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CHAPTER GUIDE

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SWEET ADELINES INTERNATIONAL

Chapter Guide

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FOREWORD

The *Chapter Guide*, used in conjunction with the *Policy Book* and bylaws, provides a thorough overview of Sweet Adelines International's policies and procedures. However, the *Chapter Guide* is just that—a guide. It is designed to assist chapter leaders in the efficient management of their chapters. The information contained in this guide is the result of many years of knowledge and experience gained by observing and participating in successful chapter operations. This guide provides a basis on which chapters can operate with uniformity and consistency within the international organization.

Because the organization is broad in scope and constantly changing, it is almost impossible to anticipate every question, change, or development that may arise. The *Chapter Guide* is written to allow chapters flexibility in their methods of operation, while ensuring that these methods do not conflict with any organizational bylaws, policies, or procedures. For information on topics not covered in this guide, or further information and/or clarification on any subject, contact your regional leaders or the staff at international headquarters, 800-992-7464. This is your guide, so feel free to submit topics that you would like to see addressed in future revisions of the *Chapter Guide* to international headquarters.

The *Chapter Guide* is available online for all members. Hard copies of the *Chapter Guide* are available for sale through international headquarters. Revision also may be purchased from international headquarters. For price information, or to order additional copies of the *Chapter Guide* or any of its revisions, contact the international Sales Department, 800-992-7464.

CHAPTER GUIDE
A YEAR IN THE LIFE OF A CHAPTER

Event/Activity	Chapter Guide Section	Policy Book Section
<i>March</i>		
Current President/Team Coordinator:		
Elect chapter board or management team; Notify region	II, B-1	
Update chapter officers in the members only section of the website	II	
Schedule audit of chapter financial records	V, E-6	
Annual chapter budget meeting	V, E-5	
Annual chapter business meeting	II, B-6	
Plan installation/order appropriate jewelry	II, B-11	
Regional competition deadlines	X, J-4	VIII, Div. H
Provide SA website link information for <i>Policy Book</i> and <i>Chapter Guide</i> to newly elected president or team coordinator	IV, D-12	
President/Team Coordinator-elect:		
Review Policy Book and Chapter Guide	IV, D-12	
Selection of committee chairs	I, A-8 IV, D-3	
Submit officer and committee chair data to region		

Event/Activity	Chapter Guide Section	Policy Book Section
<i>April</i>		
Current President/Team Coordinator:		
Conduct audit of chapter financial records	V, E-6	
Prepare chapter tax forms	V, E-28	VIII, Div. B
Review insurance/bonding	V, E-5 V, E-7	VIII, Div. E
Request written year-end reports from committee chairs		
Update chapter bank accounts with signatures of new officers	V, E-21	
Regional competition deadlines	X, J-4	VIII, Div. H
Installation of new chapter board/officers; ensure that region has been notified of new board/officers and information has been updated on SA automated Chapter Officer update form	II, B-11	
President/Team Coordinator-elect:		
Finalize appointments/committee chairs	I, A-8 IV, D-3	
Prepare for first board meeting/joint board meeting with outgoing officers	IV, D-11	
Orientation/training for new board, officers, committee chairs		
Review goals/long-range plans	IV, D-1	
Prepare any advertising or editorial material for the July issue of <i>The Pitch Pipe</i> . Submission deadline is May 1.	XIII	XI, Div. A

Event/Activity	Chapter Guide Section	Policy Book Section
May		
Chapter renewal	VI, F-1	III, Div. A, 2
Quartet re-registration	IX, I-1	IX, Div. A
Encourage attendance and participation in regional meetings	X, J-1	VIII, Div. B
Review insurance/bonding	V, E-5 V, E-7	VIII, Div. E
Prepare chapter tax forms	V, E-28	VIII, Div. B
June		
Prepare chapter tax forms	V, E-28	VIII, Div. B
Deadline for international quartet entry form	X, I-5	
Deadline for convention program advertisements		
July		
Submit chapter tax forms	V, E-28	VIII, Div. B
Submit verification of audit by July 15	V, E-29	
Review chapter standing rules and revise or update, if needed	III	
Prepare any advertising or editorial material for the October issue of <i>The Pitch Pipe</i> . Submission deadline is August 1.	XIII	XI, Div. A
August		
International chorus competitors submit entry form		
International chorus competitors submit "Assignment of Recording and Film Rights" form		X, Div. A, 2

Event/Activity	Chapter Guide Section	Policy Book Section
<i>September</i>		
International chorus competitors submit entry form		
International chorus competitors submit “Assignment of Recording and Film Rights” form		X, Div. A, 2
Plan and publicize international convention	VII	
Copy and distribute slate for International Board elections		V, Div. B
Deadline for submission of tax forms	V, E-28	VIII, Div. B
<i>October</i>		
International convention (any week from the end of September to the first of November)		
Copy and distribute slate for International Board elections		V, Div. B
Prepare any advertising or editorial material for the January issue of <i>The Pitch Pipe</i> . Submission deadline is November 1	XIII	XI, Div. A
<i>November</i>		
Hold election for International Board		V, Div. B
Submit official ballot within 24 hours of International Board election		V, Div. B
<i>December</i>		
Official ballots for International Board election must be received at international headquarters		V, Div. B
Remind quartets to register with international 60 days prior to regional competition	IX, I-1	IX, Div. A VIII, Div. H

Event/Activity	Chapter Guide Section	Policy Book Section
<i>January</i>		
Select qualified chapter members as potential nominee(s) to International Board of Directors for following fiscal year		V, Div. A
Plan and prepare publicity for regional competition	VII	
Hold chapter long-range planning meeting	IV, D-1	
Meet deadlines for regional competition		
Appoint nominating committee 30 days prior to chapter elections	II, B-1	
Prepare any advertising or editorial material for the April issue of <i>The Pitch Pipe</i> . Submission deadline is February 1.	XIII	XI, Div. A
<i>February</i>		
Collect per capita fee, if not done throughout the year	V, E-17	
Meet deadlines for regional competition		
Verify that all members planning to compete in regional quartet and chorus competitions have met eligibility requirements		
Submit regional chorus and quartet competition entry forms to international headquarters		
Publicize regional competition/convention	VII	
Select delegate to Regional Annual Membership meeting, if applicable	X, J-3	
<i>Monthly</i>		
Collect per capita fees		
Submit anniversary dues	V, E-17	
Plan publicity for chapter events/activities	VII, G-6	
Submit "Certification of Membership" form with required per capita fee for new members to international headquarters	VI, F-8	

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CHAPTER GUIDE

SECTION I

CHAPTER ORGANIZATION

OPTIONS FOR CHAPTER GOVERNANCE

Each Sweet Adelines chapter may choose its own form of governance. There are two approved forms of chapter governance from which your chapter may choose. The original form of governance includes a board of directors. There is also a form of governance that includes a management team.

The board of directors form provides for a total of four to 12 directors, each elected for a two-year term. A management team consists of four to eight elected members plus the chorus director, with up to three appointed members if desired (five to 12 team members).

The following table compares specific criteria of each approved form:

	<u>Board of Directors</u>	<u>Management Team</u>
Number of Members:	Four to 12	Four to eight elected members plus the chorus director, with the option to appoint three additional members (12 maximum).
Method of Selection:	Elect	Elect/appoint
Term of Office:	Two years (number of consecutive terms stated in standing rules)	One- or two-year terms (term and number of consecutive terms stated in standing rules)
Chorus Director Involvement:	May participate in discussion, but not a voting member	Team member
Required Positions: (job descriptions can be found in the <i>Standard Form Chapter Bylaws</i>)	President Secretary Treasurer	Team Coordinator Secretary Finance Manager Chorus Director
Selecting Officers:	Board vote	Specified in standing rules
Committees Required:	Membership, Nominating, Bylaws and Rules	Nominating (others specified in standing rules)
Meeting Schedule:	At least monthly; specified in standing rules	Specified in standing rules
Decision-Making:	Motion and vote	Discussion and consensus
Responsibilities:	Manages chorus funds Plans for goal-achievement Oversees and evaluates Ensures open communication	Manages chorus funds Plans for goal-achievement Oversees and evaluates Ensures open communication

Standard Form Chapter Bylaws have been developed for both approved forms of governance. It is important for you to become familiar with these bylaws. The current version of *Standard Form Chapter Bylaws* may be downloaded from the Sweet Adelines International website, www.sweetadelineintl.org or you may request a printed copy from the Corporate Secretary at international headquarters.

What Governance Structure Is Right for Your Chorus?

The role of a board of directors and a management team is:

- To develop a long-range plan based on the goals and core values of the chorus.
- To oversee and evaluate the implementation of the strategies developed to achieve long-range plans.
- To establish an appropriate structure of task-oriented groups (teams, committees, staffs etc.) that are responsible for developing the strategies.
- To ensure open communication at all levels of the chorus.

Your selection of a governance structure depends on the leadership style of your chorus director and chorus members. Before making the choice, it is strongly suggested that your chorus hold a special meeting to discuss and agree on core values and goals. Your chorus' leadership – board or team – will make decisions based on the direction established by these goals and values.

Goal Setting

Goals are a standard of achievement. They give purpose to plans and motivate actions. Goals are tangible, measurable and valuable. Goals are set by people, not by organizations. It is common for chapter leaders to set goals and agree about the work to be done. It is also common for chapter leaders to present their goals to the chapter and ask for chapter members to commit to supporting them by agreeing to work toward achieving them. Leaders should welcome member feedback.

If your chapter leaders are goal-oriented, the chances of successful outcomes are significantly increased. Goal-oriented individuals:

- Initiate action.
- Take personal responsibility for goal-driven work.
- Excel at tasks that can be improved, often assessing them from creative perspectives.
- Enjoy solving difficult problems.
- Seek feedback about results and welcome evaluation of their performance.

Goals must be measurable. Goals should be specific and written in language that is easy to interpret. Goals typically inspire action. Your chapter's goals make an important contribution to the achievement of the purpose and mission of Sweet Adelines International. Avoid broad, unattainable goals, such as improve singing and increase membership, by agreeing upon specific, measurable goals. Examples of attainable goals are:

- Increase our chapter membership by 25 percent within the next three years.
- Purchase new risers during the next fiscal year.
- Demonstrate the Young Women in Harmony program in three schools before January.
- Fund our director to the next international directors' seminar.

Goal setting should be an on-going process. Goal setting should be part of your annual chapter calendar and you should include time to evaluate current goals, then adjust, change or add new goals as needed.

Making the Decision

The decision about the chorus' governance structure should be made by its members because it has a great impact on their chorus life. For example, one chorus may agree to balance its focus on vocal production with community performances. Another chorus may agree to concentrate on vocal production and competition success both regionally and internationally. There is room for both of these foci in the organization, just as there is a governance structure for both.

While the switch from one form of governance to another is not terribly difficult, it is recommended that once a switch is made, chorus members give the leadership a one- or two-year trial. If, for example, the management team structure does not work as effectively as the board of directors, the chorus can revert to the previous governance structure at the time of rechartering.

Board of Directors

If your chorus chooses a board of directors governance structure, the *Standard Form Chapter Bylaws* (Article V, Section 1) allow your chorus to choose a four- to 12-member board of directors. The size of the board depends on your chorus' size and the availability of leadership.

The board of directors makes decisions on administrative matters and approves musical decisions made by the musical team headed by the chorus director. The board also oversees the work of individual committees. It is important that the board seek input from the chorus membership when making decisions.

Chapter officers are chosen from the board by a vote of the board. The *Standard Form Chapter Bylaws* (Article VI) describes the duties and terms of the chapter officers.

Management Team

If your chorus chooses a management team, it will:

- Elect four to eight team members.
- Automatically appoint your chorus director (member, nonmember, female or male) as a decision-making member of the team.

This group of elected leaders plus the chorus director may appoint up to three additional team members. You could have as few as five (if you choose not to make any additional appointments) and as many as 12 members on your management team. Your standing rules must specify the actual number of elected and appointed team members.

The entire chorus gives input to the team through such means as goal-setting, questionnaires and discussion of values. The team is responsible for planning and managing the process in much the same way as a board of directors would, but the chorus director is an integral part of the decision-making.

The *Standard Form Chapter Bylaws – Management Team* (Article VI) describes the terms and duties of the management team officers, which are stated below. The method of selecting officers will be specified in the chapter standing rules.

In the management team form of governance, decisions are made through consensus. Consensus may be a new decision-making process for some members of the team, one which typically requires a longer discussion period about issues and results in outcomes that typically are positive for participants.

Consensus is:

- An agreement among team members to support each other for the common good. It can be experienced only when everyone has participated in the decision-making process and can support the final decision. Consensus means that even those who do not fully agree can at least support the group decision, if only for a trial period.
- A flexible process, which often uncovers thoughts and ideas that otherwise might not surface. Through discussion, a more creative or different solution is often reached rather than the one originally conceived. Often groups find routes to agreements that no one recognized when discussion first began.
- A process that accommodates varying points of view. Consensus also means that you have a voice and can block decisions that you cannot accept. However, you must then be prepared to present a viable alternative, not just reject the ideas of others. One value of a diverse team is hearing many points of view, which can lead to better ideas. Decisions made by consensus bring people together rather than polarizing them, as voting often does.

Consensus does not mean:

- That team members are 100 percent sold on every course of action. Not only will different points of view be expressed, but more than one “right” solution may exist. In fact, total agreement on a complex issue is rare. To successfully implement any significant change, team members should be at least 70 percent comfortable with an action. Be aware that the process of reaching consensus can delay a decision.
- Saying “yes” when you really mean “no.” It is important that team members be honest and forthright in stating opinions. Giving your “real” opinion after the meeting, to friends in the parking lot, for example, defeats the team’s purpose. Lack of commitment and follow-through are almost always the result when the “no’s” are not expressed and fully discussed during team meetings.
- Majority rule that forces the minority to go along. When this happens, subtle and overt resistance may occur. Consensus decisions require a degree of discussion and interchange that doesn’t occur in voting.

Changing Governance Structure

Changes to governance structure can only be made at the time of rechartering.

Changing the Number of Board Members

Increasing or decreasing the number of directors on your chorus’ board sometimes can be beneficial to your chapter. The procedure to be followed is described in Article IX of the *Standard Form Chapter Bylaws*:

- Schedule a meeting of the membership. Notify all chapter members at least 10 days prior to the date of the scheduled meetings that the purpose of meeting is to consider a change in the number of board members. Be sure to specify the change that is under consideration, e.g. from eight board members to six.
- At the meeting, present the questions, explain the reasons for requesting the change, and invite discussion and questions. Take a vote of the membership. A change in the number of board members requires a 2/3 affirmative vote of those members present and in good standing.
- If the membership approves the change in the number of board members, update your chapter standing rules and send a copy of the revised document to your regional team coordinator (or bylaws and rules chair) for their approval and signature. Notify the membership department at international headquarters of the change in the number of board members.

It is best to start fresh when changing the size of your board of directors by electing a complete new board. Refer to the initial election procedures outlined in Section II of this guide.

Changing from Board of Directors to Management Team

The following procedures are recommended to those choruses that opt for the management team governance structure. It is the responsibility of the decision-makers in the chorus to:

- 1) Learn as much as possible about team management.
- 2) Review the pros and cons with thoughtful consideration and analysis as to the forms of governance and make a determination that the management team would best serve the needs of the chorus.
- 3) Present the recommendation to the chorus, citing the main reasons for reaching the decision and provide essential information on the management team structure. Take time to listen to concerns, answer questions and accept suggestions.
- 4) Revise the chapter standing rules to reflect the following:
 - A majority of team members must be elected – minimum four, maximum eight.
 - Specify the term of office for management team members (one-year or two-years) and the number of consecutive terms permitted. Terms are the same for all team members, whether appointed or elected.

There are four required positions on the management team: team coordinator (president), financial manager (treasurer), secretary and chorus director.

- Elected members of the team, along with the chorus director, appoint the remaining members of the team. Specify the number of appointed team members – minimum zero, maximum three.

While revising the chapter standing rules, questions may raise such as:

- How many team members will there be? How many will be elected? Appointed? In addition to the four required positions, what specific positions will be included on the team (if any)?
- Will elected members run for a general position on the team or a specific position?
- How will the required positions of team coordinator, financial manager and secretary be selected?

Decisions about these important questions should be made for efficiency and chorus preference. Remember that your chorus' standing rules must not conflict with the *Standard Form Chapter Bylaws – Management Team*.

- 5) Present the amended standing rules to the chorus for approval according to the recommended procedure with the previous notice. Once approval is obtained, the rules must be submitted for review by the regional bylaws and rules chair.
- 6) A change from board of directors to management team may take place only at the beginning of the fiscal year. The board of directors officially dissolves* on April 30, and the management team takes office on May 1.

Allow plenty of time to prepare for the change from board of directors to management team. It may take weeks of discussion and education with the chorus for everyone to feel comfortable with the plan. Decisions may require several meetings of the board of directors and key leaders in the chorus. The standing rules may go through several iterations before approval is obtained.

**Incorporated chapters may find that in their states dissolving a board of directors is equivalent to dissolving a chapter. In those instances, it is acceptable for the board of directors to resign and be replaced by the management team. Additionally, the Articles of Incorporation should be thoroughly checked and amended if necessary. Your state's Corporation Commission is available to answer questions.*

COMMITTEE STRUCTURE

The *Standard Form Chapter Bylaws* (Article VII) state that each chapter should have a nominating committee, a membership committee and a bylaws and rules chair. The bylaws do not specify that these be the only standing committees. Other regular committees may be established to carry out the functions of the chapter. The need for additional committees will depend upon the size and goals of your chapter. Each committee is responsible for developing its own long-range plan that supports the chapter's goals. The board of directors or management team is responsible for the approval, implementation and evaluation of each committee's long-range plan. Each committee also should conduct an ongoing evaluation of its plan as a part of the long-range planning process.

Additional Committees

In addition to the usual standing committees such as education and history, the following committees should be established:

Choreography/Visual Team
Ways and Means/Fundraising
Website
Operations/Facilities

e-Group/Telephone
Regional/International Liaison
Show/Performance
Proofreading

Public Relations/Marketing
Competition
Auditions

Any additional committees that are formed should be provided for in the standing rules or in a detailed attachment to the standing rules. Job descriptions, if incorporated in the standing rules, should be included as an addendum to the standing rules and updated as functions change.

Throughout the year, all committee chairs should keep accurate records of all activities. Committee files, whether in printed or electronic format or both, are turned over to the succeeding committee chairs at the end of the fiscal year.

Following are some suggested functions of various committee appointees:

Bylaws and Rules The bylaws and rules chair acts as an adviser on parliamentary procedure. The current edition of *Robert's Rules of Order, Newly Revised* has been accepted by Sweet Adelines International as the guide in all cases not covered in chapter, regional and international bylaws, so long as the rules are not inconsistent with the bylaws, policies, standing rules or procedures that Sweet Adelines International may adopt. Parliamentary rules are followed to the extent that chapter meetings are properly conducted, but not so intensely that the group becomes rigid. The chair of this committee must be thoroughly familiar with the bylaws of the organization, and should also be a member of the committee that drafts or revises the chapter standing rules. It is strongly encouraged that an annual review is made of your chapter's standing rules. All revisions of your standing rules should be sent to the regional bylaws and rules chair for review and approval. For assistance in preparing standing rules, refer to Section III of this guide.

Membership The primary focus of this committee is membership recruitment and retention. To aid that effort, a variety of membership marketing, event promotion, and publicity templates are available on the Sweet Adelines' website, in the Marketing Center.

This committee needs the support of each member in your chorus because the future of your chapter depends on attracting new members and retaining current ones. The chair of this committee and its members should:

- Spearhead membership drives by working in conjunction with the chorus and regional marketing team and holding events such as guest nights, contests, and encouraging members to bring guests. The committee should employ all local advertising means available to publicize the chapter's activities.
- Promote honest, respectful communication within your chorus.
- Welcome visitors and introduce them to the joy of four-part harmony, barbershop style, which binds the chorus together.
- Keep in mind that the quality of vocal and visual performance will depend on the quality of members accepted. Be familiar with the membership admittance procedures (*Policy Book*, Section III, Div. C).

Nominating At least 30 days prior to the annual business meeting of the membership, the president/team coordinator appoints the members and chair to serve on this committee. It is composed of at least three persons, with ratification of the appointments by a majority vote of the board/consensus of the team. Under the direction of its chair, this committee prepares a list of nominees, which, ideally, will consist of at least twice the number of vacancies to be filled. A single slate shall be valid only if the nominating committee is unable to secure the consent of two qualified members for each position to be filled. A list of qualifications for each nominee is distributed to the membership at least 10 days prior to the date of the election meeting. Nominations from the floor are allowed, provided prior consent of the nominee has been obtained. The chair of the nominating committee should remind the persons selected for the slate that Sweet Adelines International does not permit campaigning in its elections.

Education The purpose of this committee is to educate the members on Sweet Adelines International's procedures and policies. The chair of this committee coordinates all educational activities of the chapter and works with all officers, committee chairs and the chorus director to this end.

In planning educational activities, the chair considers what areas of education are needed and lists these areas according to their order of importance. They plan for educational activities well in advance, and reviews all plans and programs with the chapter president/team coordinator and the chorus director. Education can be provided in the form of demonstrations, lectures, panel discussions, website articles, skits, quizzes, games, or in any number of other creative ways. The education committee chair should be familiar with all areas of this guide, the *Policy Book*, and both the chapter and regional standing rules.

History The history committee assembles documents and preserves all records of the chapter's activities. The chair of this committee acts as the chapter's "historian" and strives to record as many events as possible for posterity. Examples of important events to document are: the founding of the chapter, the chartering of the chapter, the first official meeting, the first election and installation, the first chorus/quartet performance, minutes of all meetings, bylaws, bulletins, and records of special activities, occasions, invitations, etc. A link to a history page on your chapter's website, a chapter scrapbook, or possibly a public display, should be prepared using photographs, brochures, newspaper articles, etc., and added to as events occur. All historical records are passed on to the succeeding historian so that subsequent events can be properly documented and added to the historical files.

THE CHORUS DIRECTOR

The chorus director is an integral part of your chapter's musical structure, and is essential to the musical success of the chorus. It is wise to allow sufficient time to find the best possible director for your chorus, even if several months are required. In the interim, a temporary director may be appointed to assume the musical responsibilities until a permanent director is found.

Director Search

Guidelines for Conducting a Director Search are posted on the Sweet Adelines website at: <https://sweetadelines.com/sites/default/files/leadership/directorguidelines.pdf>. A suggested chronological procedure to use for conducting a chorus director search includes the following:

- 1) The needs and goals of the chorus should be determined, including the chorus members' expectations of the director's functions. These items can be discussed during a chapter goal-setting session and finalized during a chapter board of directors/management team meeting.
 - 2) The president/team coordinator should appoint a committee chair to oversee and coordinate the search for a director. The chapter president or a member of the management team should be included as an ex-officio member of the committee. All suggestions and recommendations regarding potential candidates should be referred to the committee.
 - 3) Potential candidates should be contacted and asked to submit résumés to the search committee chair. When all résumés have been received, the entire committee should review them to determine which candidates should be interviewed. (A sample résumé is included at the end of this section.)
 - 4) Personal interviews should be conducted by the committee. The résumé, in conjunction with the "Prospective Director Questionnaire" (a sample of which also is at the end of this section) should be used as a basis for determining the actual experience and potential of each candidate. After each interview, the committee should determine if the candidate is qualified to audition for the position.
 - 5) Auditions should be scheduled for those candidates who have been interviewed and deemed acceptable. The audition should be planned so that chapter members have the opportunity to observe and evaluate the applicant's:
 - Conducting techniques and ability.
 - Ability to teach new material.
 - Method of reviewing repertoire.
 - General knowledge of vocal production techniques.
 - Communication style and potential as a leader of the chorus.
 - People Skills.
 - Organizational skills in planning and delivering a rehearsal night.
- The search committee should provide an evaluation form to be filled out by chorus members following each applicant's audition.
- 6) The results of the auditions and chorus member evaluations should be reviewed, and the committee should make a recommendation to the chapter board of directors/management team. A second audition may be required of finalists, if the results are inconclusive.
 - 7) The chapter board of directors/management team should make a recommendation to the chorus.
 - 8) The chorus should vote on the recommendation. If the vote is favorable, a written agreement is provided to the new director. If the vote is not favorable, the chapter board of directors/management team decide whether to recommend a second choice candidate to the chorus or begin the search once again.
 - 9) The board of directors, management team or appointees should negotiate a director's agreement, which is amenable to all parties and contains specific language regarding the responsibilities of the chorus and the director. A clear verbal understanding may be reached prior to finalizing the responsibilities in writing. The chorus representatives are responsible for executing the agreement and gathering appropriate signatures on behalf of all parties.

- 10) Notify your regional leaders of the new director's name, address and other contact information. Complete the online, automated Chapter Officer update form available in the Members Only section of the website to inform International of your new director.

Chapter/Chorus Director Relationships

The chorus director is important to the successful operation of the chapter. (S)he is charged with carrying out one of the purposes for which Sweet Adelines International was formed, "Providing education and training for its members in singing four-part harmony, barbershop style..." Therefore, whether your chorus director is a member of your chapter, a member of another Sweet Adelines International chapter, or a nonmember, their musical responsibilities do not change.

In order for chapter members and the chorus director to understand the division of authority and delegation of responsibilities, it is important that all responsibilities are defined in writing. An agreement should be drawn up and executed between the chapter and director. The chorus director should be furnished with a copy of the actual agreement for future reference.

The following responsibilities of the director to the chapter should be defined in writing:

- Attendance at rehearsals
Amount of notice required in case of absence
- Performances
Availability of director
Procedure to use for checking with director before confirming dates
- Competition
Define chorus' expectations of director's participation
- Educational workshops/seminars
Define expectations of director's participation in Sweet Adelines International and regional educational events
- Selection of music
Responsibility/authority of director in selection of music
- Chapter shows
Responsibility of director in preparation of shows
Specific areas in which director will have input or final decision
- Choreography
Responsibility of director in planning and approving
Role of director in selecting choreography committee chair and members (if applicable)
- Music staff/music committee
Role of director in establishing or maintaining a chorus music staff or committee
Responsibility of director in selection of assistant directors, associate directors, section leaders and other vocal leaders
Procedure to be used to select other musical leaders
- Participation in the Directors Certification Program (DCP)
Specific expectations or timeline for advancement

The following responsibilities of the chapter to the director should be defined in writing:

- General expenses
 - Method for compensation
 - Method for submitting expense statements
- Salary/stipend
 - Specification of salary or stipend to be paid to the director on a monthly basis
 - Specification of salary or stipend to be paid to the director for additional services (such as directing additional shows/performances)
 - Specifics of non-monetary compensation offered to the director, e.g. show tickets, CDs produced, etc.
- Competition
 - Provision to cover director's expenses when attending competitions (specifics of what is included)
- Educational workshops/seminars
 - Provision to cover director's expenses when attending educational events
- Attendance (if applicable)
 - Include any precompetition, show or performance attendance standards (which, if enforced and applicable, should be outlined in the chapter standing rules) to help ensure a certain number of participants
- Procedure for termination
 - Length of notice required (for both director and chorus)
 - Method of handling

Financial Responsibilities (United States Chapters)

Independent Contractor Compensation paid to a director who is an independent contractor is considered "fees for services" rather than wages. Therefore, withholding for income taxes and FICA payments do not have to be made. However, if the director receives \$600 or more in fees from the chapter during a calendar year, Form 1099-MISC must be mailed to the recipient by January 31 of the next calendar year. The chapter must file Form 1099-MISC with the Internal Revenue Service by February 28 of that year.

A director who is an independent contractor should be aware that all fees are considered taxable income and should be reported on their individual income tax return.

Each state in the United States has additional tax requirements beyond the Federal requirements listed above. It is the responsibility of the chorus leadership to conform to state and local employment and tax laws as well as Federal law.

Employee/Employer Compensation paid to a director as an employee is subject to FICA (Social Security and Medicare) taxes and income tax withholding. An equal amount of FICA taxes must be paid by the employer (chapter) and the employee (director).

The chapter also is required to report all compensation paid to the director as wages on a quarterly basis using Internal Revenue Form 941. The chapter's employee identification number (EIN) or tax identification number (the same number used to file Form 990) should be included on the form, and a chapter check enclosed for the amount of taxes withheld from wages and FICA contributions. Checks should be made payable to the Internal Revenue Service. Deadline dates for filing Forms 941 are April 30, July 31, October 31, and January 31. The chapter must furnish the director with a W-2 Form at the end of the year.

Expense Reimbursement

Any money paid to the director as reimbursement for expenses incurred (whether for special events or in the normal course of their duties) is not considered taxable income. The chapter should require receipts or an expense voucher signed by the director prior to reimbursement.

Review of Tax Requirements

It is suggested that each chapter enlist an accountant (or attorney) to review its affairs with respect to tax requirements. Chapters should maintain their agreements with their directors. When properly executed, an agreement can help establish the chorus director/chapter relationship for tax purposes, which is especially important for the independent contractor relationship.

For more information on tax filing requirements, see Section V of this guide.

Balance of Responsibility and Authority

On rare occasions, a director has been allowed to take on so much authority that eventually (s)he appears to be “running” the chapter. Of course, this situation is not ideal. The operation of the chapter should be handled by its board/management team, officers, and appointed chairs. These people are the administrative leaders of a chapter; the director is the musical leader of the chapter. In order to achieve a harmonious relationship, chapter leaders must understand and respect the responsibilities and authorities of one another. In a sense, the leaders are working with each other and for each other. The director works under the supervision of the governing body, and in the case of a management team, is a part of that team. However, the director has a right to specify the conditions under which (s)he will serve, and to terminate those services if the conditions are not met. The chapter members work under the supervision of the director in trying to achieve their musical goals. If a member feels the director is not performing in a satisfactory manner, they may bring their concerns before the governing body.

No director should be allowed to “run” a chapter. However, their approval should be solicited when creating choreography, selecting costumes, planning chapter shows, selecting music, programming meetings, etc. The director has the final responsibility or approval for any subject that involves the musical product of the chapter.

Before accusing the director of overstepping their bounds, take a long, objective look at the situation. Perhaps the chapter has, by default, forced the director to perform in areas which should rightfully be the members’ responsibility. Neglect of responsibilities can happen so gradually that the director is in the habit of exercising more control than the chapter wants, especially if the administration is seemingly irresponsible in its duties.

As a creative musician, the director may have ideas that (s)he would like to express. In addition, the director must remember it can be detrimental to the morale of the group for one person’s ideas to continually take precedence, even though the ideas may be good. Cooperation, not competition, between director and administration is necessary to ensure a successful and harmonious chapter.

Chapter/Director Agreements

As stated earlier, the chorus director is the musical leader of the chapter and has certain obligations to the chorus members. The chapter also has a definite responsibility to the chorus director, one being to work toward a successful relationship between the two parties. A written agreement between the chapter and chorus director is essential so that each party is fully aware of all responsibilities and expectations. The agreement should be evaluated and, if necessary, renegotiated on an annual basis. It is recommended that the annual agreement period run from July 1 to June 30, or from August 1 to July 31, to allow for a more thorough evaluation after regional competition. It is also recommended that the agreement be read to the entire chorus so that all parties understand their responsibilities.

The following sample résumé, questionnaire and agreements are suggested format only. Your chapter should tailor these documents to fit its own needs.

(SAMPLE)
PROSPECTIVE DIRECTOR RÉSUMÉ

Sweet Adelines International
Your Chorus' Name Here

Name _____ Phone _____ (cell)

Address _____ Phone _____ (other)

City/State/Zip _____ E-mail _____

A. Background/Training in General Performance

1. Indicate areas of participation during high school:

<input type="checkbox"/> Choral groups	<input type="checkbox"/> Instrumental groups
<input type="checkbox"/> Show choir	<input type="checkbox"/> Stage band
<input type="checkbox"/> Dance	<input type="checkbox"/> Other _____

2. Indicate areas of participation during college:

<input type="checkbox"/> Chorus groups	<input type="checkbox"/> Instrumental groups
<input type="checkbox"/> Show choir	<input type="checkbox"/> Stage band
<input type="checkbox"/> Dance	<input type="checkbox"/> Other _____

3. Formal music education:

a. Did you study music in college? ☐ Yes ☐ No

b. Total music hours: Undergraduate ____ Graduate ____

c. Degree earned: _____

d. Indicate areas of concentration:

<input type="checkbox"/> Instrumental	<input type="checkbox"/> Composition
<input type="checkbox"/> Music theory	<input type="checkbox"/> Directing technique
<input type="checkbox"/> Vocal technique	<input type="checkbox"/> Other _____

4. Indicate types of directing experience:

a. School vocal groups:

☐ Elementary (grades 1-5)
☐ Junior high (grades 6-8)
☐ High school (grades 9-12)

b. School instrumental groups

☐ Elementary (grades 1-5)
☐ Junior high (grades 6-8)
☐ High school (grades 9-12)

c. College/University

☐ Choral groups ☐ Instrumental groups

d. Church choir(s)

<input type="checkbox"/> Children	<input type="checkbox"/> Junior high
<input type="checkbox"/> Senior high	<input type="checkbox"/> Adult
<input type="checkbox"/> Other _____	

B. Background/Training in Barbershop Harmony

1. Indicate present or past membership participation in:

Sweet Adelines International _____

Other _____

2. Indicate areas of participation in the art form:

☐ Chorus member

☐ Director

☐ Section leader

☐ Quartet

☐ Choreographer

☐ Assistant Director

☐ Other _____

3. Indicate other types of experience in the art form:

☐ Coaching

☐ Teaching

☐ Arranging

☐ Other _____

4. Indicate training received in the art form:

a. Sweet Adelines International (list attendance at regional and international education events): _____

b. Director Certification Program (list highest level attained): _____

c. Other: _____

C. Availability

1. Occupation _____ Employer _____

2. Do you work evenings? ☐ Yes ☐ No Weekends? ☐ Yes ☐ No

3. Would your work schedule permit you to attend weekly chorus rehearsals?

☐ Yes ☐ No

If not, explain _____

4. Would you be available to direct the chorus for:

Daytime performances? ☐ Yes ☐ No

Weekend performances? ☐ Yes ☐ No

If not, explain _____

5. Indicate when you would be available to attend educational events:

☐ Weekdays ☐ Weekends ☐ Evenings ☐ Summer

Please provide an explanation for the times when you are not available:

D. Agreement and Salary Requirements

1. Indicate salary/fee expected: _____
 - a. Indicate instances when you would expect an additional fee for directing:
☐ Performances ☐ Extra Rehearsals ☐ Other _____
2. Indicate any expenses you would expect to be reimbursed for:

<input type="checkbox"/> Travel to weekly rehearsals	<input type="checkbox"/> Travel to extra rehearsals
<input type="checkbox"/> Travel to performances	<input type="checkbox"/> Travel to education events
<input type="checkbox"/> Costumes	<input type="checkbox"/> Travel to regional competition
<input type="checkbox"/> Registration fees	<input type="checkbox"/> Per capita fee, chapter dues, etc.
<input type="checkbox"/> Other _____	
3. Other financial requirements, if any: _____
4. Other compensation required: _____

(S A M P L E)

PROSPECTIVE DIRECTOR QUESTIONNAIRE

Sweet Adelines International

Name of your chorus

Prospective Director _____ Date _____

1. Describe your thoughts concerning the chorus director's relationship with each of the following:

a. Chapter President or Team Coordinator:

b. Chapter Board of Directors or Management Team:

c. Assistant director(s):

d. Section leaders:

e. Choreographer(s):

f. Music committee:

g. Costume committee:

h. Other

2. As chorus director, what would you expect from the members of the chorus regarding:

a. Attendance at regular rehearsals:

b. Participation in performances:

c. Extra rehearsals:

d. Competition:

3. How do you feel about the use of a chorus coach?
4. Discuss your feelings concerning quality vs. quantity of singers.
5. What would be your criteria for the selection of music for the chorus to perform?
6. From what sources would you expect to obtain music for the chorus to perform?
7. Describe your “ideal” rehearsal schedule for one evening.
8. Describe your approach to teaching a new song.
9. Rate your understanding of vocal technique and proper tone production.
 - a. Are you familiar with Sweet Adelines International’s approach to vocal technique and proper tone production?
 - b. Are you able/willing to attend Sweet Adelines International’s education events in order to become better acquainted with our methods and philosophy?
10. What is your philosophy regarding competition?
11. Describe your degree of familiarity with Sweet Adelines International’s judging structure and rules as defined by the Judging Category Description Book.
12. What is your philosophy regarding chorus performances?

13. What, in your opinion, are the major functions of a Sweet Adelines International chorus director?

14. What are your musical expectations of the _____ Chorus?

15. Additional comments:

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(S A M P L E)

DIRECTOR AGREEMENT

I, _____, agree to serve as the musical director for the
_____ Chorus. I understand my duties to include:

- Teaching and training members to sing four-part harmony, barbershop style.
- Assessing the musical qualifications of prospective members.
- Establishing and training a musical staff.
- Directing the chorus at all performances, chapter shows and competition.
- Providing a suitable replacement in the event I cannot attend a chorus rehearsal(s) or any of the above-mentioned events.

1. In return for my services, I expect to receive:

\$ _____ per _____ (week, month, year)

or

\$ _____ for each rehearsal I conduct

or

\$ _____ for each rehearsal and \$ _____ for each performance.

2. Transportation, room and board (actual cost) for all regional and international functions in which the chorus participates. (Individual choruses may wish to include costs to education events such as music schools, directors' retreats, summer music camps, etc.)

3. All costumes and accessories, including dressmaker costs, if necessary.

4. International per capita fees and regional assessments, paid by the chapter.

5. Waiver of all chapter dues and assessments.

In the event I must terminate my services, I agree to give the chorus at least _____ days' notice in writing. I also understand that my services may be terminated for just cause, as set forth in the chapter standing rules, after 30 days' written notice from the chapter president/team coordinator.

Signed:

Chorus Director

Date

Chapter President or Team Coordinator

Date

(SAMPLE)

CHORUS AGREEMENT WITH DIRECTOR

We, the _____ Chapter, Sweet Adelines International, agree to retain the services of _____ as musical director from _____, 20 ____ to _____, 20 ____.

We understand our responsibilities to include:

- Provision of adequate rehearsal facilities.
- Regular and prompt attendance at rehearsals and performances.
- Learning lyrics, music and choreography to all songs promptly and accurately.
- Performing in all competitions in which the chorus participates.

Our financial responsibilities to director include:

1. The chapter will pay the director's international dues and regional assessments. The director will be exempt from chapter assessments and dues.
2. The chapter will pay the director a monthly allowance for transportation expense in the amount of \$ _____.
3. The director's registration fees, room, board (this could be a per diem payment or the actual cost of meals), and transportation costs to regional and international conventions in which the chapter participates. These expenses will be paid for a maximum of _____ days at the regional convention and _____ days at the international convention unless otherwise reimbursed at the regional or international level. Other expenses, or additional days' expenses, may be paid at the discretion of the chapter board of directors.
4. Registration fees, room, board (this may be a per diem payment or the actual cost of meals), and transportation to regional and international music schools, education classes and retreats.
5. The director will be given an honorarium of \$_____ per _____.

In the event the director's services must be terminated, the chorus agrees to give the director at least 30 days' notice in writing. The director's services may be terminated for just cause, as set forth in the chapter standing rules, after 30 days' written notice from the chapter president/team coordinator.

Signed:

Chorus Director

Date

Chapter President or Team Coordinator

Date

(SAMPLE)

DIRECTOR/CHORUS AGREEMENT

The following is agreed to between the _____ Chapter of Sweet Adelines International and _____, chorus director, effective _____, 20 ____, to _____, 20 ____.

The director agrees to:

1. Attend all regularly scheduled chapter rehearsals, except in cases of emergency or necessary absence. As much notice as possible will be given to the president or team coordinator if absence is necessary.
2. Teach and train the chorus in four-part harmony singing (barbershop style) and provide a minimum of _____ hours of rehearsal time at each regularly scheduled meeting.
3. Appoint and assume the responsibility for training a musical staff, consisting of:

This staff will serve as consultants and specialists in designated musical areas and will assist the director as required. (You may define the musical staff in this agreement, or refer to an addendum in which the staff is defined.)

4. Be responsible for determining the musical qualifications of prospective members. (The procedure should be documented in standing rules.)
5. Be responsible for determining the music eligibility of members for singing engagements, shows and competition. (The procedure should be described in your chapter's standing rules.)
6. Assume or delegate responsibility for the following aspects of chorus performance: standing positions, music, order or program, emcee.
7. Accept or reject chorus performance engagements in consultation with the chapter president/team coordinator or other designated person.
8. Make arrangements for an assistant to conduct chorus rehearsals and singing engagements when the director cannot attend.
9. Direct the chorus in each competition for which the chorus is eligible, provided all criteria for performing in competition has been met by the chorus members.
10. Cooperate with the show chair in planning chapter shows, and direct the show.
11. Consult with (or serve as a member of) the choreography committee in the planning of choreography, to ensure that it enhances the musical product.

