

# 2018 ANNUAL REPORT



# Letter from the HeartMath Institute President

Dear Supporters and Friends,

Everyone at HeartMath Institute contributed in unique and caring ways to make 2018 heartfelt and special. Our accomplishments are your accomplishments, made possible by your generous and caring support. We sincerely thank you.

Highlights included in this 2018 Annual Report are some of HMI's research, education, training and other accomplishments.

I am especially pleased to report the rollout of our Add Heart campaign. For a long time at HeartMath, we've been adding heart to our daily interactions with one another and our community as well as to services, programs and products for you and people around the world. By adding heart, we mean being extra kind, compassionate and forgiving and affording lots of latitude to people everywhere – for isn't it true we all are trying in our own way. Love is the new transformational intelligence, and accordingly, Add Heart/+❤️ is now central to HeartMath's message and mission.

Now, please take a few minutes to peruse the 2018 Annual Report and see what you made possible.

With care,



*Sara Childre*

Sara Childre,  
President and CEO, HeartMath Institute



# Statement of Accomplishments

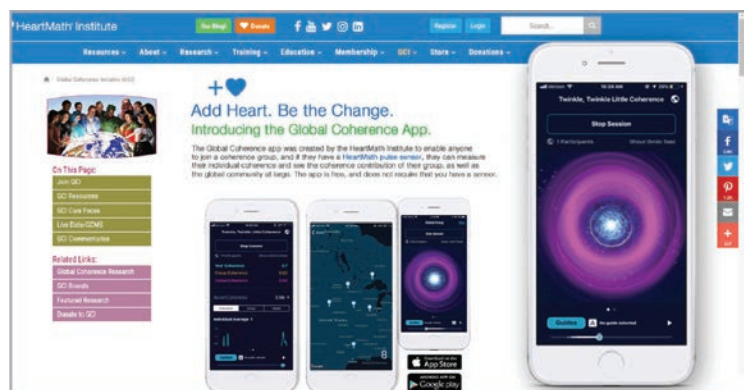
## Inner Balance™ Helps Students

HeartMath Institute donated 30 Inner Balance Lightning Sensors to assist students at Marjory Stoneman Douglas High School in Parkland, Florida in the wake of last year's mass shootings there. HMI also held trainings for parents and mental health professionals.



## Global Coherence App

Our research and development divisions made substantial progress during the year on the Global Coherence App to connect people in a worldwide network dedicated to generating global heart coherence. Our researchers and staff added new features and prepared the platform for beta testing in 2019.



## Activating the Heart of Teams™

We developed this new training program for increasing team and group harmony and coherence. Beta testing was planned for this year, with trainings scheduled to take place in May and September. Tentatively, a launch is planned for 2020.



## Scholarships

- ▶ **HeartMath for Communities:** \$3,100 was shared between two recipients.
- ▶ **Education Sponsorship Fund:** \$8,986 was shared among seven recipients.
- ▶ **Military Service Appreciation Fund:** \$2,823 was shared among 11 recipients.



# Statement of Accomplishments

## International Institute for Psychosocial Development

HMI continued funding and working with this compassionate nonprofit organization, which has provided care and assistance to thousands of Syrian refugees forced to flee their homeland during nearly nine years of civil war.



## SAND Conference

HeartMath Institute's Global Coherence Initiative received lots of follow-up inquiries after the October Science & Nonduality Conference in San Jose, California at which HMI Director of Research Dr. Rollin McCraty spoke. McCraty's presentation, *How We Are All Connected: Coherence and The Global Field Environment*, was well-received along with his announcement of the release of the new Global Coherence App mentioned above.



