THE NARRATIVE E N N E A G R A M

The Year of Evolution 2019 ANNUAL REPORT











Transforming lives. Creating a more compassionate world.

www.EnneagramWorldwide.com

OUR MISSION

THE NARRATIVE ENNEAGRAM (TNE) is an educational nonprofit dedicated to transforming lives and creating a more compassionate world. Our mission is to advance human consiousness through our pioneering Narrative Enneagram curriculum, which integrates psychological, spiritual and somatic practice.



TNE Board, Faculty and Staff at the October 2019 Strategic Planning Retreat in Boulder, CO

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EXECUTIVE DIRECTOR'S MESSAGE





ED SELF Executive Director

July 30, 2020

INTEREST IN THE ENNEAGRAM HAS BURGEONED as new demographics discover its power. Over the past two years, TNE has experienced a **30% increase in program registrations**, with many courses at full capacity, and **more younger and diverse attendees** than in the past. Our new **Strategic Plan**, prepared in July 2019, calls for TNE to engage a much larger audience in our programs.

While the following pages of this report focus on our many accomplishments in 2019, it's important to acknowledge that **2020 brings unprecedented challenges** that none of us could have anticipated. The **COVID-19 pandemic** has had a significant impact on The Narrative Enneagram (TNE). We've had to cancel or postpone multiple courses, which has had a **serious short-term impact** on the revenue flow needed to sustain the organization.

While the pandemic has been a huge challenge, it is also a tailwind pushing us toward where we already planned to go. We have the urgency to accelerate three aspects of our 2019 Strategic Plan, which we had planned to roll out over three years, but now are achieving in just a few months.

- 1. Engage a much larger and broader audience
- 2. Expand our capacity to **deliver programming** (faculty and technology infrastructure)
- 3. Provide high quality **online experiences**, allowing more people to be exposed to the power of the Narrative Enneagram and personal transformation

Our programs are more important and relevant than ever, because they provide **tools for emotional health and well-being** to help us experience presence and self-awareness, manage uncertainty and anxiety, heal family systems stressed by lockdowns, connect deeply in a time of social isolation, and so much more.

With in-person trainings not feasible at this time, we are boldly moving ahead to take our **core and professional training programs online**. We're also offering a range of additional online events tuned to evolving circumstances. We greatly appreciate the support of donors wanting to invest in our capacity to serve our expanding community in this time of need.



PRESIDENT'S MESSAGE

The Year of Evolution

2019 WAS A DYNAMIC YEAR OF CHANGE AND EVOLUTION.

The progress described in this annual report is a reflection of many dedicated individuals working in the background to move The Narrative Enneagram (TNE) along the path of transforming lives and creating a more compassionate world.

Our entire team stepped up to honor TNE's history and embrace the present as we planned for the future. In July 2019, TNE stakeholders – staff, faculty and board members – gathered in Boulder, CO for four days of discussions focused on envisioning and prioritizing a broad range of goals. The result of these efforts was an ambitious new **three-year Strategic Plan**, which outlines key initiatives in the following categories:



JOYCE PLAZA 2019-2020 Board President

- Deliver, expand and innovate program offerings
- Produce and enhance member services and benefits
- Cultivate communities interested in the Enneagram
- Promote and market TNE
- Challenge, educate and develop our stakeholders
- Develop and implement a comprehensive and sustainable financial and operational plan

We are very fortunate to have engaged our new Executive Director, **Ed Self**, who started on October 15, 2019, following **Mary Freund's** resignation in July. Ed founded Wildlands Restoration Volunteers (WRV), Boulder, CO, in 1999 and served as its ED for 19 years.

Many thanks to Mary for her leadership during more than three years, and for chairing our successful 2019 Fundraising Campaign through December 2019; to **Allison DeHart**, TNE Accounting and Finance Manager, who served as our Interim ED during the transition; and to the ED Search Committee comprised of board, faculty and staff members.