12. Attend _____ music school(s) and _____ regional meetings per year. (Include all regional and international musical events as desired.)
13. Promote chapter quartets and assist them when possible.

Signed:

Chorus Director

Date

Chapter President or Team Coordinator

Date

(Rev. August 2010)

Note: *The Chapter Guide* is **SEARCHABLE** using the “FIND” feature:

Hold down the Ctrl (CONTROL) button while pressing the “F” (FIND) key and type any word or phrase (e.g. X-A-3, president, associate membership, etc.) in the FIND box. The FIND feature will take you to every instance of the word or phrase you typed in the FIND box.

Chapter Guide

SECTION II:

NOMINATION AND

ELECTION PROCEDURES

Nomination and election procedures vary depending upon the governance structure your chorus has selected. Before proceeding, you should refer to the *Standard Form Chapter Bylaws*, available on the Sweet Adelines website, and the Management Team portion of Section I of this *Chapter Guide*.

Election Timetable

- Set a date for the annual business/election meeting. The meeting must be held after January 1, but before April 30. Make sure the date you choose will not conflict with competition preparations.
- At least 30 days prior to the annual business/election meeting, the president/team coordinator appoints the nominating committee. These appointments must be ratified by the board/team. Please note that 30 days is the minimum time required in the chapter bylaws. You may appoint a nominating committee earlier, depending on your chapter's activity schedule. It is important that the committee has enough time to do a thoughtful, thorough job.
- At least 14 days prior to the annual business meeting, advance notice of the upcoming election should be announced to every member, including the date of the election and a reminder about absentee voting.
- At least 10 days before the annual business/election meeting, the slate and qualifications for each nominee should be distributed to the membership. Again, 10 days is only the minimum time required in the chapter bylaws. You may give members more time to study the slate and nominee qualifications.
- A tellers committee is appointed by the president/team coordinator as soon as the slate is ready. (The tellers committee is discussed later in this section.)
- If the president/team coordinator is a nominee, they appoint another member in good standing to chair the election meeting.

Appointing a Nominating Committee

Strong chapter administration begins with the appointment of a nominating committee. The president/team coordinator appoints a committee made up of members who are familiar with all chapter members and their capabilities, and with the duties of the board of directors/management team.

The committee must be objective, placing the good of the chapter before personal preferences. It must have the courage to exercise good judgment because strong leadership contributes to strong chapters.

The nominating committee is composed of three or more members. An odd, rather than even, number of members is recommended to avoid the possibility of a tie vote in the selection of a prospective nominee. A majority vote of the committee becomes the decision of the committee.

Appointments to the nominating committee, including the chair, made by the chapter president must be ratified by a majority vote of the board of directors. Appointments made by the team coordinator must be ratified by the team or by a majority vote of the chapter as determined in the chapter's standing rules. Chapter presidents may not serve on the nominating committee, per the *Standard Form Chapter Bylaws*, Article VI, Section 3. A.

Duties of the Nominating Committee

Members of the chapter are encouraged to share their ideas on prospective nominees with the nominating committee. While a chapter president/team coordinator may make recommendations to the committee regarding candidates' qualifications, they may not attend the nominating committee meeting.

The committee may wish to present an education class to the chapter membership that outlines the duties of the various offices and chairs, along with an explanation of how chapter government works. In many cases, members—especially newer ones—do not really understand what is expected of board/team members or of board/team officers.

A membership list should be on hand so that the nominating committee can look up who is eligible for nomination. A good tool to use when soliciting nominees is the "Potential Nominee Questionnaire" (sample at the end of this section). This questionnaire provides standard information on each potential nominee as well as their qualifications.

Check that each prospective nominee is in good standing (dues paid and attendance requirements fulfilled as stated in the chapter's standing rules) before they are invited to submit a "Potential Nominee Questionnaire." Be sure the potential nominee understands that submitting their name for consideration does not automatically ensure selection to the slate. Check your chapter's standing rules for special eligibility requirements for nominees such as length of membership or previous experience. Prospective nominees should never be disqualified because they are not in good standing or have not met requirements in the standing rules, as these requirements should be checked prior to inviting the prospective nominee to run for the slate.

Some people question if it is ethical for nominating committee members' names to appear on the slate. Since no rule prohibits this, it would be a waste of talent to insist that a qualified member choose between the nominating committee and the slate. If a member of the nominating committee wishes to have their name considered for the slate, it is best to ask them to leave the room while their qualifications are discussed by the rest of the committee. The committee might prefer to select its slate by secret ballot in such cases. Let common sense and diplomacy be the guide.

At this point, consider the qualifications of each nominee. Strive for a balance between experienced and newer members, while considering the strengths and weaknesses of the continuing board members. Remind the committee that it is endorsing, not electing, the slate of candidates it deems qualified. It requires courage to select a candidate who is good for the chapter as a whole, not just someone who is well liked. The final choice is up to the membership.

The slate should consist of at least twice the number of vacancies to be filled. Only when the nominating committee is unable to secure the consent of two qualified nominees for each vacant position is a single slate valid. The committee also must be satisfied that the nominee will, if elected, accept the position and perform the required duties to the best of their ability.

Once the slate is chosen, print the nominees' names and qualifications (use information from the "Potential Nominee Questionnaire") in alphabetical order and distribute this information to the membership at least 10 days prior to the election meeting. The qualifications should follow a standard format so all nominees receive equal treatment. Nominees and members should be reminded that international policy prohibits campaigning.

A report of the nominating committee is prepared for the membership and signed by all committee members if they are in agreement with the report. The chair signs the report first without listing their title. The chair then presents the report to the membership at the election meeting. Now, the duties of the nominating committee are complete. The nominating committee chair does not lead the election meeting. That is the duty of the retiring president/team coordinator. If the chapter president/team coordinator is a nominee, they appoint a chair for the meeting.

The Nominee

Although Sweet Adelines International is an organization of members who are interested primarily in music, many members also are highly qualified administrators, organizers and leaders. Fortunately, these talented members are willing to give their time and effort when possible, but it is up to the administration, the organization and the membership to seek out, nurture and develop them. The following points can aid you in identifying prospective nominees in your chapter:

A good leader:

- Is confident in their ability to do a job.
- Has past experience or past performance that indicates they are a leader.
- Has a good attendance record at meetings and rehearsals.
- Has special knowledge of leadership.
- Is liked well enough to enable them to work with others but is not necessarily the "most popular" member.
- Is dependable, organized, adaptable to change, level-headed.
- Places the good of the chapter above all other considerations.

An alert nominating committee seeks out obvious leaders as well as potential ones who need only to be developed.

Tellers Committee

The president/team coordinator appoints a tellers committee as soon as the slate is presented to the membership. The tellers are chosen for accuracy, dependability, discretion and their knowledge of election procedures. Though the tellers have no personal involvement in the election, they are eligible to vote.

As soon as the slate is announced, printed ballots listing the names of all nominees in alphabetical order should be prepared, allowing room for the addition of floor nominees. The ballot should state the number of nominees to be selected.

All blank ballots should be ignored. Ballots that are not marked as instructed by the chair of the election meeting should be discarded as invalid.

After the balloting is complete, instruct members to fold their ballots in the manner announced in advance, or as stated on the ballot itself. The chair directs the tellers to collect the ballots. In collecting the ballots, it is the tellers' responsibility to see that no member votes more than once.

If unidentifiable ballots were cast by persons not entitled to vote, and if such ballots might affect the results of the election, the entire ballot vote is null and void and a new ballot must be taken.

A plurality vote elects. A plurality vote is the largest number of votes cast for any nominee.

If any absentee ballots are received by the president/team coordinator before the election meeting, the president/team coordinator should give the absentee ballots to the election meeting chair. It is the duty of the election meeting chair to give the ballots to the tellers committee before the tellers retire to another room to tally the ballots.

Four is the ideal number of volunteers for a tellers committee. Two tellers read the ballots, while two tellers mark the tally sheets that have been prepared in advance. The first teller opens the ballot, looks at the name, and passes it to the second teller. The second teller opens the ballot, reads the name out loud, then lays the ballot aside so it does not become mixed with uncounted ballots or lost. The other two tellers record the votes on the tally sheet by placing a vertical line to the right of the name of the nominee as it is read. The marks are made in groups of five, the fifth line being drawn diagonally across the four vertical ones. Whenever the fifth line is drawn, the recording teller calls "tally." If the other recorder is not also marking a fifth line for that vote, a recount becomes necessary.

The tellers report must be agreed upon by all committee members. The completed report is signed by all tellers and presented to the chair of the election meeting without announcing the results. The chair of the election meeting reads the report, declaring in turn each board member elected. If the voting results in a tie, the chair of the election meeting announces "no election" and calls for another ballot.

The actual number of votes cast for each nominee should not be listed on the tellers' report that is handed to the chair of the election meeting. The tellers committee is honor bound not to divulge this information. As soon as the election is declared final and official, the ballots and tally sheets are sealed in an envelope and destroyed. At this point, the tellers committee is dissolved.

The tellers report is recorded in the official minutes of the chapter.

Initial Election

Board of Directors

To facilitate the balloting process for the initial election of any board/management team, either of the following options can be followed.

Option 1 The nominating committee prepares a slate containing twice the number of nominees as there are vacancies to be filled, e.g. eight nominees for four vacancies. Of those who are elected, the half that received the highest number of votes will serve two-year terms, and the other half will serve one-year terms.

Option 2 The nominating committee prepares separate slates for the positions to be elected to two-year terms and one-year terms. The membership votes on each slate. The nominees on each slate receiving the highest number of votes are elected for the specified term.

Management Team

The *Standard Form Chapter Bylaws* describe the composition of the management team. See Article V, Section 1 for this information. It is important that your chapter's standing rules define the length of the term of office for members of the management team, except the musical director whose relationship to the chapter is described in Section I of the guide.

Chapter Election Meeting

The retiring president/team coordinator chairs the election meeting; they do not turn the meeting over to the chair of the nominating committee. If the president/team coordinator has been nominated for election, they must appoint someone who is not a nominee to serve as chair of the election meeting.

The following order of business is in accordance with proper parliamentary procedure and with the *Standard Form Chapter Bylaws*. It is designed to guide the chair in conducting the chapter's election meeting. Even if a single slate is presented, voting must be by ballot, per the chapter bylaws.

- Call to order.
- Establish a quorum. Count the number of members present who are in good standing and eligible to vote.
- Advise the tellers committee chair of the number of eligible voters present, plus the number of absentee ballots received before the meeting. (If the president/team coordinator is not conducting the election meeting, they should present the absentee ballots to the chair before the meeting begins.)
- Introduce the tellers committee.

- The chair of the nominating committee announces the names and qualifications of each nominee. (Since the membership has had sufficient time to study the qualifications, the chair of the nominating committee or other chapter member may make a motion that the reading of the nominees' qualifications be waived. A majority vote of the membership will pass the motion.)
- The chair of the election meeting invites nominations from the floor. No second is required for a nomination. (Floor nominees must have given prior consent and have their "Potential Nominee Questionnaire" prepared for presentation to the membership at this time. Oral statements of qualifications are not permitted.)
- No motion is required to close nominations. The chair of the election meeting asks for any further nominations, pauses, and if there is no response, declares the nominations closed.
- The tellers committee distributes the prepared ballots, which list the original nominees in alphabetical order. The election meeting chair instructs the membership to write the names of any floor nominees on the bottom of the ballot.
- The membership is instructed at this time to vote for a specific number of nominees depending upon the number of positions to be filled—no more, no less. Voting for more or fewer than the announced number of nominees will disqualify the ballot. Instructions for folding the ballot in a uniform manner (in quarters, in half) also are given at this time. Correctly folded ballots assist the tellers and ensure a secret ballot for the membership. The chair of the election meeting and the tellers vote.
- The tellers collect the ballots. It is the responsibility of the tellers to see that no member votes more than once. The tellers receive the absentee ballots at this time.
- The tellers go to another room to tally the ballots. A tally sheet has been prepared ahead of time. A plurality vote elects.
- The chair of the tellers committee presents the tellers report to the chair of the election meeting without announcing the results.
- The chair of the election meeting reads the results of the election without announcing the number of votes received by any individual.
- If there is a tie for the final position to be filled, the chapter should revote for the nominees who are tied. Do not announce the results of the election until the tie is resolved.
- The chair of the election meeting presents the new board of directors/management team to the membership.
- Meeting is adjourned.

Though absentee voting is allowed, proxy voting (assigning voting rights to another) is prohibited.

Election of Officers

The *Standard Form Chapter Bylaws* and *Standard Form Chapter Bylaws – Management Team* describe the requirements for electing the officers. Refer to your chapter's own bylaws and standing rules regarding your chapter's process for election of officers.

Board of Directors

The elective officers of the chapter are: president, vice-president, secretary, and treasurer. Electing officers is the responsibility of the board members who take office on May 1. Board members whose terms expire on April 30 do not have the authority to vote. Because fewer people are involved, this election meeting is less formal than the election for members of the board of directors. Nevertheless, correct parliamentary procedure must be followed.

Management Team

The established positions (officers) of the management team are team coordinator, financial manager, secretary, and musical director. The position of musical director, even if a non-member, is exempt from the election process. See Section I of this guide for information about new director search, the relationship between chapter and musical director and how to prepare a letter of agreement between the director and the chapter.

Preparation for the Meeting to Elect Officers

Because there are options for electing officers of a chapter management team (described in the *Standard Form Chapter Bylaws*, Article VI, Section 1) the following information may or may not apply to your chapter. Refer to your chapter's own standing rules. If, however, your team's officers are chosen by the team the following should apply.

Distribute an "interest survey" to members of the new board of directors/management team. Ask them to indicate the office(s) for which they will accept nomination. Give a deadline date for the return of the "interest survey" to the presiding officer. After the surveys are returned, a list of the offices with the names of the board members willing to accept nomination is distributed to all members of the new board/team. Ideally, more than one name will be placed in nomination for each office. Nominations may be made from the floor provided prior consent is given by the nominee.

The presiding officer of the election meeting is the retiring president/team coordinator. The exception to this is if they are a member of the new board. The retiring president/team coordinator should then appoint another member who is not an incoming director to preside; a past president/team coordinator could serve in this capacity.

Before the election, the presiding officer appoints a secretary to record the minutes of the meeting as well as a tellers committee composed of two or three individuals. The tellers are members who have indicated they will not seek office, or are members of the retiring board/team. Their duties are the same as those listed under the tellers committee heading of this section. The tellers should read this outline and be thoroughly familiar with their duties before the meeting.

The Election Meeting

For the election meeting, the secretary records:

- Date, time and location of the meeting
- Attendance, including names of the presiding officer, board members present, the secretary, members of the tellers committee, any nonvoting members in the room
- Nominees for each office
- Newly elected officers

The secretary should not record any discussion that takes place during the meeting. Once the meeting is over, it is their responsibility to type the minutes. The minutes will be read at the next board/team meeting in order to be approved and/or corrected. The minutes of the election meeting become part of the official minutes of the chapter.

Upon calling the election meeting to order, the presiding officer establishes a quorum, informs the tellers committee that a quorum is present, and announces the number of votes needed to elect. Once they have introduced the appointed secretary and the tellers committee, the presiding officer reads the description of the duties of the president/team coordinator. At this point, they call out, "Nominations are now open for the office of president." After recognizing each nominee, the presiding officer then asks, "Are there further nominations for the office of president?" If there are no further nominations, the presiding officer announces that the nominations for president/team coordinator are closed.

With the nominations for president/team coordinator closed, the nominees and nonvoting members are asked to leave the room. Board/team members are then able to freely discuss the qualifications of the nominees and share opinions. When the board/team members are ready to vote, the presiding officer asks the nominees to return to the room.

Upon return of the nominees, the tellers distribute ballots to all members of the new board/team. The secretary reads the names of each nominee for the office of president/team coordinator. When each nominee has been announced, the presiding officer instructs the board members to write the name of one nominee for the office of president/team coordinator on a ballot.

The tellers collect the ballots and go to another room to count the votes. The tellers present the tellers report to the presiding officer without announcing the vote. If one of the nominees received a majority vote, the presiding officer states the name of the newly elected president/team coordinator. If there is not a majority vote, or if the vote is tied, the presiding officer should announce: "No election." In the latter case, repeat the previous steps, beginning with a new vote. Continue the process until one of the nominees receives a majority vote. Follow this procedure for each of the other offices.

In order to become elected, a nominee must receive a majority of the votes cast. Robert's Rules of Order, Newly Revised defines majority vote as "more than half."

Once the voting is finished and the officers are elected, the ballots are destroyed. The tellers committee should not divulge the results of the vote. With the election completed, the meeting should be adjourned and no further business should be brought before the board/team until a new meeting has been called.

Filling a Vacancy

In the event that a present board member is unable to complete their elected term on the board, the president shall appoint a member, in accordance with the *Standard Form Chapter Bylaws*, Article 5, Section 5.

If you have a management team form of governance, your chapter's standing rules should describe the procedure by which a vacancy should be filled.

Election Results

Immediately following the annual election of the chapter board/team and officers the secretary should log in to the Members Only section of the Sweet Adelines website and update the Chapter Officers.

Installation of Officers

Examples of installation ceremonies are available on the Sweet Adelines International website.

(S A M P L E)

POTENTIAL NOMINEE
QUESTIONNAIRE

Name _____

Date joined Sweet Adelines International _____

Number of years as member of the _____ Chapter

Occupation: Present _____

Former _____

Skills (leadership ability, bookkeeping/accounting, parliamentary law, computer, etc.)

Membership in other Sweet Adelines International chapters: _____

Sweet Adelines International positions held (administrative and/or musical):

Chapter _____

Regional _____

International _____

Experience with other organizations (positions held) _____

In the event of nomination, I agree to have my name placed on the slate. If elected, I agree to comply with the chapter's bylaws and standing rules, the bylaws and standing rules of the region and the bylaws and policies of the international organization. I have read the job description, am aware of the duties and obligations of being a member of the board of directors/management team, and understand my responsibilities, if elected.

I understand that submitting this "Potential Nominee Questionnaire" to the nominating committee does not guarantee that my name will be on the slate.

Signature of Potential Nominee

(SAMPLE)
BALLOT

Four nominees will be elected to serve two-year terms on the chapter board/management team. Mark an "X" by the name of the four nominees for whom you wish to vote. A vote for more or less than four nominees will void this ballot.

- | | |
|-----------|--------------------------|
| Nominee 1 | <input type="checkbox"/> |
| Nominee 2 | <input type="checkbox"/> |
| Nominee 3 | <input type="checkbox"/> |
| Nominee 4 | <input type="checkbox"/> |
| Nominee 5 | <input type="checkbox"/> |
| Nominee 6 | <input type="checkbox"/> |
| Nominee 7 | <input type="checkbox"/> |
| Nominee 8 | <input type="checkbox"/> |
| _____ | <input type="checkbox"/> |
| _____ | <input type="checkbox"/> |
| _____ | <input type="checkbox"/> |

After you mark your ballot with four nominees, fold the ballot in quarters. The ballot will be collected by the tellers committee.

(S A M P L E)
TALLY SHEET

NAME	TALLY	TOTAL	PLACE
Nominee 1			
Nominee 2			
Nominee 3			
Nominee 4			
Nominee 5			
Nominee 6			
Nominee 7			
Nominee 8			

(S A M P L E)
Tellers Report

Chapter _____ Region _____ Date _____

Number of members eligible to vote:

Number of votes cast:

The four nominees receiving the largest number of votes are:

Submitted by the tellers committee:

Signature _____

Signature _____

Signature _____

Signature _____

Chapter Officer Update Instructions


Updating Chapter Officers

1. Go to members.sweetadelines.com/membersonlymenu and log in.
2. Click the Chapter Portal
3. Click "Chapter Officers."
4. To remove a chapter officer, scroll down to their position and click "Remove."

Membership Chair

The following are individuals related to this chapter as a Membership Chair:

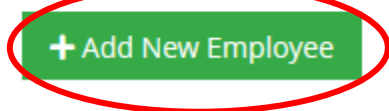
[+ Add New Employee](#)

1	[1 to 2 out of 2 records]				 Tools
Name	Title	Email Address	Actions		
Crockett, Laura		laura@sweetadelines.com	Edit	Remove	

5. To add a chapter officer:
 - a. click "Add New Employee" under the position.

Treasurer/Finance Manager

The following are individuals related to this chapter as a treasurer/finance manager:



- b. Fill out the first and last name, and email address.
 - i. You must fill out the email address with their Sweet Adelines account email, or the system will not link their officer role to their account.
- c. Click "Add"
- d. It will take 1-2 business days for the officers to be added.

Note: *The Chapter Guide* is **SEARCHABLE** using the “FIND” feature:

Hold down the Ctrl (CONTROL) button while pressing the ”F” (FIND) key and type any word or phrase (e.g. X-A-3, president, associate membership, etc.) in the FIND box. The FIND feature will take you to every instance of the word or phrase you typed in the FIND box.

Chapter Guide

Section III:

Guidelines for Standing Rules

It is important that each chapter have a workable set of standing rules to augment the *Standard Form Chapter Bylaws*. Bylaws are the rules that every chapter must follow while your standing rules describe the procedures by which a chapter will implement/comply with the bylaws. Standing rules may also address areas of interest that are specific to your individual chapter, e.g. process for selecting member of the year.

When writing or revising your standing rules, it is not necessary to state purpose, parliamentary authority, etc., as is required in the bylaws. It is recommended that you do not quote the bylaws verbatim in your standing rules as it might confuse the chapter regarding what it does and does not have the authority to change. The bylaws can be amended only by the International Board of Directors. It is preferable for you to cite references to specific sections of the bylaws, e.g. Article III MEMBERSHIP AND DUES, Section 1. – ELIGIBILITY, when necessary. The most current version of the *Standard Form Chapter Bylaws* is available online on the Sweet Adelines website.

Some items in the following standing rules template are marked with an asterisk (*) to call your attention to certain procedures that are required by international policy. These procedures need to be included in your chapter standing rules and should be identified as international requirements. Your chapter's current standing rules should be available 24/7 to the members of your chapter. It is easy to post your standing rules in the members only section of your website.

Items marked with an asterisk should be written to follow closely the wording of the required international policy or bylaws. Items without asterisks use suggested wording only, and some variation of the language may work better for your chapter. However, your chapter's standing rules should contain specific information about all of the subjects covered in this section.

Every chapter needs rules for guidance, and once adopted, the rules should be followed. Keep the rules as simple as possible and make sure they suit your chapter's needs. Rules should not be so stringent that they are unenforceable.

What Are Standing Rules?

According to *Robert's Rules of Order, Newly Revised*: "Standing rules are motions or resolutions governing actions of an organization. They are adopted from time to time as needed to support the bylaws."

How Are They Adopted?

Standing rules may be adopted at any meeting of the chapter without previous notice by a majority vote of members present who are in good standing.

How Are They Rescinded or Amended?

Standing rules may be rescinded or amended at any meeting of the chapter by a 2/3 vote of the members present who are in good standing. If notice of the proposed action was given at a previous meeting, or in the call for a special meeting, the standing rules may be rescinded or amended by a majority vote of the members in good standing present at the meeting.

How Are They Suspended (Waived)?

Standing rules may be suspended (waived) for one meeting only by a majority vote of the members in good standing present at any meeting of the chapter.

Do Chapter Standing Rules Require International Approval?

No, but a chapter's standing rules cannot be adopted if they conflict with any provisions of the *Standard Form Chapter Bylaws*, *Standard Form Regional Bylaws*, *Corporate Bylaws*, or international policy. Should such a conflict occur, the standing rules in question are null and void and the bylaws take precedence.

Regional standing rules require that chapter standing rules be reviewed periodically by the regional bylaws and rules chair, and that changes to chapter standing rules be approved. The regional bylaws and rules chair is a valuable source of help with your standing rules questions. Take advantage of that help whenever necessary.

STANDING RULES

Chapter of Sweet Adelines International,

(city)

(state)

SAMPLE RULES OUTLINE

Section I: Chapter Membership⁽¹⁾

A. Eligibility

1. Membership is open to those who are _____ years of age or older (2).

*2. Each prospective member must be auditioned (3).

*3. A prospective member must attend at least three rehearsals before being auditioned (3) & (4).

*4. After passing the audition, a prospective member receives the standard "Application for Membership" form and a copy of the chapter bylaws and standing rules (1) & (6).

B. Acceptance

*1. Applications for membership and the results of the audition are reviewed by the chapter board of directors¹ (1).

*2. Applications are accepted either by a 2/3 affirmative vote of the members present and in good standing (5) at a regular meeting of the membership or at a special meeting called for that purpose, or by 2/3 affirmative vote of the chapter board of directors¹ (1) & (6).

COMMENTARY

(1) Applications for membership are handled in accordance with policy. (See *Policy Book*, Section III, Div. C for further information.)

(2) Necessary only if the chapter wishes to establish a minimum age requirement. No maximum age limit may be established. (See *Policy Book*, Section III. C, 1.)

(3) The chapter should outline its own procedure for auditions (other than those required by the *Policy Book*, Section III, Div. C, 5).

(4) Attendance at three rehearsals is required; however, you may require a prospective member to attend for a longer period of time or attend a specific number of rehearsals within a specified time.

(5) If a member's dues are paid, they are considered in good standing to vote on membership applications, provided they are present when the vote is taken.

(6) If a prospective member submits an application, they must be either accepted or rejected by a vote of the chapter membership or the chapter board of directors¹. Specify which method is used by your chapter. (See *Policy Book*, Section III, Div. c, 5 regarding options for admittance procedures.)

¹ Management Team

² Team

³ Team Coordinator

B. Acceptance (continued)

3. An acceptance or rejection letter will be sent to the prospective member by _____ (7).

4. Dual members must meet the audition requirements as outlined previously. (Or: Dual members, if current members of other Sweet Adelines International chapters will be accepted as members without going through the audition process.)

C. Associate Members

1. The chapter allows/does not allow associate membership as outlined in the *Policy Book*, Section III, Div. C, 9. In addition, the chapter has the following requirements: (List any additional requirements specific to your chapter.)

D. Dues

*1. Annual membership dues (8) are \$_____. (Explain the breakdown of international per capita fee, chapter portion of dues, regional assessments, escrow account, when dues are paid and by whom, etc.) (9)

*2. Dues are payable as follows: (State method of payment and when due: monthly, quarterly, by April 1, etc.)

*3. Any member in default in payment of dues as outlined is suspended from all privileges of membership. If after written notice, default is not remedied within a period of 60 days, their membership automatically terminates (10).

(7) The prospective member must be notified in writing if their membership is accepted or rejected. Be sure to include in these rules who is responsible for writing the letters.

(8) Definition of dues: "The sum established by the chapter as the total financial obligation for membership in that chapter." International per capita fee is due during the month of the member's anniversary date or during the month of May annually, whichever is applicable. Standing rules should state any special dues categories such as youth, dual, or associate member.

(9) Stipulate whether the chorus collects international per capita fees and any regional assessment from the members to pay when due or if chorus members are expected to pay the fees in a lump sum when due. Give details for both new and renewing members' payments of membership dues, international per capita fees and regional assessments.

(10) In accordance with *Standard Form Chapter Bylaws*. You may want to stipulate who will give written notice regarding default in payment of dues. Written notice should be sent to the member as soon as they are in default. A copy of the notice should be sent to the membership department at international headquarters.

E. Attendance Requirements

(if applicable)

1. Any member absent from _____
(# or %) rehearsals within _____
(period of time) is not considered to be
in good standing and forfeits voting
privileges (with the exception that any
member whose dues are current may
vote on applications for membership if
your chapter uses the chapter vote
option) (11). A member may re-
establish good standing by attending

(# or %) rehearsals.

2. Associate members are/are not
required to comply with the preceding
attendance requirements. (If not, list
any special attendance requirements.)

(11) If your chapter enforces attendance at
chorus rehearsals, the requirements should
be set forth here. Your chapter's
requirements should not be so rigid that they
constantly require enforcement, are largely
ignored or waived, or are enforced
sporadically or in special circumstances.

F. Leave of Absence (if applicable)

1. Any member who finds an extended
absence necessary may request leave of
absence from the chapter (12). Requests
for leaves of absence are acted upon by
the board of directors¹.

2. A leave of absence will be limited to
(three, six) months after which a
member (may, may not) apply for
extensions.

3. A member of the board of directors¹
who finds it necessary to request a leave
of absence from the chapter must:

(12) State if the request should be made in
writing or if verbal notice is sufficient. It is
strongly advised that no longer than six
months be considered for the initial period.

¹ Management Team

² Team

³ Team Coordinator

F. Leave of Absence (continued)

- a. Resign their position on the board².
 - b. Limit their leave of absence to no more than _____ months.
 - c. Other.
4. Dues of members on leave of absence must be _____. (paid in advance, kept current, etc.)
5. State specifically what "leave of absence" means (13).

***G. Good Standing**

1. A member is considered in good standing if:
- a. Annual membership dues and any other required financial obligations are current.
 - b. Attendance standards have been met (if this is a requirement in the chapter).
2. A member must be notified in writing of loss of their good standing by the _____ (14).
3. Loss of good standing causes the member to forgo these membership privileges: _____ (15) & (16).
4. The member's good standing is restored by:
- a. Attending _____ consecutive rehearsals (if applicable).
 - b. Bringing dues current (if applicable).

(13) Suggestions:

- a. Leave of absence means that the member will be inactive during the period of leave granted, and will not participate in any chapter activity. (Leave may be terminated by the member at any time upon notification to the chapter president³.)
- b. Members on leave of absence may, at their option and with the consent of the director, participate in performances.
- c. Clarify whether loss of good standing due to nonattendance will/will not result.
- d. Any combination of the above or other.

(14) Specify who writes the letter: secretary, treasurer, membership chair, etc.

(15) The chapter may list privileges such as voting on chapter business (except for membership applications if dues are current, if chapter uses chapter vote option), voting at chapter elections, participating in singing engagements, participating in chorus or quartet competitions, etc.

(16) All members of a registered quartet must be in good standing with the chapter to be eligible to compete. (*Policy Book*, Section IX, Div. A).

¹ Management Team

² Team

³ Team Coordinator

H. Other Responsibilities of the Chapter Member

1. Each member will be required to provide the standard costume(s) of the chapter and maintain them in a condition suitable for appearance with the chorus (17).
2. Each member should make every effort to attend each performance given by the chorus (18).
3. Music purchased with chapter funds and provided to members by the chapter is considered to be on loan and must be used for rehearsal purposes only. It must be returned when membership terminates (19).
4. A quartet representing Sweet Adelines International or the chapter must audition before the _____ (20) prior to performing in public.

Any other specifics such as not smoking during chorus rehearsals, turning off cell phones, prohibiting the wearing/display of political statements, punctuality, etc., may be included here.

*I. Termination of Membership

1. Resignation
 - a. Any member who wishes to resign from the chapter should do so in writing to the board of directors¹ and/or the chapter membership (21).
 - b. The board of directors¹ will inform the chapter membership and see that a copy of the resignation is sent to international headquarters (21).

(17) In some cases, the chapter provides the costume and the member maintains. The costume must be returned if the member leaves the chapter.

(18) The chapter may wish to stipulate who is to be contacted if a member is unable to attend. One method to help ensure attendance at performances could be to take a count of those willing to participate before a commitment to perform is made by the chorus, director, or music staff.

(19) Provisions for control of chapter-owned music such as deposits on music notebooks, check-out procedures, compliance with copyright laws, etc., may be added here.

(20) Chapter, music committee or director, whichever is most suitable for the chapter. See Section IX of the Chapter Guide for more information on this topic.

(21) Members should be aware that when they resign, their resignation is effective not only for the chapter, but for the entire organization as well. If a member wishes to become a member of another chapter or an at-large chapter, they should apply for a transfer rather than resign. (*Policy Book*, Section III, Div. C, 6).

Members can apply for a 60-day period in which to transfer to another chapter or an at-large chapter.

¹ Management Team

² Team

³ Team Coordinator

I. Termination of Membership (continued)

***2. Transfer to Another Chapter**

a. A member may apply for transfer of membership to another chapter or an at-large chapter by following the correct procedure for transfer to the desired chapter (21).

3. Forfeiture (if applicable)

a. Membership is automatically terminated if a member is absent, without a granted leave of absence, from _____ consecutive rehearsals and does not, after written notice, either return to the chapter or contact the chapter president³ within _____ days (22).

b. Membership is automatically suspended if a member is in default in the payment of dues. Membership is terminated if default is not remedied within 60 days of written notice.

c. The appropriate chapter officer (corresponding secretary, membership chair, treasurer, etc.) follows the procedures for forfeiture/termination of membership as is stated in these standing rules.

***4. Removal**

a. Only the International Board of Directors may remove a member from membership in Sweet Adelines International (23).

(22) Failure to meet attendance requirements may result in forfeiture of membership.

(23) See Section VI of the Chapter Guide.

¹ Management Team

² Team

³ Team Coordinator

J. Reinstatement of Membership

Former members who have allowed their membership to terminate must meet the eligibility requirements and be accepted by the membership as stated in these standing rules (24).

A member whose longevity in the organization has been interrupted, for whatever reason, may buy back their missing years resulting in a record of continuous membership. (Policy Book, Section III, Div. C, 4.)

*K. Transfer

If a member wishes to transfer their membership from another chapter, they must follow the procedures set out in Section ____ of these standing rules (25).

Section II: Meetings

A. Chorus Rehearsals

Regularly scheduled meetings for chorus rehearsals are held _____.

B. Business Meetings

1. Necessary business may be conducted on the date of a regular chorus rehearsal, or at a special meeting called for that purpose.

*2. The president³ may, when necessary, call a special chapter business meeting (preferably with advance notice) (26).

*3. A quorum for the transaction of business at any chapter business meeting shall consist of a majority of the membership in good standing.

(24) Membership records of members who resign (or fail to renew their membership) are retained on computer at international headquarters for one full fiscal year. Re-affiliation within this period will result in retention of longevity and other records of the member.

(25) Refer to Policy Book, Section III, Div. C, 6 for special instructions.

(26) Regularly scheduled meetings do not require advance notice, but adequate notice of special meetings should be provided. It may be designated here if copies of minutes are to be made available to all members. (See *Standard Form Chapter Bylaws*.)

¹ Management Team

² Team

³ Team Coordinator

C. Annual and Election Meetings

*1. The annual business meeting is held after January 1 but before April 30 (27).

*2. The annual election meeting for the purpose of electing (28) board² members is held on the same date as the annual business meeting.

Section III. Board of Directors¹

A. Meetings

1. The board of directors¹ meets at least once each month at a predetermined time and place (29).

*2. The annual meeting of the board of directors¹ shall be held between January 1 and April 30 each year (30).

*3. A meeting for the purpose of electing officers is held prior to May 1. Board² members who have a year remaining in their terms and newly elected board² members who begin their terms on May 1 have voting privileges at this meeting.

4. A combined board of directors¹ meeting consisting of incoming and outgoing directors is held after the annual election meeting, but before the beginning of the fiscal year (31).

*5. Special meetings may be called by the president³ or by a majority of the members of the board², as needed, with notification of time, place and purpose to be given to each board² member at least _____ in advance.

(27) Specify whether the annual business meeting is to be a chorus rehearsal night or a specially called business meeting.

(28) As many members as necessary to achieve a full board². If your chapter operates under the management team form of governance, refer to Section II of the Chapter Guide for specifics related to election/appointment of team members.

(29) Management Teams meet as needed and may determine the frequency with which they meet.

(30) The chapter may stipulate that minutes of all board² meetings will be given or made available to the chapter membership

(31) This meeting is held to present annual reports, review ongoing projects, transfer materials to successors, tie up loose ends, etc.

¹ Management Team

² Team

³Team Coordinator

B. Eligibility

1. To be considered for election to the board², a member must be in good standing with the chapter (32). (The chapter may wish to set out other requirements in order for a member to be considered for election.)

2. Dual members and/or associate members may/may not be considered for election to the board.

(32) The term “good standing” must be defined in the standing rules.

C. Election and Term of Office

*1. The board of directors¹ consists of four to 12 members.(33)

*2. After the chapter’s initial election following chartering, the chapter membership annually elects half the number of positions provided for in the chapter’s standing rules to two-year terms (34).

(33) Management Teams consist of four to eight elected members (plus the chorus director).

(34) Select twice the number of candidates to run for the open positions on the board¹. (If you are using the management team form of governance, refer to Section II of the Chapter Guide for election/appointment information.

D. Vacancies

*In the event of a vacancy on the board of directors¹, the chapter president³ appoints a chapter member to fill the unexpired term, within 30 days, subject to ratification by the remaining members of the board². Any stipulations as to qualifications of replacements may be set out here.

E. Duties and Responsibilities

*1. The board of directors¹ has the authority and responsibility to enforce the rules and regulations necessary to manage the chapter.

2. The chapter may wish to state that each board² member, other than officers, be assigned a specific duty such as chair of a committee.

¹ Management Team

² Team

³Team Coordinator

Section IV: Officers' Duties and Responsibilities

The specific duties and responsibilities of each officer (or team member) that are not listed in the *Standard Form Chapter Bylaws* should be added in a job description as an addendum to the standing rules.

Section V: Committees and Duties

A. Appointment and Term

*1 The president³, with ratification by the board of directors¹, appoints the chairs of the standing committees. Terms are from May 1 through April 30 (35).

*2. Standing committees are: (list here) (36).

3. Standing committee chairs choose committee members as needed.

B. Duties of Standing Committees

The specific duties of committees should be included in a job description addendum (37).

C. Special Committees

Any special committees that the chapter wishes to have, such as a show committee, should be included in the standing rules and duties should be included in a job description addendum. The chapter should specify how these committees are appointed and if ratification is needed by the board of directors¹.

(35) It is important that these appointments be made prior to May 1 so that they new chairs can assume their duties promptly at the beginning of the fiscal year.

(36) Standing committees, other than those set forth in the *Standard Form Chapter Bylaws*, such as newsletter, history, music, public relations, quartet promotion, social, costume, ways and means, long-range planning, etc. may be stated here.

(37) Section I of the Chapter Guide details committee duties.

¹ Management Team

² Team

³Team Coordinator

*D. Nominating Committee

*1. A nominating committee of ____ (38) members is appointed by the president³ and ratified by a majority vote of the board of directors¹ at least 30 days prior to the annual election meeting of the chapter.

a. The chair of the nominating committee is appointed by the president³.

b. This committee prepares a slate consisting of two nominees (if possible) for each vacancy to be filled, listing the qualifications of each (39). The slate is distributed to the membership at least 10 days prior to the election meeting.

2. Procedures in Section II of the Chapter Guide should be followed.

*3. Absentee ballots are sent upon request to any member in good standing who is unable to attend the annual election meeting. Absentee ballots must be received by the chair of the election meeting prior to the election (40).

(38) At least three members, as required by the *Standard Form Chapter Bylaws*. It is preferable that the nominating committee be appointed early in the year so that it has sufficient time to obtain the most qualified nominees possible for the slate.

(39) If a slate of at least two nominees for each vacancy cannot be obtained, then the slate should consist of at least one more person than the number to be elected. A single slate will be valid only if the nominating committee is unable to secure the consent of two qualified members for each position to be filled. (See *Standard Form Chapter Bylaws*, Article VII, Sec. 3).

(40) See Article IV, Sec. 1, C of the *Standard Form Chapter Bylaws*.

¹ Management Team

² Team

³Team Coordinator

Section VI: Chorus Director (41)

A. Selecting

1. Selection of and related details to the chorus director are decided by a _____ (42) vote of the chapter membership in good standing, upon recommendation from the board of directors¹.

Specific duties, terms of compensation and provisions for termination should be defined in a separate agreement with the chorus director. A copy of the agreement should be provided for each member.

Provision for annual review and renewal of the director's agreement should be included here.

B. Termination

Termination of the chorus director's term of service is by a ____ (43) vote of the chapter membership in good standing, after notification to each qualified member. Each member in good standing must be notified at least _____ (44) in advance of the meeting at which the vote is to be taken.

C. Assistant Chorus Director(s)

1. Assistant chorus director(s) will be chosen by the chorus director with ratification by (45).

Duties for assistant director(s) may also be specified in a separate agreement, if desired.

(41) See Section I of the Chapter Guide.

(42) Specify either a majority or 2/3 vote.
(Voting rules should be consistent for acceptance and termination of the director.)

(43) Specify either a majority or 2/3 vote.
(Voting rules should be consistent for acceptance and termination of the director.)

(44) Specify the amount of notice required for the membership.

(45) Specify here who ratifies the selection of the assistant chorus director(s).

Section VII. Regional and International Activities

A. Regional Bylaws and Standing Rules

1. Every chapter member is bound by the regional bylaws and standing rules.

B. Regional Annual Membership Meeting (RAMM) (if applicable)

- *1. The chapter selects from its membership in good standing a delegate to the RAMM (46).