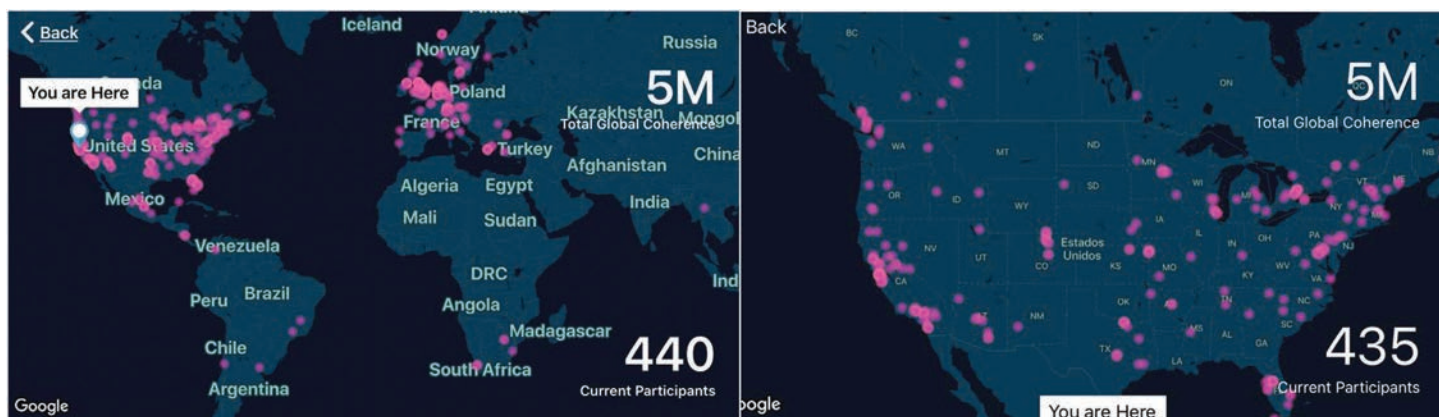
## Mexico Event

Our seventh annual Mexico Event, whose theme was *Lifting the Vibration of Our Spirit: Unleashing the Heart Power of Collective Consciousness*, was the biggest ever. We had 152 attendees and raised \$94,367 for the Global Coherence Initiative at the conference, which was held in the Mexican Riviera. Program hosts for the four-day conference were HeartMath's Rollin McCraty, Deborah Rozman and Howard Martin. A fifth day was reserved for HeartMath Certified Professional Day, that was attended by HeartMath Certified Trainers, Coach/Mentors, HeartMath Intervention Practitioners and International Alliance Partners. The special day included guest speakers, sharing of best practices and group discussions related to our professional staff's mission, vision and the future.





# Research Accomplishments



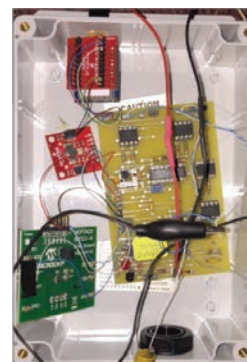
## Global Coherence App

HeartMath Institute's research and development divisions continued work in 2018-2019 on the Global Coherence App, which will connect people in a worldwide network focused on generating global heart coherence.

Through higher levels of heart coherence, a harmonious state in which the heart, mind and body are united in cooperation and flow, we can increase our personal and collective efficiency and effectiveness and achieve better outcomes for ourselves and the global community.

## Global Tree Monitoring System

Researchers progressed on developing hardware, software and a public website for the Global Tree Monitoring System. They now have working prototype tree sensors and base stations, with sensors in place and transmitting tree-potentials data every 60 seconds from Boulder Creek, California. (Other future locations include San Carlos, California. and Detroit, Michigan.)



With research suggesting Earth's magnetic fields carry biologically relevant information connecting all living systems, we believe awareness of our interconnectivity with trees may portend numerous benefits for humankind.

HMI continued to feature the Tree Research Project donation page on its website. Next steps include fine-tuning the tree sensors and base station, reduce their size and produce and test a total of 50 units worldwide.



# Research Publications

## ***The Influence of Heart Coherence on Synchronization Between Human Heart Rate Variability and Geomagnetic Activity*** – (HMI Director of Research Dr.

