1023 application for recognition of HSA's not for profit status was submitted on Jan 31, 2023.
- An IRS letter of recognition of 501 c 3 status was received on Feb 8<sup>th</sup> granting non profit status dating back to HSA's NYS Corporate Filing date of Jan 10<sup>th</sup>

With Not for Profit Corporate Status in New York State and Federal Recognition of 501 (c) 3 status in place, the HSA Board of Directors was established. The Healing Story Alliance Executive Committee became the HSA Advisory Committee under which is nested all working committees

# **First Board Meeting**

Our first HSA organizing Board Meeting took place on February 23, 2023. At that meeting officers were elected, bylaws were edited and approved, a motion to establish a new independent checking account was passed and the fiscal year of January to December was established.

- President of Board: Heather Forest
- Vice President Jo Radner
- Secretary: Lani Peterson
- Treasurer: Elisa Pearmain
- General Trustee: Jim Brule

Responsibilities of the new HSA Corporate Board include:

- $\circ$   $\;$  Ensure that the nonprofit purpose is fulfilled
- Record keeping
- Annual report to IRS
  - 990 EZ or 990N postcard
- Annual report to charities registration board (in NY state)
  - CHAR 500

Further NYS Requirements were filed by Heather in March:

• Form CT-247 (Application for Exemption from Corporation Franchise Tax) which was granted on March 20 2023

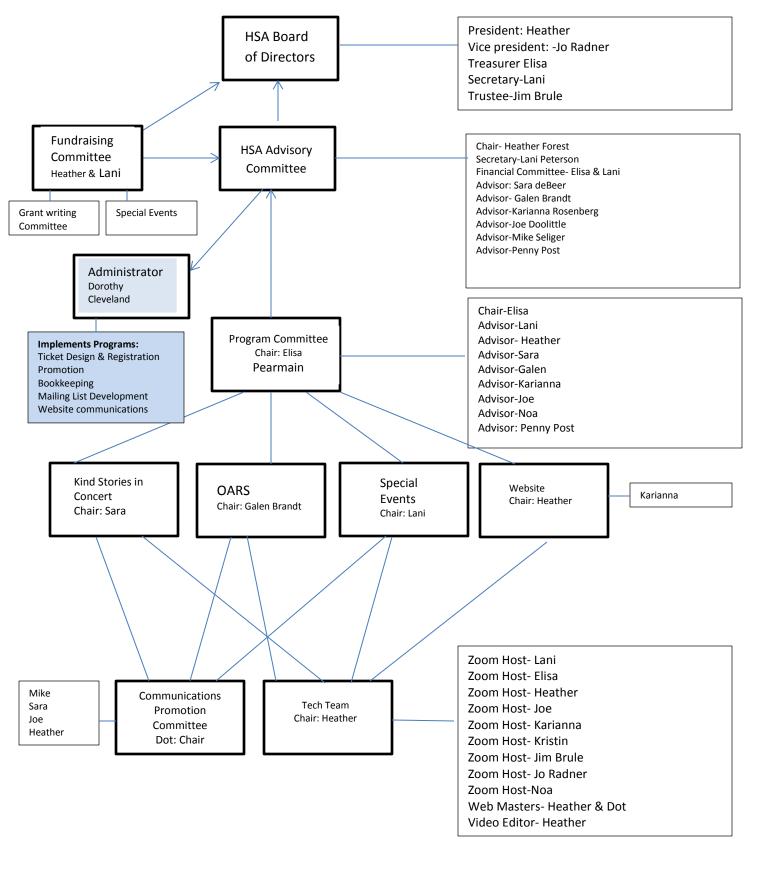
• Form ST-119.2 (Application for an Exempt Organization Certificate for Sales Tax) which was granted on March 27<sup>th</sup>. **Our Sales Tax exempt Number in NYS is 281227** 

With the successful establishment of Healing Story Alliance Inc. as an independent 501 (c) 3 not for profit organization completed, the Memorandum of Understanding with Story Arts Inc. Ended.