2. The chapter pays \$ _____ toward the expenses for lodging, registration and transportation (per mile or flat fee) for the delegate to attend the RAMM.

C. Presidents' Forum

1. The chapter president ³ should attend each presidents' meeting sponsored by the region and report the meeting's outcome to the chapter.

2. The chapter pays \$ _____ toward the expenses for lodging, registration and transportation (per mile or flat fee) for the president³ to attend each scheduled meeting of the Presidents' Forum.

(46) Any qualifications the chapter wishes to require for a member to be eligible to serve as a delegate may be added here.

¹ Management Team

² Team

³Team Coordinator

D. Regional and/or International Chorus Competition

1. To be eligible to compete with the chorus, new members must be accepted _____ (47) prior to the regional/international chorus competition. (Special requirements for performing or competition eligibility such as attendance, auditions, etc., should be included here. Be specific, including the position/title(s) of the person(s) responsible for determining eligibility.)

2. Refer to the *Competition Handbook* to determine eligibility of quartets for competition.

(47) Specify here the required length of time a new member must be an official chapter member before being eligible to compete.

Section VIII. Finances

A. Income

1. Operating income is derived from the following sources: (*List*) (48)

(48) For example: dues, ways and means, performances, etc.

B. Expenses

1. Expenses to be reimbursed by the chapter or expended from chapter funds: (*List*) (49)

(49) For example: chorus director's compensation, fees for coaching, rehearsal hall rental, etc.

C. Paying Bills – Receipts Required

1. Include a procedure for submitting bills for payment.

D. Authorization of Expenditures (50)

1. Budgeted items

2. Expenditures over budget

3. Number of signatures required on checks (51)

4. Bonding (52)

(50) This area can be adjusted to fit your chapter's particular needs.

(51) *Standard Form Chapter Bylaws*, Article VI, Sec. 3, D.

(52) All members responsible for handling chapter money should be bonded.

E. Escrow Account

1. The chapter collects dues and holds in escrow the portion designated for regional and international dues.

2. When a member terminates their membership, funds held in escrow are ALWAYS returned upon receipt of all chapter property. (53)

(53) See *Chapter Guide*, Section V Finances.

F. Audit Procedures

*1. The records maintained by the chapter treasurer are audited annually before transfer to the incoming treasurer (54). Verification of this audit must be sent to international headquarters (applies to U.S. and Canadian chapters).

(54) See *Standard Form Chapter Bylaws*, Article VI, Section 3, D.

2. The board of directors¹ will appoint an auditor from within or outside the chapter to perform the audit by

_____,
(date)

G. Internal Revenue Service Forms (55)

(55) Applies to U.S. chapters only.

*1. By the deadline established by the IRS, the treasurer (or another qualified person such as the auditor) prepares in duplicate the required IRS forms in compliance with the rules established by Sweet Adelines International and the Internal Revenue Service.

Section IX: Chapter Property

A. Description

1. Chapter property consists of costumes, music, manuals, stage properties, etc. (Include anything else the board of directors¹ stipulates as chapter property.)

¹ Management Team

² Team

³Team Coordinator

B. Termination

1. When an individual member terminates their membership they must return all chapter property to the designated person(s). (56)

(56) Specify who has the responsibility of reclaiming chapter property if it is not returned.

Section X: Amendments

These standing rules may be amended:

A. Previous Notice

*1. With previous notice (at a meeting or in the call for a special meeting) by a majority vote of the members present and in good standing.

B. Without Previous Notice

*1. With no previous notice by a 2/3 vote of the members present and in good standing at a regular or special meeting.

Revised/adopted by _____ Chapter membership
on the _____ day of _____, 20 _____.

Signed:

Chapter President¹

Chapter Bylaws and Rules Chair

Reviewed by:

Regional Bylaws and Rules Chair

Date

¹ Management Team

² Team

³Team Coordinator

(S A M P L E)

STANDING RULES

Sweet Adelines International

Chapter

Section I. Chapter Membership

A. Eligibility

1. Membership is open to those who meets the audition requirements.
2. Each prospective member must audition. See audition schedule.
3. A prospective member must attend at least three rehearsals before auditioning.
4. A prospective member who passes the audition receives the standard "Application for Membership" form and a copy of the chapter bylaws and standing rules.

B. Acceptance

1. Applications for membership and audition results are reviewed by the board of directors¹. The chapter membership is notified of the date the decision will be made and is invited to submit comments or information regarding the prospective member(s) to the board².
2. Applications are accepted by a 2/3 affirmative vote of the board of directors¹ or 2/3 affirmative vote of the chapter membership.
3. A letter of acceptance or rejection is sent the prospective member by the audition coordinator.

C. Dues

1. Annual dues are (fill in the current amount): \$XX.00 for international *per capita* fee
\$XX.00 for regional assessment
\$XX.00 for chapter
2. International dues and regional assessments are payable upon acceptance into membership. A monthly fee of \$XX.00 is payable on the first Thursday of each month. Of that amount, \$X.00 is held in escrow to cover the following year's international and regional dues.
3. Any member in default in payment of dues is suspended from all privileges of membership, and if, after written notice by the treasurer⁴, default is not corrected within 60 days, their membership automatically terminates.

¹ Management Team

² Team

³Team Coordinator

⁴Finance Manager

D. Attendance Procedure

1. Any member who expects to be absent from four or more consecutive rehearsals is required to request a leave of absence.
2. Any member who will be absent from a rehearsal or chapter activity is expected to inform the chorus director or the president³.
3. Associate members are/are not required to comply with these rules.

E. Leave of Absence

1. Any member who requires an extended absence (four or more weeks) may request a leave of absence, in writing, from the chapter. Requests for leave are acted upon by the board of directors¹.
2. A leave of absence is limited to three months, after which the member may apply for an extension.
3. Any member of the board of directors¹ who finds it necessary to request a leave of absence must resign from the board².
4. Members requesting a leave of absence must pay dues in advance.
5. Leave of absence means:
 - a. That the member is inactive during the period of leave granted and does not participate in any chapter activity. Leave may be terminated at any time upon notification to the president³.
 - b. That the member who requests to take a leave of absence does not lose their good standing status in the chapter.

F. Good Standing

1. A member is considered in good standing if:
 - a. Annual dues and any other financial obligations are current.
 - b. Attendance procedures are followed.
2. A member must be notified in writing of loss of good standing by the membership chair.

¹ Management Team

² Team

³Team Coordinator

⁴Finance Manager

3. Loss of good standing causes the member to forgo the following privileges: voting in chapter/regional/international elections, participating in singing engagements and participating in chorus or quartet competitions.

4. A member's good standing is restored by:

- a. Bringing dues current.
- b. Meeting attendance requirements.

G. Other Responsibilities of Chapter Membership

1. The chapter provides and owns the standard costume(s). Each member is required to maintain their costumes in a condition suitable for appearance with the chorus.

2. Each member is expected to make every effort to participate in all performances given by the chorus.

3. Each member is expected to demonstrate performance readiness, both vocally and visually, to the satisfaction of the chorus director and choreographer before participating in a chorus performance.

4. Music purchased by the chapter and provided to members is considered to be on loan and should be used for rehearsal purposes only. Music must be returned to the chapter when membership is terminated.

5. Specific quartet responsibilities are:

- a. A quartet representing Sweet Adelines International or the chapter must audition and be approved for public performance by the music committee.
- b. If quartet members are from more than one chapter, the quartet should meet the audition requirements for the chapter as well as any audition requirements of the other chapters represented.
- c. The quartet is required to present for audition a mini-performance of two or three songs plus appropriate emcee material.

H. Termination of Membership

1. Resignation procedure:

- a. Any member who wishes to resign from the chapter and/or Sweet Adelines International should do so in writing to the board of directors¹.

¹ Management Team

² Team

³Team Coordinator

⁴Finance Manager

b. The board of directors¹ informs the chapter membership and international headquarters of the resignation.

2. Transfer to another chapter procedure:

a. If a member wishes to leave the chapter but not the organization, they may apply for transfer to another chapter, to chapter-at large, or to member-at-large status.

b. If the transferring member has not decided where to relocate their membership, they may apply to international headquarters for transition status by submitting a “Request for Transition Membership Status” form. The member is permitted a 60-day transition period during which all privileges of international and regional membership are retained. (*Policy Book*, Section III, Div. C, 6.)

3. Forfeiture

a. Membership is automatically suspended if a member is default in the payment of dues, and terminated if default is not corrected within 60 days of written notice by the treasurer⁴. The membership chair follows up on this procedure.

4. Removal

a. Only the International Board of Directors may revoke membership in Sweet Adelines International.

I. Reinstatement of Membership

Former members who have allowed their membership to terminate and wish to rejoin the chapter must meet the eligibility and acceptance requirements as stated in Section I of these standing rules.

A member whose longevity in the organization has been interrupted, for whatever reason, may buy back their missing years resulting in a record of continuous membership. (*Policy Book*, Section III, Div. C, 4.)

J. Transfer or Dual Members

Members of Sweet Adelines International who wish to transfer from another chapter or who are current members of another chapter must meet the eligibility and acceptance requirements as stated in Section I of these standing rules.

Section II: Meetings

A. Chorus Rehearsals

Regularly scheduled meetings for chorus rehearsal are held Thursday evenings at 7:30 p.m.

¹ Management Team

² Team

³Team Coordinator

⁴Finance Manager

B. Business Meetings

1. Options

- a. Necessary business may be conducted on the date of a regular chorus rehearsal or at a special meeting called for that purpose.
- b. An annual meeting of the membership is held between March 1 and April 1 for the purpose of electing members of the board of directors¹. Advance notice shall be given to each member at least 14 days prior to the meeting.

2. The president³ may, when necessary, call a special chapter business meeting with 10 days prior notice.

3. A quorum for the transaction of business at any chapter business meeting consists of a majority of the membership in good standing and present.

Section III: Board of Directors¹

A. Meetings

1. The board of directors¹ meets on the first Monday of every month.
2. The annual meeting of the board of directors¹ shall take place between January 1 and April 1.
3. A combined meeting of the outgoing and incoming boards of directors¹ shall be held prior to April 30 each year after the new team is established.
4. Special meetings of the board of directors¹ may be called by the president³ or by a majority of the board² members as needed. Notification of time, place and purpose of the meeting is to be given to each member one week in advance.

B. Eligibility

To be eligible for election to the chapter board of directors¹, a member must be in good standing with the chorus as stated in these standing rules.

C. Term of Office

1. The term of office for all positions on the board of directors is two years (term of office for management team members is either one or two years, except for the chorus director).
2. If using the management team form of governance, the chorus director automatically becomes a member of the management team for the duration of their contract.
3. The number of consecutive terms a member of the management team may serve is not limited. (Establish any term limits for members of the chapter board of directors here.)

¹ Management Team

² Team

³Team Coordinator

⁴Finance Manager

D. Election and Appointment

1. The number of chapter directors shall be four (for example). (or: The management team shall consist of four elected members, three appointed members, plus the chorus director for a total of eight members.)
2. Three (for example) board members are elected annually for two-year terms. (or Each year, prior to April 30, the elected members of the management team and the chorus director shall appoint three members to fill the following positions: secretary, finance manager and audition coordinator.)

E. Vacancies

In the event of a vacancy on the board of directors, the president shall appoint a member to fill the vacancy within 30 days, subject to ratification by a majority vote of the board of directors. (In the event of a vacancy on the management team, the remaining team members shall appoint a chapter member to fill the unexpired term in that specific position.)

Section IV: Officers' Duties and Responsibilities

1. The board of directors¹ has the authority and responsibility to enforce the rules and regulations necessary for the proper maintenance, control and management of the chapter.
2. The board of directors¹ is accountable to the membership for the efficient operation of the chapter and effective communication with the members.

Section V: Committees and Duties

A. Appointment and Term

1. The president (or management team) appoints the chairs of all standing committees. (Exception: The nominating committee is appointed by the president³.) The chairs appoint the members of their committees with ratification by the board of directors¹. Terms are one year: May 1-April 30.
2. Standing committees are: fundraising, membership, public relations and nominating.
3. Two additional appointments are made to serve these functions: bylaws and rules chair and newsletter/website content editor.
4. Special committees may be appointed by the board of directors¹ as needed for a specific task. The committee is dissolved upon completion of the task.

¹ Management Team

² Team

³Team Coordinator

⁴Finance Manager

B. Nominating Committee

1. The nominating committee, consisting of three members, at least one of whom is not a member of the board of directors¹, is appointed by the president³ with ratification by a majority vote of the board of directors¹.
 - a. This committee prepares a slate of nominees for each position listed in Section III, D, 2 of these standing rules. Where possible, two or more nominees are presented for each position. Prior to determining the slate, chapter members are invited to submit applications. Each applicant is interviewed by the nominating committee to assess suitability for the role.
 - b. The slate of candidates is distributed to the membership at least 10 days prior to the election meeting.
2. The procedures as outlined in the Nominating & Election Procedures section of the *Chapter Guide* are generally followed. (See Section I of the *Chapter Guide* for procedures for governance by management team.)
3. Absentee ballots are sent upon request to any member in good standing who is unable to attend the election meeting. Absentee ballots must be received by the president³ prior to the election.

Section VI: Chorus Director

A. Director's Annual Agreement

1. Duties, responsibilities and entitlements of the chorus director are set out in the chorus director's annual agreement.
2. The chorus director's agreement is renewed annually prior to July 1 by a 2/3 affirmative vote of the chapter membership.

Section VII: Regional and International Activities

A. Bylaws and Standing Rules

Every chapter is bound by international bylaws and regional bylaws and standing rules.

B. Regional Annual Membership Meeting (RAMM)

The chapter selects from its membership in good standing a delegate to attend the RAMM.

¹ Management Team

² Team

³Team Coordinator

⁴Finance Manager

C. President's Forum

1. The president³ should attend each meeting of the Presidents' Forum and report the meeting's outcome to the chapter.
2. The chapter pays the actual expenses for lodging, registration and transportation (for example, 50-cents per mile) for the president³ to attend each scheduled meeting of the President's Forum.

D. Regional and International Competition

1. To be eligible to compete with the chorus, new members must be accepted prior to the regional/international chorus competition and must be in good standing.
2. To be eligible to compete with the chorus, each member must meet the performance readiness criteria as stated in Section I, G. 3, of these standing rules.
3. Eligibility of quartets for competition is evaluated according to the *Police Book*, Section IX.

Section VIII: Finances

A. Income

Operating income is derived from dues and miscellaneous fundraising.

B. Expenses

Expenses to be paid by the chapter or expended from chapter funds are: chorus director's compensation, coaching fees and related expenses, rehearsal hall rental, music, stage costume(s) where applicable, riser set-up and transportation, administrative expenses and others as established in the annual projected budget.

C. Paying Bills - Receipts Required

Receipts should be submitted with invoices for reimbursement.

D. Authorization of Expenses

1. Budgeted items are authorized without further approval.
2. Expenditures over budget are submitted to the board of directors¹ for approval.
3. The signatures of the treasurer⁴ and president³ are required on all checks.

¹ Management Team

² Team

³Team Coordinator

⁴Finance Manager

E. Escrow Account

1. The chapter collects dues monthly and holds in escrow the portion designated for regional and international dues. (For information on establishing escrow accounts, refer to Section V of the Chapter Guide, *Finances*.)
2. When a member terminates their membership, funds held in escrow are ALWAYS returned by the president³ upon receipt of all chapter property assigned to the resigning member.

F. Audit Procedures

1. The records maintained by the treasurer⁴ are audited annually before transfer to the incoming treasurer⁴. Verification of this audit is sent to international headquarters.
2. The board of directors¹ appoints the auditor, who may be a member of the chapter or someone from outside the chapter, by April 1.
3. By the deadline established by the Internal Revenue Service, the treasurer⁴, during the year for which Form 990 is to be filed, prepares the required IRS forms in compliance with the rules set forth by Sweet Adelines International and the Internal Revenue Service (for U.S. chapters only).

Section IX. Chapter Property

A. Defined

Chapter property consists of costumes, music, stage properties, and equipment.

B. Returning Chapter Property

When an individual member terminates their membership they must return all chapter property to the appropriate chair or the president³ within 30 days.

Section X: Management Team Terminology

A. Job Titles

Much of the terminology used by the chapter for the management team does equate to the traditional titles used under the board of directors form of governance. These are:

Management Team	=	Board of Directors
Team Coordinator	=	Chapter President
Financial Manager	=	Treasurer
Secretary	=	Secretary
Position	=	Office

¹ Management Team

² Team

³Team Coordinator

⁴Finance Manager

B. Use of Titles

The traditional titles will be used when conducting official chapter business such as signing tax returns, conducting banking business, applying for incorporation, etc.

¹ Management Team

² Team

³Team Coordinator

⁴Finance Manager

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CHAPTER GUIDE

SECTION IV

TIPS TO

CHAPTER LEADERS

STRATEGIC PLANNING

“You will never be greater than the vision that guides you.” Strategic planning provides your chorus with a mechanism for putting that vision into concrete terms and developing strategies for making it a reality. Strategic planning requires that you look not only inward to what you desire for your chorus, but also at the external forces and trends that will affect your chorus’ future and the realization of your vision.

The strategic planning process is simple, but it requires time and commitment on the part of chorus leaders and members. Consider bringing in an outside facilitator to guide you through the process. Sessions can be limited to chorus leaders or include the entire chorus; it can be effective either way. By including the entire chorus for the initial brainstorming session, you will arrive at a collective vision or mission, which increases the likelihood of commitment to the final product by your chorus members.

The Strategic Planning Process

Pre-session Work

- Develop and conduct a membership survey to obtain input on issues important to the chorus. Distribute survey results to all participants involved in the process.
- Analyze the environment in which your chorus exists—the opportunities and challenges in your community—and your chorus’ strengths and challenges.
- Prepare a 12-18 month timeline that lists the chorus’ planned activities, meetings, fundraisers, etc.

Strategic Planning Sessions

- Conduct a brainstorming session where all ideas are welcome. This format allows you to dream what you think is possible for your chorus. Make sure that all key chorus members, especially your director, are involved in this process.
- Formulate a mission statement—a succinct statement that sets forth your chorus’ purpose and philosophy. A mission statement provides your chorus with overall direction, which allows the chorus to avoid expending resources on activities unrelated to your mission statement.
- Identify core values—statements that describe the chorus’ operating philosophy and guide internal conduct as well as the chorus’ relationship with others. Begin the discussion of core values by discovering what your chorus members value, need and expect.
- Draft goals—a goal is an observable and measurable end result, having one or more objectives to be achieved within a more or less fixed timeframe. Goals should be challenging, yet realistically achievable. The question, “Has the goal been achieved?” can always be answered with either a “Yes” or “No.” Criteria for forming goal statements are:

Is each one necessary by itself?
Are they sufficient as a group?
Are they feasible?
Are they appropriate in comparison to the mission statement and core values?

- Develop strategies—how your chorus will organize and focus its resources and actions to effectively and efficiently achieve goals. Break into groups and assign each group to develop strategies for achieving a specific goal. Select a few strategies to implement each year. Priorities are not set in the plan, but are determined by the leadership. It is the vision of the leaders that guides the plan.
- Examine current programs, activities and structure to determine their relevance to the new goals and strategies. Use the 12-18 month timeline prepared in the pre-session and make adjustments as needed. Some current programs or activities may no longer be relevant to the new goals or strategies and should be discontinued. Also, the chorus may need to make changes in its organizational structure.
- Develop action plans—how your chorus will implement the strategies and make progress toward achieving its goals. The strategic planning group can continue to develop action plans or bring others into the process by assigning specific strategies to work groups or committees. The plans developed by the work groups should be submitted to the board or management team for approval. Action plans should include the responsible parties, timelines, resource allocations and checkpoints. Checkpoints are the measurable, attainable milestones that your chorus wants to achieve by a specific point in time on the way to accomplishing a goal.
- Communicate the plan to all chorus members. Let them know what the plan means to them personally. Involving members in the plan will enable them to buy into and support the mission/direction of the chorus.
- Continually monitor the implementation of the plan. Select a person or committee to be responsible for the strategic plan. Discuss the plan annually at meetings of your team/board. Schedule a specific time/meeting at which to review and update progress each year.

A strategic long-range plan is an active, working document. It is about focus and selecting a limited number of goals that will take your chorus where it wants to go.

TEAM BUILDING

How to Build a Team

When you belong to a Sweet Adelines chorus, you are part of a team. Think of your chorus board/management team and committees as interconnecting teams that share the same underlying goal: to help the chorus operate effectively, efficiently and objectively.

Most individuals find satisfaction in being part of a team that works well together and accomplishes its goals. Have you ever wondered why some teams accomplish so much, while others need constant prodding to complete their tasks? When putting together a committee or work group, look for chorus members who have the traits and characteristics of successful team members who:

- Show initiative and project an attitude of individual responsibility in routine areas and also in crisis mode.
- Are goal-setters and achievers.
- Know how to set priorities and work efficiently; they organize the work at hand and meet realistic deadlines.
- Are positive, dynamic people who are dedicated to self-improvement and growth; they thrive on success, yet know how to learn from failure.
- Understand the goals and their part in achieving them.

If your chorus has members who display these characteristics, enlist them to serve on your chapter's board or management team, or chair a committee.

Ensuring Team Success

A team is built to perform a function—whether it is planning, research or logistics. In addition to securing a qualified team leader, many factors contribute to a team's successful completion of its assignment. Consider these guidelines when constructing a team:

- The team must have a valid reason to work together. In other words, the assignment must have importance.
- Assign specific responsibilities to the team and set high expectations for the outcome.
- Appoint individuals who have the ability or training to meet team goals.

- Select individuals who have the desire or motivation to serve. Experience has shown that appointing someone to serve on a committee just “to get them involved” can be detrimental to the morale of everyone on the team.
- Provide the tools, time and opportunity to get the job done right. Be realistic about budgetary restraints.
- Be sure that chorus goals meet the SMART* test:

S-pecific

M-easurable

A-ction-oriented

R-ealistic

T-ime-bound

Three Steps to Training

Once a team has been appointed, there are three basic steps to training team members. It is well worth the team leader’s time to think through the following training steps:

- **Show and Tell.** Demonstrate to team members exactly what the assignment entails.
- **Performance.** Encourage feedback from team members throughout the project. Provide assistance when necessary. Establish time schedules and checkpoints to measure progress.
- **Feedback and Evaluation.** This is the “how are we doing?” stage. Solicit feedback and evaluate problems or deviations from the plan. Construct a new action plan, if necessary.

Managing and Leading Your Team

Let’s say that the team you helped select was hitting all the right chords for a few weeks, but progress now has slowed to a halt. What’s the problem? As team leader, it’s time to analyze operations. Step back and make certain all team members are aware of performance standards and goals. Next, examine whether all team members have the training or ability to complete the assignment. Maybe a team member has decided they do not like the assignment and has subconsciously fallen out of step with other team members. Or, perhaps the assignment is taking more time than everyone realized and enthusiasm is waning. Once the problem is identified, a solution can be found and implemented.

Reward for an Assignment Well Done

Everyone appreciates being thanked for a job well done. Appreciation has special importance for volunteers since their livelihood rarely is linked to performance. Reward good performance and recognize contributing members. Rewards and recognition come in many forms. One reward could even be a promotion to a more challenging assignment! Remember, what is rewarded is repeated.

INTERPERSONAL SKILLS

Honing Your People Skills

Successful chorus leaders know the importance of people skills in performing their chorus management functions. They have learned to form working relationships that encourage understanding and mutual respect, and that acknowledge the needs and feeling of others. By doing so, a healthy, productive environment is created.

Improving your people skills will foster personal and musical growth for yourself and for other members of your chorus as well. Find a trustworthy peer to give you objective feedback on your people skills. Consider taking an interpersonal skills seminar, or go online to look for information about interpersonal communication or human relations.

Remember that your personality style affects those around you. Have you noticed that if you smile at people, they smile back? If you are confident about reaching a goal, others feel the same confidence. Compare the following desirable personality traits to your own:

- Are you approachable, relaxed and open?
- Do you use effective communication skills and encourage feedback?
- Do you have a well-developed, “sensitive” sense of humor and avoid sarcasm in your speech?
- Are you tolerant of differing points of view?
- Do you take a personal interest in the other members of your chorus?
- Do you treat individuals fairly and establish rules that ensure equity?
- Are you knowledgeable with others looking to you for guidance and direction?

Listening Skills

Listening plays an important role in decision-making and problem-solving. A good listener hears beyond the words and facts that are spoken. A good listener also observes the speaker’s body language to better understand the meaning of the message.

If you think that your listening skills need sharpening, try focusing your attention on understanding a speaker’s meaning. Listen carefully for main thoughts or ideas. Avoid interrupting speakers until they have finished making their point. Make eye contact without staring, and use body language that indicates you are actively listening and interested in what is being said. Don’t think about what you are going to say next while others are speaking.

When disagreeing with a speaker, avoid reacting emotionally. Paraphrase what others have said when clarification becomes necessary, and ask open-ended questions to draw out a person’s thoughts and feelings. If you feel that you are being drawn into a conflict, ask for time to review the facts or to think about the problem from the other individual’s point of view.

ORAL COMMUNICATION

Because miscommunication can cause avoidable confusion or hurt feelings, oral communication skills are just as important as music skills in chorus leadership. Through communication with the chapter management team/board, the director, committees, and the general membership, a chapter leader is presented with many opportunities to develop their speaking abilities.

For better oral communication, check yourself on the following good communication practices:

- Make clear, understandable and concise statements when talking.
- Organize your supporting thoughts into a logical flow.
- Provide sufficient information for others to process or act upon.
- When giving instructions, ask the listener to paraphrase the main idea to ensure that what you are saying is what they are hearing.
- Record a conversation with you as a participant and analyze how you sound. Listen for your level of enthusiasm, the interruptions you made during the conversation, the speed of your speech, and voice inflection. Identify any problems and eliminate distracting speech habits.

CONFLICT MANAGEMENT

When working with groups, it is inevitable that disagreements and conflicts will arise. Chapter leaders should be prepared at all times to deal with those less than harmonious situations.

Each of us deals with conflict in our own way. It is wise to understand your own conflict style before attempting conflict resolution. Below are four basic conflict styles. Identify which style describes you best:

- **Agreeable**—you usually permit the other person to have their way
- **Disagreeable or aggressive**—you promote win-lose situations
- **Withdrawn**—you avoid conflict whenever possible
- **Constructive**—you work toward compromise

If your conflict style is other than **constructive**, work toward improving your conflict resolution style. Being aware of your basic conflict style is the first step toward positive change.

Promote a Positive Environment

Although differences of opinion within a chorus are inevitable, a positive environment where open communication is practiced will prevent many disagreements from becoming serious problems. Since differences of opinion are normal, bring conflict out into the open without feeling that your leadership is threatened. Rely on your Regional Management Team for honest feedback when needed. Schedule regular chapter visits with your RMT.

Following are some tips for promoting a positive chorus environment:

- Keep members informed about activities and changes taking place within the chorus.
- Provide time away from regular chorus rehearsals for open discussions and socializing.
- Use active listening skills to determine signs of early interpersonal problems.
- Don't gloss over genuine differences of opinion. Clarify differences and try to understand the goals that each party is trying to reach. Look for win/win solutions.
- Depersonalize the conflict; look at it as a conflict of ideas/approaches, not people.

Addressing Conflict

When conflict affects chorus harmony and productivity, it is time to become involved. To minimize conflict, follow these guidelines:

- Determine who is involved in the dispute.
- Determine the cause of the conflict.
- Analyze the problem from both parties' perspectives. Try to be as objective as possible, and try to understand all parties' reasons for behaving as they do.
- Decide whether it is necessary to hold a meeting with the involved parties. Face-to-face discussions may keep the conflict from escalating.
- Choose a capable facilitator. By initiating the conflict resolution process, you have placed yourself in the role of facilitator or mediator. If you are not comfortable in managing the tension that may arise during such a meeting, you may want to arrange for a member of the Regional Management Team to facilitate.
- Begin the resolution meeting by giving both parties an opportunity to state their grievances. Move into problem-solving mode as quickly as possible. Search for common ground on which both parties can agree, then look for areas of compromise.
- At the end of the conflict resolution meeting, summarize the accomplishments, noting areas of agreement and compromise. Give the parties involved the opportunity to confirm or correct your summary statements. If further meetings are needed, be sure to document the meeting time and place along with the meeting's goal or expected outcome.

You may learn more about conflict management online. Your local library may have books or recordings on the subject. Or, suggest to your Regional Management Team that a class on conflict management be included at a regional workshop. A number of International Faculty members have expertise in this area. Information about the International Faculty is available on the Sweet Adelines International website.

CONDUCTING EFFECTIVE MEETINGS

Whether you are chapter president/team coordinator, director or committee chair, it is important to conduct effective, efficient meetings. Time is a precious commodity.

Prepare for the Meeting

Pick a time and location that is conducive to a productive meeting. The location should be accessible to all participants. Schedule meetings on a date when all the participants are available. Avoid mealtime meetings—the fewer distractions the better.

Gather the materials and documentation you need to prepare a detailed agenda for the meeting such as budget information and committee reports and requests. The agenda should list each topic to be addressed. Allot a reasonable amount of time to discuss each topic.

Distribute the agenda and supporting documents (reports and recommendations) to all meeting participants at least one week in advance.

Guide the Meeting Effectively

Meetings can get off track easily, especially when the participants know one another. Use the following tactics to ensure that the meeting runs smoothly:

- Seat people where they can have eye contact with other meeting participants.
- Stick to the time allotments published on the agenda.
- Keep discussions relevant, but ask for clarification when needed.
- Summarize discussions as you move from one subject to another.
- Maintain a business-like atmosphere. Be calm and kind, but firm in guiding the proceedings.
- Encourage the presentation of many viewpoints.
- Insist on conclusions and action.
- Document meeting actions and assignments.

CHAPTER FILE MAINTENANCE

Correspondence, forms, reports and other papers are the essential means by which work is accomplished. However, essential as paperwork may be, it is not a goal in and of itself. Therefore, strive to create only necessary paperwork, and efficiently manage paperwork from its inception to its final disposition.

As more correspondence and paperwork is shared and maintained electronically, we can avoid using paper as much as possible. However, it is important to remember when filing electronic documents to ensure their security and safety.

Responsibilities of Chapter Leaders

While holding a chapter office or chairing a committee, each member is responsible for maintaining the records in their custody. The responsibilities of determining the future value of any record, whether or not it is covered here, rests with the board member or chair. When in doubt, consult with your Regional Team Coordinator about what records to retain or destroy. Consider the following criteria when deciding whether or not to retain a record:

- Retain records indefinitely if they pertain to historical or legal documentation.
- Retain records indefinitely if they document an activity, measure its accomplishment, and could materially aid a successor in these areas:
 - a. performing their duties
 - b. making decisions
 - c. arriving at timely and accurate solutions to problems

The **President's or Team Coordinator's** files should contain:

<i>Standard Form Chapter Bylaws*</i>	<i>A list of international staff contacts*</i>
<i>Policy Book*</i>	The last several issues of the chapter and
<i>Chapter Guide*</i>	regional newsletters
Robert's Rules of Order, Newly Revised	
Chapter's standing rules	
Chapter and regional directories	
Minutes of all chapter meetings	
Correspondence to the office of president	
Original copy of all legal contracts	

The **Chapter Secretary's** files should contain:

<i>Standard Form Chapter Bylaws*</i>	Chapter's standing rules
<i>Policy Book*</i>	Chapter minutes from the last 12 months
<i>Chapter Guide*</i>	Chapter and regional directories
Robert's Rules of Order, Newly Revised	

The **Chapter Treasurer's** files should contain:

<i>Policy Book*</i>	Chapter minutes from the last 12 months
<i>Chapter Guide*</i>	Reports and correspondence pertinent to
Chapter's standing rules	the office of treasurer
All tax and other financial records	Chapter and regional directories

All referenced records should be kept up-to-date and turned over to the position's successor at the term's conclusion along with all other files pertinent to the office.

**Items listed in italics are available online through the Sweet Adelines International website.*

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CHAPTER GUIDE

SECTION V:

FINANCES

SECTION 1

CHAPTER TREASURER

Some chapters are governed by a board of directors while others have chosen the management team structure. Under the board of directors structure the title of the financial officer is treasurer while the management team position is frequently titled financial manager. In this section of the *Chapter Guide* this position is referred to as **treasurer**.

In accordance with the chapter bylaws, there can be only one chapter treasurer. Elected by the chapter board of directors or management team, they are responsible for overseeing all financial transactions, maintaining appropriate bank accounts, and accurately maintaining chapter books and ledgers.

STANDING RULES

A chapter's standing rules should include financial criteria. All regular, income-producing projects should be included, for example:

- o Provisions for annual shows
- o Dues -- how much, how collected, i.e., chapter dues, international per capita fee, regional assessment
- o Performance fees
- o Fund-raising projects
- o Scholarship fund
- o Benevolence or charitable provisions

Criteria for regular expenditures should also be included, for example:

- o Director's fees and expenses, including expenses to attend regional or international educational events
- o Coaching fees
- o Rehearsal hall rental
- o Expenses for president/other representative to attend regional or international events
- o Any other regular expenditures to be reimbursed from chapter funds

Other criteria that should be included, for example:

- o Authorization of expenditures
- o Audit procedures
- o IRS Forms (for United States chapters)
- o Chapter property

Standing rules should be reviewed annually. As financial needs change, make certain the standing rules concerning those plans are revised accordingly.

CHOOSING A CHAPTER TREASURER

The Standard Form Chapter Bylaws provide an outline of the duties of the officers, and the first item on the list for each officer should be a review of those bylaws. To build a strong chapter, familiarity with the bylaws is a **MUST!**

A chapter treasurer does not need to have extensive bookkeeping experience, but they do need to have sufficient business acumen to understand the fiduciary (defined as relating to or involving a confidence or trust) and record-keeping duties involved. They should have access to the SA website and be willing and able to devote time each week to their duties. The chapter treasurer, like all chapter members who handle a significant amount of money, **should be bondable**.

DUTIES OF THE TREASURER

Standard Form Chapter Bylaws, Article VI, Officers - Treasurer

“The treasurer shall have custody of all chapter funds and securities and shall keep in books belonging to the chapter full and accurate accounts of all receipts and disbursements. They shall be responsible for the deposit of all money, securities and other valuable effects in such depositories as may be designated for that purpose by the board of directors or management team. They shall disburse the funds of the chapter as may be ordered by the board of directors or management team, taking proper receipts for such disbursements. All checks, drafts and orders for payment of money shall be signed in the name of the chapter by the treasurer and countersigned by such other officers, if any, as the board/team in its discretion may designate. They shall render at the annual business meeting, and whenever requested by the president or board of directors or management team, a report of all their transactions as treasurer and of the financial condition of the chapter. The books of the treasurer shall be audited annually at the close of the fiscal year as directed by the board of directors or management team, the cost, if any, to be borne by the chapter.”

It is essential that the treasurer keep the financial records of the chapter current. Time should be set aside regularly to keep the chapter books in order and record all entries promptly. Reports to the board of directors or management team and to the chapter should be made regularly. Bookkeeping advice is provided in Section 4 of this section of the *Chapter Guide*. Whatever system is used, the chapter books should clearly reflect the financial status of the chapter.

DELEGATION OF DUTIES

The chapter treasurer may delegate many tasks associated with their position, but they must retain complete responsibility to the board/team and must be certain that adequate safeguards are in place. As an officer, the treasurer will serve as finance chair, sign all chapter checks and make all deposits in a timely manner. The chapter may appoint or hire a member or nonmember to do the actual bookkeeping under the supervision of the treasurer.

CHAPTER BANK ACCOUNTS

Each chapter must maintain a chapter checking account, and all chapter expenses, with perhaps the exception of very small petty cash items (determined by chapter board/team), must be paid by check from this account. Two checking accounts with separate treasurers are not permissible. For example, the show committee may not appoint a “show treasurer” who will establish a separate account. All banking transactions are controlled by the chapter treasurer, although in the instance described above, the chapter treasurer may open another checking account in the name of the chapter for the annual show or may reflect these transactions in a separate ledger account. They may also want an assistant to aid them in financial transactions dealing with large fund-raisers such as shows, etc.

The chapter bank accounts **MUST** be carried in the official name of the chapter, i.e., “_____”Chapter, Sweet Adelines International, and the checks should be so imprinted. It is strongly advised to require two signatures on all checks but certainly on significant amounts (determined by board/team). An example threshold might be any debit in excess of \$500.00. The treasurer must always sign the checks, but the president and/or vice president may also be authorized to sign checks as second party to the treasurer.

INVESTMENTS

Only funds necessary for the day-to-day operation of the chapter should be in the chapter's checking account. The remaining funds should be in savings accounts, certificates of deposit, or other reliable, protected sources that will yield interest income. The International Board of Directors strongly recommends that funds be invested only with institutions that fully insure the funds. Make certain that the money will be available when needed. Investment decisions should not be made by the chapter treasurer alone. They should discuss various options with the board/team and act upon their recommendations. The chapter board/team may choose to seek competent financial advice locally from a financial advisor specializing in non-profit organizations before making investment decisions.

ESCROW ACCOUNTS

An escrow account is one established to collect funds for a future expenditure that depends on the occurrence of a "condition precedent." Funds placed in escrow do not become the property of the chapter until and unless the "condition precedent" occurs. An example might be a chorus that wants to buy new costumes *if* it wins the regional competition. Money collected for this future and uncertain expenditure could be placed in an escrow account and returned to members if the "condition precedent" does not occur. In this way, the funds are kept separate from chapter funds until they are committed to the purpose for which they were collected because the condition has occurred.

The use of escrow accounts to collect chapter dues, regional assessments and international dues is strongly recommended. Refer to Section III, Dues and Assessments.

CHAPTER BUDGET

One of the most important duties of the treasurer is the preparation of the chapter budget. The treasurer usually serves as the chair of the budget committee, although this may vary from one chapter to another. It is customary to have three members on the committee. The president of the chapter is automatically an *ex officio* member. Refer to Section 2 regarding financial planning and budgeting.

BONDING

The chapter treasurer should be bonded. Either a personal or a position bond may be obtained. The position bond is usually the most convenient and inexpensive. For an annual premium, the position of treasurer will be covered for the amount of money they normally handle. A separate rider may be purchased for periods when larger sums of money are expected to be in the treasury (e.g., for annual shows, competitions, etc.). Bonding protects the chapter from misappropriation of funds by any of the bonded individuals. Be sure to find out if coverage will automatically shift from one

treasurer to another. Other members handling chapter money should also be covered for the time they are handling funds. Notification of additional persons to be covered must be given within that time if coverage is to be continued.

Most insurance agents can write coverage for the chapter. However, it is a good idea to have all chapter insurance with ONE agent. A single agent will be more likely to act as an advisor and to take care of insurance and claim problems promptly.

CHAPTER CREDIT/DEBIT CARDS

It is recommended that a chapter obtain either a chapter credit card or debit card. This card will allow chapters to pay their members dues online through the SA website. If the chapter establishes a chapter credit card be sure to establish a maximum amount chargeable and specify exactly who may use the card and what items they may charge.

FINANCIAL REPORTS

The board/team should be aware of and understand the finances of the chapter. The chapter treasurer should present a report at each regular meeting of the board of directors or management team. Preferably, a complete report should enclose a current *Statement of Activity* and a *Statement of Financial Condition*. (Refer to Section 4, Bookkeeping and Financial Reporting, for examples.) At the minimum, the treasurer should report cash balances in bank accounts and investments and any unusual income or expense items, status of escrow accounts, etc.

AUDITING THE BOOKS

The chapters' books should be audited at the end of each fiscal year by a person or firm qualified to do so. (It is strongly recommended that a CPA or PA be engaged to do this. If that is not feasible, an audit committee made up of three chapter members with business expertise is recommended.) A new treasurer should never accept unaudited books. If there is any discrepancy, it would fall upon the new treasurer if not uncovered before they assumed responsibility.

The person (or committee) conducting the audit should submit a signed letter to the chapter board/team stating what was done and the results of the audit. This letter should be filed with the chapter's minute book. Also, each chapter will be asked to complete a verification of audit form at the end of the fiscal year, to be returned to international headquarters, confirming that the chapter's books have been audited.

INTERNAL AUDIT CONTROLS AND PROCEDURES

Example A (Section 8) outlines some simple control and audit procedures for the chapter to follow. These procedures should be in place whether the audit is internal or external. In fact, the chapter may choose to have both an internal audit committee and an independent auditor.

EXTERNAL AUDITS

If the chapter chooses to have a CPA, PA or another independent party audit the books, be sure to establish the fee in advance. It is unlikely that the chapter will need or want an in-depth audit. The audit should ascertain that cash receipts are being deposited and that disbursements are fully

authorized, documented and in keeping with the tax-exempt purpose of the organization. Be sure that the auditor understands that they do not need to issue an “opinion.” The board/team may want a general statement from the auditor as to the condition of the books.