Rollin McCraty and HMI researcher Mike Atkinson helped conduct the study, which was published in the December issue of Journal of Complexity in Health Science.) The study concluded that raising heart coherence, through the use of HeartMath's Heart Lock-in® Technique, had a positive impact on the synchronization between the heart rate variability (HRV) of participants and the Earth's magnetic field. The importance of this finding is, techniques such as this "can be valuable not only psychologically (in sustaining positive emotions), but also physiologically, since high synchronization between heart rate variability and geomagnetic activity has been associated with better health conditions.



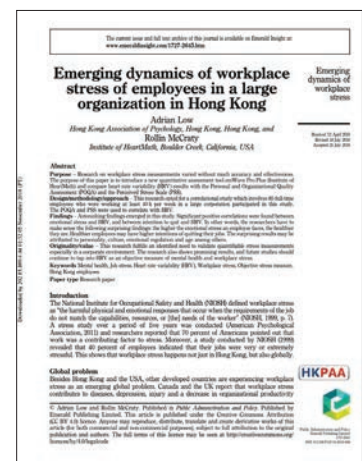
## ***Long Term Study of Heart Rate Variability Responses to Changes in the Solar and Geomagnetic Environment*** – (HMI Director of Research Dr. Rollin McCraty and

HMI researcher Mike Atkinson helped conduct the study. It was published in the February 2018 edition of Nature magazine journal Scientific Reports.) The researchers found geomagnetic and solar activity could affect the human autonomic nervous system (ANS), which controls breathing, heartbeat and digestive processes. They said the findings "support the hypothesis that these energetic environmental factors act as energy sources that outplay in different ways depending on an individual's health status and maturity level and capacity of self-regulation." One particularly significant aspect of this study was, although previous studies had reached similar conclusions, they focused on how the factors affected individuals, whereas this one concentrated on how they affected an entire group.



## ***Emerging Dynamics of Workplace Stress of Employees in a Large Organization in Hong Kong*** – (HMI Director of Research Dr. Rollin McCraty helped conduct the

study, published in 2018 in Public Administration and Policy, an Asia-Pacific journal.) They found significant positive correlations between emotional stress and HRV and between participant workers' intention to quit their jobs and HRV. The higher the emotional stress employees faced, they said, the healthier they were, noting that healthier employees may have higher intentions of quitting their jobs than less healthy employees. The authors noted the results would need further analysis and said they may be attributable to personality, culture, emotional regulation and age among other factors. The researchers introduced a new quantitative assessment tool, HeartMath's emWave® Pro Plus, and compared HRV results with the Personal and Organizational Quality Assessment and the Perceived Stress Scale.



# Education Achievements



- ▶ **HeartMath Institute master trainer and education specialist Jeff Goelitz** traveled to Fort McMurray in Alberta, Canada from Oct. 13-20 to conduct training and give a presentation. Six people completed the training to become Certified HeartMath Trainers. Goelitz also gave a presentation on HeartMath to the staff of Telus Spark scientific museum in Calgary, Alberta. The museum purchased dozens of Inner Balance Trainer devices and Smart Brain Wise Heart™ (SBWH) classroom and home social-emotional learning program, which it planned to roll out at the museum to an estimated 1,800 students per year.
- ▶ **The HeartMath System of tools and techniques** were taught to about 10,000 students in 35 schools in Alberta. Alberta Health Services purchased 350 of HeartMath's Inner Balance Lightning Sensors and 100 Smart Brain Wise Heart™ and 100 Sunshine Secret™ classroom and home programs.
- ▶ **The Project BLEND Legacy Symposium** was held July 18-21 in Baldwin, N.Y., where a final sendoff was held for 20 educational leaders earning education administration degrees from SUNY Oswego and who completed three years of training in HeartMath's Resilience Advantage® program. HeartMath trainers delivered a pilot for its Social Coherence program to the education leaders, who are dedicated to providing education in low-economic urban areas.
- ▶ **The New Bedford Boys & Girls Club** in New Bedford, Massachusetts was selected for a study on use of the emWave® Pro Plus.
- ▶ **HeartMath Certified Trainer Barry Jacob** announced plans to roll out Smart Brain Wise Heart™ in afterschool programs at 10 elementary schools as part of his Verdun Adventure Experiential learning group. He planned to train 30 staff in Resilience Advantage training and the SBWH program.