Other 2019 highlights included:

- **30% increase in program registrations**, resulting in many sold-out trainings and more younger attendees than ever before
- 40% increase in TNE members since 2018, when sister nonprofits Enneagram Studies in the Narrative Tradition (ESNT) and Enneagram Association in the Narrative Tradition (EANT) merged to become TNE
- \$151,685 in donations, affording us the opportunity to expand our program offerings and award \$46,664 to qualified scholarship recipients to attend TNE trainings, including \$10,850 to support participants from the Enneagram Prison Project
- Successful launch of a **new TNE hub in Nashville, TN**, thanks to sponsorship by TNE board member **Evan Barbee**
- Rollouts of *The Enneagram and the Nine Types* TNE's first 4-part online class and a TNE Next Generation Mentoring Program, both facilitated by Core Faculty member Renée Rosario

2019 – BY THE NUMBERS

660,992 visits to our website from 213 countries and territories, an increase of 129% over 2018. 82,135 views of our YouTube videos, 7,837 Facebook likes and 2210 Instagram followers. 5279 people took our online test. 834 attendees of Narrative Enneagram onsite programs. 441 TNE members. 14 International Training Associates, 8 new Certified Teachers and 5 new Certified Practitioners in our U.S. programs through 4 training hubs: Menlo Park, CA, Denver, CO, Cincinnati, OH and Nashville, TN.



2020 TNE LEADERSHIP

Board of Directors



Top row: Joyce Plaza, President; Sheryl Cohen, PhD, Treasurer; Mike Alexander, Evan Barbee Bottom row: Felicia Lee, Kirsty Spence, Mónica Tinoco and Brian Vent

Core Faculty



Helen Palmer, Terry Saracino, Peter O'Hanrahan, Renée Rosario and Christopher T. Copeland

Adjunct Faculty



Marion Gilbert

Staff

Ed Self

Executive

Director



Allison DeHart

Accounting and

Finance Manager

Sarah Duet Social Media Manager



Satoya Foster Administrative and Marketing Coordinator

Pat O'Hanrahan

Database Manager

Internship Director



Registrar

Martha Scherzer **Evangeline Welch** Marketing Director and Webmaster

TNE Board, Faculty and Staff as of June 30, 2020

THANK YOU, 2019 DONORS

Thanks to the generous support of the Narrative Enneagram Community, we received \$151,685 in donations in 2019.

Anonymous Nisha Advani Mary Akerson and Steve Cohen Sue Armstrong Tom Baldwin and Holly Gilster Evan Barbee Dona-Kaitlin Beitel Ahshua Bolton Fred Boykin and Jack Killen **Rick and Lesley Bradstreet** John Brett **Deborah Burditt Deborah Burns** Margot Burns Christine Chapman Charities Aid Foundation of America Donna Chase Sheryl Cohen Chris Copeland Jack Craven Amy Crippen Christopher and Helen Cullander Elaine Culverwell Fara Curlewis D.C. Enneagram Group **Charles Davis** Allison DeHart Pam Earnest Nancy Embry **Gerry Fathauer** Tom Flautt **Ruth Foster Mistler Family Foundation** Mary Freund Mercy Fudell Susan Galvin Anne Geary Marion Gilbert Goldman, Sachs & Co. Elizabeth Gonzalez Network Good George Gordon Gwen Gordon Emile Haddad **Denyse Hadley**

Amy Haller Jean Halloran Lorraine Hancock Julie Honsey Laurie Hopkins William Hughes **Carolyn Humphreys** Carol Jackson Melody Jackson Sue Jones Susan Jones Rebecca Keane Linda Kelly Elizabeth Killian Carrie Kirkpatrick Celeste LeBlanc Paige LeBlanc Janelle Lika Hallie Logan Patricia Martin Robin Meckley Linda Messia Jean Meyer Curt Micka Lorraine Miller **Charles Morehead Skip Morris** Lisa Nack Lisette Narragon Sandra Nearpass Peter and Pat O'Hanrahan **Kirin Parmar** Hans Peter **Barbara** Peters Gerald and Adele Phelan lovce Plaza Harriet Marple Plehn Verdele Polson Karen Poole Lynda Rands Cecelia Rapaich **Emily Rayburn** Theresa Rembert **Brigitte Riom** Teresa Roche