CHAPTER INSURANCE

Liability Insurance

All Sweet Adelines International chapters in the United States and Canada are required to purchase liability insurance through a group plan provided by the international organization. This coverage provides protection for claims brought by third parties who may have been injured or had property damage by activities of members or chapters. This coverage is for legal liability, which means the claimant must show that the member or chapter was negligent in causing the accident. It is not voluntary coverage which pays even though we are not at fault.

The insurance does not cover injuries to members who may be injured in performing chapter activities. Their own personal medical insurance should cover those situations.

The types of claims covered include:

- Claims for Bodily Injury or Property Damage caused to non-members which result or occur in connection with chapter/regional activities.
- Claims for Personal Injury, including libel, slander, false arrest.
- Claims for Liability arising out of the sale of products, including the serving of food and beverage. It **does** provide primary liquor liability coverage for chapters and regions. This applies regardless of any licensing requirement and whether or not there is a charge for the beverage served.

Types of claims not covered:

- The policy is intended to cover legal liability arising out of normal chapter/regional activities. It is not intended to cover unusual events such as fireworks, rock concerts, carnival and amusement rides, racing events or sporting events.
- If your chapter/region is considering being involved in an event that is out of the ordinary, you should contact the headquarters to be sure coverage is in place.
- In addition, the policy does not cover acts of war, nuclear disasters, aircraft and watercraft accidents. Professional liability is not included.
- There is no coverage for damages incurred by hired (rented) vehicles.
- There is no coverage whatsoever for collision or other damage caused to a member's vehicle.

Each year, chapter presidents will be advised by international headquarters regarding the amount

of the annual premium and the name of the insurer or agent providing the coverage. International will also provide the address of the insurer to contact in order to obtain a certificate of insurance for a special event or a certificate of insurance for ongoing coverage such as weekly rehearsal space.

If there are questions regarding any aspect of the chapter's coverage, do not hesitate to contact international headquarters or the agent to ask for clarification.

Property Insurance

The group liability insurance policy does not cover chapter property. Property insurance must be obtained separately.

Medical Insurance

The group liability insurance policy does not cover injuries to members who may be injured in doing chapter activities. A member's personal medical insurance will normally cover these situations. Chapters interested in providing coverage for members may contact international headquarters for referral to the current insurance agent.

SECTION 2

FINANCIAL PLANNING AND BUDGETING

FINANCIAL PLANNING

Financial planning is the responsibility of the chapter board of directors or management team. While the budget committee (usually with the chapter treasurer as chair) is an integral part of this process, all of the board/team must accept responsibility for planning the financial future of the chapter. Financial planning should be incorporated into all goal-setting sessions and long-range planning meetings.

It is important to make a clear distinction between **financial planning** and **budgeting**. Budgeting is generally considered a short-term financial plan. Most budgets are developed annually based on anticipated revenue and expenses. Ideally, organizational programs, funding, and allowances for cash reserves should be planned in three-to-five year increments. By establishing overall chapter objectives and program priorities, the long-range planning process provides the framework within which financial plans and budgets are developed.

Financial planning concerns the variables that make each chapter unique: size, location, personal incomes of members, local economic climate, and attitudes of individual members. The chapter board or management team must consider these factors and many others when developing a financial plan, for financial plans must reflect the needs and desires of chapter members.

The criteria for establishing long-range financial goals should include the following for at least a three-year period.

- o Establish goals and objectives
- o Estimate sources of revenue
- o Estimate cost of each objective (events, projects)
- o Estimate administrative expenses
- o Estimate capital expenditures
- o Determine cash reserve needs
- o Periodically review status of long-range financial plan

Establish Goals and Objectives

Establish new goals and objectives and decide if they realistically can be achieved within the three-year plan. For example, a chorus with 60 members may establish a goal for membership growth of 300% within three years. Although not impossible, the goal may be too optimistic and projected revenues should not be based on 180 members. Analyze current programs and activities. Determine if they are effectively serving the members. If they are to be continued, incorporate them into the long-range plan.

Other considerations may include:

- o In what educational experiences will the chapter want to participate? At the chapter level? At the regional level? At the international level?
- o If the chapter meets its goals for increased membership, will the present meeting place be adequate?
- o Where will regional competitions be held the next two years? Should money be allocated for transportation and registration fees? What other chapter expenses need to be included in the budget?
- o Will new costumes be needed within the next year or two? How will the purchase be funded? Is an adequate supply of costumes or material available for the anticipated number of new members?

Estimate Sources of Revenue

Forecasting revenue serves as the starting point in developing a budget plan. Revenue budgets should always be prepared before expense budgets.

When estimating sources of revenue do not be too optimistic. Considerations for estimating revenue include:

- o What is the membership growth?
 - a. Decrease or increase?
 - b. Determine percentage of decrease/increase over previous five years and project accordingly.
 - c. Goals established for increasing membership should be conservatively incorporated into the projections.
- o Establish fees for self-supporting events and project attendance.
 - a. Separate budgets for self-supporting events should be developed, correlating costs to revenue.
- o Project cash available for investments, length of investments and estimate interest income accordingly.
- o Determine non-dues sources of revenue
 - a. Grants
 - b. Fund-raising projects

Estimate Costs for Goals and Objectives

Estimating costs for existing programs is much easier, since historical data is available. An effective method for projecting costs for current programs is to analyze historical information and develop a percentage relationship of expense to revenue. For example, if administrative expenses averaged 8%-10% of revenue for the previous five years, project expenses for the next three years at 10%. A three-to-five-year projection can be developed using the same format and percentage trends as established in the historical data.

Variables (e.g., new educational programs, capital expenditure needs) can be added to the projection, which then provides the basis for making long-range financial decisions. These decisions may include increasing dues or assessments (or not), establishing fund-raising activities for specific purposes, reallocating financial resources, etc.

The percentage relationship method works very effectively for routine expenses and those relating to established programs and routine expenses. Developing costs for new programs is more difficult. Research must be conducted to gather all costs associated with implementing a new activity or program.

Estimate Administrative Expenses

Important components of any budget are the operating and administrative expenses for sustaining the business needs of the region/chorus. Because administrative needs remain fairly constant, historical data will be useful for projecting future expenses. The percentage relationship previously discussed may be applied.

Estimate Capital Needs

Two of the most overlooked areas in budgeting and long-range planning are projecting capital expenditure needs and establishing desired cash reserves.

Capital expenses include risers, video equipment, computers, etc. These needs should be evaluated annually. Estimating the "life" of existing capital assets and projecting a timeline for replacement is important to financial long-range planning. New goals and objectives may also affect capital needs.

For example, if significant membership growth is achieved, additional risers may be needed.

Cash Reserves

Cash reserves are vital for maintaining a healthy financial position. Usually there are two principal reserve needs:

- Sustaining reserves, to assure fulfillment of obligation to current members and;
- Contingency reserves, to offset the effects of an operating reversal until expenditures can be adjusted or additional revenues generated.

The importance of establishing cash reserves cannot be overly emphasized. Some myths regarding cash surpluses are still circulating.

Because Sweet Adelines International and affiliated chapters are nonprofit organizations, one misconception is that all excess income must be spent by the end of year, and that accumulation of cash surpluses will jeopardize the tax exempt status of the chapters. In fact, nonprofit organizations are allowed excess income over expense. The United States Internal Revenue's position on accumulation of cash surpluses is that as long as monies held are for the purpose of conducting the activities of the chapters, as specified in the IRS determination letter, it is legal to maintain these cash surpluses.

When a chapter dissolves, cash surpluses and/or assets may not be divided among the members but must be returned to the international organization, a region or another chapter, or donated to another charitable organization, per the dissolution procedures outlined in the *Policy Book*.

Establishing Cash Reserves

Now that it's absolutely clear that cash surpluses are legal and a necessary component of sound financial planning, how can they be established when there is no money? The other questions is, how much should be in cash reserves?

Cash reserves can be modestly established. Remember, this involves long-range planning and if no reserves are available it may take five to seven years to build desired reserves. Specific resources for building cash reserves must be identified and maintained to achieve the desired results.

Consider modest increases for chapter dues, performance fees, registration fees for educational meetings, etc. The financial impact per member may only be \$2.00 to \$5.00 per year but the cumulative effect on the chapter treasury will provide significant funding for member benefits.

Suggestions for beginning the process are as follows:

- Increase chapter dues or other fees modestly and place the increase in an interest-bearing account for the explicit purpose of establishing cash reserves.
- Conduct an annual fund-raising project and place funds in cash reserves.
- Designate a portion of the annual show revenue for cash reserves.

Once significant cash reserves are established, the chorus is in a position to decide the best use of reserves while at the same time consistently adding to cash reserves. Most likely, additional increases in dues or fees will not be necessary for several more years.

The membership is more receptive to increases that will sustain the treasury for five to seven years rather than implementing crisis increases or assessments every two to three years.

Investing Cash Reserves

Before investing the funds, an investment policy should be adopted by the board/team defining the following:

Who is authorized to invest the funds?

- a. Treasurer
- b. President and treasurer
- c. Define any restrictions or limitations on investment authority

Define criteria for investments.

- a. Certificates of deposit
- b. Treasury bills and notes
- c. Savings accounts
- d. Corporate bonds
- e. Money market funds

Investment options should be weighed carefully. Within the investment policy, specific criteria should be defined. For example, it is not likely the board/team will place the funds in risky stock options. This should be clearly stated.

Capital expenditures are usually funded from cash reserves. Reserves also may be maintained so that frequent increases for dues are not required.

Determine the amount of cash reserves to maintain. This amount will vary according to the needs of the chorus. A percentage of annual operating expenses should be available. A recommended amount ranges from 20%-50%. Although deficit budgeting is not recommended as standard procedure, cash reserves may be used to supplement deficit budgets.

Bank Negotiations

Consolidating the financial functions through one bank will provide negotiating leverage for interest rates. If substantial amounts of monies are processed through the bank regularly, a higher rate of interest on certificates of deposit, money market or savings accounts may be obtained just by asking. If the bank cannot provide a higher rate, then ask for free banking services.

Stock Brokers

Depending on the amount of monies available for investments, a stock broker may be a valuable resource for obtaining better rates of interest for certificates of deposits, treasury notes or money market funds. Before deciding to use the services of a stock broker, be sure all costs have been clearly presented and clarified. Always use a reputable firm with the proper credentials and certifications.

Analyze Projections

Once the projected financial plan is completed on paper, analyze the projected financial status of the chorus. Ask the following questions:

- Will current dues sustain the plan for the next three to five years?
- If not, when will a dues increase be needed? Plan carefully and far enough ahead so that the membership is prepared for the increase.
- Rather than raising dues, should other fees be raised or implemented for programs and activities?
- Will cash reserves sustain any unexpected shortfalls in revenue or unexpected expenses?

Review Status of Long-range Financial Plan

The real test of a financial plan is whether it works or not. Annually review actual revenue and expense compared to the projected budget. Determine if any variances are significant enough to adjust the plan for future years. However, to maintain the integrity of long-range planning and to determine the validity of the plan, it is important to continue the plan as developed for at least three years. Certainly, adjustments may be necessary. Continue to extend the plan annually.

BUDGETING

Preparing the chapter's annual budget is an extension of the long-range financial plan. Logically, the annual review of the long-range financial plan should take place after the close of the fiscal year and before budget development. The annual budget incorporates any adjustments needed to reflect actual growth trends for membership, new programs or activities, unexpected capital needs, etc.

If a long-range financial plan has not been developed, the budget can be prepared using the same criteria and processes as outlined previously for financial planning.

The annual budget is presented to the chapter's board of directors or management team for adoption.

Deficit Budgeting

Although not recommended, budgeted expenses may exceed budgeted revenue. It is vital that a portion of cash reserves be maintained to provide for this contingency.

As previously stated, the chapter should have an investment and cash reserves policy defining how cash reserves may be used and how they may be invested.

Some chapters do not allow deficit budgeting but allow cash reserves to be used for unexpected shortfalls in revenue. The standing rules should clearly state if deficit budgeting is allowed.

Cash Forecasting

Cash forecasting predicts cash surpluses as well as impending cash deficits. Forecasting works best if financial activities are fairly predictable. A cash flow statement, prepared from the previous year's financial activities, provides a guide to projecting cash flow patterns for the ensuing year. By identifying when the chapter receives most of its income and when expenses are anticipated, the chapter may structure investments accordingly.

When forecasting cash balances, operating revenue and expenses are considered but so are other sources of revenue including escrowed dues, deferred income, and loans, all sources of cash.

Anticipated capital expenditures including costumes, risers, equipment, etc. are also included in the cash projections.

SECTION 3 DUES AND ASSESSMENTS

Each chapter establishes its own procedures for collecting chapter dues, regional assessments and international dues from its members. According to the chapter bylaws, it is the chapter board of directors or management team that sets the amount of the chapter dues. (However, many boards/teams ask the chapter members to ratify a dues increase.) The chapter board/team should also determine how it wishes to have the money collected. This will be the chapter's "Dues Payment Plan," which should be clearly stated in the standing rules, with any exceptions that may be made.

ANNIVERSARY DUES

Approximately 45 days before the members' renewal date, international will send the chapter president, treasurer and membership chair an email notifying them that their renewal invoices are available to review and pay through the Members Only section of the SA website. Those members not paid will soon expire.

Applications and payments for new members must either be mailed to international headquarters or the chapter officer may provide their chorus credit or debit card information to international headquarters for payment.

Dues Payment Plans

For most members, payments collected in small increments are easier to manage. Some members, however, may prefer to write one check annually for the full amount. Plans should allow members the option to prepay the entire amount once a year or provide for monthly, biweekly or weekly payments. Any monies collected by the chapter from the members for future fees (international per capita fees, regional assessments) are ALWAYS refundable minus debts owed by the member.

Optional Escrow Plan

Members pay chapter dues in incremental payments (monthly, biweekly, weekly) and prepay regional assessments and international dues for the next fiscal year into an escrow account so that these funds will be "ready and waiting" at renewal time. If a member does not wish to renew their membership, the escrowed amount paid is refunded. Your chapter's standing rules should state that debts owed a chapter may be settled out of the member's escrowed funds, before any refund is paid. "Good standing" is based only on amounts paid to cover the current fiscal year, since the escrowed funds do not become the property of the chapter until the member indicates they wish to renew their membership. Because this plan is optional, members who do not want to pay international dues or annual regional assessments in advance are allowed to pay in full just before renewing their membership.

No Escrow Plan

Any chorus that chooses not to offer escrowed payment of fees (international per capita fees and regional assessment) must collect fees in a lump sum from the member(s) at the time the payment is due.

Mandatory Escrow Plan

Under this plan, all members must pay regional assessments and international dues into the escrow account at stated intervals, in addition to paying their chapter dues in incremental payments. Under a mandatory escrow plan, "good standing" may or may not be based on payments applicable to the next fiscal year. It is the decision of the chapter and should be clearly stated in the standing rules. When funds are held "in escrow," they are not yet the property of the chapter. For that reason, **refunds of monies paid for the next fiscal year's international dues and regional assessments are made to members who do not renew their membership.** Interest earned on escrowed funds may be retained by the chapter. Standing rules should clarify if debts owed by the member to the chapter may be settled out of the member's escrowed funds.

Prepayment Plan

The prepayment plan is not encouraged because of inequities that can arise when a member leaves the chapter.

Combination Payment and Escrow Plan

A payment plan allowing a member to make monthly payments for **current** year chapter dues **plus** a monthly amount for next year's international dues and regional assessment does not need to be complicated to administer. Chapters have many different variations of payment and escrow plans. Most chapters require new members to pay current year international dues and regional assessment upon joining but allow monthly payments for current year chapter dues. Members are also allowed to make monthly payments that apply to the next year's international dues and regional assessment. This amount is escrowed. The payment options are numerous. **Regardless of the payment structure the chapter standing rules should clearly state what portion of the payments are refundable. Escrowed dues must always be refundable.**

It is essential that payment records be maintained for each member. This constitutes the subsidiary records or journals referred to in Section 4, Bookkeeping and Financial Reporting. The first entry in the payment record is the total amount owed by the new member and includes not only the current amount for international dues, regional assessment, and chapter dues but also the escrowed amount. The payment record indicates how much the member owes at any time during the year and also what portion of the payments represent escrowed dues. The escrow balances for all member payment records should reconcile to the total amount shown in the **general ledger** account titled "**Escrow Dues.**" If the totals are not the same, an error has been made in recording payments either in the cash receipts journal, general ledger, or member payment record.

SECTION 4 BOOKKEEPING AND FINANCIAL REPORTING

A chapter's bookkeeping system should be structured and maintained to **record, reconcile, and report** the financial activities of the chapter accurately and comprehensively. The bookkeeping records provide the foundation for financial planning and budgeting.

Before a bookkeeping system is established, some preliminary procedures should be established.

CHECKING ACCOUNT

If the chapter does not have a checking account, open one immediately at a conveniently located bank. Often there is no charge to nonprofit groups. If there is a change in officers who are signatories on the account, new signature cards must be signed and filed with the bank at the beginning of every fiscal year or during the year if signatures are changed. Signature cards are furnished by the bank.

Ask that all checks to the chapter be made payable to the “_____” Chapter, Sweet Adelines International. Checks should **not** be made payable to the treasurer.

Have an endorsement stamp made using the chapter's official name. This is for convenience and to save time endorsing checks when preparing a deposit. Most financial institutions have the necessary information imprinted on the stamp: FOR DEPOSIT ONLY, account name and account number.

DISBURSEMENTS

All disbursements should be substantiated by invoices, vouchers, or specific action of the chapter board/team authorizing the expenditures (as documented in the minutes of the board/team meetings). All expenditures should be paid by check or credit card. A treasurer should **never** commingle their own funds with those of the chapter. In addition, the treasurer should have their own expenditures approved by an authorized person, usually the president.

VOUCHER FORM

An expense voucher form should be used by members when submitting bills for reimbursement. Requests should have receipts attached and an explanation as to the reason for the expense. The voucher should include the member's name and/or vendor, date of expense, description of expense, and amount. The voucher should be approved by the president of the chapter and submitted to the treasurer for payment. An electronic format may also be used for preparing and submitting vouchers.

RECORD RETENTION

Various financial, insurance and legal records should be retained by the chapter. Listed are items that apply to chapters and the length in years that each item needs to be retained.

<u>Accounting Records</u>	<u>Retention Period</u>
Bank statements and deposit slips	four years
Payroll records	four years
Expense reports	six years
Subsidiary ledgers (includes A/P & A/R ledgers)	six years
Trial balances (monthly)	three years
Checks	eight years
Payroll or 1099 Misc. records	eight years
Vouchers (for payment to members)	eight years
Audit reports and financial statements	permanently
General ledgers & journals	permanently
Tax returns & supporting documents	permanently
<u>General</u>	
Labor Contracts	permanently
Contracts & agreements	permanently
Bylaws, charter & minute books	permanently
<u>Correspondence</u>	
Legal & tax correspondence	permanently
<u>Insurance Documents</u>	
Policies (expired)	four years
Accident reports	six years
Claims (after settlement)	ten years

The Internal Revenue Service of the United States requires tax exempt organizations to keep such permanent books of accounts or records, including inventories, as are sufficient to show specifically the items of gross income, receipts and disbursements, and other required information. The period for retaining tax records is described as being "while the content thereof may become material in the administration of any internal revenue law."

As a practice, the IRS has indicated that tax returns are usually closed within three years after submission. Except in cases of suspected fraud, the IRS is unlikely to ask for tax data that is more than three years old.

Chapters in countries other than the United States should check the laws of their country to see if a chapter is required to register with any government agency. Retaining records for a reasonable time makes good business sense, whether or not the chapter is required to file tax returns.

BOOKKEEPING SYSTEM

The size of the chapter may determine the complexity of the bookkeeping system. A double-entry system is preferable. This means that every financial transaction will affect at **least two accounts**. For example, a deposit to the bank is an **asset** entry (debit) and the offsetting entry is usually to an **income** (credit) account. A disbursement affects an **asset** (credit) account, the bank balance, and usually an **expense** (debit) category.

The following is an overview of the components and procedures of a double-entry bookkeeping system.

- o A **chart of accounts** is a listing of **income, expense, asset, and liability** categories for the chapter. The chart of accounts provides the basis for recording and reporting the financial activities of the chapter in a consistent and meaningful manner. Categories may be identified numerically and by name or name only. A sample chart of accounts is included in this chapter.

The chart of accounts may be expanded as needed. However, it is important to maintain consistency in how transactions are categorized so that historical financial information can be accurately compared to current financial information.

- o Determine if the bookkeeping system is on **cash or accrual** basis. A **cash** basis recognizes income at the time it is received and expenses are recognized when a check is written.

An **accrual** basis is used primarily when accounts receivable are maintained or expenses are not paid when incurred. Also, revenue received or an expense paid relating to an event or activity in the next fiscal year is recorded on an accrual basis. These entries are recorded in liability or assets as **deferred income** and **prepaid expense**. At the beginning of the new fiscal year these amounts are reversed to the appropriate accounts as current revenue and expense. An accrual basis more accurately reflects the financial condition of the chapter.

Hotel or other contractual deposits are recorded in a pre-paid account under Assets and can be titled to suit the need. Eventually, the deposits are either refunded to the chapter or used to pay for a future expense.

Because an accrual basis is more complex to maintain, a thorough knowledge of accounting principles is needed or professional assistance should be obtained when establishing an accrual basis bookkeeping system.

- o A **subsidiary record** should be maintained for each member when chapters allow members to make periodic payments for current or escrowed dues, costumes, etc. A subsidiary record is an extension of the original transaction to the **cash receipts journal** or **cash disbursement journal**.

Computerized Bookkeeping System

The easiest and least time-consuming way to maintain the chapter's bookkeeping records is on a computer. Members experienced with spreadsheet programs such as *Excel* may set up and customize the applications to suit their chapter's needs. However, this requires a thorough understanding of accounting principles.

There are several bookkeeping programs on the market designed for individuals not familiar with the debits and credits of double-entry bookkeeping and accounting procedures. The most widely used software is *Quickbooks Pro*.

QuickBooks Pro provides options for designing bookkeeping systems based on needs, personal or business. Many small nonprofit organizations such as clubs, churches, and charities use *Quickbooks Pro* to maintain members' dues or donation records. Because of the flexibility of these programs, a customized system can easily be developed that suits your chapter's specific needs. For United States chapters required to file IRS 990 forms and statements, *Quickbooks Pro* can be linked to other tax preparation software.

Intuit, the company that produces *Quickbooks Pro*, offers a Web-based application at a cost-effective subscription rate. Intuit can be accessed at <http://quickbooks.intuit.com/premier/?industry=nonprofit>.

Manual Bookkeeping System

A manual system is more cumbersome and time-consuming to maintain. However, a small chapter that operates on a cash basis may find a manual system fulfills its needs. A double entry bookkeeping system provides a reconciliation process. Most office supply companies offer bookkeeping systems. Some systems incorporate the one write check system for cash disbursements. Others combine the cash receipts and disbursements into one journal.

Individuals familiar with accounting principles may set up a system using columnar ledger sheets to include:

- Cash Receipts Journal
- Cash Disbursements Journal
- General Ledger
- Check Register (optional)
- Subsidiary Records Journal

Journals are set up for **cash receipts** and **cash disbursements**. A **cash receipts** journal identifies the sources of revenue and the **cash disbursement journal** identifies the disposition of cash.

Although the checkbook may be used to maintain the current bank balance, a **check register** may be used to summarize deposits and disbursements.

Periodically, the information in the journals is transferred to a **general ledger** in summary form, usually this is done on a monthly basis (for chapters with minimal financial activity, quarterly may be appropriate). The general ledger provides cumulative totals of all categories and is used to compile financial reports. Although not necessary, it may be helpful to prepare a **general journal**

summary and post to the general ledger from the general journal summary. By preparing the summary sheet, the treasurer is assured that both journals are in balance.

The following information provides a simplified explanation of how to establish a manual bookkeeping system and how the information is compiled to present financial reports.

Cash Receipts Journal

Cash received and deposited to the bank is recorded in the **cash receipts journal** under the column titled *cash to checking account/amount*. This amount is then distributed to the appropriate account as identified in the chart of accounts. If for any reason cash is not deposited directly to the bank checking account, then other columns must be identified to indicate the disposition of the cash, i.e., savings, petty cash.

Cash Disbursements Journal

In the **cash disbursements journal** the amount of the check is recorded under the column titled *checking account/amount* and distributed to the appropriate category accounts as identified in the chart of accounts. If a disbursement is made from other accounts or petty cash, a column must be provided to identify the source of the disbursement.

At the end of the month all the columns are totaled. In the **cash receipts journal** all the distribution columns are totaled and should equal the total of the *checking account/amount* column and other deposit accounts. If they do not equal, then an error has been made in addition or in recording the distribution of the cash. The same procedure applies to the **cash disbursements journal**: The total of disbursement categories should equal the total of the checking account/amount column. The reconciliation of the **cash receipts** and **cash disbursements journals** constitutes the debit and credit equation of double-entry bookkeeping.

Every transaction has a debit and credit entry. Cash receipt deposited to the bank (or other deposit account) is the **debit** entry; the source of the cash receipt is the **credit** entry.

The opposite is true of cash disbursements. A disbursement from the bank, savings, or petty cash is a **credit** entry while the distribution is a **debit** entry.

NOTE: Escrowed international dues are not considered operating revenue nor are they an operating expense when paid to international. When received from members the entry is a debit to the bank (asset account) and a credit to escrow dues (liability account). When escrowed dues are forwarded to international or the region, the entry is a credit to the bank (asset account) and a (debit) to the escrow dues account (liability).

General Ledger

The general ledger summarizes, by account, all entries to the **cash receipts** and **cash disbursements** journals. As previously mentioned, a **general journal summary** may be prepared before posting to the general ledger. The monthly or quarterly totals from these journals are posted to the general ledger accounts. A ledger sheet is provided for each account. To reduce the number of ledger sheets, some categories may be grouped on columnar pages. For example, general and administrative expenses may include office supplies, telephone, postage, rent, etc. The columns, when totaled vertically, provide cumulative costs per category and when totaled horizontally

provide the cumulative total for all general and administrative expenses. **Example B** illustrates the flow of summarized postings from the cash receipts and cash disbursements journals to the general ledger.

Financial Reports

The cumulative balances for each general ledger account are used to compile financial reports. Sample *Statement of Financial Position* (balance sheet) and *Statement of Activity* (revenue/expense statement) are presented as **Examples C and D**.

A current *Statement of Activity* and *Statement of Financial Position* should be presented at each regular meeting of the chapter board/team. Over-budget or significant variances between budget and actual revenue or expense should be fully explained. Any difficulties in dues collections should be reported to the board/team.

The assets and liabilities, as presented on the *Statement of Financial Position*, should be reviewed. The difference between assets and liabilities represents the equity (net worth) of the chapter. Assets are owned by the chapter while liabilities are owed by the chapter. Escrow dues are included in the cash balances (asset) but are owed (liability) to international, the region, or the member.

**SWEET ADELINES INTERNATIONAL
Your Chapter**

CHART OF ACCOUNTS

INCOME

Chapter Dues
Performance Fees
Interest Income
Fund-raising
Performance Fees
Annual Show

EXPENSE

Director Fees
Director Expense-miscellaneous
Director Expense-competition
Director Expense-education
Coaching Fees
Rent
Postage
Telephone
Supplies
Performance Expense
Educational Materials/Music
Annual Show
Membership Recruitment/Retention
Regional Competition

ASSETS

Cash assets:
Cash In Bank--Checking Account
Cash In Bank--Savings Account
Cash In Bank--Money Market Account
Pre-paid Expenses (deposits or expenses paid for next fiscal year)

Capital assets:
Risers
Costumes (if owned by the chapter)
Office Equipment

LIABILITIES

International Dues (current year)
Regional Assessments (current year)
Escrow--International Dues (next year)
Escrow--Regional Assessments (next year)

EQUITY

Equity (net worth)

SECTION 5 PREPARATION OF TAX FORMS

A ruling issued on October 27, 1955, by the U.S. Treasury Department, Office of the Commissioner of Internal Revenue Service, Washington, D.C. granted Sweet Adelines, Inc. now Sweet Adelines International, and all affiliated chapters and regions tax exempt status as a 501(c)(3) educational organization. This ruling affects all chapters located within the United States. The exemption letter, dated October 27, 1955, serves as that official ruling and is reproduced in its entirety further in this section. Remember to use the date October 27, 1955, any time you are asked for the date of our exemption.

It is vitally important that each chapter and region understand and observe the conditions and requirements of the ruling. Failure to comply with the requirements could cause the chapter's or region's exemption to be revoked. Please read the ruling carefully.

ALL chapters and regions are identical in their purpose, method of operation, and activities, as was stated in our request for a group ruling from the Commissioner of the Internal Revenue Service. Please review the Standard Form Chapter Bylaws and the Corporate Bylaws of Sweet Adelines International. These documents are posted on the Sweet Adelines International website. Copies of the Standard Form Chapter Bylaws, Standard Form Regional Bylaws, and the Corporate Bylaws have been provided to the Commissioner, and they serve as a part of the basis of this federal ruling.

Often chapters and regions must provide proof of their non-profit exempt status when applying for postal bulk permit, grants, or for solicitation of donations. A copy of the **IRS exemption letter** along with a **letter of affiliation** should be submitted to agencies or organizations requiring verification of the exempt status. The most recent IRS exemption letter is available on the Sweet Adeline International website in the Document Center. Upon request, a letter of affiliation will be provided to your chapter by international headquarters staff in the Finance Department.

FEDERAL TAX REQUIREMENTS

All United States chapters, prospective chapters in Step II, and regions in existence during the period beginning May 1 to the following April 30 are required to file Forms 990 annually with the Internal Revenue Service. It is important to maintain the fiscal year of May 1 through April 30 as this is the fiscal year period reported to the Internal Revenue Service for international and its United States affiliates (chapters and regions). Chapters located in countries requiring a calendar year may conform to their laws but financial reports sent to international should be on the fiscal year basis.

990EZ and 990 Forms

Chapters or regions with gross receipts of less than \$200,000 and total assets less than \$500,000 may now file a **990EZ**.

The 990 FORM is only required if gross receipts exceed \$200,000 and assets are more than \$500,000.

Because of the complexity of the 990 Form, it is highly recommended that the 990N or 990EZ be filed if the gross receipts requirement can be met.

Annual Electronic Filing Requirements-Form 990N (e-Postcard)

Chapters with \$50,000 or less in gross receipts are only required to electronically file the Form 990N (e-Postcard).

Even if the current year's gross receipts were more than \$50,000, the organization could still file a 990N if the following conditions apply.

An organization's gross receipts are considered to be \$50,000 or less if the organization:

- Has been in existence for one year or less and received, or donors have pledged to give, \$7,500 or less during the organization's first tax year;
- Has been in existence between one and three years and averaged \$6,000 or less in gross receipts during each of its first two tax years; or
- Is at least three years old and averaged \$50,000 or less in gross receipts for the immediately preceding three tax years (including the year for which the return would be filed).

An e-Postcard must be filed on the IRS Web site. The information required for the electronic filing is as follows:

- Employer identification number (EIN)
- Tax year
- Legal name and mailing address of the chapter or region (name of chapter/region of Sweet Adelines International)
- Name and address of a principal officer (finance coordinator/treasurer or president)
- Web site address if chapter or region has one
- Confirmation that the organization's annual gross receipts are normally \$50,000 or less
- If applicable, a statement that the organization has terminated or is terminating

To learn more about the 990N requirements and how to file:

<http://www.irs.gov/charities/article/0,,id=169250,00.html>

EIN

Every chapter and region has their own EIN. If you need to verify the chapter's EIN, please contact the finance department at International Headquarters.

990T Form

Additionally, a Form 990T must be filed if gross income from an unrelated trade or business is \$1,000 or more. Generally, chapters and regions do not generate unrelated business income as almost all fund-raising projects are conducted by volunteers (members).

SCHEDULE A

Schedule A should be used if filing Form 990 or Form 990EZ. In Part I, Box 9 needs to be checked, part II does not need to be filled out, part III needs to be completed and part IV should be filled out only if needed.

SCHEDULE O

Schedule O should be used to explain various line items on the Form 990 or Form 990EZ. The deadline for filing these forms with the Internal Revenue Service is **September 15** of each year.

FAILURE TO FILE 990 INFORMATION FOR THREE CONSECUTIVE YEARS, MAY RESULT IN REVOCATION OF THE CHAPTER'S TAX EXEMPT STATUS

Please provide a copy of the 990EZ or 990 filing to International Headquarters, attention Finance Department.

A reminder with additional information regarding the 990 filings is sent electronically to all United States chapters and regions and all tax related information is available on the SA website in the Document Center.

FORM 941 AND W-2

If a U.S. chapter has employees, it must satisfy the federal and state reporting requirements for taxes, withholding, and quarterly reports. Please refer to Section I of the *Chapter Guide* for further information with regard to filing requirements when the chorus director is an employee of the chapter. The same filing requirements would hold true for any employee of the chapter.

FORM W9 AND 1099-MISC

It is the responsibility of the chapter treasurer to obtain taxpayer identification numbers from vendors or individuals to whom the chapter makes payments by using form W9.

Form W9 Request for Taxpayer Identification Number and Certification may be downloaded from the IRS Web site, <http://www.irs.gov> or purchased at an office supply store. The information provided on the W9 is used to prepare 1099-MISC Forms at the end of the year IF payments of \$600 or more were made during the calendar year to any individual or unincorporated business. Individuals include chapter directors, coaches, and faculty. It is recommended the completed W9 Form be provided to the chapter treasurer prior to any payments being issued.

The Form 1099-MISC should be sent to each qualified recipient by January 31. Copies of 1099-MISC Forms issued should be sent to the Internal Revenue Service by the end of February along with Form 1096 Annual Summary and Transmittal of U.S. Information Returns.

Detailed instructions for the W9 and 1099-MISC Forms can be accessed at <http://www.irs.gov>.

STATE FILING REQUIREMENTS

Many states have filing requirements that apply to nonprofit organizations. Each chapter should check with the appropriate state agency to determine if there are any filing requirements. Sweet Adelines International's exemption from federal income tax does not necessarily exempt chapters from filing requirements and tax requirements on the state and local level.

It is each chapter's responsibility to obtain the necessary forms and to file them on a timely basis. This information should become part of the chapter's files and should be passed on to each subsequent treasurer.

SALES TAX EXEMPTION

As a 501(c)(3) organization, Sweet Adelines International and all United States affiliates (chapters and regions) are exempt from federal income tax and, in some states, state income tax. Canadian chapters registered with Revenue Canada as a charitable organization are exempt from income tax.

Information regarding taxation laws in other countries should be sought by chapters to ensure you are in compliance. This information is not available through international headquarters.

Many United States chapters inquire about sales tax exemption. A sales tax exemption allows the purchase of goods and services without paying sales tax. The majority of states **do not** grant a sales tax exemption on the basis of being a 501(c)(3) organization, but state laws vary and other criteria may apply. To determine if your state grants sales tax exemptions to 501(c)(3) organizations, please contact the agency that administers your state's sales tax collections. Usually, state agencies require Sweet Adelines International to verify the chapter's affiliation and exempt status. Please request this information from the finance department at international headquarters.

PERSONAL TAX DEDUCTIONS FOR MEMBERS

Sweet Adelines International, in conjunction with an accounting firm specializing in non-profit organizations, has formulated some guidelines regarding the deductibility of expenses of members.

Since Sweet Adelines International qualifies as a tax exempt education organization, certain expenses paid by members in connection with activities of the organization may be deductible as a charitable donation. Information concerning charitable contributions and deductible expenses is posted on the SA website in the Document Center.

The volunteer and travel expense form is available on the SA website in the Document Center. Please contact the finance department at International Headquarters for assistance.

SECTION 6 FUND-RAISING MISCELLANEOUS TAX EXEMPT ISSUES

Generally, any fund-raising activity or event that generates revenue that is used to fulfill the purpose for which the chapter was established is acceptable.

RAFFLES

Frequently, inquiries are made about the legality of conducting raffles. According to the Internal Revenue Service it is legal for Sweet Adelines International chapters and regions to conduct raffles if they **comply with state laws and U.S. Postal Service regulations**. A raffle is considered a game of chance that involves selling tickets (chances) to win a prize by random drawings. The goal is for revenue generated from the sale of tickets to significantly exceed the cost of the prizes. All funds generated from the raffle must be used to further the activities of the chapter or region as specified in the 501(c)(3) Internal Revenue Service exemption code.

Each state has its own registration laws for raffles or lotteries. A chapter or region may conduct a raffle **if** state laws **and** postal regulations are followed. The following U.S. Postal Service regulations apply:

- a. A not-for-profit organization (i.e., one that would qualify as tax exempt under Section 501 of the Internal Revenue Codes of 1986) may advertise a raffle through the U.S. Postal mail service **but may not provide tickets through the mail. This applies only within states that allow raffles or lotteries. Advertisements or promotions may not be conducted within states that do not allow lotteries or raffles.**

For example, a state may allow raffles but postal regulations will not permit tickets or payment for tickets to be sent through the U.S. Postal Service either within the state or to other states.

- b. Any form of payment for a lottery or raffle ticket **may not** be sent through the U.S. Postal mail service.
- c. Violation of these U.S. Postal Service regulations can result in fines and/or imprisonment.

Before conducting a raffle, contact the state attorney general or appropriate governing agency to obtain information regarding raffle and lottery laws. If raffles or lotteries are legal in the state, it is suggested that the local postmaster also be contacted regarding postal regulations.

Questions regarding raffles should be directed to the finance department at International Headquarters.

CONTRIBUTING TO OTHER CHARITABLE ORGANIZATIONS

A frequent inquiry is to what extent choruses, quartets, and regions may donate to, or raise funds for, other non-profit/charitable organizations or individuals. It is often assumed that this is a permissible activity since Sweet Adelines International is a 501(c)(3) charitable organization. However, when the Internal Revenue Service grants a tax exempt status, the organization must conduct activities and raise monies to further the purpose for which the organization was granted this status. There are numerous exemption statuses and each of them serves a different purpose.

Sweet Adelines International was granted status as an exempt educational organization under Section 501(c)(3) of the United States Internal Revenue Service Code. Exempt status is granted based on the purposes stated in the application for exemption and in the Articles of Incorporation. To maintain the exempt status, the organization and its affiliates (choruses, quartets, and regions) must adhere strictly to these purposes:

- Providing education and training for its members in singing four part harmony, barbershop style, without instrumental accompaniment.
- Giving public and private performances to promote an interest in the development and general appreciation of all things pertaining to the art form of barbershop harmony.
- Doing any and all things necessary to accomplish said purpose, including the owning and disposition of real and personal property; provided that no actions inconsistent with its status as a charitable organization recognized under Section 501(c)(3) of the United States IRS Code shall be permitted.

One of the primary Internal Revenue Service requirements to maintain tax exempt status is that no funds of the organization or its affiliates (chapters and regions) may be used to benefit an individual.

Chapters or regions may not hold or sponsor events that raise monies for individuals. Several examples of inappropriate activities include fund-raising events for disaster relief such as hurricanes, fire or other acts of nature. Benefits or performances may not be sponsored by the chapters or regions for individuals with medical or financial needs. To engage in any of the above-mentioned activities jeopardizes the tax exempt status of the affiliates. Organizations granted tax exempt status to conduct these activities include the American Red Cross, the Salvation Army, and most churches and denominations.

If invited to perform at a fund-raising or benefit event, choruses or quartets may do so as long as they are not directly soliciting and collecting monies for the beneficiaries (for example, chorus members may not wear advertising, wave signs, etc., and should serve as the performing “talent” only.)

FUND-RAISING FOR OTHER ORGANIZATIONS

There are provisions within the IRS code that allow restricted participation with, or donations to, other 501(c)(3) non-profit organizations. **The primary requirement is this participation may not exclusively benefit another organization or be ongoing.** The primary focus and participation of a Sweet Adelines affiliate should be the performance of four-part harmony singing with the fund-raising aspect secondary.

To verify if an organization qualifies as a 501(c)(3), please refer to the IRS Publication 78, Cumulative List of Organizations, www.irs.ustreas.gov. This listing is also available at most public libraries. Another resource is www.guidestar.org.

An attorney specializing in tax exempt organizations provided these guidelines for participating in fund-raising activities for other organizations.