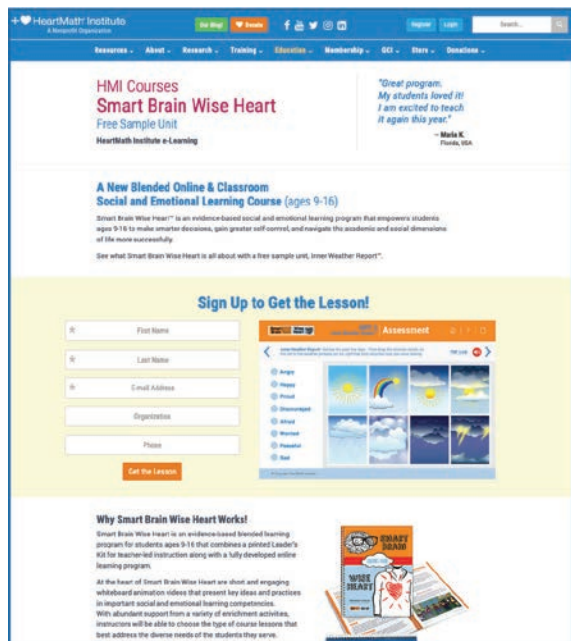


# Education Achievements

► **HeartMath Institute sent 30 Inner Balance™ Lightning Sensors to the SEDNET regional coordinator in Fort Lauderdale, Florida** to assist students at Douglas Stoneman High School in Parkland, Florida in the wake of last year's mass shootings there. HMI also held trainings for parents and mental health professionals.

► **The Sunshine Secret®** interactive e-learning classroom program received gold and silver in the 24<sup>th</sup> annual Communicator Awards, and a new live landing page for the program was added to HMI's website.

► **Smart Brain Wise Heart™** live landing page was unveiled.



► **HMI staff** attended and in some cases gave presentations at the following conferences.

- Oct. 3-5 – Association for Training on Trauma and Attachment in Children (ATTACH)
- Oct. 1-2 – Trauma-Informed School, Sacramento, California.
- June 18-20 – Trauma-Informed School, St. Charles, Missouri.



► **Development of the new HeartSmarts Adventure® blended e-learning program for ages 4-6**

is in progress and is scheduled for release before 2020. The program's digital curriculum introduces children to important ideas and practices on health and emotional well-being. The core ideas and skills from HeartSmarts Adventure came from the previous Early HeartSmarts program.





# People's Comments About HeartMath Programs and Tools

**They said this about HeartMath programs and tools ...**

**Add Heart® Facilitator Program**—Tools and insights for improving personal and professional outcomes. *Excellent Program – I signed up to be an Add Heart Facilitator to see how the materials were as a first step before choosing to sign up to be a Coach/Mentor. The program was easy to follow and I was able to begin sharing these tools with others. Having the Inner Balance® Trainer has been a great experience both for me as I learn more about myself using coherence skills daily, but also, other people were blown away every time I taught them how to add heart. Highly recommend this program as a way to improve one's life and the lives of others, or as a first step in moving further into the HMI and its global community.”* –Linda, Los Angeles, California, healthcare

**2018 Mexico Event/Lifting Global Consciousness**—HeartMath Institute and the Global Coherence Initiative's signature annual event in the Mexican Riviera.