# New Administrator Hired

- In February, HSA hired Dot Cleveland as the new Administrator to manage bookkeeping and to pick up many of the administrative tasks formerly completed by Heather Forest.
  - Heather trained Dot in use of:
    - Simpletix
    - Square
    - MailChimp
    - Website oversight and editing
- The Executive Committee transitioned to become The Advisory Committee with a new organizational structure made up of project sub-committees.
  - o Chair of Advisory Committee: Heather Forest
  - Chair of Program Committee: Elisa Pairmain
    - Overseeing OARS: Galen Brandt
    - Overseeing Kind Stories: Sara deBeer
  - Co-Chairs of Fundraising committee
    - Grants: Heather Forest
    - Special Events: Lani Peterson

Throughout this year of major transition, HSA continued to provide creative programming for its participants, including its twice monthly *OARS in the Water* meetings, its monthly *Kind Stories in Concert*, and two special fundraising events: *Deeper than the Skin* with Reggie Lewis and Greg Greenway, and *Two-Eyed Seeing* with Lewis Mehl-Madrona and Barbara Mainguy. As we move into 2023, we are creating a budget to ascertain what we need to bring in on a yearly basis to be sustainable. We will continue to encourage participants in our free offerings to donate as well as provide special events that act as fundraisers to support our ongoing mission. We are off to a great start!





Department of the Treasury Internal Revenue Service Tax Exempt and Government Entities P.O. Box 2508 Cincinnati, OH 45201

#### HEALING STORY ALLIANCE INC C/O HEATHER FOREST 47 FOXHURST ROAD HUNTINGTON STATION, NY 11746

Date: 02/08/2023 **Employer ID number:** 92-1774340 Person to contact: Name: Customer Service ID number: 31954 Telephone: 877-829-5500 Accounting period ending: December 31 Public charity status: 509(a)(2) Form 990 / 990-EZ / 990-N required: Yes Effective date of exemption: January 10, 2023 **Contribution deductibility:** Yes Addendum applies: No DLN: 26053433003693

Dear Applicant:

We're pleased to tell you we determined you're exempt from federal income tax under Internal Revenue Code (IRC) Section 501(c)(3). Donors can deduct contributions they make to you under IRC Section 170. You're also qualified to receive tax deductible bequests, devises, transfers or gifts under Section 2055, 2106, or 2522. This letter could help resolve questions on your exempt status. Please keep it for your records.

Organizations exempt under IRC Section 501(c)(3) are further classified as either public charities or private foundations. We determined you're a public charity under the IRC Section listed at the top of this letter.

If we indicated at the top of this letter that you're required to file Form 990/990-EZ/990-N, our records show you're required to file an annual information return (Form 990 or Form 990-EZ) or electronic notice (Form 990-N, the e-Postcard). If you don't file a required return or notice for three consecutive years, your exempt status will be automatically revoked.

If we indicated at the top of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

For important information about your responsibilities as a tax-exempt organization, go to www.irs.gov/charities. Enter "4221-PC" in the search bar to view Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, which describes your recordkeeping, reporting, and disclosure requirements.

Sincerely,

stephene a. martin

Stephen A. Martin Director, Exempt Organizations Rulings and Agreements

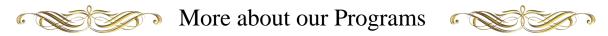
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Letter 947 (Rev. 2-2020) Catalog Number 35152P

# Healing Story Alliance Programming

Healing Story Alliance is devoted to creating public programming in support of storytelling as a healing art. Even during this 2022 year of HSA's transition from a Special Interest Group under the auspices of the National Storytelling Network to an independent 501 c 3 not-for-profit organization, HSA has maintained its robust virtual programming offerings which included:

- 24 OARS in the Water sessions on the second and fourth Wednesday of each month
- 8 Kind Stories in Concert presentations on the first Sunday of each month (excluding June-September)
- a free video archive of Kind Stories in Concert on the HSA website
- 2 Special Events in support of social justice and applied storytelling in the healing arts.



## Keeping Our Oars In The Water: Gathering To Bear Witness To Experiences And Stories Of Vulnerability And Resilience



When a small boat meets turbulent water, the best way to maintain balance and stay upright is to keep your oar in the water. It will become your stabilizing rudder, enabling you to maintain course and steer your vulnerable craft towards safety. We are each like that small boat.