- Choruses and regions are encouraged to share the joy of our art form by performing and participating in community activities, including fund-raising benefits as long as the guidelines are followed.
- Sweet Adeline choruses, quartets, and regions should restrict themselves from serving as a collection agent or fiduciary of the other organizations. It is acceptable for a representative from the another organization to attend chorus performances and collect donations. Persons contributing to this particular solicitation should understand that funds donated are being donated directly to the other organization (not Sweet Adelines). It is also acceptable for the chorus or quartet to advertise this type of activity through its promotional materials and make announcements at the performance with respect to same.
- It is acceptable for Sweet Adelines International affiliates to announce as a part of a performance that a portion of the proceeds from the performance will go to another 501(c)(3) organization in order to support that organization's tax exempt purpose and activities. But in connection therewith it should be understood that these collected funds will at the time of the collection be Sweet Adelines funds, subject to the claims of Sweet Adelines creditors, if any, and reportable as Sweet Adelines funds at the time of collection for the tax period in which the funds were collected. So long as it is not part of, and does not constitute an ongoing program, a Sweet Adelines affiliate is authorized to make distributions from its treasury directly to the other organization of the precise amounts of funds collected, or in amounts less than these funds or more than these funds. The other organization must understand in connection with such an arrangement that it does not have a right to "claim" the funds raised by Sweet Adelines, but the other organization would have an expectation of receiving a portion of the proceeds from the activity from Sweet Adelines. This arrangement must be made clear between the two organizations. Otherwise, Sweet Adelines conceivably could be viewed as a collection agent, fiduciary or other form of agent for the other organization.
- Any chapter, region, or quartet of Sweet Adelines International is permitted to make a donation from its general treasury from time to time to a properly qualified 501(c)(3) charitable organization such as the American Red Cross or a September 11 fund. This type of activity is included in the broad purposes of Sweet Adelines International governing instruments, and comports with 501(c)(3) laws and regulations. No such activity should be regular and continuous, but these types of gifts and contributions certainly can be made in support of these types of causes and activities to 501(c)(3) organizations which are in receipt of IRS determination letters.

- The international, regional, and chapter levels of Sweet Adelines International may lend their name to other 501(c)(3) activities, provide performances, and solicit donations generally in support of the other organizations but they should not actively collect, handle, or distribute any donations on behalf of the other organization (except as described in guideline #2).
- If the activity consistently is seen as raising or soliciting funds on behalf of another 501(c)(3) organization, tax exempt status concerns may exist. The concerns are minimized if the Sweet Adelines involvement is strictly a performance of singing.

POINT OR INCENTIVE SYSTEM

Many chapters have established point or incentive systems, allowing members to receive “points” for participating in activities of the chapter. The chapter helps defray members' expenses to attend functions, such as regional or international competitions, based on the number of points earned.

The International Board of Directors does not endorse point or incentive systems. However, because these systems are known to exist, guidelines have been established to aid chapters in administering the funds.

The tax law requires that an exempt organization must serve a public, rather than a private interest, and that no part of the earnings of such an organization may actually benefit any private individual. Chapters should feel free to reimburse members for ordinary and necessary expenses incurred in carrying out the exempted purposes of the organization. Chapters should avoid payments to members for unrelated expenses or reimbursements that are excessive. Chapters should maintain records that clearly show the purpose for which payments are made, including copies of documentation relating to the reimbursement of expenses paid by members.

Regarding the distribution of funds under a point or incentive system, it is strongly recommended that chapter funds be disbursed directly to a third party and not to a chapter member.

Example: A chapter has sufficient funds to partially pay the transportation costs for its members to attend the regional convention and competition. The cost per member is \$100. Some members have enough points so that the full cost of their transportation is paid by the chapter. Other members have enough points to receive partial credit and must pay the chapter for the remaining portion of their transportation costs.

The chapter collects the funds due for transportation costs from its members and then pays the entire amount directly to a third party.

This method allows for complete record-keeping and accountability of chapter funds. This method also relieves the members of possible tax considerations on their personal income tax returns.

Under a point or incentive system, if the chapter still feels it is necessary to give money directly to the members, the chapter should require each member to submit an expense statement accompanied by appropriate receipts. Without this receipted documentation, the expenditure could be viewed as a personal benefit to the member rather than to a benefit to the chapter. Under these circumstances, the

expenditure could very well make up taxable income for the member and the chapter would need to determine if a Form 1099-MISC should be filed. The members should not assume that, while they should claim the funds as income, they can also deduct the related expenditures. Expenses to travel to a regional or international convention are not necessarily tax deductible.

In summary, if a chapter supports a point or incentive system, the chapter should implement the following guidelines:

1. Avoid giving chapter funds directly to chapter members.
2. Disburse chapter funds to a third party payee on behalf of the members.
3. If funds must be given to members, require expense statements and documentation for the full amount distributed.

AUDIT CONTROLS AND PROCEDURES

<u>Control and Procedure</u>	<u>Frequency</u>
1. If feasible, the accounting procedures should be documented in flow charts and in an accounting manual. The board/team should review and update this documentation annually.	Annually
2. Expenses and costs should remain under budgetary control. An account analysis for all accounts is prepared to investigate and explain all significant variances from budget.	Monthly
3. Petty cash should be test counted on a periodic basis.	Semi-annually
4. Paid checks should be reviewed on a random basis to verify proper signatures and to search for any alterations.	Quarterly
5. Bank reconciliations on all bank accounts should be done each month. Any significant outstanding checks and other reconciling items should be investigated.	Monthly
6. If possible, someone who has no cash handling duties should prepare the bank reconciliations. Bank statements should be delivered, unopened, to the person responsible for the reconciliation.	Monthly
7. Amounts due from chapter members should be reviewed. Notices should be sent for delinquent accounts and the board/team should be advised of outstanding amounts.	Monthly
8. Cash receipts and deposits should agree and deposits should be made regularly. Random reviews should be made.	Quarterly
9. All check vouchers should be reviewed for: <ul style="list-style-type: none"> A. Proper account distribution B. Clerical accuracy C. Approvals D. Adequate support E. Verification of math calculations 	Monthly or Quarterly
10. Before payment, be sure to double check the math calculations on all expense statements and invoices. This is done on a random basis when conducting an audit.	Monthly or Quarterly

11. Ensure that all members provide properly documented and receipted expense statements to prove all advances.	Monthly
12. Check requests, along with vouchers or other supporting documents, are presented with the checks submitted for signatures.	Weekly
13. All old invoices or statements are investigated before a check is prepared, to prevent duplicated payment.	Weekly
14. All disbursements, except from petty cash, should be paid by check.	Weekly
15. It is advisable to require two signatures on all checks.	Weekly
16. All unused checks are verified for proper sequential numbering and are held in safekeeping.	Weekly
17. Voided checks are properly defaced and held in safekeeping.	Weekly
18. Proper physical safeguards should be in place to protect assets.	Daily
19. Ledger entries are reviewed for supporting data and significant or unusual adjustments.	Monthly or Quarterly
20. All significant accounts, disbursements, etc., should be reviewed in detail.	Quarterly or Annually

YOUR CHAPTER

General Ledger Account Balances

	Balances ending <u>March 31, 20xx</u>	April Activity <u>DR.</u>	Balances ending <u>(CR)*</u>	<u>April 30, 20xx</u>
<u>Asset Accounts</u>				
Cash In Bank-Checking Account	\$1,620.80	<u>384.00</u>	<u>454.18</u>	<u>1,550.62</u>
Cash In Bank-Savings Account	300.00	_____	_____	<u>300.00</u>
Cash In Bank-Money Market Account	700.00	_____	_____	<u>700.00</u>
Risers	600.00	_____	_____	<u>600.00</u>
Costumes	2,500.00	_____	_____	<u>2,500.00</u>
Office Equipment	300.00	_____	_____	<u>300.00</u>
<u>Liability Accounts</u>				
International Dues - current year	-0-	<u>140.00</u>	<u>140.00</u>	<u>-0-</u>
Regional Assessments - current year	-0-	<u>52.00</u>	<u>52.00</u>	<u>-0-</u>
Escrow-International Dues	<u>733.22</u>	_____	<u>23.32</u>	<u>756.54</u>
Escrow-Regional Assessments	<u>520.00</u>	_____	<u>8.68</u>	<u>528.68</u>
<u>Equity</u>				
Equity	<u>3,113.72</u>	_____	_____	<u>3,113.72</u>
<u>Income Accounts</u>				
Chapter Dues	<u>3,160.00</u>	_____	<u>40.00</u>	<u>3,200.00</u>
Performance Fees	<u>800.00</u>	_____	<u>100.00</u>	<u>900.00</u>
Interest Income	<u>130.00</u>	_____	<u>20.00</u>	<u>150.00</u>
Fundraisers	<u>1,100.00</u>	_____	_____	<u>1,100.00</u>
Annual Show	<u>3,600.00</u>	_____	_____	<u>3,600.00</u>
<u>Expense Accounts</u>				
Director Fees	1,100.00	100.00	_____	<u>1,200.00</u>
Director Expense- miscellaneous	145.70	_____	_____	<u>145.70</u>
Director Expense- competition	375.00	_____	_____	<u>375.00</u>
Director Expense- education	765.00	_____	_____	<u>765.00</u>
Coaching Fees	600.00	_____	_____	<u>600.00</u>
Rent	1,100.00	100.00	_____	<u>1,200.00</u>
Postage	125.62	_____	_____	<u>125.62</u>
Telephone	135.00	_____	_____	<u>135.00</u>
Supplies	19.82	62.18	_____	<u>82.00</u>
Performance Expense	100.00	_____	_____	<u>100.00</u>
Educational Materials/Music	310.00	_____	_____	<u>310.00</u>
Annual Show	1,900.00	_____	_____	<u>1,900.00</u>
Membership Recruitment/Retention	460.00	_____	_____	<u>460.00</u>

*NOTE: The shaded figures represent credit balances

At the end of the year April 30, the income and expense accounts are “closed”. The difference between income and expense accounts equal net revenue or net expense and is an increase or decrease to equity.

Total Income Accounts=\$8,950.00-Total Expense Accounts=\$7,398.32=\$1,551.68 Increase to Equity=Total Equity=\$4,665.40 (See Example I)

SWEET ADELINES INTERNATIONAL CORPORATION

YOUR CHAPTER

Statement of Financial Condition
April 30, 20xx

ASSETS

Current assets	
Cash - Checking	\$1,550.62
Cash - Savings	300.00
Cash - Money Market	<u>700.00</u>
	\$2,550.62
Property and equipment	
Costumes	2,500.00
Risers	600.00
Office equipment	<u>300.00</u>
	\$3,400.00
	<u>\$5,950.62</u>

LIABILITIES AND EQUITY

Liabilities	
Escrow Dues/Assessments	\$1,285.22
Equity at beginning of year	3,113.72
Increase to equity	<u>1,551.68</u>
Total Equity	<u>\$4,665.40</u>
Total Liabilities and Equity	<u>\$5,950.62</u>

SWEET ADELINES INTERNATIONAL CORPORATION

YOUR CHAPTER

Statement of Activity
for period ending April 30, 20xx

	Month <u>April</u>	<u>Year to date</u>	Annual <u>Budget</u>	Variance <u>(Over)/Under</u>
REVENUE				
Chapter Dues	\$ 40.00	\$3,200.00	\$3,000.00	\$ (200.00)
Performance Fees	100.00	900.00	1,000.00	(100.00)
Interest Income	20.00	150.00	180.00	30.00
Fundraisers	.00	1,100.00	900.00	(200.00)
Annual Show	<u>.00</u>	<u>3,600.00</u>	<u>3,500.00</u>	<u>100.00</u>
Total Income	\$160.00	\$8,950.00	\$8,580.00	\$ (370.00)
EXPENSES				
Director Expenses:				
Director Fees	100.00	1,200.00	1,200.00	.00
Director Miscellaneous	.00	145.70	160.00	14.30
Director Competition	.00	375.00	400.00	25.00
Director Education	.00	765.00	800.00	35.00
Coaching Fees	.00	600.00	600.00	.00
Rent	100.00	1,200.00	1,200.00	.00
Administrative Expenses:				
Postage	.00	125.62	150.00	24.38
Telephone	.00	135.00	125.00	(10.00)
Supplies	62.18	82.00	75.00	(7.00)
Performance Expense	.00	100.00	100.00	.00
Educational Material & Music	.00	310.00	300.00	(10.00)
Annual Show	.00	1,900.00	2,000.00	100.00
Membership Recruitment/Retention	<u>.00</u>	<u>460.00</u>	<u>400.00</u>	<u>(60.00)</u>
Total Expenses	\$262.18	\$7,398.32	\$7,510.00	\$ 111.68
Net Revenue/(Expenses)	\$(102.18)	\$1,551.68	\$1,070.00	\$ 481.68
<u>Capital Expenditures</u>				
Copier	.00	\$ 300.00	\$ 300.00	\$.00
Net to cash reserves	N/A	\$1,251.68	\$ 770.00	N/A

Following is an actual reproduction of the letter of exemption from certain taxes issued by the U.S. Treasury Department affecting all U.S. chapters.



U. S. TREASURY DEPARTMENT
WASHINGTON 25

OFFICE OF
COMMISSIONER OF INTERNAL REVENUE

ADDRESSEES REPLY TO
COMMISSIONER OF INTERNAL REVENUE
AND REFER TO

T:R:PEO:S
FCB

OCT 27 1955

Sweet Adelines, Inc.
c/o Narcille Gouger, International Treasurer
501 Driscoll Building
Corpus Christi, Texas

Mesdames:

We have your letters of August 18, 1955 and October 4, 1955 in which you request a group ruling covering you and your affiliated chapters for Federal income and admissions tax purposes.

Our records show that in a ruling dated September 16, 1949, addressed to you under your former name, Sweet Adelines in America, Incorporated, you were held to be exempt from Federal income tax under the provisions of section 101(6) of the Code of 1939.

On the basis of the information heretofore presented, which resulted in our ruling of September 16, 1949, and on the information recently submitted, it is the opinion of this office that you and your affiliated chapters appearing on the list furnished with your letter of August 18, 1955, are entitled to exemption from Federal income tax under the provisions of section 501(c)(3) of the Code of 1954, as it is shown that you and such chapters are organized and operated exclusively for educational purposes.

Accordingly, it will not be necessary for you and your affiliated chapters referred to above to file income tax returns so long as there is no change in your organization, purposes, or method of operation, or that of such chapters. Any such changes should be reported immediately to the National Office of the Internal Revenue Service in Washington, D. C., in order that their effect upon your exempt status, or that of your chapters may be determined.

However, you and your chapters referred to above are required to file annually information returns on Form 990A with the District Directors of Internal Revenue for the respective districts in which located so long as the exemption remains in effect. This form may be obtained from the District Director and is required to be filed on or before the fifteenth day of the fifth month following the close of your respective annual accounting periods.

2 - Sweet Adelines, Inc.

Contributions made to you and to your chapters referred to above are deductible by the donors in computing their taxable income in the manner and to the extent provided by section 170 of the Code of 1954.

Bequests, legacies, devises or transfers, to or for your use or to or for the use of the chapters listed are deductible in computing the value of the taxable estate of a decedent for estate tax purposes in the manner and to the extent provided by sections 2055 and 2106 of the Code of 1954. Gifts of property to you and to such chapters are deductible in computing taxable gifts for gift tax purposes in the manner and to the extent provided in section 2522 of the Code of 1954.

No liability is incurred by you or the chapters referred to above for the taxes imposed under the Federal Insurance Contributions Act (social security taxes) unless you or such chapters have filed waiver of exemption certificates in accordance with the applicable provisions of such Act. In the event you and your chapters desire social security coverage for your employees or have any questions relating to the filing of waiver of exemption certificates you should take the matter up with your respective District Directors of Internal Revenue.

Your attention is called to the provisions of section 501(c)(3) of the Code of 1954 under which your exemption and that of your affiliated chapters will be revoked if any substantial part of your activities, or those of such chapters consists of carrying on propaganda, or otherwise attempting, to influence legislation, or if you or your chapters participate in, or intervene in (including the publishing or distributing of statements), any political campaign on behalf of any candidate for public office.

For the purpose of applying this ruling to any period with respect to which the Code of 1954 is not applicable, any reference herein to a provision of the 1954 Code shall be deemed a reference to the corresponding provision of the 1939 Code.

In regard to the admissions tax status of Sweet Adelines, Inc., and its affiliated chapters, you are advised that the organization and its chapters qualify for the exemption provided civic and community membership associations by section 4233(a)(3) of the Code. Under this provision of the law, the organization and its affiliated chapters are exempt from collection of tax on admissions to any concerts conducted by them. The organization and its chapters may establish their right

3 - Sweet Adelines, Inc.

to this exemption by filing Form 755, application for exemption, with the district director of internal revenue concerned in connection with any concerts which are conducted. Information indicating that the organization and its chapters have been held exempt under section 1233(a)(3) and the date of this ruling should be submitted with the application.

You should furnish the National Office annually, on the calendar year basis, lists, in duplicate, showing only the names and addresses of any new chapters affiliated with you during the year, and the names and addresses of any chapters which for any reason have ceased to exist. These lists should be accompanied by a statement of one of your principal officers as to whether the information heretofore submitted by you, and on which this ruling is based, is applicable in all respects to the new chapters appearing on the lists. This information should be forwarded so as to reach the National Office not later than February 15 of the following year.

The District Directors of Internal Revenue, for the districts in which you and your chapters listed are located are being advised of this action.

Very truly yours,

H. J. Swartz

Director, Tax Rulings Division

REC'D NATL. TREAS. OCT 28 1955
Corpus Christi, Texas, and
forwarded by my office
■, same date, to me at
Grand Rapids, Michigan, where it
was:
REC'D NATL. TREAS. OCT 29 1955

Note: *The Chapter Guide* is **SEARCHABLE** using the “FIND” feature:

Hold down the Ctrl (CONTROL) button while pressing the “F” (FIND) key and type any word or phrase (e.g. X-A-3, president, associate membership, etc.) in the FIND box. The FIND feature will take you to every instance of the word or phrase you typed in the FIND box.

CHAPTER GUIDE

SECTION VI:

MEMBERSHIP

CHAPTERS: THE HEART OF SWEET ADELINES INTERNATIONAL

Chartering New Chapters

Membership growth is crucial to the well-being of Sweet Adelines International. The Regional Education Coordinator and the Regional Membership Coordinator have the primary responsibility of guiding prospective chapters through the *Steps* program. It is always exciting when a prospective chapter completes all chartering requirements and is eligible to charter. (See the Step I and Step II booklets, and the *Policy Book*, Section III, Div. A, 1 for chartering information and requirements.)

Most prospective chapters charter within three to four years. Prospectives in Step I are required to progress into Step II within three-years. Prospectives in Step II are granted two years from the day they enter this step to charter. If a prospective chapter is unable to meet the term limits in either step, they will be dissolved and will not be able to re-enter the Steps Program without approval from the Region's Education Coordinator and Membership Coordinator.

Many prospective chapters have as a goal to complete the process in time to compete in their regional competition. In order to compete, the prospective chapter must be approved for charter at least 60 days prior to the date of its competition. Application for chapter membership in Sweet Adelines International is made to the International Board of Directors through the Membership Department at international headquarters.

Renewal of Chapter Membership

Application for Renewal (Rechartering)

Renewal of chapter membership, commonly referred to as "rechartering," is due in May of each year. A chapter must have a total of 12 members plus a director to recharter. The Charter Renewal form is automated online in the Chapter Membership Report pages of the Members Only section. At the time of charter renewal your chapter must resolve the following:

- Charter renewal fee
- Per capita fees for any new members and each renewing members whose renewal dates are in May (For a detailed discussion on anniversary dues, see Section V of this guide.)
- Comprehensive general liability insurance fee, if the chapter is in an eligible location
- Chapter officer updates

If international headquarters has not received a chapter's renewal by May 31, the chapter is charged a late fee. If, after May 31, a chapter has not fulfilled the charter renewal requirements, an extension of time until June 30 may be granted by the International Board of Directors. The extension does not include membership privileges.

If chapter administration is aware of problems within the chorus that could affect rechartering, the chapter president/team coordinator should alert the Regional Membership Coordinator as soon as possible. Any chapter that is unable to recharter has the option of applying for revitalization status dissolving, or applying for prospective status.

Competition Requirements

It is important to remember that, except for chapters in the worldwide areas (apart from the worldwide and satellite regions) that hold biennial competitions, a chapter must have competed in a regional or international competition at least once in the preceding three years in order to renew chapter membership. Chapters in the worldwide areas that hold biennial competitions must compete for scoring or evaluation only at least once in alternate contests in order to renew chapter membership.

Chapter Name Change

A chapter may change its official name at the time it applies for renewal of chapter membership in May or in December. The Education Coordinator and the Membership Coordinator must approve the name choices of the chapter before final approval at international headquarters. Requests for chapter name change must be accompanied by the processing fee. (See International Policy, Appendix F, 2) A chapter may not select a chorus name that sounds like the name of any other currently chartered chapter or registered quartet.

Although most restrictions on selecting a chapter name have been removed, most chapters still prefer names that designate their geographic location. It also is practical to select a name that will fit comfortably on a standard mailing label. No two chapters can be granted the exact same name.

Suspension

A chapter may be suspended from Sweet Adelines International privileges (fail to be in good standing) for failure to meet recharter requirements, failure to file Form 990 as required by the U.S. Internal Revenue Service, or for failure to pay its regional assessment.

MEMBERSHIP GROWTH AND RETENTION

Aside from music, membership growth and retention is the lifeblood of Sweet Adelines International. The *Real Guide for Growth* is a valuable tool to chapters seeking new members and retaining present members. Every chapter leader should read and be familiar with the contents of this toolkit.

A bright, enthusiastic, self-starting member should be selected as the chapter's membership chair. Because of the nature of the position, the membership chair should be one of the first appointments made. Encourage your membership chair to appoint a committee to assist them in planning the year's outreach program—the more creative ideas, the better.

Here are a few tips for membership success:

- Establish a chorus growth expectation.
- Plan rehearsals for maximum enjoyment, satisfaction and musical education.
- Select a chorus director with people skills in addition to musical skills.
- Create and nurture a confident, positive chorus attitude that will attract others.
- Set chorus priorities and follow a long-range plan.
- Recognize and enjoy each member's uniqueness and talents.
- Give everyone a job to do and expect them to do it well.
- Be flexible.
- Develop your sense of humor—you will need it at times.
- Get to know your regional leaders and invite them to visit often.

The “Middle Child” Member

Some chapters are so successful in attracting new members through the “free vocal lessons” plan or other adaptations that they admit groups of new recruits two or three times a year. As exciting as this growth may be, remember the new members from last year's recruitment. Do not let them feel like the “middle child” sandwiched between the new members receiving the attention and the seasoned members who seem to know all the music and the right notes. Member research has indicated that more members are lost during their first year of membership than at any other time. Be sure to practice membership retention before admitting new members, keep everyone involved and feeling needed.

Membership Admittance Procedures

Although individuals join a Sweet Adelines International chorus for a variety of reasons, the most important reason is to sing! All prospective members must be auditioned by the chapter's music committee to determine the individual's potential to train and sing in the barbershop style. Auditions help establish and maintain high standards of quality in the chorus.

No maximum age limit may be established for membership in the organization. However, a chapter may set a minimum age for its members, if it so desires.

While recognizing the need for prospective members to feel comfortable during their first initial visits to the chapter, it is advisable that the admittance procedures be as compact as possible. False hope should not be given to any prospective member who is unlikely to pass their audition.

Members may be admitted into the chapter by one of two methods:

- Vote by chapter membership
- Vote by chapter board of directors/team

Both of these membership admittance procedures are described in detail in Section III, Div. C., 5 of the *Policy Book*.

Once a member is admitted into a chapter, the following process occurs:

- A “New and/or Transfer of Membership” form with the required per capita fee is submitted to international headquarters for processing. (Sample “Application for New Member or Transfer of Chapter Member” can be found at the end of this section.)
- The membership department at international headquarters issues a membership card for a new member, which is sent to the chapter. Once the chapter receives the membership card, the membership chair immediately notifies the applicant in writing that they have been accepted for membership and issues them the membership card. (An individual may be notified of their acceptance by phone or in person prior to their receipt of the formal written notice.)
- If a chapter declines an application, the applicant must be notified in writing and informed that a new application can be considered after a period of one year, provided the prospective member passes the audition. Rejection letters represent the overall organization, and much tact and diplomacy should be used to convey the message. (A sample rejection letter is included at the end of this section.)

MEMBERSHIP OPTIONS

Sweet Adelines International offers membership options in addition to a standard membership. Following is a brief description of each option.

Associate Membership

Associate membership was created to provide an option for chorus members who cannot fully participate in chapter activities because of physical limitation or time restraints. The criteria for the associate member are as follows:

- An associate member pays full or discounted chapter dues as outlined in the chapter standing rules.
- An associate member holds full or partial chapter membership privileges as outlined in the chapter standing rules.
- An associate member may not compete with the chorus in any Sweet Adelines chorus competition.
- An associate member may or may not be permitted to perform with the Sweet Adelines chorus as outlined in the chapter standing rules.
- An associate member pays the full International per capita fee and holds all privileges of active membership in the International organization including the right to vote in the election of the International Board of Directors. If the associate member is also a dual member, voting for the International Board of Directors election takes place in the associate member's primary chorus.
- An associate member pays any Regional assessment due and holds all privileges of active membership in the Region including the right to vote in regional elections.
- An associate member may reapply for full chapter membership at any time according to the membership and audition procedures established by the chapter they wish to join.

Each chapter determines if it will offer associate membership. If it does, the chapter must make it available to every member. Chapters may add restrictions to associate membership status in their chapter standing rules. It is the decision of the chorus director whether an associate member is permitted to sing on the risers at rehearsal.

Youth Membership

Youth membership is open to persons who are 25 years of age or younger as of their membership application date or annual renewal date. (Chapters may specify a minimum age in their standing rules.) Youth members receive full membership privileges, but are required to pay only half of the regular international per capita fee. Although it is not mandatory, chapters are encouraged to offer youth members half price chapter dues.

at-Large Membership

at-Large membership provides regional and international affiliation for nonmembers or former or current members of Sweet Adelines International who are no longer able or who choose not to affiliate with a local chapter.

All at-Large members pay the regular international per capita fee, plus \$10 at-Large dues. The at-Large per capita fee for members of the Satellite Area is one-half the regular international per capita fee, plus \$10 at-Large dues.

Chapter-at-Large (CAL) members are assigned to regions by the International Board of Directors and must pay regional assessments in addition to annual at-Large dues.

Member-at-Large (MAL) members are not assigned to regions and are not required to pay regional assessments. MAL members are affiliated with, and pay dues to the international organization. Competing is prohibited for MAL members but they are free to perform with a quartet.

Many members participate in the myriad Sweet Adelines International activities. CAL members often hold positions and offices at the regional, area or international level or perform and compete with a quartet.

If a CAL member finds that they have the time or desire to join or rejoin a chapter, they are eligible to transfer their membership without paying an additional per capita fee in the same fiscal year. Upon transfer, CAL membership automatically terminates. (See Section III, Div. B of the *Policy Book* for detailed CAL information.)

Dual Membership

Dual membership is an option for any member. Sweet Adelines must observe the following guidelines as dual members:

- A Sweet Adeline may hold membership in more than one chapter. All chapters must accept dual members and offer reasonable attendance standards to them. Also see the Corporate Bylaws, Article III, Section 3, B.
- The dual member must designate one chapter for payment of international per capita fees. Dual members may change this designation at any time by notifying the chapter to which they belong.
- The dual member may compete with all chapters of which they are a member.
- A dual member must pass an audition, pay dues (for all chapters and regions to which they belong), and be accepted into all chapters.
- Current rules still apply to members who direct one chapter but sing with another within the same region.
- Dual members count in all chapters for chartering and rechartering purposes.

Any members of Sweet Adelines International may apply for dual membership status at any time. The chapter they are joining must submit the application to international headquarters. No additional international dues are required with the application.

Patron Membership

Patron membership is open to fans and supporters of the organization who are not otherwise members of the organization, friends and family of current or former members, corporations, vendors, etc. A Patron member pays an annual International per capita fee in an amount published in the current edition of the Policy Book. Patron members are not required to pay Regional assessment or chapter dues. Patron members are not eligible to compete or perform with a chorus or quartet. Patron members do not receive access to the Education and Marketing Centers of Sweet Adelines International and are not eligible for member discounts to be an exhibitor at International Convention.

Director Affiliate Membership

Director Affiliate membership is available to all active directors of a chartered or prospective Sweet Adelines Chorus.

- Director Affiliate members are required to pay an annual International per capita fee (see Appendix F, 3).
- Director Affiliate members receive International membership benefits such as a subscription to *The Pitch Pipe*, member pricing for International sales items, and discounts to International Convention registration, educational events and music.
- Director Affiliate members will have access to the Members Only Education and Marketing Centers.
- Director Affiliate members are not eligible for member discounts to be an exhibitor at International Convention.
- Director Affiliate members may participate in the Director Certification Program (DCP) and Leadership Certification Program (LCP) educational programs.
- Director Affiliate members are not eligible to participate in any votes at the regional or international level and may only vote at the chapter level if there is a Management Team governance.
- Director Affiliate members are not eligible to serve on the Regional Management Team (RMT), on International Committees, or the International Board of Directors.
- Director Affiliate members are not eligible to serve in the Sweet Adelines International Faculty Program or participate in the International Judging Program or Arranger Certification Program (ACP).

PROCESSING MEMBERSHIPS

Transferring Membership

A transfer member is an individual who transfers their membership from one Sweet Adelines International chapter to another with no break in membership. Members transferring from one chapter to another do not pay an additional per capita fee for that membership year. Members transferring into at-Large membership pay \$10 for at-Large dues. Transfers from a Satellite Region to a chapter in any other region must make up any difference between the current Satellite fee and the regular per capita fee.

Transfer of membership is not automatic. A member who wishes to transfer to another chartered chapter must meet the admittance requirements of the new chapter and be a member in good standing with their current chapter.

To maintain constant affiliation with Sweet Adelines International, members should transfer their membership to another chapter or to at-large status.

Members should be aware that they have the option of a 60-day transition period when transferring from one chapter to another. The transition period begins upon receipt of the "Request for Transition Membership Status" form at international headquarters. (This form is available online or may be obtained from your chapter, regional leaders or international headquarters. A sample is included at the end of this section.) The form may be submitted by either the chapter or the member.

The chapter accepting a transferring member must complete the online New and/or Transfer Member Form in the Members Only section that includes the transferring member's name, address and membership number. After completing and submitting the online form:

- the transfer will be recorded on the international membership roll
- a new membership card will be issued to the transferring member
- the transferring member's name and information will be removed from the former chapter's membership roll

(See Section III, Div. C, 6 of the *Policy Book* for detailed transition period information.)

Adding New Members

International headquarters must be informed of any members added to a chapter's membership list, whether they are new or transfer members. When adding new members, the online New and/or Transfer Member form in the Members Only section must be completed for each new member. Required fields that must be submitted with the form include name, address, phone, birth date, email address and payment information for new members. The New and/or Transfer Member form can also be found in the Document Center of the website where it can be printed and mailed with check payments to international headquarters.

Renewing Members

A dues renewal notice is emailed to the chapter President, Membership Chair and Treasurer 30 to 45 days prior to members' expiration date. Any of these chapter officers are responsible for renewing chapter members every month through the online Chapter Invoices form in the Members Only section. Payment information must be submitted with this online form for each renewing member. An online resignation form must be completed and submitted for members not renewing.

Reaffiliation of Membership

Should a former member, who resigned or forfeited their membership, wish to reaffiliate with any Sweet Adelines International chapter during the same membership year as the resignation, they must follow that chapter's admittance procedure and pay the full per capita fee to the international organization, in addition to any required chapter dues. If the former member reaffiliates in a membership year other than the year of their resignation, their membership would be processed as would any other new member of the chapter.

Lifetime Membership

Effective January 1, 2018 and March 1, 2018 respectively, granted and purchased Lifetime Membership options were discontinued (except for the President's Lifetime Achievement Award recipients and Past International Presidents). All members previously granted or who purchased a Lifetime Membership were grandfathered into the membership option and will continue to receive its benefits. Lifetime members are not required pay the annual International per capita fee. Even if the lifetime member allows their chapter membership to lapse, they will not have to pay the international per capita fee if they decides to rejoin. The following list includes additional information on lifetime memberships:

- Lifetime memberships are valid only for the life of the individual, regardless if they are a member of a chartered chapter or at-Large.
- Lifetime memberships are not affected by any subsequent increases in the international per capita fee.
- Lifetime members who are also members of chapter-at-large will not be required to pay the \$10 chapter portion of the CAL dues each year.
- Lifetime members count toward the number of members required to recharter.
- Lifetime membership in Sweet Adelines International is initiated and granted by the International Board of Directors to each immediate Past International President.
- Lifetime membership is annually awarded to the recipient of the President's Lifetime Achievement Award.

Lifetime Discounted Legacy Membership for 50-year + Members

50-year + members receive full membership privileges, but are required to pay only one-half (50%) of the regular international per capita fee.

Definition of Good Standing

The definition of “good standing” and its relationship to all areas of Sweet Adelines International activities is ultimately determined by the International Board of Directors. A member in good standing, as defined by the Board, is up-to-date in the payment of all dues and assessments to the chapter, region and international. (Regional assessments, defined as charges established by the regional team and collected from each chapter for the regional treasury, also affect a chapter’s good standing in its region. Should a chapter not pay its regional assessment, the chapter is considered not to be in good standing and is rendered ineligible to compete or vote on the regional or international level.)

While the membership dues paid to international headquarters (referred to as the “per capita fee”) are set at a certain price per member, each chapter is free to structure its dues assessment program in whatever manner the chapter’s board of directors/team sees fit. In the majority of cases, the chapter dues include the per capita fee and payment is structured in a variety of ways. Payment can be made on an annual basis, or can be put into an escrow account at intervals throughout the year. The per capita fee is then paid from this escrow account to international headquarters. The International Board strongly recommends an escrow plan for payment of dues.

Additional conditions (other than the payment of dues) also are to be met for a member to be considered in good standing in their chapter, and for a chapter to be considered in good standing in its region. (An example of such a condition on the chapter level would be attendance requirements at chorus rehearsals, if applicable to the chapter.) The stipulations are stated in the respective chapter’s and regions’ standing rules and are recognized as valid rules provided they do not conflict with the organization’s bylaws or policies.

When a chapter is not in good standing with Sweet Adelines International:

- its members may not compete
- it may not be represented at regional meetings
- it does not qualify to cast votes for International Board member elections
- new members cannot be processed by international headquarters
- its members may not hold regional or international office or chair a committee at either level

If you need more information on the definition of good standing and its position in the organization, contact your regional team coordinator or the corporate secretary at international headquarters. More information on good standing, the payment of dues and escrow plans is provided in the *Financial Guide*, which is found under Section V of this guide.

Membership Termination and Removal

A member’s affiliation with a chapter and with the international organization can come to an end in several ways—resignation, forfeiture, and removal (involuntary termination). The following provides a brief description of each.

Resignation

When a member decides to resign from the organization (chapter and international), they must notify international headquarters of their intent to do so by submitting a Resignation of Membership form (see sample form at the end of this section) online in the Members Only section or available for print in the Document Center of the website. The chapter may submit the signed form if the cancelling member is unable to be reached. The resigning member should keep in mind that once international headquarters is notified of the resignation, their name will be immediately removed from the chapter rolls maintained at international headquarters. If they desire to rejoin the organization (even during the same membership year), they must comply with membership acceptance policies and procedures and pay the full per capita fee to the international organization, in addition to any required chapter and regional dues.

Forfeiture of Membership

A member forfeits their membership when they fails to comply with attendance standards, if outlined in the respective chapter's standing rules (see *Corporate Bylaws*, Article III, Section 4), or if they do not pay their dues. Both the *Standard Form Chapter Bylaws* (Article III) and the *Corporate Bylaws* (Article II) state that "any member in default in the payment of dues shall be suspended from all privileges of membership and, if after written notice by the chapter treasurer, such default shall not be remedied within a period of 60 days, the membership of such member shall automatically terminate." When a chapter member does not pay their dues and, if after appropriate notice is given to the member, the situation still remains unremedied after 60 days, the chapter should notify international headquarters in writing that the member in questions has automatically terminated their membership. A copy of the notice should be sent to the member as well as kept in the chapter's records.

Transfer/Transition

Members have the option of transferring from one chapter to another, to Chapter-at-Large or Member-at-Large, or they may request a Transition Period. A transition period begins upon receipt of the "Request for Transition Membership Status" form. The form is available on the website under the Resources Tab, Document Center. The form may be submitted either by the chapter or the member. Transfer to another Chapter or at-Large membership must be completed by the end of the 60-day grace period after the member's renewal date. If the transfer is not completed by the 60-day grace period, then membership in Sweet Adelines International will be terminated.

Removal

Membership removal, which is an involuntary termination, cannot be handled at the chapter level; it can only be determined by the International Board of Directors. Both the *Standard Form Chapter Bylaws* (Article III) and *Corporate Bylaws* (Article III) state that:

"Any member may be removed from membership by a 2/3 vote of the International Board of Directors for conduct which is detrimental to the harmonious function of the chapter, or for other conduct inconsistent with the privileges of membership, or other good and sufficient cause, as determined by the International Board of Directors. Action of the International Board of Directors shall be conclusive, final and binding on all chapters and on all members."

The commitment of the organization to its individual members is very strong. However, individual members must function in groups in order to pursue the purpose of the organization. The cohesiveness and harmony of the group is critical and must be given paramount consideration. Therefore, the International Board of Directors, while committed to a program of counseling and support for chapters experiencing member friction, recognized that membership removal may become necessary in order to reach a permanent solution. It must be stressed that membership removal should not be contemplated until after counseling efforts by the regional personnel and/or a counselor appointed by the International President have failed to attain a satisfactory result.

Procedure for Removal from Membership

The procedure for membership is initiated by one of the following two methods:

- A chapter board/team may vote to bring the matter before the chapter membership, who would then in its entirety vote to petition the International Board of Directors to consider membership removal proceedings against a specified member. A 2/3 affirmative vote by the chapter membership is required to initiate the petition proceedings.
- The International Board of Directors may initiate membership removal proceedings of its own volition, for cause as specified in the *Corporate and Standard Form Chapter Bylaws* (Article III).

In fairness to all involved in the membership removal process, a specific procedure developed by the International Board of Directors will be followed. A chapter board that is considering initiating a removal process should contact the International President or Corporate Secretary at international headquarters to assure that the proper procedure is used.

APPLICATION FOR NEW MEMBER or TRANSFER OF CHAPTER MEMBER

SWEET ADELINES INTERNATIONAL

Email: member@sweetadelines.com or Fax: 918-388-8083

FUNDS MUST ACCOMPANY FORM TO BE PROCESSED																																												
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 100%;">Chapter Name</td> </tr> <tr> <td>Submitted by:</td> </tr> <tr> <td>I certify that the persons listed have met all the membership requirements as stated in the Sweet Adelines International Corporate Bylaws, and have been accepted for membership.</td> </tr> <tr> <td>Chapter Officer Signature Member ID</td> </tr> </table>	Chapter Name	Submitted by:	I certify that the persons listed have met all the membership requirements as stated in the Sweet Adelines International Corporate Bylaws, and have been accepted for membership.	Chapter Officer Signature Member ID	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th colspan="4" style="text-align: center;">International Dues</th> </tr> <tr> <th style="width: 15%;">Cost</th> <th style="width: 35%;">Membership Category</th> <th style="width: 15%;">Quantity</th> <th style="width: 35%;">Amount Paid</th> </tr> <tr> <td>\$100.00</td> <td>Member</td> <td></td> <td></td> </tr> <tr> <td>\$50.00</td> <td>Satellite (Region 30)</td> <td></td> <td></td> </tr> <tr> <td>\$50.00</td> <td>Youth (Age 25 or younger at join date)</td> <td></td> <td></td> </tr> <tr> <td>0.00</td> <td>Transfer</td> <td></td> <td></td> </tr> <tr> <td>\$270.00</td> <td>3 Year Membership (not available for youth)</td> <td></td> <td></td> </tr> <tr> <td>\$400.00</td> <td>5 Year Membership</td> <td></td> <td></td> </tr> <tr> <td>\$700.00</td> <td>10 Year Membership</td> <td></td> <td></td> </tr> </table>				International Dues				Cost	Membership Category	Quantity	Amount Paid	\$100.00	Member			\$50.00	Satellite (Region 30)			\$50.00	Youth (Age 25 or younger at join date)			0.00	Transfer			\$270.00	3 Year Membership (not available for youth)			\$400.00	5 Year Membership			\$700.00	10 Year Membership		
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INTERNATIONAL DUES ARE NOT REFUNDABLE				
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	Country			
Email		Cell Phone		Home Phone

PLEASE SUBMIT TO INTERNATIONAL HEADQUARTERS Email to member@sweetadelines.com or Fax to 918.388.8083 or Mail to 9110 S. Toledo Ave., Tulsa, OK 74137	
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Sample Letter

April 30, 20__

Name
Street Address
City, State, Zip Code

Dear _____:

At a meeting of the membership/board on April 26, your application for membership in the _____ Chapter was considered, and we regret that it cannot be accepted at this time.

However, please be aware that, according to our admittance policy, you may reapply for membership in one year, provided you pass the audition.

Thank you for your interest in the _____ Chapter.