*“Mind and heart expanding – I am so grateful I took the time and resources to attend. It was truly wonderful to be in such a beautiful place, with such heartfelt human beings from all over the world. The pace was excellent! We met in the morning and again in the evening, so during the day I could explore, rest and just be.”* –Debra, Osceola, Indiana, healthcare

**Inner Balance® Lightning Sensor**—Training to connect with your heart's intuitive.

*“Easy to use – This is my second lightning sensor. I gave my other to my son. This is easy to use... I was surprised at some of the reviews weren't highly positive. I think this is great. I would definitely recommend it.”* –Karen, Detroit, Michigan., business

**Smart Brain Wise Heart™** social and emotional learning program.

*“Something for all ages! – I'm really enjoying the course. As an adult I'm learning a lot. It really is great information for any age. Easy to teach and for children to understand. A wonderful course. Thank you!”* –Deirdre, Irvington, N.Y. business

**emWave®2 handheld** emotion-self-regulation, coherence-building device.

*“Great tool! – I have had it one week. I have used it daily to learn how to calm down and to monitor my reactions. I have also just played with it and let my friends play as well.”* –Larri, Austin, Texas, healthcare

**Sunshine Secret®** interactive e-learning program.

*“Teaching transforming emotions – I work with preschool age children and teach mindfulness to them. The Sunshine Secret tool for transforming emotions is perfect for 3- and 4-year-olds who are experiencing sadness due to missing their mommy and daddy. ... I was really happy with how the Heart Shine method was taught through story. ... There is one HM tool, the Heart Shine, and I was really hoping for more. I'm grateful for this one tool though. It's working wonders.”* –Kara, Santa Cruz, California, education

# Training the Trainers

**HeartMath Institute is pleased to report that more than 250 trainers, mentors and clinicians were certified in 2018:**



## **Featured New Resource for all HeartMath Trainers**

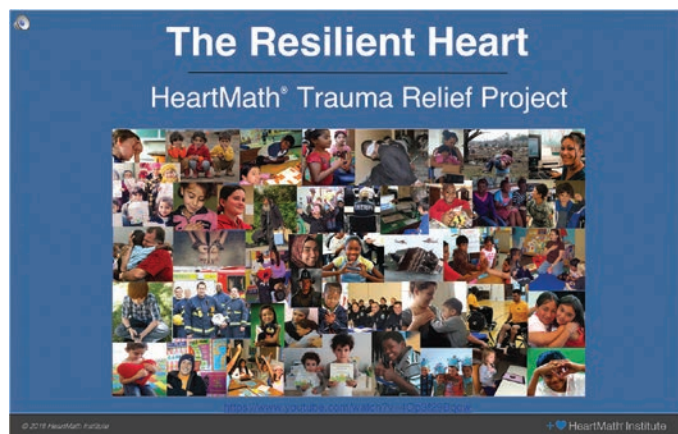
### **The Resilient Heart™: Trauma Program for Humanitarian and Emergency Responders**

Development of this free program was completed last year and we began offering it in January of this year to our HeartMath certified trainers and Add Heart facilitators. Because of wide interest in the program, plans were made to offer it to a variety of other groups as well. The following entities requested the program: Integrative Healers Action Network; Chicago Police Department; Multi-Faith Veteran Initiative, Chicago; and Pastors for Patient-Centered Outcomes Research Initiative.



### **The Resilient Heart™: HeartMath Relief Program**

Trauma specialists, experts and HeartMath practitioners Steve Sawyer, Sara Gilman, Susann von Meijenfeldt, HeartMath's Dr. Jorina Elbers, Dr. Daniel Siegel, Drs. John and Julie Gottman and others were collaborating on this eight-hour online video course. The course, which is aimed at and intended to certify healthcare professionals, is being planned for a late 2019 or early 2020 release.





# Training the Trainers

## Activating the Heart of Teams™

This new training program was developed to increase team and group harmony and coherence. Beta testing was planned for this year, with trainings scheduled to take place in May and September. A launch is tentatively planned for 2020.



## USS Michael Monsoor Building Shipboard Resilience

A total of 180 sailors went through the Resilience Advantage workshop training, and 14 new HeartMath coach mentors were certified. The sailors also participated in HeartMath's Inner Balance™ training.