Ronald Rojas Renée Rosario Ienn Rosenblum Mary Ruccio Michele Ruhmann Iulie Sahlin **Terry Saracino** Samuel Schindler Sophia Seage Josephine Seccombe Ed Self Louise Phipps Senft **Charlotte Shepic** Jennifer Shubin Julie Smith Morgan Smith **Timothy Smith** Curt Spear Lorrine Spoelstra Margaret Stege Paul Strasburg Brenda Kay Sylvester Tod Tappert Michelle Thompson Monica Tinoco Kelly Vanasse Caitlin VanDusen Dana Vitorelo Mary Wampler Curt Wang Noelle Wainwright Warner Keith Washburn Martha Waters Carol Watson Janell Weber Jo Ann Weber Evangeline Welch Daphne Whitman Karen Wiese **Betty Withers** Monirah Womack Wordlab Carolyn Workman



We make every effort to list all donors and ensure correct spelling. If you find that your name has been inadvertently omitted, or is listed incorrectly, please contact us at allison@enneagramworldwide.com.

2019 FINANCIALS

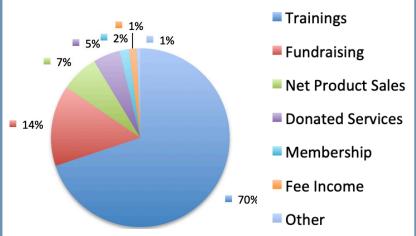
Income Statement

Income

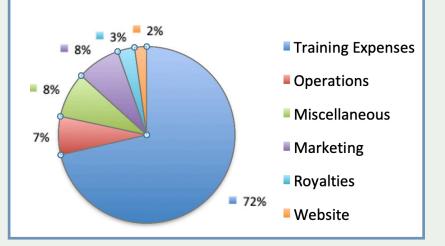
Trainings Fundraising Net Product Sales Donated Services Membership Fee Income Other	\$ \$ \$ \$ \$ \$ \$	725,827 151,685 71,173 50,500 18,090 14,339 6,894
Total income	\$1,038,509	
Expenses Training Expenses Operations Miscellaneous Marketing Royalties Website	\$ \$ \$ \$ \$ \$	638,464 62,696 74,710 * 71,104 27,959 19,820
Total expenses	\$894,753	
Net income	\$143,755	

* Includes database, credit card fees, professional fees, travel and other expenses

Total Income: \$1,038,509



Total Expenses: \$894,753



BALANCE SHEET

Assets		Liabilities & Equity		
Cash	\$ 428,666	Current Liabilities \$ 9,032		
Inventory Net Fixed Assets	\$ 2,456 \$ 53	Equity		
Other Assets	\$ 1,159	Net Assets \$ 279,547 Net Income \$ 143,755		
Total Assets	\$432,334	Total Equity \$ 423,302		

Total Liabilities

and Equity

\$432,334

HOW TO SUPPORT US



Our 2020 fundraising goal: \$198,000

With registration fees covering only 81% of TNE's annual expenses in 2019, we rely on our generous donors to make up the difference. Please consider an amount that fits your budget. **Monetary support** may start as small as a \$10 one-time or monthly donation. You also may donate stock, set up planned giving or employer-match programs, transfer your airline miles, and/or shop at AmazonSmile. A portion of every dollar we receive supports our **Scholarship Program**.

Please consider **contributing today** at **www.EnneagramWorldwide.com/donate/**. Or send a check payable to "TNE" to PO Box 4114, Boulder, CO 80306-4114.

Beyond a financial donation, there are other direct ways to support us:

- Become a TNE member at an annual cost of \$60/year. www.enneagramworldwide.com/tne-membership
- Participate in our trainings and workshops. www.enneagramworldwide.com/programs
- **Refer colleagues, clients, friends and family to our programs.** Most of our program participants come from direct one-to-one referrals.

THANK YOU FOR YOUR SUPPORT!



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