Board of Directors

_____, Secretary

_____ Chapter

cc: International Headquarters
Chapter File

REQUEST FOR TRANSITION MEMBERSHIP STATUS

THIS FORM DOES NOT TRANSFER MEMBERSHIP TO ANOTHER CHAPTER

This form indicates intention to transfer to another chapter in the near future – official transfer of membership must be completed online by your new chapter's membership chair.

Member Name	Member #
Current Chapter	Region #

- ☐ I plan to transfer my membership to _____ Chapter.
- ☐ I plan to transfer my membership to either Chapter-at-Large or Member-at-Large.
- ☐ I need a CAL/MAL Application form. ☐ I do not need a CAL/MAL Application form.
- ☐ At this time, I do not know where I will be transferring my membership.

Please sign below to indicate that:

I understand that if the transfer is not completed by the end of the 60-day grace period, then my membership in Sweet Adelines International will be terminated.

Member's Signature

Chapter Officer's Signature

RESIGNATION OF MEMBERSHIP

Resigning member should complete this form and return it to International Headquarters.

Email: member@sweetadelines.com or Fax: 918-388-8083

Member Name	Member ID
Chapter Name	Region #

Important information for resigning member:

1. If you plan to transfer to a new chapter or to Chapter-at-Large or Member-at-Large, **do not** submit this resignation form. You must be a current member to transfer your membership.
2. If you submit this form to International Headquarters you will be removed from membership in Sweet Adelines International – not just your current chapter.
3. If you resign now and later desire to rejoin a Chapter (including your present Chapter) or become Chapter- at-Large or Member-at-Large, you must meet the membership admittance requirements, including payment of another per capita fee. There will be a \$10 reinstatement fee.
4. Per Capita Fees are not refundable.

I find it necessary to resign from Sweet Adelines International. I have read the above information and understand its meaning.

My primary reason for resigning is: (Select only **one** reason. Use the space below for additional reasons and/or comments.)

Financial <input type="checkbox"/>	Does Not Meet My Expectations <input type="checkbox"/>
Takes Too Much Time <input type="checkbox"/>	Chapter and Personal Goals Conflict <input type="checkbox"/>
Travel/Retirement <input type="checkbox"/>	Chapter Problems <input type="checkbox"/>
Moving <input type="checkbox"/>	Lack of Musical Quality or Leadership <input type="checkbox"/>
Illness/Health <input type="checkbox"/>	Lack of Administrative Leadership <input type="checkbox"/>
Family Obligations <input type="checkbox"/>	Personality Conflict <input type="checkbox"/>
Conflict with Other Commitments <input type="checkbox"/>	Distance to Rehearsal Too Far <input type="checkbox"/>

Comments: _____

Member Signature	Date
------------------	------

SWEET ADELINES INTERNATIONAL

Application for Dual Membership

Please type or print clearly.
Form is to be submitted by officer of NEW chapter that member is joining.
Chapter Officers cannot add dual memberships.

New Chapter	Officer Name and Title (please print)	
Officer Signature	<i>I certify that the applicant has met all membership requirements and been accepted for membership.</i> <input type="checkbox"/>	
Member Name	Member ID	
Address		
City, State, Zip		
Country		
Daytime Phone (include area/country codes)		
Email		
Primary Chapter (dues paying)	Region No.	
Secondary Chapter (non dues paying)		
Third Chapter (non dues paying)		
Applicant Signature		
Date		
Instructions: The applicant must be a current member of the primary chapter listed above. The primary chapter will collect and pay the international dues for this member. Return completed form to International Headquarters, Membership Department.		
The member has the option to compete with each chorus of which she is a member.		
International Headquarters must be notified in writing (or by email) when dual membership is dropped or changes are made in any of the chapter affiliations.		
Sweet Adelines International 9110 S. Toledo Ave. ◦ Tulsa, OK 74137 Phone: 918.622.1444 ◦ Fax: 918.388-8083 member@sweetadelines.com		

Note: *The Chapter Guide* is **SEARCHABLE** using the “FIND” feature:

Hold down the Ctrl (CONTROL) button while pressing the “F” (FIND) key and type any word or phrase (e.g. X-A-3, president, associate membership, etc.) in the FIND box. The FIND feature will take you to every instance of the word or phrase you typed in the FIND box.

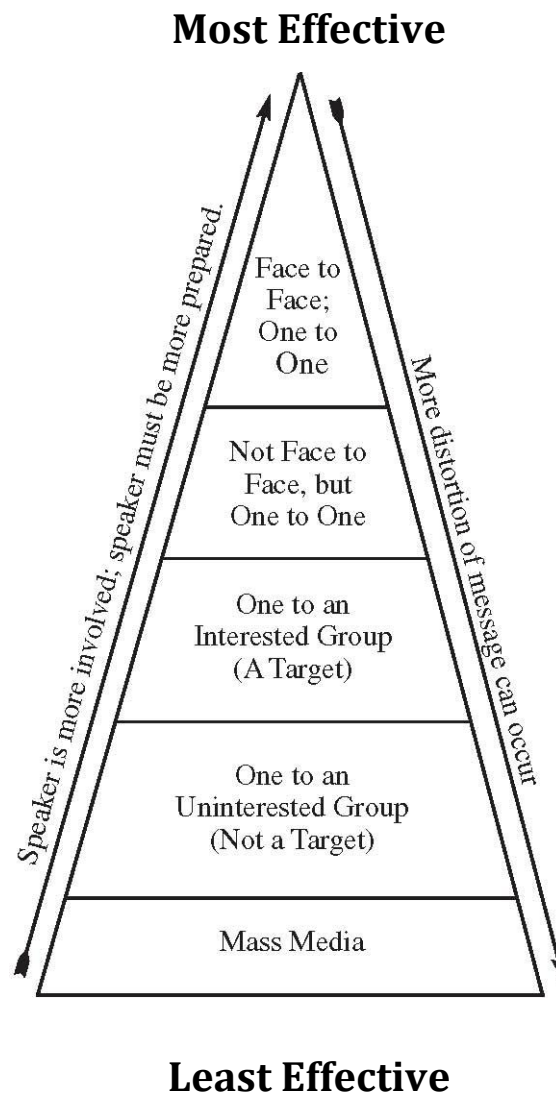
CHAPTER GUIDE

SECTION VII:

COMMUNICATIONS

THE COMMUNICATION PROCESS

The communication process can be depicted as a triangle that is divided into five horizontal sections, unequal in size, importance, and effectiveness. The top of the triangle represents the most effective methods to communicate and the bottom represents the least effective.



Important differences between the top and bottom of the triangle are:

- The closer to the top of the triangle, the more time, preparation and personal involvement is needed for successful delivery of your message.

- The opportunity for distractions or distortion to interfere with the listener's interpretation of a message increases farther away from the top.
- Dialogue occurs between the speaker and the listener only at the top of the triangle.
- Measuring results becomes easier the closer you get to the top of the triangle.

Inside, Outside, All Around Town

Within the chapter, the administrative committee, and the director and the music committee must use the communication process effectively in order for their messages to be received clearly. Messages can be sent by many methods to achieve the desired result, including:

- general chapter announcements at rehearsal
- email
- e-group
- chapter newsletter
- telephone calls outside rehearsal
- personal letters with specific instruction
- chapter bulletin board

When chapter leadership fails to communicate important messages repeatedly and frequently, an informal system - often known as "the grapevine" or just plain gossip - may deliver inaccurate, distorted, and sometimes harmful information that can dampen enthusiasm, diminish morale, scare off new members, and destroy existing relationships within the chapter.

Communicating outside the chapter is just as important. Performance opportunities and new members come from telling people in your community about your chapter and Sweet Adelines International.

You Are the Key

As chapter leader, you are the gatekeeper of the information you receive from internal and external sources. You are responsible for passing along the pertinent information you receive, while keeping sensitive information to yourself. The success or failure of your chapter depends upon a happy, productive environment.

Open, honest communication within the chapter and the communities it serves should be standard operating procedure. You are key in helping individual members prepare for musical and administrative positions within the chapter, the region and at the international level. Communicate truthfully, clearly, and often, repeating your message as many times as necessary to have it understood.

INTERNAL PUBLIC RELATIONS

Each chapter member is a walking, talking, singing advertisement for Sweet Adelines International. People with whom they interact will believe what they say about the worldwide organization and their chapter before they will believe what the worldwide organization and chapter say about themselves.

Singer, Know Yourself

It is vital that chapter members have current knowledge about the organization - locally, regionally, and internationally. Members must have access to information about anything that affects their chapters including:

- short- and long-range plans
- budgets
- membership changes
- policy or procedure changes
- community involvement
- anticipated performance opportunities
- regional and international news

Keeping members up-to-date so they can be effective representatives of the organization and chapter is as good a definition as any of the internal public relations process. You are strongly encouraged to customize the *Member Handbook*, available in the Marketing Center online, which is a valuable information resource for new and veteran members.

Email – A Blessing and a Curse

Email is by far and away the most popular application on the Internet. Just about everyone uses email. Some users may send one or two messages a week, others dozens, and some send and receive hundreds every day.

This section will give you some guidelines for using email, as well as some pointers about email “etiquette.”

Keep It Short!

Few people enjoy reading on their computer screens; fewer still on the tiny screens in cell phones and other mobile devices. Email messages should be concise and to the point. It's also important to remember that some people receive hundreds of email messages a day, so they may only skim your message if it's too long.

There's No Such Thing as Private Email

Anyone can easily forward your message, even accidentally. This could leave you in an embarrassing position if you divulge personal or confidential information. If you don't want to potentially share something you write, consider using the telephone.

Formatting

Since reading from a screen is more difficult than reading from paper, the structure and layout is very important for email messages. Use short paragraphs and blank lines between each paragraph. When making points, number them or bullet them.

Use Concise Subject Lines

Be sure to properly title messages to help people organize and prioritize their email. A subject line of "Hi" is not specific enough – your message may either be deleted as junk mail or not be opened in a timely manner. Try to limit your subject line to five to eight words. And never leave the subject line blank.

Threads (topics)

Once you send that first email, you will probably get a response. If you want to reply to that response, just hit REPLY ... don't type a new subject line – this breaks the link (called a "thread") between the original message and your soon-to-be-created response. Without the link, it can get difficult for the users on each end to follow the sequence of messages, especially after several exchanges. This becomes an even larger problem when you are dealing with e-groups (more later) where several people may be replying to messages and trying to follow the thread of exchanged information.

NOTE: when you open your in-box, if you see a series of emails all with the same subject, take some time to read ALL of the emails relating to that topic – starting from the first one through the most recent. Don't start replying immediately after reading the first message.

Threads – Changing the Subject

If you change subjects, be sure to change the Subject line.

To, CC and BCC

- Use the TO: field for people you are directly addressing.
- Use the CC: field for people who are being included as an FYI only. Copy only those who need to be copied. Be sure to check that they weren't already listed on the original message – and if not, forward a copy of the original email to them for reference.

- Use the BCC: field (blind carbon copy) to include others in the conversation. As the name implies, these recipients are not visible to those in the TO: or CC: fields. Using BCC for all recipients is especially important when addressing a message that will go to a large group of people who don't necessarily know each other.
- REPLY ALL – Decide when it is appropriate to send your reply to everyone who received the message and when it's better to send your reply to the sender only.

Quoting

Have you ever received an email response with "I agree" and nothing more in the message? What if the response came many days ... and many emails ... later? Can you remember what the sender is agreeing to? When replying to an email question, the most effective method is called "quoting," where you cut/paste a snippet of the original message (the part with the question) into your reply message. For example:

>and do you agree with the proposal to hire Sue Smith as the emcee for our show?
Yes, I think Sue will be great!

The ">" in front of the text indicates to the recipient that this is quoted material from their last email message. The second sentence is your response to the quoted material. The key with quoting is to include enough material in the quote so that it will be relevant to the recipient – but not the entire message again.

Attachments

Because of computer viruses, many people won't open attachments unless they know the sender. Even that can be a mistake because some viruses come disguised in email messages from someone you know. Do not send unannounced large attachments. Many people do not realize how large documents, graphics or photo files are. Get in the habit of compressing anything over 200,000 bytes (200K). There are several types of file compression software available for these purposes (for example, winzip for PCs or StuffIt for Macs).

IMPORTANT: Before sending attachments, be sure you have a good virus scanner software program so you don't unknowingly send viruses with your attachments. Get an active program that is always "ON." This will catch any viruses as they are being downloaded so they can immediately be quarantined and cannot infect your system. Update your virus patterns daily or every time you log on. These updates can be downloaded from the website of your virus software manufacturer. Most software has a scheduler to tell your computer to do this automatically. You need to ensure your system is protected from the latest viruses, which may have just been discovered since last you were online. New viruses are identified daily!

NEVER click on any attachment or an .exe (example: Happy99.exe, free stuff, click here or ILOVEYOU.exe) file attached within an email without making sure the attachment has been checked for viruses. **Even if the email appears to come from someone you know very well!** The attachment may be virus generated and plucked your friend's email address off another infected computer belonging to someone they communicated with. Or your friend unknowingly may be

infected and not aware of the virus on their system that has just spawned an email that has their name on it and is addressed to you. The email may look like it is from your friend just to get you to open it when in fact it is an email generated by a virus.

Check Your Spelling and Grammar

To be sure your message isn't compromised by misspelled words, always double-check your message before sending. Use a dictionary or a spell checker — whichever works better for you. While you can write in a conversational tone (contractions are okay), pay attention to basic rules of grammar.

Signatures

Unless your email address is well known to the recipient, always sign your email. Consider setting up an automatic signature in your email software so the same information appears at the bottom of every email you send. For example:

Sue Smith
Communications Coordinator
Harmony Chorus
ssmith@emailcarrier.com

You will sometimes run across a user's signature that contains a quote (as in "Don't just stand there... SING!"). If you want to add a quote, select one that is a reflection of yourself. Keep it short.

Respond Promptly

People send an email because they want to receive a quick response. Try to respond to emails within two days – even if it is just to tell the sender that you received it and that you will get back to them.

Expecting a Response

Email is a conversation that does not require an immediate response (like a telephone). With email you send a message and then wait for a response. The response may come in five minutes or the response may come in five days. Either way it's not an interactive conversation.

Too many users assume that the minute someone receives an email, the person will read it. If you schedule a meeting for an hour from now and send an email to each attendee, the chance that all the attendees will read that message within the hour will be pretty small. On the other hand, if you schedule the meeting for the next day, the chance that they will read the message will be pretty high.

Receiving and/or Sending Confrontational Emails

In the world of email, a "flame" means you've received or sent a verbal attack in electronic form. Flame email is an insulting message designed to cause pain (as when someone "gets burned").

Remember that it is very difficult to express tone in writing, and that often times, your “tone” can be misinterpreted. If the subject of your email is, in any way, sensitive or could be misinterpreted, pick up the phone instead.

Don't reply to an email message when angry, as you may regret it later. Once the message has been sent, you will not be able to recover it. Better to write your message one day and then re-read it the next day ... and then either send it or delete it.

Never Respond to Spam

“Spam” is the same as junk mail. It is unsolicited. By replying to spam or by unsubscribing, you are confirming that your email address is “live.” Confirming this will only generate even more spam. Therefore, just hit the delete button or use email software to remove spam automatically.

Avoid Using All Capital Letters

USING ALL CAPS MAKES IT LOOK LIKE YOU'RE SHOUTING! AND IT'S ALSO MORE DIFFICULT TO READ.

Use a “Smiley” To Make Sure That a Statement Is Not Misunderstood

Since there are no visual or auditory cues with email, users have come up with something called “smileys.” They are simple strings of characters that are interspersed in the email text to convey the writer's emotions (cues). The most common example is :-). Turn your head to the left and you should see a happy face (the colon is the eyes, the dash is the nose and the parentheses is the mouth).

Keep in mind, however, that it's rude to write something mean or derogatory, then place a happy smiley at the end of the sentence.

Wait To Fill In the “To” Field

To avoid accidentally sending your message before you're ready, consider leaving the TO: field empty until you are completely through proofing your email and you are sure that it is exactly the way that you want it.

Never give out phone numbers or personal information without confirming you are communicating with a reputable party. Never give out personal contact information of others without their specific permission to do so.

Don't Forward Virus Hoaxes and Chain Emails

If you receive an email message warning you of a new unstoppable virus that will immediately delete everything from your computer, this is most probably a hoax. By forwarding hoaxes you use valuable bandwidth and sometimes virus hoaxes contain viruses themselves, by attaching a so-called file that will stop the dangerous virus.

The same goes for chain letters that promise incredible riches or ask for your help for a charitable cause. Even if the content seems to be bona fide, the senders are usually not.

Before you forward an email that appears good-intentioned with an incredible story that instructs you to "read and share" with everyone you know, first check Snopes.com to see if the story is legitimate or a hoax.

Jokes and Other Unimportant Emails

Don't forward jokes to your family and friends without their permission.

A Strong Chain

It is important that members feel no communication barriers between themselves and chapter, regional or international leadership. You may have heard references to the Sweet Adelines International communications chain. The chain begins with the individual member, and is linked through the chapter to regional and international volunteers. Any chain is only as strong as its weakest link.

Recognize Contributions

Members want to be recognized for their contributions. They also want opportunities to serve. They deserve a nonthreatening environment in which they can offer suggestions, comments and criticisms. A successful internal public relations program will provide for individual recognition.

Effective Internal Relations Tactics

Following is a brief list of tactics your chapter can use to improve internal relations:

- Hold special chapter get-togethers outside rehearsal such as picnics, holiday parties, etc. where the bond among members can be strengthened.
- Post a chapter newsletter/bulletin on your chapter's website. The length and sophistication will depend upon the size of your chapter and its resources. This document should promote the atmosphere of common experience, feelings of belonging, identity, unity, and a source of regular, readable, accurate information. This could be placed in a Members Only section.
- Create a bulletin board where important notices, letters, and even photos can be posted. Ask a member of your chapter to assume the responsibility of monitoring the bulletin board. When information stays up too long, members lose interest.

- Promote member recognition programs such as member-of-the-month/year; best suggestion of the month; perfect or near-perfect attendance; invited the most guests; sold the most tickets. Use your imagination. You know better than anyone the kinds of member recognition that will promote the feeling of belonging. The award does not have to be expensive.

The list does not have to stop here. Any method benefits all if it brings chapter, regional and international leaders closer to members who sing on the risers.

Tools Available

Many tools are available from international sales that your chapter can use to make new and veteran members feel at home in your chapter and the organization.

Visit the Marketing Center online to access a wide variety of Webinars, publications, guides and handbooks that are valuable sources of information. There are many sales items that can be especially helpful in orienting new members to Sweet Adelines International.

Visit Online Sales to review the items that might be helpful to your chapter, especially in the Manuals/Brochures and Public Relations/Marketing sections.

Other tools that individual members should be aware of and encouraged to purchase are:

Judging Category Description Book
Copyright: The Complete Guide
Arranger's Guide
The Performer Prepares
Sight-Singing (book and audio tape)

Duplicating any of the sales materials locally is a violation of the organization's copyright. This practice is larceny and drains the resources of the organization we love.

EXTERNAL PUBLIC RELATIONS

The term “public relations” is so ambiguous that its meaning is not the same from chapter to chapter. In 1987, The Public Relations Society of America adopted a definition of public relations that even 100% of all professional practitioners cannot agree on: “Public relations is the management function that identifies, establishes and maintains mutually beneficial relationships between the organization and various publics upon whom its success or failure depends.” (Even if you have your own definition of public relations, let’s agree in this guide that the PRSA definition is a starting point.)

The main reason why defining public relations is important in your chapter’s life is because public relations tactics, especially establishing mutually beneficial relationships with targeted publics, can shift the image of Sweet Adelines International and barbershop harmony from that of a mere hobby to that of a quality musical product.

It is to your advantage to create a strong chapter image in your own community. In the absence of a good-singing, happy chorus image, the barbershop stereotype takes over. What is the barbershop stereotype? Though not the same in all areas of the world, one of the strongest images of barbershop comes from Meredith Willson’s musical and movie, “The Music Man.” As appealing as that image might be, it is not an image of contemporary people singing the art form with excellence.

The Truth, the Whole Truth and Nothing But

Public relations cannot be successful if the story you present to external publics is not truthful. You need to look within your chapter before you focus on forming relationships with external publics. If you skipped the section on internal public relations in this section of the *Chapter Guide*, please take a few minutes and turn back to it. A unified internal public is the basis for all external relationship building.

The amount of internal relationship-building that must be done varies from chapter to chapter. The following must be in place before you can truthfully go to external publics and build mutually beneficial relationships:

- musical quality
- excellence in music education programs
- a chapter atmosphere where members are valued as individuals and derive a sense of belonging and joy from their involvement with the chapter
- a chapter that makes a social contribution to its community

What Do You Want from Your External Relationships?

Some Sweet Adelines chapters enjoy the attention of the media that they have carefully cultivated, while others find their overtures to media repeatedly rebuffed. Keep in mind that barbershop harmony is a special interest that has appeal, but not necessarily universal appeal. In other words, you will attract some important publics and others simply are not going to be interested in your chapter. On all levels, especially local, you should seek to create greater awareness of your chapter as being part of a worldwide organization of singers committed to advancing the musical art form of barbershop harmony through education, performance, and competition. Below are a few tips to help your chapter gain exposure:

- Get involved with other arts organizations in partnerships. Perform for and with local opera companies, community theater groups, community choral ensembles, gospel choirs, etc.
- Solicit members from other singing organizations in your community to join your chapter.
- Network with the convention and visitors bureaus, newcomers' organizations, service clubs, business and professional groups, schools, colleges, trade schools, and the opinion leaders and influential citizens in your area.

Please refer to the *Real Guide to Growth Membership Handbook*, available online in the Marketing Center under Training Library tab, for a wide range of information that will assist your chapter in building mutually beneficial relationships.

WRITTEN COMMUNICATION

The fear of writing and publishing errors keeps many of us from writing letters, memos, news releases, chapter brochures, show flyers, advertising copy, radio public service announcements, etc. It's just a fact that, try as hard as you may, errors are going to occur. Even so, if you are still not comfortable writing, delegate your writing assignments to someone who is.

Writing Effectively

Regardless of the type of document you are writing, you should always follow these principles of effective writing.

- Use short, familiar words. Use a short word instead of a long one when the meaning of the shorter word is as precise as the longer one. Your reader wants information quickly and easily. Short, familiar words hit harder. For example, write "use" not "utilize."
- Use precise words. Consult a dictionary, thesaurus, or usage guide to make sure each word conveys its correct meaning.
- Use strong verbs. Action verbs strengthen your sentences, tighten your writing and convey a direct, straightforward message. For example, write "The quartet sang my favorite ballad," not "My favorite ballad was sung by the quartet."
- Drop excess words. Adjectives, adverbs and prepositional phrases slow readers seeking information. Throw out unnecessary modifiers. Write with nouns and verbs.
- Keep sentences short; try for a 20-word average. Balance long ones with short ones and vary the sentence pattern. Monotony in sentence length puts readers to sleep.
- Get to the point. Go directly to your subject, verb, object. Rambling sentences, packed with qualifying clauses, make your readers lose thought.
- Simplicity. Write to express, not impress. Avoid pompous phrases, generalities and jargon*.
- Let the facts speak. Use concrete terms rather than opinionated descriptions. Overwritten, flamboyant copy cries out for deflation. Write, "We laughed, sang and talked through the night," not "A good time was had by all."
- Be human. Don't hide behind an impersonal style. Give your readers some idea of the people involved, their personalities and mannerisms. Tie the story to the reader's experiences.

- Revision, revision. Read and reread what you write. If deadlines permit, see if you can rewrite your document at least once to improve it. Rewrites are usually shorter, stronger, faster and more readable.

Beware of Jargon

To communicate effectively, your words must mean the same thing to your reader as they do to you. As understandable as it may seem to you, audiences outside the organization do not understand much of the jargon that, internally, is common knowledge. When you write a news release announcing that your chapter is traveling to the state capitol for regional competition, your readers probably will not understand the term “regional competition.” Sweet Adelines jargon includes words and phrases such as:

- lock and ring
- Regional Coordinators
- tag
- summer music camp
- CAL

To avoid jargon, write your first draft as though you were telling a story to a nonmember. When you come to a term that is unique to Sweet Adelines or describes the mechanics of the art form, either explain it or delete it.

The Written Image

When Sweet Adelines get together, they represent the image of the organization - in restaurants, hotels, airplanes, at public performances, and on stage. When sporting your chapter's name and insignia, or the name and insignia of the international organization, written material can have a similar effect of the image of the organization.

According to policy, members are entitled to use the organization's name and official insignia, but permission must be obtained from the Senior Director of Marketing & Communication at international headquarters if the items on which the symbol, logo and/or name appear are offered for sale. (See *Policy Book*, Section XII, Div. A, 2, a, for details.)

Examples of a Good vs. Poor News Release

When you provide information to the media, there are specific rules for format and content that you should follow. Review the Press Materials in the online Marketing Center for examples. The following example is a news release submitted by a Sweet Adelines chapter. Name of the chapter, its community, the theme, date of the show, and other participants have been changed to protect the identity of the chapter. However, spelling and obvious grammar errors are indicated with (sic) following them.

NEWS RELEASE

"SWEET ADELINES FLYING HIGH"

IT'S (sic) TIME ONCE AGAIN (sic) FOR THE SWEET ADELINES OF XYZ Chapter TO TAKE CENTER STAGE AND "WOW" THE SOCKS OFF OF POTTERSVILLE.

IN APRIL, XYZ CHAPTER WILL PRESENT THEIR 12TH ANNUAL COME ONE COME ALL NIGHT, AND WHAT A NIGHT THEY HAVE PLANNED OR (sic) YOU! NOT ONLY WILL THEIR ADORING PUBLIC BE ABLE TO HEAR THAT LOCK AND RING OF A BARBERSHOP CHORD, BUT THEY HAVE INVITED A FEW FRIENDS ALONG TO MAKE THE EVENT SPECIAL.

THIS YEAR THE BIG TOP CLOWNS WILL JOIN THEM ON STAGE AT THE COMMUNITY COLLEGE AUDITORIUM. THE CLOWN DIVISION WILL ALSO BE IN THE LOBBY BEFORE AND AFTER THE SHOWS MAKING "BALLOON ANIMALS" AND ENTERTAINING IN THEIR OWN UNIQUE STYLE.

A TALENTED CREW OF LOCAL ENTERTAINERS WILL BE ON HAND TO ROUND (sic) OUT A SIDE SPLITTING SKIT CALLED "SWEET ADELINES FLYING HIGH." COME ON (sic) DOWN AND SEE HOW "CALAMITY JANE" HANDLES A NEW RADIO SHOW IN TOWN, GEARED TOWARD AN "ALL-BARBERSHOP STYLE."

MAKE YOUR PLANS NOW, FOR SATURDAY - MAY 18TH AT 2:30 PM FOR THE GUILD (sic) COMMUNITY COLLEGE AUDITORIUM - TICKETS \$10.00. FOR INFORMATION CALL 555-1211.

PROCEEDS WILL BENEFIT XYZ Chapter AND THE BIG TOP CLOWN DIVISION.

ALL TICKETS WILL BE SOLD BY THE BIG TOP CLOWNS OR THE BIG TOP CIVIC CLUB (sic) AND WASHINGTON HIGH SCHOOL I.B. HONOR STUDENTS.

SO FLAG DOWN A CLOWN OR AN I.B. STUDENT AND BUY YOUR TICKET TODAY.

Below is a more professional approach to the release, following the suggested guidelines:

News Release

For Release:	Upon Receipt
Representing:	XYZ Chapter, Sweet Adelines International
For More Information, Contact:	Lynn Anderson, Public Relations Chair, 555-5555

Annual Barbershop Show Set

April 11, 2014, Pottersville, AL - These songs from the circus and the golden age of radio comedy will highlight the annual spring show produced by the XYZ Chapter of Sweet Adelines International.

This 45-member barbershop chorus, directed by Thelma Clarke, will be joined by the Big Top Clowns in the annual fundraiser set for 2:30 p.m., Saturday, May 18, at the Community College Auditorium.

XYZ Chapter was organized here in 1984. It is one of more than 500 Sweet Adelines International chapters around the world where members receive education, training and the opportunity to perform four-part barbershop harmony, a uniquely American form of vocal music.

Tickets are \$20 each and may be purchased by calling 555-1211. Proceeds from the show will be shared with the Big Top Civic Club, a community organization that supports local adult literacy programs.

-30-

It is in the best interest of your chapter to follow the rules of news release writing. A good release is succinct, brief, and the facts are accurate. If no one in the chapter will assume the responsibility for writing news releases, deliver information to the media in the form of a fact sheet. The story of XYZ Chapter's annual show, when reduced to a fact sheet, looks like this:

Fact Sheet:

Who:	The XYZ chapter of Sweet Adelines International, a 45-member vocal music ensemble directed by Thelma Clarke, organized in Pottersville in 1984; and the Big Top Clown Division of the Big Top Civic Club.
What:	"XYZ Chapter Flying High" is the theme of the annual fundraiser. The show features song from the circus and themes from the comedy shows popular during the golden age of radio. Clowns will make balloon animals before the show.
Where:	Community College Auditorium

When: 2:30 p.m., Saturday, May 18, 2014

Why: Proceeds from ticket sales will be shared between the chapter and the club, which supports adult literacy programs in Pottersville.

How: Tickets are \$20 each. They may be purchased from any member of the XYZ Chapter, Big Top Civic Club, or Washington High School I.B. Honors Society. Further ticket information can be obtained by calling 555-1211.

It Takes a Written Plan

At the beginning of the fiscal year, the public relations chair should provide a public relations plan to chapter leadership. Among the items that should be covered in the plan are:

- publicity of chapter events/activities such as annual shows
- membership drive announcements
- public singing announcements
- special fundraising activities such as Valentine's Day Singing Greetings
- the chapter's preparation for and results from annual regional competition
- submitting articles to *The Pitch Pipe*
- results of the annual election of chapter leaders

Social Media Communication

It's evident that communication has expanded significantly in recent years. Who you communicate with and how you communicate has changed drastically through social media. When used effectively, social media can be powerful in building and developing relationships for your chapter internally and externally. To learn more about social media and how to build a successful social media communications plan see Section 2 of the *Real Guide to Growth* membership handbook located in the Training Library of the online Marketing Center.

VERBAL COMMUNICATION

The important thing to remember about successful verbal communication is that in order to G-E-T, you have A-S-K. The media cannot read your mind - nor can the chapter's members, regional leaders, headquarters staff, or international volunteers. Hinting, innuendo, and offhand remarks will not produce the results you want.

When speaking to the chapter, when talking to media, and especially when seeking a performance opportunity, it is important to use good grammar, strong eye contact in face-to-face communication, and an enthusiastic voice. The following interpersonal communication skills will help you as chapter leader to build strong relationships internally and externally:

- ask for what you want
- be a good listener as well as an articulate speaker
- follow through on assignments
- learn the needs of those you seek
- appearance and grooming (dress your face, body and even your voice for your audience)
- organizational knowledge

Note: *The Chapter Guide* is **SEARCHABLE** using the “FIND” feature:

Hold down the Ctrl (CONTROL) button while pressing the “F” (FIND) key and type any word or phrase (e.g. X-A-3, president, associate membership, etc.) in the FIND box. The FIND feature will take you to every instance of the word or phrase you typed in the FIND box.

CHAPTER GUIDE

SECTION VIII:

KEEP THE

MUSIC RINGING

BASIC CRITERIA FOR PUBLIC PERFORMANCE

Each chapter and quartet, as part of Sweet Adelines International, is committed to advancing the musical art form of barbershop harmony through education and performance. In order to promote this appreciation, each ensemble must present a professional performance that enhances the music and emphasizes the appropriate image.

To ensure the quality of our public performance, the education coordinator is responsible for evaluating the musical abilities of chapters and prospective chapters, including their readiness for public performance. In addition, chapters are expected to establish quality control and auditioning procedures for quartets that represent their chapters. Although quality is difficult to specify, minimum standards must be established.

Listed below are the Basic Criteria for Public Performance adopted by the International Board of Directors. These criteria are used by the education coordinator in determining if an ensemble may perform in public. The International Board of Directors strongly urges chapters to use these same basic criteria when auditioning quartets.

I. Performance

A. Musical Performance

1. Performing groups and their audiences enjoy variety (including novelty or comedy songs, solos, and songs with modern chords) in a performance. However, the performance should include predominant use of barbershop arrangements sung in barbershop style as defined in the *Judging Category Description Book*.
2. Public performances should include the following musical skills
 - a. Correct notes and words
 - b. In sync and in tune
 - c. Energy and forward motion

B. Visual Performance

1. Correct stage stance and posture
2. Even spacing between chorus and quartet members
3. Synchronization of planned movement
4. Display of appropriate facial expression and poise
5. Energy and emotional connection with the audience

C. Appropriateness

1. Subject matter, lyrics or presentation should not be offensive to members and/or audience
2. Length of performance should fit the occasion and the audience

- D. Emcee
 - 1. Material is planned ahead and relevant to the audience
 - 2. Delivery enhances the performance and creates a sense of continuity throughout the program
 - 3. Uses appropriate material in good taste. Good singing is the emphasis; joke telling should be minimized and used with caution

II. Unit Appearance

- A. Costume
 - 1. Proper fit
 - 2. Clean, pressed and in good repair
 - 3. Appropriate for venue and audience
- B. Grooming
 - 1. Hair is neat, clean, and styled suitably for the costume
 - 2. Appropriate stage or street makeup applied in a uniform manner

III. Members as Ambassadors

- A. All performance-related contacts between Sweet Adelines and the public should be business-like and pleasant. A generic plan, either formal or informal, should be developed that assigns responsibilities and ensures that all performance-related administrative details are properly handled.
- B. Each chorus and quartet member should be aware that any interaction is a chance to make a positive impression. Of particular importance are:
 - 1. Interaction between the performance coordinator and those who hire the group to perform
 - 2. Interaction between the performing group and the audience before, during and after the performance
 - 3. Interaction with personnel at the performance site

MUSIC SELECTION

One of the most fun, important and difficult decisions that chorus members must make is what songs they are going to sing. The music should be interesting and challenging; it also should be appropriate for the chorus' ability level, the occasion and the venue. Inappropriate music can make a well-prepared performance seem mediocre. The vehicle chosen to display your chorus in performance of a wisely chosen song/arrangement makes a strong presentation that will be rewarded on both the performance and contest stage.

In accordance with the our guiding principles on the *Culture of Belonging* and *Diversity & Inclusion*, Sweet Adelines International rejects any song with racist lyrics, messages or history, and they are considered unacceptable for performance in any setting. In order to provide tools and support to help members identify songs with those characteristics, a Song Assessment Tool was created. Information about the Song Assessment Tool can be found on the Diversity, Equity, & Inclusion page of the website. Additional questions about the Song Assessment Tool process can be emailed to songassessment@sweetadelines.com.

Although the task of choosing music may seem monumental, tools are available that can help your chorus locate appropriate songs/arrangements. Below are several topics your chorus will want to consider when selecting music for a performance or competition. More in-depth discussions on music selection can be found in *Module 9 of the Director Certification Program*, the *Judging Category Description Book*, and online in the education section of the Sweet Adelines website.

Sources for Music

- International Sales, international headquarters (call or online)
- Arranged Music List, international headquarters (call or online)
- Arranger Certification Program participants and other arrangers
- Barbershop Harmony Society
- Regional Education Coordinators

Range

It is important to match the arrangement to the capabilities of each part of your chorus. Usually the lead and bass range are the important restrictions. At the same time, continue to work on the vocal habits that will allow both parts to extend their ranges. When choosing music for contest, adhere to the comfort level of each part. Extended passages at the outer edge of the vocal range will produce tension and contribute to poor vocal quality.

Level of Difficulty or Singability

Avoid jumpy part lines or extended passages that require singing at the edge of voice ranges. Complicated syncopation will be difficult for choruses lacking experience. Interpretations requiring long passages of well-controlled, continuous sound may prove difficult for growing choruses. Continued work on good vocal production will increase your chorus' ability to handle this aspect of barbershop music.

In order to improve, a chorus needs the challenge of an arrangement that is a little more difficult than the last. However, keep in mind when selecting contest material that if the choice is beyond the capability of your chorus, too much time may be spent learning the song. A lack of fine-tuning may affect your chorus' performance.

Structure

Select arrangements with chord structure that fits the barbershop style. Look for major triad/ barbershop seventh and barbershop ninth chords that will give you the opportunity to ring the music and make that unique barbershop sound.

Lyrics

A strong message is characteristic of barbershop style. Look for singable consonants and strong vowel sounds at the end of the introduction and tag, and at the climax of the song. The lyrics should be congruent with the music.

Form

Form is how the song is put together. A typical arrangement will consist of an introduction, verse, chorus and tag. The chorus must have at least 32 measures; all other parts should be divisible by four.

Congruency

Choose an arrangement that matches the personality and vocal capability of your chorus. Follow through with attention to costumes, choreography and lyrics. Standing still during an uptune is just as distracting as singing a heavy ballad with bright, happy facial expressions. When choosing competition material, keep your present level of proficiency in mind. If it takes too long to "feel the match," the selection is probably inappropriate for competition.

Feelings

Consider the feelings of both director and chorus. If your director is not sold on a piece of music, the chances of it being performed to its potential are slim. On the other hand, if your chorus is not pleased with the choice of material, the performance often suffers. Work on your chorus' ability to transcend its own personal feelings.

Feedback

Listen to your audience, judges, coaches and chorus members; their observations can help your chorus improve.

CHAPTER PERFORMANCES

What is a show?...a performance! What is a Sweet Adeline?...a performer! Chapter performances may be a visit to a nursing home or school, delivering holiday or birthday messages, providing entertainment at business/organizational functions, or a staged event.

Whatever the performing situation may be, the purpose is to entertain the audience and to advance the musical art form of barbershop harmony. Preparation and planning is fundamental to achieving your chorus' goals. The following information on planning a performance has been prepared for you as a guide. Customize the guidelines for your own chorus' performance. A chapter performance organizational chart can be found at the end of this section.

Getting Organized

Coordinating a successful show is dependent on selecting a capable person to chair the show committee. The chair should be appointed well in advance to allow ample time for planning. Attributes to consider when selecting a show committee chair should include: the ability to lead, a personality that can handle pressure well, the ability to encourage and recognize creative ideas, and a strong business sense. An assistant show chair may be selected as well.

Show committee members could also chair the following subcommittees:

Costuming	Program	Tickets
Hospitality	Marketing	Stage Manager
House	Public Relations	Secretary
Makeup	Script	Treasurer

The Director's Role

The director is involved with nearly every aspect of the chapter show. They work closely with the show chair, and is responsible for maintaining the musical integrity of the chorus. Of primary concern to the director is music selection, the performers, staging, and choreography. The director must select music that not only fits the theme of the performance but fits the abilities of the performers as well. Though coordinating with the show chair, the director has the ultimate authority with regard to music.

Staging and choreography are critical aspects of the sound and musicality of the chorus. Both should be used to enhance the performance. The director must be consulted at all stages of development. Chorus members must be placed and moved without disrupting the chorus' sound. The director must work with the show chair to develop a realistic rehearsal schedule while contributing to the other aspects of the show such as scripts, costuming and makeup. All of these areas are reflected in the performance.

Planning a Show Budget

No chapter should ever plan a show without a budget. An estimate should be made of how much is going to be spent and how many tickets will have to be sold to cover expenses. The following is a list of some standard income and expense items to consider in planning a show budget:

Income

Ticket Sales
Advertising
Afterglow

Auditorium
Staging
Guest Talent
Tickets

Expenses

Performance License
Insurance
Publicity
Programs
Costumes
Gifts
Makeup

Planning the Show

The “parade” is the simplest type of barbershop show – a succession of acts, introduced by a master of ceremonies, with little or no continuity running through the show. The “book” show revolves around a story line. Most Sweet Adelines shows are a combination of both. Decide on a show theme and a possible name. A list of ideas could be gathered at a brainstorming session during a regular chapter meeting.

The show chair furnishes each subcommittee chair with a written list of assignments and due dates. Depending upon the complexity of the show, start planning six to 12 months out. Periodically review progress to make sure everything is on schedule. Remember to clear your chorus’ show date with your Regional Team Coordinator to avoid conflicts with other regional activities. A sample show production schedule follows:

Show Production Schedule **Name of Show / Date**

<u>Date Due</u>	<u>Responsible</u>	<u>Assignment</u>	<u>Date Completed</u>
Jan. 1	President	Appoint show chair	
Jan. 15	Show Chair	Appoint committee members	
Jan. 20	Committee	Show committee meeting	
Jan. 25	Show Secretary	Initiate correspondence with potential guest quartets; request bids.	
Jan. 25	House Chair	Clear suggested show date with Regional Team Coordinator and auditorium.	
Jan. 25	Afterglow Chair	As soon as auditorium is finalized, begin looking for afterglow facilities.	