## Madison, WI. Police Department Goes emWave

The Madison Police Department purchased 70 emWave2® devices, and HeartMath staff conducted 135 quality assessments before Resilience Advantage training for officers and again about two months after the training. The officers practiced the self-regulation techniques using the emWave®2. They all received an electronic version of the Resilience Advantage pocket guide for their smart-phones so they could use it as a quick reference while practicing the techniques and learning the Resilience Advantage content. In all, HeartMath distributed 450 e-versions of the guide.



## Another Year of Service ...

- ▶ Naval Special Warfare Development Group
- ▶ Air Force Special Tactics Training Squadron, Florida
- ▶ Schriever Air Force Base, Colorado
- ▶ Provided 500 Resilience Advantage pocket guides to the Blue Courage leadership organization.
- ▶ Fort Campbell, Kentucky
- ▶ City of Philadelphia
- ▶ U.S. Department of Justice – International Criminal Investigative Training Assistance Program
- ▶ Naval Health Research Center

## Conferences ...

- ▶ Jan. 17-19 – First Responder Fitness and Wellness, Seattle, Washington
- ▶ Oct. 5-10 – International Association of Police Chiefs Conference, Orlando, Florida

# Financial Report

*The caring  
and hopeful spirit  
of contributors  
like you is present  
every time  
HeartMath touches  
someone's life.  
We truly appreciate  
your generosity.*

All of us at HeartMath Institute offer sincere thanks to our donors and supporters, whose generosity, energetic support and continued confidence in our work made all of our successes in 2018 possible. Once again this year, we are using all of our supporters' contributions toward improving people's lives by educating them about the principles and intelligence of the heart and providing tools, programs and services.

Donations to the institute come from individuals, corporations, other nonprofits and a wide variety of public and private institutions and organizations.

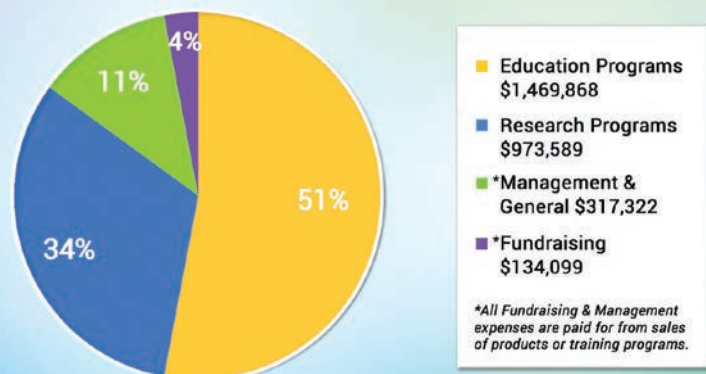
## 100% Donation

HMI is a nonprofit that uses 100% of the donations it receives to fund initiatives, public programs and research projects. We use product sales and licensing fees to cover administrative and fundraising expenses, so each contributor's donations can be used solely for projects that help people.

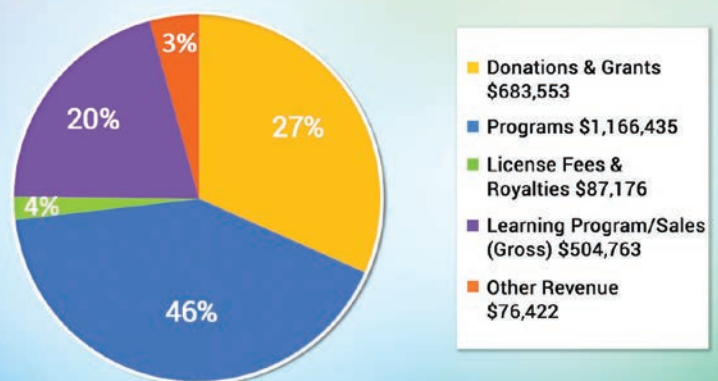
Every child, woman and man HeartMath is able to empower to improve their lives has contributors like you to thank. For them and all of us at HeartMath, thank you. We truly appreciate your generous spirit.