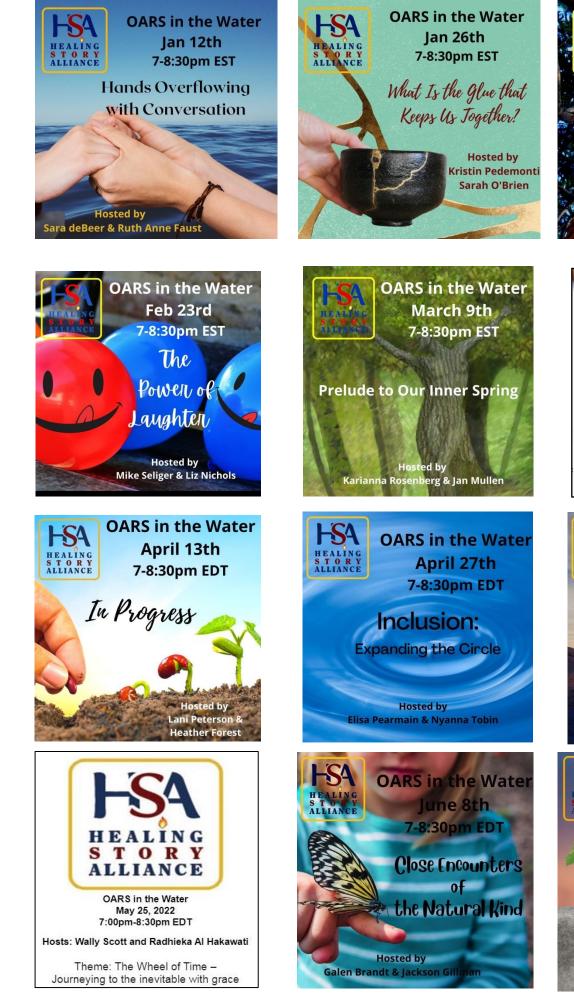
HSA hopes that sharing our experiences, stories and ideas might be another stabilizing oar in the water for each of us.

Meetings are held on Zoom. Admission is free. Donations are appreciated.

Attendance to each of these bi-monthly virtual gatherings averages around 35 attendees. The meetings are facilitated by rotating volunteers who partner, devise a theme, and conduct the sessions. Our own rotating tech team hosts the sessions.

# OARS THEMES Jan-Dec.2022

January 12th: Sara deBeer & Ruth Anne Faust Hands Overflowing with Conversation January 26th Kristin Pedemonti & Sarah O'Brien What is the Glue that Keeps Us Together February 9th Lani Peterson and Jyoti Pande Tree Wisdom February 23rd Mike Seliger and Liz Nichols The Power of Laughter March 2nd, Laura Simms and Lani Peterson A special holding space for Ukraine March 9th Karianna Rosenberg and Jan Mullen Prelude to Our Inner Spring March 23rd Joe Doolittle & Phyllis Blackstone Heart-Grown & Hand-Made April 13: Heather Forest & Lani Peterson In Progress April 27: Elisa Pearmain and Nyanna Tobin (Tech: Heather) Inclusion: Expanding the Circle May 11: Sara deBeer and Hearscrow (Tech: Elisa) Remembering As Healing May 25: Wally Scott and Radhieka Al Hakawati (Tech: Joe) The Wheel of Time: Journeying to the Inevitable with Grace June 8: Galen Brandt and Jackson Gillman (Tech: Heather) Close Encounters of the Natural Kind June 22: Heather Forest and Noa Baum (Tech: Elisa) Challenges & Triumphs July 13: Karianna Rosenberg and Penny Post (Tech: Lani) When Life Throws You a Curve July 27: Elisa Pearmain & Sara deBeer (Tech: Heather) ANNUAL MEMBERSHIP MEETING August 10: Joe Doolittle and Ai-Lin (Tech:Elisa) Touched by Awe and Mystery August 24: Sara deBeer and Jyoti Pande (Tech: Lani) **Belonging** September 14: Heather Forest and Megan Wells (Tech: Lani) Imagining September 28: Lani Peterson and Karen DeMauro (Tech: Elisa) Protecting Our Gifts October 12: Elisa Pearmain and Erin Johnson (Tech: Joe) Listening October 26: Mike Seliger & Regina Ress (Tech: Heather) Honoring Ancestors Nov 9th: Joe Doolittle & Penny Post (Tech: Elisa) Touched by Praise & Gratitude Nov 23: Elisa Pearmain & Usha Venkatraman (Kristin) Churning Dec. 14: Heather Forest & Jim Brule (Tech: Elisa) Legacy Dec. 28: Laura Simms & Donna Jacobs (Heather) Rising Up in the New Year