<u>Date Due</u>	<u>Responsible</u>	<u>Assignment</u>	<u>Date Completed</u>
Feb. 1	Music Chair Chorus Director	Finalize selection of music. Begin plans to obtain music not already available. Work out schedule for rehearsal.	
Feb. 17	Show Treasurer	Present budget, including recommended ticket prices.	
Feb. 17	Script Chair	Rough draft of script ready for presentation to committee.	
Feb. 17	Costume Chair	Costume ideas ready for presentation	
Feb. 17	Stage Manager	Tentative plans ready for presentation	
Feb. 17	Marketing Chair	Strategies for publicity campaign ready for presentation	

During the next few months, each subcommittee chair will be performing their duties as outlined in the list of assignments. As the script is finalized, music learned, costumes selected, and staging set, the show chair will need to keep each subcommittee chair informed of these decisions. Instead of holding frequent, short meetings, it may be wiser to have the committee secretary send the same memo or email to all chairs and to the chapter membership.

In the final two or three months before the show, the show chair should work with the chorus director in developing a rehearsal schedule. The schedule and a complete script should be distributed to all chapter members.

Two weeks before the show, the show chair should double-check the following:

- Is the house chair prepared for dress rehearsal and show night, including ushers, parking, ticket booth sales, etc.?
- Has the stage manager made arrangements for pickup and delivery of all props and scenery to and from the performance site?
- Has the costume chair made arrangements for final fittings and given instructions to members?
- Has the makeup chair purchased all makeup and made a schedule for show night?

- Has the hospitality chair made final arrangements for guests?
- Did the program chair deliver the program artwork to the printer?
- Has the ticket chair taken a final count of sales?
- Does the marketing chair have all marketing strategies in place?
- Has the public relations chair made arrangements for photographers, quartet appearances, final publicity releases?
- Has the ordering of any flowers, gifts and gratuities been taken care of?

Wrap-Up

Following the performance, the show chair should prepare a complete show report for the chapter files, including their report, reports from subcommittee chairs, and copies of documents such as news releases, programs and recommendations for next year's show.

COPYRIGHT

Copyright is an exclusive bundle of rights provided to an author(s) of an original work of authorship, such as books, music, poetry, pictures, drawings, etc. For musical works, copyright extends to both the music and the lyrics. The "bundle of rights" that are included in copyright are the right to: (1) distribute copies of the work, (2) reproduce (or make copies of) the work, (3) display the work publicly (for example, a painting that you want to allow a museum to publicly display), (4) perform the work publicly, and (5) create derivative works based upon the original work. A copyright owner or holder is a person or company, such as a publisher, that owns any one of the exclusive rights of copyright in a work.

The rights mentioned above can be separated. The rights of musicians can vary depending on whether they are composers or performers. A composer is a person who creates the music — i.e. the melody, rhythm and lyrics. A performer is one who performs music. The performer's copyright exists in the sound recording.

Copyright ownership is separate from the ownership of the work itself. For instance, when a musician sells a CD to someone, the musician retains the copyright in the music. That means the buyer of the CD will have the right to play the CD at home or in their car but the musician will retain the rights to copy, perform and distribute the music, and make other works based on the music. When you purchase a song book, you do not purchase the right to make copies of that song book; that property right remains with the copyright holder.

Moreover, copyrights not only can be sold independent of the work itself, but the different exclusive rights can also be sold separately. For instance, a musician could sell the right to make copies of their CD to one person and could sell the right to publicly perform it to someone else.

Copyright ownership is generally indicated by the word "copyright," a small enclosed letter (c) or ©, followed by a date and the name of the owner of the copyright in the work (e.g., © 2016 Sweet Adelines International). Permission to copy this material may be given to others by the owner and is usually shown by adding a phrase such as "Used by Permission" on the bottom of the first page. While a copyright notice was once a requirement of copyright protection, it was made optional in 1989. Therefore, copyright protection attaches to a work even though it does not have a copyright notice on it. Of course, it is important to place copyright notices on musical works to put people on notice that a copyright is claimed. However, the absence of the copyright notice does not indicate that the work has not been copyrighted or that it is in the public domain.

Moreover, simply because a work appears on the Internet, does not mean that the author has placed the work in public domain or granted permission for anyone to download the work and make copies of it. Please assume that anything that appears on the Internet is protected by copyright unless you receive explicit permission from the owner to make copies of the work.

Copyright protection does not last forever. A copyright has a "term" or length, depending on when the work itself was created and is determined by the laws of the country in which the music is used. In the U.S., for works created after January 1, 1978, the term of copyright is the life of the last

surviving author plus 70 years or, if the work is a Work-for-Hire, the term is 95 years from first publication or 120 years from creation, whichever expires first. For works published or registered between 1964 and 1977, the term of copyright is 95 years, and for works published or registered between 1925 and 1963, the term of copyright is 95 years, if renewed in the 28th year. Copyright in works published or registered prior to 1925 has expired, and thus, are now in the public domain in the U.S. It is important, however, to clearly understand what is in the public domain and what is not. While all of Beethoven's musical works are in public domain, most of the sheet music of Beethoven's works would not be in the public domain. That sheet music would, unless created prior to 1925, be protected by copyright in the U.S. The same is true with sound recordings of Beethoven's symphonies. The publisher of the sound recording would have copyright protection in it even though the underlying musical works that were performed were in the public domain.

Because of the nature of our organization, we are primarily concerned with the right to reproduce songs, specifically music manuscripts and recordings and the right to perform songs in public. Unless the copyright on a song has expired (public domain), fees designated by the song owner (royalties) must be paid for copies made. In addition, you need permission of the copyright owner to publically play the song during a performance or concert.

Sweet Adelines International works with the American Society of Composers, Authors & Publishers (ASCAP), Broadcast Music, Inc. (BMI), Society of European Songwriters, Artists and Composers, Inc. (SESAC), Global Music Rights, and the Society of the Composers, Authors and Music Publishers of Canada (SOCAN) to comply with the copyright law, and to protect the rights of the copyright owners and the Sweet Adelines International music arrangers.

It is the responsibility of Sweet Adelines International performance groups to determine that all music they use in public performance is legally cleared and applicable fees have been paid. If you are unsure about a particular piece of music, take steps to be certain as to the legality of copying or purchasing the music. In order to create a permanent record and avoid any confusion in the future, documents relating to all music purchases should be retained. Listed below are several sources for determining copyright status and obtaining legal music:

Sweet Adelines International Published Music Just as the music publisher acts as an agent for the copyright holder, Sweet Adelines International administers the rights for the songs it publishes. All song titles that appear on the international sales single-copy sheet music list, or that have been printed in *The Pitch Pipe*, are either copyrighted by Sweet Adelines International or used by permission. This music should not be photocopied; a copy for each singing member should be purchased.

The Arranged Music List This list, available from the international sales department, contains songs submitted by individual arrangers. These arrangements have received the necessary clearance from copyright holder(s).

The men's organization maintains lists of their legal music similar to ours.

Creative Commons Creative Commons, an organization founded by a number of legal scholars, has developed a series of licenses that allows copyright holders to retain control over their works, but still make them available under terms more favorable than copyright allows. The copyright holder can choose to make the work available under a single license or a combination of licenses. For example, a copyright holder can permit use of the work only if it is used for noncommercial purposes and if the work is attributed to them, while retaining the right to make derivative works. Or they could make it available for derivative works, but require that the derivative works be made available under the same terms as the original.

Creative Commons has recently introduced a new sampling license under which artists are allowed to use portions of other artists' works in sampling. Various artists are expected to offer their work to be used for sampling through the Creative Commons website. More information about the Creative Commons license is available on their website at www.creativecommons.org.

Mutopia Project Mutopia Project (<http://ibiblio.org/mutopia>) contains a collection of modern editions, arrangements and new music which is in the public domain. All of the musical works on the Mutopia Project may be freely downloaded, printed, copied, distributed, modified, performed or recorded.

The Arranger The arranger is your best source for information regarding any music not found on these lists. If an arranger cannot be identified or prefers not to seek clearance, you may contact the music services department for assistance.

Other The public library can be helpful in determining copyright holder. Many music stores have catalogs showing music titles, composers/arrangers, copyright dates and publishers.

Copyright Exemptions

The rights of the copyright owners, the rights and obligations of performers, and the penalties for infringement can be found in the United States copyright law. An exemption to an exclusive right means that the user does not need permission from the copyright owner to use the work. Exemptions to copyrights in music and sound recordings apply to the public performance right. Certain performances like those that happen in the course of teaching in a classroom, instructional and religious broadcasts, and non-profit performances are exempted from the scope of the performance right.

"Fair use" is the right of the public to make reasonable use of copyrighted material in special circumstances without the copyright owner's permission. The United States Copyright Act recognizes that fair use of a copyrighted work by educational, religious, or nonprofit organizations such as ours "for purposes such as criticism, comment, news reporting, teaching, scholarship, or research", but there is no clear-cut-rule.

Factors to be considered include (1) the purpose and character of the use, including whether the use is for a commercial purpose or is for non-profit educational purposes; (2) what kind of work is the copyrighted work (for instance, is it creative or factual); (3) the amount and importance of the portion used in relation to the copyrighted work as a whole; and (4) the effect of the use upon the potential commercial market for or value of the copyrighted work. Fair use is determined on a case-by-case basis. An activity may qualify in one instance as fair use, while it would be an infringing activity in another context. Where there is doubt about whether something qualifies for the fair use exception, you should request a license from the copyright holder.

To illustrate a common sense approach to the application of these copyright exclusions, some permissible uses and prohibitions are listed below:

- You may photocopy a piece of music in an emergency, but you must replace it as soon as possible with a purchased copy. This exception includes any music added to notebooks for new members. Do not copy or retain copies without the inclusion of the copyright notice.
- You cannot copy any performable unit and assemble it in your own collection for the private use of your students. This is true regardless of the fact that you are not distributing the collection, but only using it privately for your students. Any copying of the performable works would constitute an infringement. Therefore, if you copied 20 separate works and assembled them in an instruction book for your students, you would have committed 20 different acts of copyright infringement.
- For music classes only, one copy per student may be made of small excerpts of a work, so long as the excerpt does not constitute a performable unit. For example, because a tag is a performable unit, it could not be copied in this instance.
- Minor re-voicing and similar adjustments to adapt the music for use by a particular group are permitted. Rewriting in a different style or altering the lyrics would require permission of the copyright holder, i.e., you cannot change the basic melody or the fundamental character of the song.
- A single recording of a chorus performance may be made for evaluation or rehearsal purposes. Additional copies of the recording require the compulsory mechanical license and royalty payment to the copyright holder. Refer to the Mechanical Licensing heading of this section for additional information.
- When Sweet Adelines International produces learning media, we, as producer, take responsibility for obtaining the mechanical licenses that cover the product. No one should make audio recordings of music for their own set of learning media, without the permission of the owner.
- Performance is one of the copyright owner's exclusive rights. However, performance of copyrighted material by instructors or pupils within a nonprofit educational institution as part of a classroom activity is permissible. A performance license is not required for chorus rehearsals or international and regional music schools.

- If directly related and of material assistance to the teaching content of a particular program, musical performances on video recordings or closed-circuit television are permissible. The viewing must occur in face-to-face situations in a classroom, or to a disabled student, within a nonprofit educational institution. The training of our approved candidate judges through the use of video recordings of competitions has proven to be one of our most effective educational tools.
- All copyrighted music used in public performance must be purchased. Part of the price goes to the copyright holder in the form of per-copy royalties. If and when the music is performed for a public audience, a performance license must be acquired. Refer to the Performance Licensing heading of this section for performance license application procedures.
- Just because you purchased content doesn't mean that you own the rights to upload it to YouTube. Even if you give the copyright owner credit, posting videos that include content you purchased may still violate copyright law.
- Additionally, just because you recorded something yourself does not always mean you own all rights to upload it to the Internet. If what you recorded includes someone else's copyrighted content, such as copyrighted music playing in the background, then you would still need to get permission from the appropriate rights owners.

Though the copyright law is very complicated, it can be simplified to two basic premises:

- Do not photocopy copyrighted music without the express permission of its owner.
- Obtain a performance license for shows given for the public. (Members in countries not covered by ASCAP, BMI or SESAC should check the performance license laws in their respective countries to ensure they are following the prescribed procedure for complying with the requirements of their countries.)

Samples, Medleys and Parodies

Music sampling is an example of a derivative use of older works. However, sampling is a controversial practice. While sampling very small portions of a composition has been held to be permissible, sampling of even small portions of sound recordings has not. However, the law in this area is far from settled. As such, before sampling you should obtain a license from the copyright holder or music publisher.

Medleys require licensing of each song part separately. You must contact and obtain permission from the copyright owner before proceeding. Medley arrangements cannot change the lyrics and/or the melody of the portion of the song that is used in the medley. The song title and copyright notice must be properly acknowledged in the medley arrangement.

A parody is the “use of some elements of a prior author’s composition to create a new one that, at least in part, comments on that author’s works.” Any parody lyric or the revision of a lyric that changes the integrity of the work requires authorization from the copyright owner. Since permission for parody lyrics is rarely granted by the copyright owner, it would be necessary to rely on the fair-use defense to forestall any liability for copyright infringement. The law has continually struggled with parody cases when ascertaining whether a particular parody falls within the parameters of fair use or is instead copyright infringement. As such, before creating a parody, you should apply for a license from the copyright holder or music publisher.

You can edit or simplify purchased, printed copies, provided that the fundamental character of the work is not distorted or the lyrics, if any, are not altered or lyrics added if none exist. If you get a compulsory license for recording, you can make a musical arrangement of a work to the extent necessary for your ensemble (actually, “to conform it to the style or manner of interpretation of the performance involved”). This arrangement, however, cannot change the basic melody or fundamental character of the work. This privilege is not meant to extend to “serious” compositions. If you wish to arrange a copyrighted work that falls outside the exceptions noted above, you must obtain permission from the copyright owner.

Further reference material on the subject of copyright can be obtained from *Copyright: The Complete Guide For Music Educators* by Jay Althouse, available from Alfred Publishing Co., Inc.

MECHANICAL LICENSE

An exclusive right afforded to copyright owners of musical works is the right to reproduce the work on paper or by making a mechanical recording. When making an audio recording, a mechanical royalty must be paid to the copyright owner. Under current U.S. copyright law, the rate is currently 9.1 cents per song per recording for songs five minutes or less, or 1.75 cents per minute or fraction thereof per song per recording for songs over five minutes. The compulsory mechanical royalty is due on all recordings made and distributed, even if the recording is not made “for profit.”

A copyright owner cannot, after the first recording of a musical work, prohibit any subsequent recordings. Nevertheless, your first step should be to contact the copyright owner with a request for a license to record the work within 30 days of making the recording and before distributing it. If the work has never been recorded, the copyright owner does have the right to deny your request. Because music publishers are usually happy to have their works recorded, you most likely will be granted a license to record.

For commercial recordings, many publishers use the services of an agent who specializes in handling mechanical licenses. The most widely used agent is The Harry Fox Agency, Inc., 601 W. 26th Street, New York, NY 10001, (212) 370-5330, www.harryfox.com. If you are planning a recording project with several songs, one contact with The Harry Fox Agency may save you a lot of time. The Fox Agency may represent many of the publishers involved in your project and can issue licenses on their behalf.

When you contact an agent, be sure to correctly list the following:

- Song title
- Writer
- Publisher
- Playing time (minutes/seconds)
- Expected release date
- Artist (your chorus/quartet)
- CD title and quantity (if applicable)
- Interactive (on-demand) streaming and quantity (if applicable)

Contact The Harry Fox Agency, Inc. or visit their website for specific directions on how to submit a licensing request. If the owner’s name and address cannot be found in copyright office records, the notice can be filed in the U.S. Copyright Office.

SYNCHRONIZATION LICENSING

Synchronization licensing covers the use of recorded music when combined with any audio/visual media. In other words, video production requires its own separate license, which pays a royalty to the composer of the song for the right to use their song on your new video recording. Unlike the mechanical license for audio recordings, a synchronization license must be negotiated on an individual basis directly with the music publisher or copyright owner. The copyright holder may charge any rate they want and are not obligated to issue a license.

You should secure a synchronization license before you upload or publish a video of recorded music combined with any audio/visual media to the Internet. Even if you create the entire performance and recording yourself, you still need both the mechanical and synchronization license to legally publish the video on YouTube, Facebook or any other website, unless it falls within public domain, or if it was published under a Creative Commons license allowing for free re-use. Reputable websites will remove videos with unlicensed copyrighted material.

Printing and recording rights, especially for synchronization licensing, may be held by different owners. There is no easy way to determine the appropriate person to contact. If you are planning to negotiate for yourself, start with the publisher who holds the print rights.

Pursuit of synchronization license requires the following information:

- Production company or name of the company to whom the license is to be issued
- Title, composers (both lyrics and music) and publisher
- Name of the project, film or video
- Duration of use (minutes/seconds)
- Nature of the use such as background, parody, vocal, instrumental, foreground
- Geographic scope of use
- Term of license requested
- Commencement date
- Episode number, if applicable
- Retail price
- Program or scene distribution, i.e., how the song will be used
- Number of units

With very few exceptions, all videos require synchronization licensing. You are, however, allowed to make a master copy of an individual performance such as your regional contest. A separate license is required for each song on your project.

PERFORMANCE LICENSES

The purpose of organizations such as ASCAP (American Society of Composers, Authors and Publishers), BMI (Broadcast Music, Inc.), SESAC (Society of European Songwriters, Artists and Composers, Inc.), and SOCAN (Society of Composers, Authors and Music Publishers of Canada) is to protect the rights of composers and authors, and to ensure that they receive fair compensation for the performance of their works. Organizations of this nature serve as clearinghouses through which users may obtain permission to perform music. The permission is granted in the form of a license.

Because the sale of printed music does not by itself provide a livelihood for most composers, they are largely dependent on fees received for public performances of their music. Unless paid for their work, composers have little time or incentive to compose, and the publication of music will be hindered. Because compositions are property and under the law a copyright owner has exclusive rights to their musical compositions, both a legal and a moral obligation exists to share the proceeds from musical performances with the people whose talents make the music available.

In Canada, the United States, and most other countries, copyright laws are very similar. Using clearinghouses simplifies the performers' task of obtaining the appropriate license.

Sweet Adelines International choruses and quartets should use the following methods to obtain a performance license.

ASCAP, BMI, and SESAC

Agreements exist between ASCAP, BMI, SESAC, and Sweet Adelines International that allow international headquarters to serve as a clearinghouse for the collection of license fees and the distribution of license certificates to chapters. License application forms are available from international headquarters. (Instructions and a *sample* application can be found at the end of this section and on the Sweet Adelines website.) Upon receipt of the application form and fees, a license will be forwarded to the chapter by international headquarters.

The rate schedule on the license application form is valid only for musical events where the attraction consists solely of vocal groups performing under the Sweet Adelines International name and does not extend to any other musical performance.

SOCAN

Public performance of music in Canada requires a license from SOCAN. Reporting requirements and payment of license fees to SOCAN will authorize the music user to publicly perform works from the world repertoire of copyrighted music.

Canadian chapters should contact SOCAN with the number and types of performances their chorus will participate in throughout the year. Based on anticipated activity, SOCAN will place the chapter on either a quarterly or semi-annual reporting schedule. SOCAN will provide the reporting forms and instructions. Licensing fees may not be paid in advance and the retroactive payment will be due along with the reports. Reporting is based on the calendar year.

SOCAN also requests that a program be submitted with the titles and other available particulars of the musical selections performed at all events. Complete instructions will be included in the material sent by SOCAN.

When an event takes place in a hospital, nursing home, prison, etc. and is of a benevolent nature, the chapter is not required to pay the license fee as long as no admission fee is charged, the chapter receives no reimbursement for the event and the event is not open to the general public. If the chorus performs in a shopping mall, at a banquet, etc., the license fee is due either from the chapter or the host organization. Be sure to determine in advance who is responsible for the license fee. It is always a good idea to verify with SOCAN that the host organization does have a license when they agree to that responsibility.

SOCAN personnel are happy to answer questions by telephone or by mail. They may be reached at:

SOCAN
Licensing Department
41 Valleybrook Drive
Toronto, Ontario, CANADA M3B 2S6
416-445-8700 or fax 416-445-7108

Countries Not Covered by ASCAP, BMI, SESAC, or SOCAN

Copyright laws vary from country to country and the methods of meeting their requirements may also vary. If your country is not covered by ASCAP, BMI, SESAC, or SOCAN, check your local regulations before sponsoring a musical concert for the public.

ASCAP, BMI, SESAC, and SOCAN are not concerned with the reproduction (printing) or recording (taping) of copyrighted songs. They are concerned with performing rights only. Permission to reproduce a copyrighted work or to record a copyrighted work must be obtained from the copyright owner.

COACHING

Choruses and quartets can accelerate the improvement of their performance levels by hiring a coach. Assessing your group's needs, determining priorities and finding the appropriate coach are a few essential steps that will help you progress in the right direction.

Assess Your Needs

- Invite someone outside your group to make an evaluation (education coordinator or another director)
- Use score sheets from previous competitions
- Observe and evaluate your chorus/quartet objectively

Determine Priorities

After your group has been evaluated, determine the priorities and focus on one or two areas. Do not attempt to "fix" everything at once. Reevaluate as you progress and adjust your priorities accordingly.

Selecting a Coach

If your chorus or quartet lacks in choreography, vocal production or other areas, find a coach who specializes in one or more of those categories. You may look up some potential coaches in the online faculty search, which lists members of the international faculty program and their areas of expertise. Other sources for coaches include certified and approved judges, regional staff, music educators, chorus directors and qualified Sweet Adelines members. Be sure to select a coach who is compatible with your group's members at their particular stage of development.

In addition to identifying your specific musical needs, the following must be considered before hiring a coach:

- What is your group's experience level, both in the art form and as a performing unit?
- What are your group's goals? What are you trying to achieve?
- How much can the group afford to spend for coaching? How often is coaching desired?
- Who is available?

Working with the Coach

Communication

Inform the coach about your chorus'/quartet's needs and what you expect to gain from the coaching session. When your group's expectations are effectively communicated, the coach can structure the session to meet your needs.

Find out if the coach will need special equipment such as a microphone, tape recorder, etc. All arrangements regarding fee, expenses, and dates of coaching should be confirmed in writing.

Preparation

To achieve maximum results from a coaching session, the chorus/quartet must be well prepared. Each member should know their music well enough that they can stop and start at any point in the song. They should be as familiar with the choreography.

Coaching sessions are intense workouts, both physically and mentally. Though tired from standing and performing for several hours, each member must concentrate on what is being said and how the direction relates to them. Members should keep in mind that the coach's comments are directed to improve the unit as a whole and at individuals only as they fit into that unit. No coach is perfect, and your chorus or quartet may later decide not to incorporate all of their suggestions. A productive coaching session is one in which all members of the chorus and the coach work together to achieve the net result—a better performing chorus.

Courtesy/Hospitality

After an agreement has been made with a coach, honor that agreement—even if you later find someone who charges half the price.

To help make the coach's visit more comfortable, ask them to complete the "Hospitality Information" sheet. (A sample form can be found at the end of this section.) If you receive this information in advance, your group will be able to better satisfy special requests or needs. Provide your coach with background information about the chorus.

Follow-up

The most important part of coaching happens after the coach returns home. The director and musical team should discuss the coach's suggestions and incorporate those that enhance the musical product. Remember, the coach was invited to help the chorus improve its skill level. You must be willing to adopt new methods and procedures. The skills, techniques and concepts presented during the coaching session must be reinforced.

Establish an implementation schedule for the newly learned skills. Determine a methodology for measuring your progress. Set reasonable goals. Immediately after the coaching session, the chorus will be focused on the areas emphasized in the session. This focus needs to be blended with the other elements of the chorus' performance. Taping your rehearsals following the coaching session will allow you to identify significant elements in the performance while the coach's words are still fresh in your mind.

Maintain reasonable expectations. Long-lasting improvements are a result of continued hard work and skill development. You need to continue to evolve in order to achieve a fully integrated product.

Alternative Coaching

Sometimes when a face-to-face coaching session is not possible, an audio and/or video record session can be quite beneficial. Many education coordinators have developed a "coach-by-tape" program, and several coaches use this system for interim coaching sessions. In making a recording, the chorus will want to present a complete package to be critiqued, using the best equipment available. The coach can listen to the performance and evaluate each song, just as if they were on site. Today some coaches are using Skype to provide another alternate to face-to-face coaching.

Self-Coaching

When you are in between coaching sessions or are unable to hire a coach, your chorus or quartet might want to try self-coaching. You can do this by recording your group's songs during a rehearsal. Take the recording home, listen to it and analyze the problems before the next rehearsal. "Duet" the parts for better synchronization, tuning and balance. Practice in front of mirrors.

Sharing Expenses

If finances are a problem for your chorus or quartet, ask another group to join you and share the expense. Be sure to have the coach's approval for a joint coaching session.

Evaluation

After a coaching visit by a member of the international faculty, evaluate the faculty member by completing an "International Faculty Evaluation" form. (A sample of the evaluation forms can be found at the end of this section.) The purpose of these forms is to help the international faculty coordinators evaluate the effectiveness of each faculty member. Keep a copy of the appropriate form in your group's files for future reference.

Coaching Aids

Educational Materials from International Headquarters

- *Judging Category Description Book*
- *Arranger's Guide*
- International competition videos
- Vocal audio and video recordings
- Visual performance video

Local Resources

- Good audio recorder/player
- Access to video camera and recorder
- Opportunity to attend other coaching sessions
- Contact with other coaches
- Contact with other musical groups
- Local library
- Attendance at local BHS and Sweet Adelines shows
- Professional musical entertainment
- Professional recordings of music that the group is singing
- Local high school or college music teacher and/or vocal teacher
- Time and experience

Frequently Asked Questions

What can we do about arrangements that are not on any Sweet Adelines International music list? How can we tell if they have cleared the process?

Find the source to inquire about copyright status and pay the appropriate fees. You might start with another organization such as BHS, the arranger, or the person or group you got it from or heard performing it.

What do we do about a completely unidentified arrangement?

The minimum amount of information needed to search ownership of a song is the correct title and composer(s) or publisher. Although the clearance process can be lengthy and expensive, it can be initiated on behalf of an unknown arranger by someone else who is willing to be responsible.

Must each group pay the arranger fee and buy copies?

Yes. This is the expected procedure and creates a record should any questions arise. The group retains the physical copies when a member leaves.

Do we need to buy a copy for each person in our group?

Per-copy fees go to the copyrights holder(s). Depriving the song owner of their rightful income (however small) can be considered infringement. Whenever copies are readily available, they should be purchased for all group members.

Do I need the arranger's permission to sing the arrangement?

No. Fees are collected by performing rights organizations, such as ASCAP, BMI, and SESAC from copyrighted material performed in a public venue. The party sponsoring the performance is responsible for obtaining the appropriate licenses.

What do we need to take to contest to prove that we have legal music?

Nothing. Retain in a permanent file all documentation relating to the purchase of any arrangement. If a question arises, refer to your file.

Is it okay to go ahead and sing arrangements that we know have not been cleared?

No. By doing so you are exposing yourself and others to possible serious penalties. A very large collection of legally cleared music in the barbershop style is now available.

Can you tell me if a particular song is cleared?

Contact the music services department at international headquarters.

If a song has not cleared, would it help if I call the arranger?

It is appropriate to call the arranger only if they have not submitted the arrangement for clearance. Once a song is in the process, additional calls will not clear it faster. Generally the holdup is with the publisher or copyright holder.

Frequently Asked Questions (continued)

*Do we need a license for our chapter show?
Competition?*

Yes. You need to complete the required forms and submit them to the music services department. The procedure is explained in greater detail in the *Chapter Guide*. If you need additional forms, contact the music services department.

*Can you tell me if this song is a good
competition song?*

This is a very subjective question. What applies to one singing group may not be appropriate for another. If you have a specific song in mind, you should contact the director, education coordinator, arranger, and/or music specialist for assistance. If you are looking in general, see the Music Selection portion of the *Chapter Guide* or JCDB.

*How do I join one of Sweet Adelines' education
programs?*

Provide the education department with your name, address and the program in which you are interested. Program descriptions, applications and instructions will be sent to you.

*Do we need a license to make an audio
recording?*

Yes. You are required to have a mechanical license. See the Mechanical License heading in the *Chapter Guide* for instructions. If you have any other questions regarding this subject, contact the music services department.

*What is the deadline for adding members to
our chorus if we want to compete?*

You may add members up to the Friday before the regional contest. The deadline is 30 days before international.

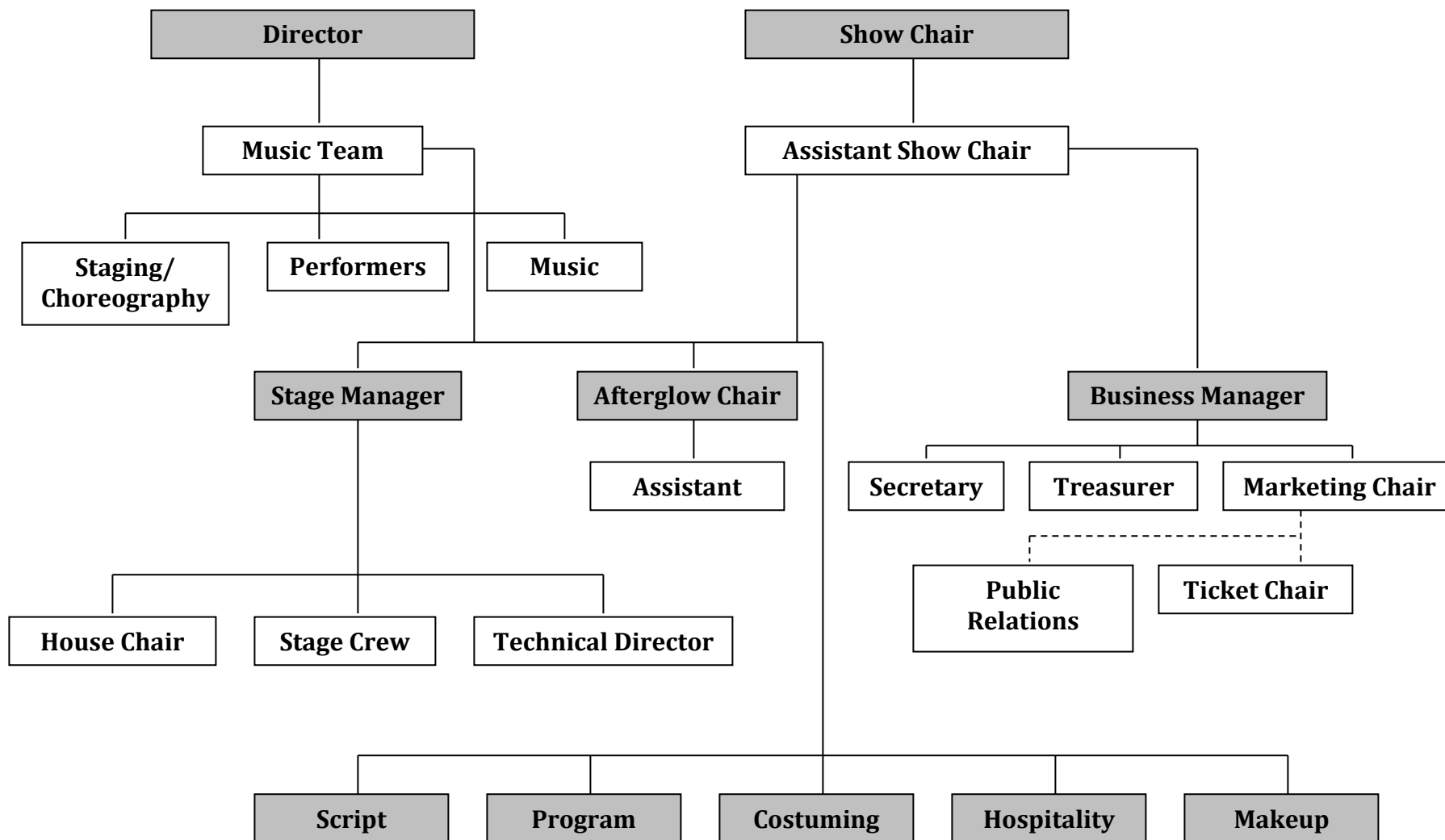
*Do we need a license to link to or embed a
copyrighted video from a video sharing site
(e.g., YouTube, Vimeo, etc.) for a class
presentation?*

No, not as long as you are not making a copy of the copyrighted video. A user who views or streams a video from a website does not violate copyright's reproduction or distribution rights. However, as noted above, you DO need to be concerned about any video that you upload to a video sharing site.

Can I change the words of a song?

No. Any parody lyric or the revision of a lyric that changes the integrity of the work requires authorization from the copyright owner.

**Sweet Adelines International
Chapter Performance
Organizational Chart**



SAMPLE



PERFORMANCE LICENSE INSTRUCTIONS

Three organizations, ASCAP, BMI and SESAC, represent the owners of virtually all copyrighted music in the U.S.A. (Countries other than the U.S.A. should check for local regulations as copyright laws vary from country to country and the methods of meeting requirements may vary also.) The purpose of these organizations is to protect the rights of composers and authors and to insure that they receive fair compensation for the performance of their works. Sweet Adelines International serves as the clearinghouse for the collection of license fees and issues the license certificates to the chapters. A performance license application form can be obtained from the Finance Department, Sweet Adelines International, 9110 S Toledo Ave, Tulsa, Oklahoma 74137, by calling international headquarters at 1-800-992-7464, or by emailing Finance@SweetAdelines.com.

ASCAP/BMI/SESAC

PLEASE SUBMIT YOUR REQUEST NO LATER THAN 10 DAYS FOLLOWING YOUR EVENT.

When applying for a license, submit the following information:

1. Chapter name, chapter number, region number
2. Region name (if this is a request for a regional event)
3. Date of performance (competition)
4. Name of facility
5. Location of facility (city and state)
6. ASCAP rate calculation based on seating capacity & gross revenue (minimum fee is \$25.00)
7. BMI rate based on seating capacity only (minimum \$20.00)
8. Add SESAC flat fee of \$10.00 (increase effective January 1, 2013)
9. Enter total enclosed and member information for the person who is to receive the license

Note: A separate license must be purchased for each performance, e.g., matinee and evening shows on the same day require two applications.

ASCAP RATE

Fill in the blanks and check the appropriate box for your event to calculate the ASCAP fee:

****Minimum fee is \$25.00**

Ticket Price \$ _____ times Tickets Sold _____ = Gross Revenue \$ 0.00

☐ Seating capacity is **0 - 2,999** - Gross Revenue \$ 0.00 times **.0068** = Total
ASCAP Fee \$ 0.00

(or Minimum Fee of \$25.00)**

☐ Seating capacity is **3,000 - 5,000** - Gross Revenue \$ 0.00 times **.0045** = Total
ASCAP Fee \$ 0.00

☒ **Free** admission event at a location with seating capacity of **5,500 or less** = Total ASCAP Fee is **\$25**

Example: Ticket Price \$ 10 times Tickets Sold 750 = Gross Revenue \$ 7,500

With seating capacity of 1,000 multiply times .0068 = Total ASCAP Fee \$ 51.00

With seating capacity of 3,000 multiply times .0045 = Total ASCAP Fee \$ 33.75

BMI FEE (Based on seating capacity only.)

Seating Capacity	Rate
0 - 1,500	\$20
1,501 - 2,500	\$30
2,501 - 5,000	\$50
5,000 - 7,500	\$68

SESAC add flat fee of \$10.00 per performance. (Rate increase effective January 1, 2013)

SAMPLE



REQUEST FOR ASCAP/BMI/SESAC PERFORMANCE LICENSE

Please complete and mail this form along with your payment (make check payable to Sweet Adelines International) **no later than 10 days following your event** to: Sweet Adelines International, Finance Department, 9110 S. Toledo Ave, Tulsa, Oklahoma 74137. If you have any questions, call International Headquarters at 1-800-992-7464.

Alternately, the form can be faxed to 918-388-8083. Please do not email form with payment information.

***NOTE:** If you are having more than one performance (show), complete a request form for each. An ASCAP/BMI/SESAC license will be issued for each performance. Fees are based on the actual seating capacity of the concert hall and the total gross revenue. Gross revenue means all money received from the sale of tickets for each performance. The Finance Department can provide the rate schedule for seating capacity over 5,000 upon request.

Chapter Name _____ Chapter # _____ Region # _____

Region Name (if this is a request for a regional event) _____

Date of Performance (*see note above) _____

Name of Facility _____

Location of Facility (city and state) _____

ASCAP RATE

Fill in the blanks and check the appropriate box for your event to calculate the ASCAP fee: ****Minimum fee is \$25.00**

Ticket Price \$ _____ times Tickets Sold _____ = Gross Revenue \$ _____ 0.00

☐ Seating capacity is 0 - 2,999 - Gross Revenue \$ _____ 0.00 times .0068 = Total ASCAP Fee \$ _____ 0.00
(**or Minimum Fee of \$25.00)

☐ Seating capacity is 3,000 - 5,000 - Gross Revenue \$ _____ 0.00 times .0045 = Total ASCAP Fee \$ _____ 0.00

☐ Free admission event at a location with seating capacity of 5,500 or less = Total ASCAP Fee is \$25

Example: Ticket Price \$ 10 times Tickets Sold 750 = Gross Revenue \$ 7,500

With seating capacity of 1,000 multiply times .0068 = Total ASCAP Fee \$ 51.00

With seating capacity of 3,000 multiply times .0045 = Total ASCAP Fee \$ 33.75

BMI FEE BASED ON SEATING CAPACITY ONLY

SEATING CAPACITY	BMI RATE
0 - 1,500	\$20.00
1,501 - 2,500	\$30.00
2,501 - 5,000	\$50.00
5,001 - 7,500	\$68.00

Please complete the following if using a credit card:

☐ Visa ☐ MasterCard ☒ Discover

CARD NUMBER _____

EXPIRATION DATE Month _____ Year _____

CVV: _____ Zip: _____

Card owner's signature - **must be signed**

ASCAP fee submitted \$ _____

(Minimum ASCAP fee is \$25.00)

BMI fee submitted \$ _____

add SESAC flat fee \$ 10.00

Total Enclosed \$ _____

Licenses will be emailed to the person listed below:

Name _____

Membership # _____

Address _____

Daytime telephone _____

Email _____

(Required to receive licenses)

12/16

INTERNATIONAL FACULTY PROGRAM HOSPITALITY INFORMATION

Instructions: Event information should be completed by the regional contact and sent to the faculty member as soon as possible.
Likewise, the faculty member should complete the faculty information side and return it to the regional contact as soon as possible.

EVENT INFORMATION (to be completed by the regional contact)

Event:
Date(s):
Event Location, City/State:

Region #:

Event Hotel:
Hotel Address:
Hotel City/State:
Hotel Phone:

Airport nearest the hotel:

Deadline for printed handouts and equipment needs:

Regional Contact:
Contact's Email:
Phone number(s):

Schedule of Events

Name of Event	Time	Faculty	Level/Size

Extra Responsibilities (emcee work, music to be learned, etc.)

Should you have any questions or suggestions regarding the proposed schedule, please contact the regional contact immediately.

FACULTY INFORMATION
(to be completed by the faculty member)

Name:
Address:
City/State/Zip/Country:
Email:
Phone number(s):
Fee:

Flight Information (If not available, please let the regional contact know as soon as possible.)

Arrival Date:	Time:	Airline:	Flight #:
Departure Date:	Time:	Airline:	Flight #:

Estimated Expenses

Portal-to-Portal Transportation	\$
Parking, tolls, baggage tips	\$
Housing/Meals (if not provided)	\$
Other (please specify)	\$
TOTAL ADVANCE REQUESTED:	\$

Equipment	Indicate Class(es)
Microphones (stand, lavalier, handheld)	
Flip chart	
Keyboard	
Overhead Projector	
Risers	
DVD player and screen	
Handouts	

Please indicate any special dietary needs:

Do you prefer to spend your off time alone or with regional personnel?

Comments:

INTERNATIONAL FACULTY PROGRAM
FACULTY EVALUATION FORM
To be completed by International Faculty Program Members Only

Please complete this form for the faculty member and return it to her as you exit, or submit it to international headquarters immediately following the event. Use the back of the sheet if more space is needed for comments. The International Faculty Coordinators will use this feedback as part of the annual evaluation process.

Faculty Name _____ Date _____ Region _____
Event Location _____ Title of Presentation _____

Please respond to each Area of Evaluation based on the descriptors listed with each category.

1. Subject Knowledge - Displays mastery of the subject, answers questions with ease and demonstrates practical application of the subject.

Below average ☐ Average ☐ Above average ☐ Superior ☐

Comments:

2. Expectations - Clearly defines objectives, gives reasons for learning, moves class purposely forward and outlines the itinerary.

Below average ☐ Average ☐ Above average ☐ Superior ☐

Comments:

3. Clarity - Effectively explains content, checks for comprehension, relates class content to previous student knowledge and to future applications and summarizes.