## 2018 HMI Expenses \$2,894,868



## 2018 HMI Revenue \$2,518,349





# Lives We Touched Through Sponsorship

**HeartMath Institute's 100% donor-funded Sponsorship Funds assisted approximately 1,500 people in 2018.**

## Education Sponsorship Fund

HMI's Education Projects Fund made a positive impact on approximately 1,000 students. Here is what some of them said:

- ▶ A 19-year-old student who participated in a HeartMath Coherence Workshop at school said, "It feels like you (the student) are on the same wavelength as life itself, that's really inspiring!"
- ▶ A 17-year-old student with stress, anxiety, low self-confidence and a sleep disorder who attended a three-day HeartMath Coherence Workshop at school said: "I never would have imagined that one could feel so good."
- ▶ A 14-year-old student who was not particularly interested in HeartMath at first resisted it because he had been "forced" to participate, but after giving the HeartMath Coherence Workshop a try said, "It has been a long time since I learned something so interesting and useful."
- ▶ A 17-year-old student who participated in a Coherence Workshop said, "This was the best meditation session of my life. I was finally able to let go of all the crazy chatter in my mind and find some peace."

## Military Service Appreciation Sponsorship Fund

The Military Service Appreciation Fund assisted approximately 110 veterans and military personnel. Here are two of those veterans' stories:

*"HeartMath meditation and technology has changed my life and improved the quality of it for me and especially my wife. I am very grateful for what I have found. I use HeartMath every day and I want to pass this on to other people. Thanks HeartMath (Institute) and the sponsorship program for helping me to develop the knowledge and skills to do just that."* –Mark, Veteran of the US Army

*"I run a local chapter of a national nonprofit organization to help veterans struggling with PTSD and other medical issues. It is clear to me that a lot of veterans could benefit from HeartMath. The Military Service Appreciation Fund has provided me with the technology that I requested, and I have been able to loan it to other veterans. One of the veterans submitted his application to the sponsorship fund and was awarded an emWave® Pro to further his treatment at home. Because of the extra technology provided to me, I have had veterans referred to me by VA therapists. I have been able to loan them (other veterans) technology to use at home so they have more access to HeartMath (tools and technology) at home. Having access to HeartMath (tools) at home has allowed me to make far greater gains than if I had to wait for my weekly VA appointment. The access that the Military Service Appreciation Fund is giving is truly life-changing."* –Jason, Veteran US Air Force

- ▶ HeartMath distributed 2,127 H.E.A.R.T. (HeartMath Education and Resilience Training) downloads and DVDs at no cost to veterans, military personnel and their families, providing comprehensive instruction in our research-based self-regulation techniques and technology. That total represented a huge increase over 2017 distributions.

# HeartMath Vision • Stay Connected • Ways to Support Us

## The HeartMath Vision

There is a global shift under way in people's attitudes and how we treat one another and the planet. This shift involves forming a deeper connection with our own and each other's hearts. As these connections are established, HeartMath believes the world we live in will be transformed. Coherent, heart-centered interactions will generate a higher vibrational consciousness field globally, increasing individual, social and global coherence and resonance.

HeartMath was founded to help individuals, organizations and the global community make this consciousness shift with ease and establish these inner and outer connections. At the same time, people can improve their personal lives and toward that, HeartMath provides tools they can use to connect with their inner guidance and technologies to help them be still and listen. Read the entire [HeartMath Institute Mission and Vision](#).

## Ways to Support HMI and GCI With In-Kind Donations

We know HeartMath's work and success begins with our supporters, so we constantly strive to provide as many ways as possible for people to contribute, including:

- ▶ Making a personal donation through cash, stocks, bonds, real estate or dividends.
- ▶ Participating in employers' corporate matching-gift programs.
- ▶ Participating in HMI's Planned Giving Program, which benefits HeartMath for generations to come and donors during their lifetime.
- ▶ Becoming a monthly donor.
- ▶ Making an in-memory contribution on behalf of a loved one.
- ▶ Include HMI in your will as part of your legacy.
- ▶ Making a donation to acknowledge special people who are doing good work, or designating a gift for birthdays, holidays or other occasions.
- ▶ Helping to fulfill the HMI wish list with in-kind donations.