**OARS** in the Water

7-8:30pm

ALLIANCE

b 9th



# **KIND STORIES IN CONCERT 2022**

Kind Stories in Concert is a virtual gathering to share and explore stories of kindness in its many faces and forms. Through folk tales and personal stories, we dive deeply into multiple experiences of kindness. What is it? How does it impact us and our relationships to ourselves, to each other, and to the world? Attendees listen to "kind stories" shared by both professional tellers and community members and see what memories of kindness emerge for them. During the second half of the gathering, audience members are invited to share a story, a moment, or a reflection about kindness that emerged for them as listeners. We all need a little more kindness in our lives. Perhaps a story can take us there. Registration for these programs averages 130 attendees.



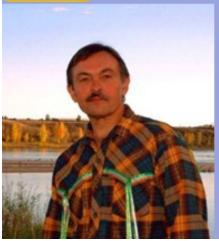
# **SPECIAL EVENTS 2022**



Nov 20, 2022 On Zoom! 7:00 PM-8:30 PM EST Tickets \$25



Two-Eyed Seeing in Relation to Life Stories KEYNOTE AND WORKSHOP



Lewis Mehl-Madrona and Barbara Mainguy December 10th, 2022 On Zoom! 1:00 PM-5:00 PM

Suggested Tuition \$75 Pay as you wish option starting at \$25



# OUR 2022 FISCAL STORY

HSA transitioned from being an NSN Special Interest Group in August of 2022. With a Memorandum of Understanding, HSA obtained an interim status as a Special Project of Story Arts Inc., its temporary fiscal umbrella, while applying for independent not-for-profit status. In March of 2023 with its newly acquired recognition by the IRS as a 501 c 3 not- for- profit organization with its own federal identification number, Healing Story Alliance Inc. established its own banking.

7 Month Transition Overview Aug 1, 2022-March 1, 2023 Fiscal History

### INCOME

| In HSA/Story Arts Account Aug 1st:        | 15,500 |
|---|--------|
| Additional HSA funds transferred from NSN |        |
| Total HSA project startup funds           | 16,416 |

While under the fiscal umbrella of Story Arts Inc., HSA generated additional income of \$7434 through program service income and donations.

| <ul> <li>Total additional income</li></ul>      |
|---|
| • Donations                                     |
| Total Inflow to HSA/Story Arts                  |
| EXPENSES  |
| Transition Administration                       |
| <ul> <li>Story Arts Admin</li></ul>             |
| • Dorothy Training                              |
| Story Arts fiscal management and administration |
| fee 5%1090                                      |
| Other Major Expenses included:                  |
| Technology                                      |
| Tadpole Website Migration2598                   |
| • Technology Subscriptions                      |
| Presenter Fees                                  |
| • Laura Simms                                   |
| Office  |
| Non Profit Corporate filing fees                |
| Total Outflow\$10,711                           |
| Left in HSA/Story Arts Checking\$13,139         |

### **Happy Ending**

Once Healing Story Alliance Inc. was established as a not for profit, Story Arts Inc. granted the new organization \$13,000. With this financial cushion HSA Inc. is moving forward with a commitment toward sustainability.

# LOOKING AHEAD

Healing Story Alliance Inc. is moving forward with exciting mission driven programming in support of storytelling as a healing art, a functioning web site, a new administrator, Dot Cleveland, and a growing mailing list of interested people! We are currently a not for profit organizational member of the National Storytelling Network and a robust part of the larger storytelling community.



Submitted by

Heather Forest, Ph.D., President HSA Board of Directors

Lani Peterson, Psy.D., Secretary, HSA Board of Directors