Below average ☐ Average ☐ Above average ☐ Superior ☐

Comments:

4. Interpersonal Skills - Establishes and maintains positive environment, handles disruptions well and provides transitions.

Below average ☐ Average ☐ Above average ☐ Superior ☐

Comments:

5. Presentation Skills - Gains and maintains attention, structures the presentation appropriate to the learners, addresses all areas of the room, displays organized approach to presentation and uses a variety of active teaching and learning methods.

Below average ☐ Average ☐ Above average ☐ Superior ☐

Comments:

6. Demeanor - Radiates confidence and shows enthusiasm for subject, shows respect for students, exhibits professional appearance and uses body language effectively.

Below average ☐ Average ☐ Above average ☐ Superior ☐

Comments:

7. As a result of attending this class, list one concept, idea, or skill that you will be able to use in your Sweet Adelines/personal experiences.

Signature: _____

Revised May 2012

INTERNATIONAL FACULTY PROGRAM
FACULTY EVALUATION FORM

Please complete this form for the faculty member and return it to her as you exit, or submit it to international headquarters immediately following the event. The International Faculty Coordinators will use this feedback as part of the annual evaluation process. The International Faculty Program Member thanks you in advance for information that will aid her in solidifying or improving her skills and presentations.

Faculty Name _____ Date _____ Region _____
Event Location _____ Title of Presentation _____

1. SUBJECT KNOWLEDGE

Assess the following skills: matches class content to the stated objectives, teaches to all learning styles, provides effective explanations and offers practical applications, shows confidence with subject area.

Below average ☐ Average ☐ Above average ☐ Superior ☐

Comments:

2. EXPECTATIONS

How well were expectations and objectives of the class communicated and met?

Below average ☐ Average ☐ Above average ☐ Superior ☐

Comments:

3. MOMENTUM

How well did the faculty keep the class moving, asking and answering questions, handling interruptions, and paying attention to time restraints?

Below average ☐ Average ☐ Above average ☐ Superior ☐

Comments:

4. ATTENTION

Appraise how well the faculty gained and maintained attention, taught to all areas of the room, and encouraged student interaction.

Below average ☐ Average ☐ Above average ☐ Superior ☐

Comments:

5. DEMEANOR

Evaluate the faculty's actions including physical movement, body language, enthusiasm, flexibility, dealing with audio-visual equipment.

Below average ☐ Average ☐ Above average ☐ Superior ☐

Comments:

6. COMMUNICATION / INTERPERSONAL SKILLS

Assess the effectiveness of the faculty's diplomacy, tact and patience, eye contact, speech patterns, appropriate voice modulation and volume, and sense of humor.

Below average ☐ Average ☐ Above average ☐ Superior ☐

Comments:

7. AS A RESULT OF ATTENDING THIS CLASS, LIST ONE CONCEPT, IDEA, OR SKILL THAT YOU'LL BE ABLE TO USE IN YOUR SWEET ADELINES/PERSONAL EXPERIENCES.

Signature: _____
(Signature encouraged but not required)

Revised May 2012

Note: *The Chapter Guide* is **SEARCHABLE** using the “FIND” feature:

Hold down the Ctrl (CONTROL) button while pressing the “F” (FIND) key and type any word or phrase (e.g. X-A-3, president, associate membership, etc.) in the FIND box. The FIND feature will take you to every instance of the word or phrase you typed in the FIND box.

CHAPTER GUIDE

SECTION IX:

QUARTET REGISTRATION AND AUDITIONS

REGISTRATION

Since no two Sweet Adelines International quartets may use the same name, each quartet should register its chosen name, for protection purposes, with International Headquarters. To register, a completed "Quartet Registration Form" should be sent to International Headquarters, along with the \$100.00 registration fee. Payment may be made by check, Discover, Visa or MasterCard. Registration may also be made online at our website www.sweetadelineintl.org. A Quartet Registration Packet, containing current information for quartets, will be sent to each registered quartet.

Quartets must be registered by January 15 prior to competing in regional contests. A \$60.00 late fee will be charged to any quartet registering between January 16 and March 31. A member may belong to more than one registered quartet. A member may sing in up to two quartets during a regional/area competition, however,

- she may only sing with one quartet per division (for example, one quartet in the International Division, including Evaluation Only, and one quartet in the Open Division)
- each quartet is responsible for complying with the appropriate entry requirements
- no more than two members per quartet may compete in a second quartet in the same Regional/Area competition and each quartet must have a different primary contact.

The name of a registered quartet is protected from registration by another quartet for the fiscal year of initial registration. To assure retention of the quartet name, the quartet must register the name each succeeding fiscal year (May 1 to April 30). If the quartet name has not been registered by July 31 of the fiscal year, it will become available to another quartet.

It is necessary for the quartet contact to notify International Headquarters in the event of a change in quartet personnel or the contact's address. A change in the name of a quartet may be made only at the beginning of each fiscal year.

It is also important to note that all requirements for charter renewal of the quartet member's chapter must be met before quartet registration can be processed at International Headquarters. Should the quartet registration be received at International Headquarters before the chapter's charter renewal is processed, the registration will be held until the chapter renews its charter.

RESTRICTIONS ON REGISTRATION

Following are the various restrictions on choosing and registering a quartet name:

1. A currently registered quartet must retain two (2) members in order to maintain its quartet name.
2. The names of current or past international championship quartets are protected and may not be used or registered by another quartet.
3. The names of international semifinalist quartets (those placing 2-15 in the international quartet competition) are protected and may not be used or registered by another quartet for a period of five (5) years from the end of the fiscal year when the latest ranking as international semifinalists was achieved.
4. The name of an international semifinalist quartet, which loses its ranking as a result of personnel changes, may not be used nor registered by remaining members or another quartet for a period of five (5) years from the end of the fiscal year when the latest ranking as international semifinalist was achieved.
5. The names of regional championship quartets are protected and may not be used nor registered by another quartet for a period of one (1) year from the end of the fiscal year when the latest ranking as regional championship quartet was achieved.
6. The name of a regional championship quartet or a wild card quartet, which loses its ranking as a result of personal changes may not be used nor registered by remaining members or another quartet for a period of one (1) year from the end of the fiscal year when the latest ranking as regional championship quartet was achieved.
7. It is necessary to notify International Headquarters, in writing, in the event of a change in quartet personnel or the contact's address. A change in the name of a quartet may be made only at the beginning of each fiscal year.

GUIDELINES FOR AUDITIONING QUARTETS

Auditioning quartets not only assures the quality of Sweet Adelines International performing groups, but also assists them in improving the quality of their performances. Chapters generally require quartets to pass an audition prior to their first public performance. It is recommended that chapters use the Basic Criteria for Public Performance (found at the beginning of Section VIII of the *Chapter Guide* or in the Guidelines for Forming a Quartet) as the basis for evaluation.

Most chapters have established audition procedures to determine a quartet's readiness for public performances. Quartet auditions may be conducted by the chorus director, the music committee, or by a specially formed audition committee. Members chosen to participate in the audition committee do not have to be experienced judges. Education coordinators are responsible for auditioning all chapter-at-large quartets.

The auditioning quartet is required to present a mini-performance of two or three songs, including emcee material and costumes. Following the performance, members of the audition committee should complete an "Audition Evaluation" form. Results of the evaluation should be given to the quartet as soon as possible after the audition. Specific comments regarding quality of musical product, choreography, and appearance are considered to be most helpful. If the quartet is approved for public performance, audition committee members should offer suggestions for coaching help. Chapter-at-Large quartets may submit their audition by sending a video recording of a 15-20 minute performance package, in costume and including emcee material, to the Regional Education Coordinator, just like an actual performance.

If a quartet's members are from more than one chapter, the quartet should audition for all chapters involved. When one or more voice part is changed, the quartet should re-audition. Any quartet formed specifically to sing at a one-time performance such as a chapter show, community event, church service or club meeting, should also be auditioned. To help quartet members feel at ease, a letter explaining the audition procedure and areas to be evaluated should be provided in advance to each quartet.

Sample Audition Evaluation

Passed _____

Re-Audition _____

When _____

AUDITION EVALUATION

_____ Chapter

Person(s) or Group Auditioning _____

Date _____ Evaluator _____

A. Audition Purpose

1. One-time performance for _____
 - a. Number of songs to be performed _____
 - b. Emceeing required? Yes No
2. To be a regularly performing quartet _____

B. Musical Performance

Inadequate

Satisfactory

Good

1. Music selection has variety with predominant use of barbershop arrangements.

2. Correct notes and words

3. In synch and in tune

4. Energy and forward motion

C. Visual Performance

1. Correct stage stance and posture

2. Planned movements appropriate and synchronized

3. Appropriate facial expressions and poise

4. Energy and emotional connection with audience

	Inadequate	Satisfactory	Good
D. Unit Appearance			
1. Costume appropriate for venue and audience	_____	_____	_____
2. Costume properly fitted, clean, pressed and in good repair	_____	_____	_____
3. Hair style suitable for costume	_____	_____	_____
4. Appropriate stage or street makeup applied in a uniform manner	_____	_____	_____

	Inadequate	Satisfactory	Good
E. Emcee			
1. Uses appropriate material in good taste	_____	_____	_____
2. Delivery creates a sense of continuity	_____	_____	_____
3. Material is planned and relevant to the audience.	_____	_____	_____

	Inadequate	Satisfactory	Good
F. Performance Package			
Performance has beginning and ending, and its tied together in an interesting manner.	_____	_____	_____

Additional comments:

Sample Letter

Date, Year

Dear Prospective Quartet Member:

Congratulations on your new adventure—quartetting! A goal of our chapter is to encourage the formation of quartets, and we want you to succeed, sing well, and have fun in the process.

Our standing rules require before Sweet Adelines International quartets perform publicly, they must pass an audition conducted by _____. The purpose of the audition is to assure you are prepared musically and visually to give quality barbershop performances.

For your audition, please prepare a mini-performance of two or three songs, including emcee material and costumes. If you are planning to sing for a one-time performance such as chapter show, community event, church service or club meeting, only one song will be required with no emcee material, unless the performance requires it.

Please contact _____ at least one week in advance to schedule the time of your audition. Remember to plan your quartet's audition far enough in advance of a tentative public performance to allow time for making changes, if necessary.

Attached is a copy of the "Audition Evaluation" form, which will be completed by members of the audition committee. Following your audition, you will be advised of the results with overall recommendations, as appropriate.

If your quartet would like some help prior to your audition, feel free to consult a member of the music committee. We look forward to your success and wish you the best of luck as you prepare for the audition.

In harmony,

Audition Committee Chair

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CHAPTER GUIDE

SECTION X:

REGION

ADMINISTRATION

Sweet Adelines International is divided into geographical areas called regions. The membership of a region consists of all the chapters and Chapter-at-Large members assigned to it by the International Board of Directors. Regions operate under the *Standard Form Regional Bylaws*.

Some regions may collect a regional assessment fee, the amount of which should be set in the region's standing rules. Chapters must be current in the payment of the regional assessment fee, if applicable, to be considered in good standing with the region.

Each region develops its own set of standing rules to cover its particular requirements and submits them to the Corporate Secretary at international headquarters for suggestions and approval. The *Guide for Regional Standing Rules* is available on the Sweet Adelines website.

Regional leadership positions are filled by chapter members and Chapter-at-Large members. Encourage talented members of your chapter to serve on regional committees, faculties or as a member of their regional management team. Every level of Sweet Adelines International is always in search of good teachers and leaders.

EDUCATIONAL OPPORTUNITIES

Various regional meetings are held each year. These meetings are open for all chapter members to attend. Through these meetings, members have opportunities for frequent participation, fellowship and an exchange of ideas with others who share the same interests. The meetings feature musical and educational programs such as quartet classes, director education, chapter improvement, leadership development, vocal technique, etc. Chapter leaders should encourage members to take advantage of these educational opportunities.

CONVENTION AND COMPETITION

Conventions are held annually within each region/area. The highlight of the convention is the chorus and quartet competitions where a regional/area champion is named from both contests. For detailed information on competition, please see the *Competition Handbook* on the Sweet Adelines website.

REGIONAL MANAGEMENT TEAMS

The Regions and Areas of Sweet Adelines International are governed by an eight-member management team.

1. Terms:

Each team member serves a two-year term, with no member serving more than three consecutive two-year terms on the Regional/Area Management Team.

2. Duties:

- Develops and implements for the region a comprehensive strategic plan that includes long-range plans for which each coordinator is responsible.
- Formulates a regional mission statement.
- Provides educational programs for all members of the region.
- Maintains a viable membership growth and retention program.
- Ensures that all financial resources of the region are managed in an effective and efficient manner.
- Develops and implements plans for recruiting and training successors.
- Appoints a nominating committee.
- Utilizes educational opportunities provided by International.
- Maintains effective communication with chapters and Chapter-at-Large.
- Maintains a supportive and positive working relationship among team members.
- Defines specific areas of responsibility for each coordinator as well as the areas in which coordinators have a joint (shared) responsibility.
- Evaluates regional events, each other, the effectiveness of the team, and team succession planning.
- Uses the process of consensus to arrive at team decisions.
- Supports the decisions made by the team.
- Serves as middle management of and liaison to the International organization; implements and supports decisions made by the International Board of Directors.

COMMUNICATIONS COORDINATOR

- Receives communications from the international organization and disperses to the region.
- Maintains internal communication channels among the region, chapters, and individual members.
- Develops and maintains the regional leadership database.
- Is responsible for regional website and database design, implementation and maintenance, with input from the Marketing Coordinator.
- Maintains a complete record of regional meetings and activities.
- Is responsible for recording and preparing minutes of all meetings of the Regional Management Team; distributes copies to members of the team, regional chapters, and the Corporate Services Department at international headquarters.
- In consultation with the RMT, prepares and submits year-end State of the Region Report to the Corporate Services Department at international headquarters by established deadline.
- Maintains contact with appropriate staff members at international headquarters.
- Maintains comprehensive records and forwards materials to successor.
- Trains their successor.
- Appoints staff to assist in the implementation of responsibilities.

DIRECTORS' COORDINATOR

- Represents the interests of the regional directors on the Regional Management Team.
- Communicates with directors in their region to assess their needs.
- Provides and facilitates a forum for directors at regional events.
- Communicates directors' needs and the needs of their chapters to the Education Coordinator.
- Maintains contact with appropriate staff members at international headquarters.
- Maintains comprehensive records and forwards materials to successor.
- Trains their successor.
- Appoints staff to assist in the implementation of responsibilities.

EDUCATION COORDINATOR

- Develops, coordinates, and monitors regional educational programs in conjunction with other coordinators.
- Plans curriculum for educational events such as seminars and workshops.
- Works in coordination with Events and Marketing Coordinators on educational and marketing events.
- Coordinates regional faculty visits to choruses.
- Maintains multi-year education plan document.
- Implements the chapter revitalization plan for maintaining the integrity of the musical product and administrative process as outlined in the RMT Handbook.
- Approves chapters and prospective chapters for public performance.
- Auditions Chapter-at-Large quartets for public performance.
- Develops faculty or staff to assist in implementing regional educational programs.
- Appoints an Arrangers Coordinator who administers the program that offers training for aspiring arrangers within the region.
- Appoints a YWIH Coordinator to educate and inform the musical leaders in each chorus about the YWIH program.
- Appoints a DCP Coordinator who administers the program within the region.
- Maintains contact with appropriate staff members in international headquarters.
- Maintains comprehensive records and forwards materials to successor.
- Trains their successor.
- Appoints staff to assist in the implementation of responsibilities.

EVENTS COORDINATOR

- Facilitates the securing of appropriate venues for regional programs and events, including site inspections and negotiation of contracts.
- Coordinates on-site arrangements for all regional meetings and events, including regional competitions.
- Oversees the work of the Chair of Regional Convention (CRC) as defined in the Guidelines for Regional Convention.
- Works in coordination with the Marketing and Education Coordinators on marketing and educational events.
- Maintains contact with appropriate staff members at international headquarters.
- Maintains comprehensive records and forwards material to successor.
- Trains their successor.
- Appoints staff to assist in the implementation of responsibilities.

FINANCE COORDINATOR

- Ensures that all financial resources of the region are accounted for in an effective and efficient manner.
- Coordinates the financial long-range plan in conjunction with other team coordinators.
- Prepares and submits the annual budget for the region.
- Manages bank accounts and investments
- Keeps accurate and current records of all financial transactions.
- Receives all funds paid to the region and issues all payments.
- Negotiates contracts for services and equipment required by the region.
- Holds sole authority to sign contracts on behalf of the region.
- Coordinates projects to raise non-dues income (ways and means).
- Presents a report on the region's financial condition at meetings of the Regional Management Team.
- Prepares an annual financial statement for submission to international headquarters.
- Submits accounting records for audit at the close of the fiscal year to a qualified person (or persons) selected by the management team or for examination or audit at any time as directed by the management team.
- Files Annual 990 tax form (United States regions) with the Internal Revenue Service by September 15 for the preceding year ending April 30.
- Provides advice and training to chapter treasurers and serves as a resource to chapters with financial questions.
- Maintains contact with appropriate staff members at international headquarters.
- Maintains comprehensive records and forwards materials to successor.
- Trains their successor.
- Appoints staff to assist in the implementation of responsibilities.

MARKETING COORDINATOR

- Develops and provides marketing and public relations programs that promote chapter and regional events, and membership growth and retention.
- Plans and implements marketing and public relations programs to increase membership growth and retention.
- Designs and implements plans to market events and products.
- Works in coordination with the Membership Coordinator on membership growth events.
- Works in coordination with the Events and Education Coordinator on marketing events.
- Works in coordination with the Communications Coordinator on the website and database design, implementation, and maintenance.
- Maintains database of media contacts.
- Writes and distributes press releases and produces media kits.
- Invites media to regional events and serves as onsite media contact.
- Maintains database of advertising contacts.
- Designs, negotiates, and buys advertising in local media.
- Sells advertisements in regional publications.
- Maintains contact with appropriate staff members at international headquarters.
- Maintains comprehensive records and forwards materials to successor.
- Trains their successor.
- Appoints staff to assist in the implementation of responsibilities.

MEMBERSHIP COORDINATOR

- Represents the interests of chapter management and membership on the Regional Management Team.
- Communicates president/team leader and chapter needs and issues to the Regional Management Team.
- Provides and facilitates a forum for presidents/team coordinators at regional events.
- Instills in the members of their region an awareness of their relationship to the organization, to the region, and to other choruses.
- Develops a plan, in conjunction with the Education Coordinator, to teach chapters in revitalization ways to attract new members and retain existing ones.
- Plans and implements programs in the areas of membership growth and retention.
- Works in coordination with the Marketing Coordinator on membership growth and retention plans.
- Visits and maintains regular contact with chartered chapters to promote membership growth and retention programs.
- Guides prospective chapters through the *Steps Toward Chartering* program.
- Assists chapters in revitalization with growth and retention programs.
- Develops support staff to assist in planning and implementing programs such as:
 - Steps Toward Chartering
 - Membership recruitment
 - Member retention
 - Chapters in revitalization
- Appoints a Chapter-at-Large Coordinator to ensure CAL members' awareness of and inclusion in regional events, programs, and publications.
- Appoints a Chapter Coordinator to maintain regular contact with chapter presidents/team leaders to assess and communicate chapter needs to the Membership Coordinator.
- Maintains contact with appropriate staff members at international headquarters.
- Maintains comprehensive records and forwards materials to successor.
- Trains their successor.
- Appoints staff to assist in the implementation of responsibilities.

TEAM COORDINATOR

- Facilitates the meetings of the Regional Management Team.
- Coordinates the agenda for Regional Management Team meetings with input from other team members.
- Reviews and approves all chapter standing rules.
- Reviews regional standing rules and job descriptions, and makes recommendations for necessary revisions.
- Maintains the region's long range plan document.
- Maintains the regional calendar.
- Maintains contact with appropriate staff members at international headquarters.
- Maintains comprehensive records and forwards materials to successor.
- Trains their successor.
- Appoints staff to assist in the implementation of responsibilities.

COMPETITION COORDINATOR (CC)

The competition coordinator is appointed by the Judge Specialists with approval by the Education Direction Committee (EDC). The annual term of appointment is from September 1 through August 30, with no limit on the number of consecutive terms a competition coordinator may be appointed. It is the competition coordinator's responsibility to oversee those areas of the regional convention that are directly related to the quartet and chorus competitions, including the facility, stage and backstage movement of contestants. The competition coordinators report regularly to the region and the Judge Specialists, and complete all reports requested by international headquarters.

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CHAPTER GUIDE

SECTION XI:

INTERNATIONAL

INTERNATIONAL BOARD OF DIRECTORS

Sweet Adelines International is managed by a board of directors. Each year, three directors are elected to the board from the membership by the membership for three-year terms; and each year, one director is appointed by the International Board of Directors for a one-year term. Six previously elected directors plus the International President and President-elect remain on the Board to serve the remainder of their terms, thus providing a substantial amount of continuity on the International Board. If the work flow is to continue without interruption, it is vital that Board members be elected from a list of well-qualified nominees. It is your chapter's responsibility to help the international Nominating Subcommittee select such nominees.

Chapter Participation in Suggesting Nominees

The International Nominating Subcommittee meets in June or July to select the list of nominees. Prior to that meeting, each chapter is requested to consider the strengths of its members. Chapters should encourage those who are qualified to allow their names to be considered by the Nominating Subcommittee as potential nominees. The chapter's candidates are required to complete an application (in the event the candidate is selected as a nominee) which is supplied to the chapters by international headquarters. Upon receipt of this notice, it is essential that the chapter take immediate action so that the established deadline is met.

General Qualifications for Suggested Nominees

To be qualified for service on the International Board, a member should be enthusiastic about a management role. Members should have a strong leadership background at the chapter, regional or the international level of Sweet Adelines International or in their professional life. The potential nominee also should have knowledge of the organization's policies and sufficient membership longevity to be able to appreciate the scope of the international organization.

Because of the distances involved, much of the work of the International Board is accomplished by email, discussion portal, and videoconference. A suggested nominee should enjoy participation in written discussion and have good computer skills. Response to and instigation of necessary correspondence is required to fulfill assigned responsibilities.

A nominee should have the ability to devote a substantial amount of time to the promotion and management of the corporate business affairs of Sweet Adelines International. The member must be available to travel to International Board meetings as required.

The International Board of Directors meets three times a year and attendance is required:

- The Summer Meeting of the International Board is held in June in Tulsa, Oklahoma. The meeting convenes Friday morning and continues through Saturday.
- The Midyear Meeting of the International Board is held in September, October or November, during the week and in the city of the international convention. Responsibilities of a Board member customarily begin on the Saturday preceding the convention and continue through the following Saturday.

- The Annual Meeting of the International Board is held in March in Tulsa, Oklahoma. The incoming and outgoing members of the Board meet together, convening on Friday morning and adjourning Saturday evening, with the incoming Board's election of officers held during that time period. Newly elected Board members, when notified of their election, are invited to attend the Annual Meeting of the International Board as observers. The newly elected Board members are eligible to vote at the election of officers during the Annual Meeting.
- Orientation for new Board members is conducted by the President, President-elect, and Immediate Past President, and by headquarters Chief Executive Officer. The orientation is typically scheduled for the Thursday preceding the Annual Board Meeting in March.

When a Board member is absent from two consecutive meetings, regardless of cause, they are expected to resign from the Board. For information regarding financial reimbursement to International Board members for expenses of these meetings, refer to the *Policy Book*, Section VIII, Div. J, 2.

Procedure for Suggesting a Nominee

A chapter should take pride in developing leadership qualities in its members. Chapter leaders should encourage those with potential for service to accept responsibilities in a wide range of Sweet Adelines International activities.

If you choose to select one of your fellow members as a potential nominee, the "Nominee Application" is to be completed by the potential nominee, certified by two chapter officers, and forwarded to the Corporate Secretary at international headquarters before the specified deadline. Nominees are notified of their selection prior to the distribution of ballots and must indicate their acceptance of the nomination. When all acceptances have been received, the slate is considered finalized. If, during the period between acceptance of nomination and the time of election, a nominee becomes in any way ineligible to serve on the International Board of Directors, the Corporate Secretary at international headquarters must be notified immediately.

Campaigning Prohibited

Sweet Adelines International does not permit campaigning in its elections. The purpose of this rule is to discourage the use of time and resources on activities that are not directed toward singing. The rule refers to active campaigning by use of printed materials, personal contact with members for the purpose of requesting votes, speech-giving or any other general politicking by a nominee and/or their supporters. Qualifications of nominees are made available to all members eligible to vote. Discussion by the membership of the nominees' relative qualifications in order to acquire an informed basis for voting is not prohibited.

Election of Board Members

Prior to the Midyear International Board of Directors meeting, the list of nominees, their qualifications, the official ballot and instructions for return of the ballot are sent to each chapter. Upon receipt of the notice, each chapter is obligated to ballot on the list of nominees. Complete instructions for balloting are included in the election notice and should be carefully studied before balloting.

Why Each Chapter Should Participate

Sincere members who give freely of their time and effort to promote your interests comprise the International Board of Directors. Your organization deserves your support in nominating and electing those qualified to promote its continued progress. The combined efforts of the Board members permit the general membership comparative freedom from many of the business details that are a necessary part of a large, dynamic organization such as ours. The degree of efficiency and success with which the organization is managed and operated is in direct proportion to the amount of time, thought and care you and your chapter use in helping to nominate and elect qualified Board members. Balloting is your opportunity to participate in the selection of those who represent you; it is your right and privilege.

INTERNATIONAL CONVENTION

The international convention of Sweet Adelines International is held annually during the month of September, October or November. In addition to the international chorus and quartet competitions, many education, business and social functions are included in the convention schedule.

International conventions are under the control and guidance of the International Board of Directors and Education Direction Committee with headquarters staff and member volunteers facilitating the logistics.

The sites for international convention are usually chosen about five years in advance. The International Board of Directors selects each convention site after studying the cities proposed by the International Headquarters staff. For your reference, future convention sites and dates can be found in each issue of *The Pitch Pipe*, on the website, and in each convention program.

A host chapter is not used to assist at the international convention. Instead, there are opportunities for volunteers to participate and assist at the annual conventions as “convention assistants.” Using convention assistants allows involvement from all regions. This is not a steering committee, but individuals who work under the direction of international staff in such areas as official panel concerns and the traffic pattern. Many participants use what they learn at international at their own regional competitions.

Regional leaders recommend individuals from their regions who might have experience and an interest in working behind the scenes. International Headquarters staff contacts the potential volunteers, asking them to fill out forms advising international of their willingness to participate and their available time for working at the convention. Those individuals selected to work as convention assistants are provided with special seating for the contest during their “nonworking” hours, various amenities and discounts on future convention registrations.

Each chapter is encouraged to send a member to international convention for the purpose of bringing back a comprehensive report of the activities of the week-long convention.

INTERNATIONAL PROGRAMS

The international organization offers many educational programs for members. Following is a brief overview of each program. More information can be found in the members only section of the website.

Arranger Certification Program

This program provides education to members interested in barbershop music arranging. It consists of three levels of education: a Beginner level (open to all members and non-member front-line directors) based on self-study and in-region testing; an Intermediate level (open to qualified members and non-member front-line directors) consisting of practical arranging assignments in an on-line cohort under the guidance of a qualified arranger; and an Advanced level ACP Scholarship (open to a limited number of promising members who demonstrate a solid foundation in barbershop arranging) that provides intense one-on-one training with a Certified or Master Music Arranger. Arrangers who successfully complete the Intermediate portion of the program will receive the designation "Approved Arranger." Arrangers who successfully complete the Advanced portion of the program will receive the designation "Certified Arranger" upon application and acceptable demonstration of advanced arranging skills.

International Judging Program

This program is open to members who are interested in becoming skilled as a judge in order to serve at regional and international competitions.

The four progressive levels of this program are: Applicant, Approved Candidate Judge, Approved Judge, and Certified Judge. Applicants in the program choose one of four specific judging categories in which they wish to specialize—sound, music, expression or showmanship. An applicant to the International Judging Program should have at least four years of membership in the organization, but exceptions may be made in unusual circumstances. Contact International Headquarters staff for more information and application procedures for the International Judging Program.

Director Certification Program

The program provides chorus directors and aspiring chorus directors with a continuing opportunity for monitored pursuit of excellence in the area of directing.

There are five levels in the program: Candidate Director, Approved Director, Certified Director, Master Director and Master Director 700. Each region's education coordinator is responsible for administering the program in the region. The education coordinator often appoints a DCP coordinator to facilitate testing and administration of the program. Contact International Headquarters staff to obtain an application and/or more information on this program.

Panel Secretary Program

Panel secretaries are assigned to the official judging panels at regional competitions. They prepare official papers for the judges, record all scores during the competition, time performances, prepare official tabulated results, and supervise the distribution of scoresheets, audio and video recordings, and tabulated results following each contest.

An applicant must have sufficient understanding of all aspects of a regional competition. Applicants also must take a professional approach to leadership positions as well as convey a professional image. Applicants must be recommended by international and/or regional leaders.

For more information on this area of service and application procedures, contact International Headquarters staff.

International Faculty Program

This program is offered to those members interested in becoming a member of the international faculty.

There are three levels to this program: Master Faculty, Faculty, and Faculty Emerita. Interested members may request an application and information from International Headquarters staff.

Young Women in Harmony Program

This program focuses on acquainting young female singers with the barbershop style, primarily through school-based choruses and quartets. Through this program, complimentary teaching materials and sheet music are sent to music educators. Volunteer support is provided to the groups by many Sweet Adelines choruses, quartets and individual members.

Young Women in Harmony packets are available by International Headquarters staff. For more information about the YWIH Program, contact International Headquarters staff.

INTERNATIONAL HEADQUARTERS STAFF

The international organization is administered by a paid, professional staff. Both full- and/or part-time employees work at international headquarters in Tulsa, Oklahoma. The staff is available to assist you Monday through Friday, 8:00 a.m. to 4:30 p.m., Central Time.

Headquarters staff is organized in departments, each under the supervision of a director or manager. To help you reach the department and/or staff member most qualified to assist you with questions or concerns, a list of departments and a brief description of their areas of responsibility and expertise is available on the SA website: **About** tab, **Staff Contacts** dropdown.

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CHAPTER GUIDE

SECTION XII:

CHAPTERS IN TRANSITION

Chapters are made up of people and people change. Therefore, it is not uncommon for chapters to undergo change as well. To enable chapters to be flexible – to bend rather than break – the international organization recognizes the following organizational options:

CHAPTER REVITALIZATION

If a chapter is unable to recharter by the June 30 extension deadline, chapter leaders may request that the regional education and membership coordinators grant a revitalization status. Revitalization gives chapters that are experiencing temporary setbacks, such as the sudden loss of members due to a chapter split or the loss of a chorus director, a year to regroup. (An extension to this time may be granted by the education coordinator and the membership coordinator in specific cases.) Though many regions offer specific programs to assist chapters in revitalization, the rebuilding process is primarily the responsibility of the chapter members. (See the *Policy Book*, Section III, Div. A, 4.)

CHAPTER CONSOLIDATIONS

A consolidation occurs when two or more chapters each discontinue their independent existence to form a new chapter. The most compelling reason for consolidation is growth, or combining complementary talents and attributes to form a stronger chapter. Consolidation guarantees that members of both previous chapters have equal status in the formation of the new chapter. Specific rules must be followed when consolidating two chapters, and a minimum of six months should be allowed to complete the process.

One of the consolidation rules maintains that the new chapter must include the memberships of both consolidating chapters as well as assume their assets and liabilities. If it wishes, the new chapter may retain the longevity date of the oldest chapter by notifying international headquarters. The new chapter formed by the consolidation retains the charter documents of both dissolving chapters for historical purposes.

Another aspect of consolidation to consider is how it affects competition. For example, suppose Chapters A and B decide to consolidate following their regional competition. In the regional competition, Chapter A won a first-place medal. However, when Chapter A dissolves to form the new, consolidated chapter, the former members of Chorus A lose their opportunity to compete as a contestant at international competition.

Usually the chapter formed by a consolidation receives a new name, but if all members are in agreement, the new chapter can take on the name of one of the previous choruses. Retaining a previous name might be done if the chapter had high name recognition or significant historic value.

Consolidation Procedures

The formal consolidation procedure begins with a vote to dissolve. Each dissolving chapter must vote on the following motion:

“The _____ Chapter is dissolved in order to consolidate into the proposed _____ Chapter, such dissolution and consolidation to be effective on the date the charter for the new _____ Chapter is approved by the International Board of Directors. “

In order for this action to be valid, affirmative votes must be cast by at least 2/3 of all members present and in good standing. Good standing for the purposes of dissolution is defined as being up-to-date in the payment of dues.

The vote for dissolution and consolidation can be taken at any regular meeting or special meeting called for that purpose provided that, in either case, notice of the question to be considered has been furnished to each member at least 10 days prior to the meeting. Voting may be in person or by absentee ballot. To be considered valid, any absentee ballot(s) must be received by the chapter president prior to the meeting.

To help defray the cost of the paperwork necessary for a consolidation, each chapter involved shall remit a fee to international headquarters. This fee must be paid by each chapter involved before any paperwork is processed. The fee is nonrefundable and nontransferable.

If two or more chapters dissolve in order to consolidate, the former chapters' assets are retained by the newly consolidated chapter. Each consolidating chapter must submit to international headquarters a complete financial statement covering its remaining assets at the time of its dissolution and application for consolidation.

If one or more of the consolidating chapters is incorporated, chapter leaders must consult a local attorney to determine proper procedures for dissolution in its particular state.

When a chapter does dissolve, it is required by chapter bylaws that certain rules be followed as described in the *Policy Book*, Section III, Div. A, 6.

CHAPTER SEPARATIONS

A chapter separation (“split”) occurs when members of a chorus leave their original chapter to form a prospective chapter.

Turmoil within a chapter that eventually leads to a “split” can be an emotional roller coaster ride for most chapter members. It is a time of unrest; a time for examining personal goals as well as chapter goals. Many chapter members are astonished to look back a year or two later and realize that the split was a positive action, both for the remaining members of the original chapter and for those who voluntarily left.

Most splits occur because of a division of goals involving the chapter’s musical product or because of power struggles. If chapter members cannot reach consensus on an important issue or agree to a compromise, the chapter remains in a constant state of anxiety and turmoil. During such a time, it is unwise to attempt any kind of membership growth program. Visitors are reluctant to join a chapter in upheaval.

When all attempts to resolve the controversy are futile, it is usually best for the group within the chapter that finds its goals and opinions in the minority to leave the chapter and begin anew. In the final analysis, it is not a matter of who is right or who is wrong, but an expression of differing philosophies, goals and personal preferences.

One of the largest issues involved in determining which group will leave the chapter revolves around finances. According to the Policy Book, the financial and physical assets of the chapter are retained by the existing chapter. Although the existing chapter has control of the assets, its members have the option to donate a stipulated sum of chapter funds to the departing group’s newly established prospective chapter.

Departing members are subject to policy regarding transferring membership. (See Section III, Div. C, 6 of the *Policy Book*.)

The regional management team can be of great value in assisting both groups involved in a split to rebuild and forget bruised feelings. An amiable chapter separation is of value to both groups. After all, both chapters will continue to interact as members of the regional “family.”

CHAPTER DISSOLUTION

The most common reasons chapters dissolve is because the chorus cannot attract or retain the minimum number of members needed to recharter. It is a sad time for chapter members when their chorus' options have dwindled down to dissolving the chorus. However, dissolving the chorus does not have to mean the end of the members' involvement with Sweet Adelines. Members of a dissolving chapter are urged to visit other chapters within their vicinity with the hope of transferring their membership. Members of a dissolving chorus also many join chapter-at-large or member-at-large. In a year or two, conditions within the city or rural area where the chapter once existed may improve and new members may regroup with previous members to form a prospective chapter.

Chapter Dissolution Procedures

Dissolution of a chapter must be voted on by the membership. A special meeting should be scheduled, and all members should be notified as to the purpose of the meeting at least 10 days prior to the scheduled date. Dissolution of a chapter requires a 2/3 vote of the membership present and in good standing. A simple majority vote of those present is not considered valid.

If the chapter votes to dissolve, the following procedures should be followed:

- The regional marketing and membership coordinators should be notified.
- International headquarters should be notified.
- The business of the chapter should be finalized. All money due to the chapter should be collected and used to meet any outstanding debts.

If a shortage of funds exists, debts should be paid in the following order:

- Vendors (from outside the organization)
- Regional obligations
- Chapter members (expense reimbursements, dues in escrow, etc.)

Physical property of the U.S. chapters, such as risers, costumes, etc., may be sold prior to the final accounting or donated to another Sweet Adelines International chapter or another nonprofit 501 (c)(3) organization. It is the chapter's responsibility to determine the tax status of a recipient.

If the property is sold, money from the sale must first be used to settle any outstanding debts. Any money returning from the sale of physical assets and all other chorus assets must be turned over to the International Organization with a final accounting report. (See Standard Form Chapter Bylaws, Article II, 4).

A final accounting report on the physical assets must be prepared and submitted to international headquarters. The report should include income/expense statements and a brief statement regarding the disposition of assets and funds. All physical assets held at the time dissolution commenced should be listed in the report as well as the book value of the assets. A copy of the report should also be sent to the region.

Regardless of the amount of annual gross receipts, the dissolving U.S. chapter should prepare the appropriate 990 Form, file it with the U.S. Internal Revenue Service, obtain the confirmation of filing, and provide a copy of the filed 990 Form and the confirmation to International Headquarters. (See Section V of this guide.)

Before the dissolution of the chapter is complete, several miscellaneous details should be taken care of:

- Return charter document, if it can be located, to international headquarters.
- Cancel performances scheduled for future dates as well as listings with local Chamber of Commerce, arts councils, community calendars, telephone company, etc.
- Distribute chapter-at-large (CAL) or member-at-large (MAL) applications to any members wishing to apply for transfer to CAL or MAL.

If the former members of a dissolved chapter wish to rebuild, they may apply to the membership department at international headquarters for prospective status. If prospective status is granted within 90 days after the dissolution, the chapter may retain its assets. Just like any prospective chapter, a rebuilding chapter must go through the *Steps* procedure beginning at *Step Two* and charter as a new chapter.

Note: *The Chapter Guide* is **SEARCHABLE** using the “FIND” feature:

Hold down the Ctrl (CONTROL) button while pressing the “F” (FIND) key and type any word or phrase (e.g. X-A-3, president, associate membership, etc.) in the FIND box. The FIND feature will take you to every instance of the word or phrase you typed in the FIND box.

CHAPTER GUIDE

SECTION XIII:

RESOURCES

COUNSELING

When a chorus is out of tune musically, members immediately stop, analyze the situation, and fix the problem. Left unaddressed, mole hills suddenly become mountains and disagreements become battle fields. Symptoms of unrest may appear in the form of sporadic attendance, secretive phone calls, demanding members, or argumentative meetings.

To keep your chorus harmonious, be alert for possible problems and actively participate in conflict resolution. Below are several different levels of conflict resolution to consider, beginning with the most basic.

Use Listening Skills to Reduce Conflict

Sometimes people just need to let off steam or verbalize their feelings to someone who cares and is willing to listen. Too often, the parties involved in an argument spend most of their time talking instead of listening. As a chapter leader, it is your responsibility to give the speaker your full attention and to clarify their position using open-ended questions. Listen for the “real” reasons underlying the problem. If the member has a valid complaint, try to fix it. If not, empathize and take time to rationally explain why the complaint cannot be fixed or changed at this time.

Take It to Your Board

Use your chapter board of directors (or your management team) as a sounding board if you think a potential problem is brewing. It is the board’s obligation to act in the best interest of the chapter, so examine the issues carefully. First, state the problem clearly. Next, write down possible solutions and discuss the ramifications, both good and bad. After discussion, select the best solution and prepare to implement it. Keep members informed and involved in the decision-making process.

Your Regional Leaders as Allies

You have heard the expression, “You can’t see the forest for the trees.” That old adage reminds us that sometimes we are so in the thick of things and so emotionally involved that our judgment becomes a bit off center. Maybe you need a reality check, a good listener or a piece of sound advice. Contact your regional management team—they are only a phone call away.

International Counseling

After examining all other options for conflict resolution, a chapter may request that a counselor be provided by international. In such instances, the International President, in consultation with the Executive Committee, will assign a counselor best qualified to intervene and achieve a successful result, given the particular circumstances.

Counseling visits can be costly, so requests for such visits should not be taken lightly. Because the International Board of Directors believes that a chapter's commitment to the success of a counseling visit should be equal to that of the international organization, one-half of the cost of portal-to-portal transportation and one-half of the housing for a counselor will be the responsibility of the chapter requesting the visit. (Chapters that are financially unable to bear the cost may request that the assessment be waived due to financial hardship. The International President/Executive Committee will consider waiving or reducing the assessment on a case-by-case basis.)

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