## Stay Connected ...

There are lots of ways to stay connected with HeartMath and keep on top of all we have to offer.

**Subscribe to News and Tools on HMI's website:** [www.heartmath.org](http://www.heartmath.org).

**Become an HMI Member on HMI's website:** <https://www.heartmath.org/membership>

**Become a GCI Ambassador on HMI's website,** <https://www.heartmath.org/gci>, or join others in the Global Care Room at <https://www.globalcarerooms.org>

**Like us on Facebook:**  
<https://www.facebook.com/HeartMathInstitute>

**Don't forget our other Facebook pages at** <https://www.facebook.com/GlobalCoherenceInitiative>, <https://www.facebook.com/HeartMathMyKids> and <https://www.facebook.com/HeartMathTroopsVeteransFamilies>

**Follow Us on Twitter:**  
<https://twitter.com/HeartMathInst> and <https://twitter.com/GlobalCoherence>

**Watch our numerous videos on YouTube at** <https://www.youtube.com/HeartMathInstitute> and <https://www.youtube.com/GlobalCoherenceInit>

**Follow us on Instagram:** <https://www.instagram.com/HeartMathInstitute>

**Follow us on LinkedIn:** <https://www.linkedin.com/company/HeartMathInstitute>

**Have a question?** Give us a call at (831) 338-8500 or toll free (800) 711-6221. Support HeartMath with your contributions by visiting <https://www.heartmath.org/Donations> or calling us toll free at (866) 221-6339 or emailing us at [info@heartmath.org](mailto:info@heartmath.org)



# Our Volunteers and Boards

With gratitude and heartfelt thanks we salute our many volunteers for the time and energy they donated in 2018.

The many individuals, diverse in background knowledge and expertise, who oversaw the operations, organization and missions of HeartMath Institute and the Global Coherence Initiative guided us lovingly through a wonderful and productive year. Their dedicated service is integral in our ability to offer programs, services and outreach.

**HMI Leadership Team:** Doc Childre, founder; Sara Childre, president and CEO; Rollin McCraty, executive vice president, director of research; Brian Kabaker, chief financial officer, director of sales; Katherine Floriano, executive vice president, Planned Principal, Legacy and Major Gifts.

**HMI Board of Directors:** Chairwoman: Katherine Floriano. Directors: Brian Kabaker, Donna Koontz, Claire Shafe, Sandy Royall, Jeddah Mali, and Diana Govan.

**HMI Scientific Advisory Board:** Doc Childre, Dr. Abdullah Abdulrahman Alabdulgader, Dr. John Andrew Armour, Linda Caviness, William C. Gough, Rollin McCraty, Ph.D., Dr. Richard Rahe, Dr. Paul J. Rosch, Deborah Rozman, Ph.D., David Joffe, Carlo Ventura and Dr. Tony Yardley-Jones.

**GCI Steering Committee:** Chairman: Doc Childre. Members: Gregg Braden, Jeddah Mali, Howard Martin, Rollin McCraty, Ph.D., Deborah Rozman, Ph.D. and Claudia Welss.

**GCI Advisory Board:** Jack Canfield, Jill S. Dodd, Mark Hempel, Larry Kuechler, Lynne McTaggart, Marci Shimoff, Lynne Twist, Nina Rothschild Utne and David Whalen.

**GCI Scientific Advisory Board:** Rollin McCraty, Ph.D., Dr. Abdullah Abdulrahman Alabdulgader, Mike Atkinson, Annette Deyhle, Ph.D., Jim Huffman, Bruce H. Lipton, Ph.D., Roger Nelson, Ph.D., Dean Radin, Ph.D., Marilyn Mandala Schlitz, Ph.D. and William E. Vosteen.





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