



**GREENVILLE MUSIC TEACHERS ASSOCIATION**  
**Policies and Procedures Manual**

President  
President-elect/Immediate Past President  
Vice President of Programs  
Vice President of Membership  
Secretary  
Treasurer  
Advertising/Yearbook Chair  
Grant Chair  
Historian  
Hospitality Chair  
Publicity Chair  
Scholarship Chair  
Student Recital Chair

*“In pursuit of musical excellence in the State of South Carolina”*

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*Officers & Chairmen:*

*Please notify the President by June 30 of any revisions in your area of responsibility which should be deleted/included in next year's manual. Also mention any needed form changes.*

September 2007

# PRESIDENT

## Yearbook Editing • NewsNotes Editing • Presiding

### YEARBOOK Editing MONTHLY CHECKLIST

#### March/April

1. Begin choosing committee chairs. Try to finalize appointments before annual Executive Board and Committee Chairs meetings.
2. Meet with Finance Committee to review general operating budget, scholarships, And competition fund in particular. (Note: All budget, scholarship, and competition fund recommendations must be submitted to the Executive Board for approval. (GMTA *Bylaws*, Art. XI, Sect. 3.)

#### May/June

1. Notify MTNA and SCMTA of new GMTA president and treasurer names and addresses.
2. Finalize committee chairs.
3. If no Student Recital Chair yet, confirm dates with location(s) yourself.
4. Begin **yearbook** preparation; confer with typographer to determine printing deadlines.
  - A. Update Executive Board, Committee Chairs, and SCMTA officers listings, as names are made available.
  - B. Update and/or revise scholarship and competition fund guidelines and their chairs.
  - C. Note any *Bylaws* revisions.

#### July

1. Finalize committee chairs.
2. Procure renewal forms/membership forms sent from National to Treasurer; begin database for **yearbook**/labels. Need names, addresses, phone numbers, e-mail addresses, teaching fields/certification status, and renewal date or date joined if new member.
3. Check status of ad/donor solicitation.
4. Continue updating officers page in yearbook.
5. Begin updating Calendar of Events pages in yearbook.

#### August

**Personnel** - Finalize all committee chairs!

#### **Policies and Procedures Manual**

1. Note any changes recommended by officers and chairmen and make revisions.
2. Collect manuals from any retiring officers/chairs and distribute to new personnel.

#### **Advertising Chair**

1. Check progress of ad sales and ad artwork.
2. Procure list of donors and amounts.

#### **Final Yearbook Preparation** (*work from spare copy of most recent yearbook and computer file.*)

1. Procure speaker/topic list from VP of Programs and make certain VP has confirmed location dates and times with host location.
  - A. Update the association's monthly meeting pages with the above.
  - B. Be sure to include all the refreshment hosts/hostesses.
2. Finalize GMTA Executive Board and Committee Chairs and SCMTA officers page.
3. Finalize all dates for calendar of events, and update pages. NOTE: If space is limited, GMTA/SCMTA/MTNA events *always* take precedence.

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4. Continue updating membership. (See July #2 above.)
  - A. Database, including renewal dates, four different databases:
    1. Actual current membership, complete information
    2. "Snail Mail" members, not able to receive e-mails
    3. Actual current membership, no bar codes, for yearbook labels
    4. Review and update "Prospective/Friends" database yearly
  - B. Yearbook page, including teaching field/MTNA Certification status
  - C. E-mail Group Distribution Lists
    1. Executive Board of Officers
    2. Committee Chairs
    3. General Membership
5. Finalize guidelines, dates, and chairs for both scholarships and the competition fund.
6. Note any new honorary lifetime members.
7. Update Presidents listing.
8. Note any revisions of SCMTA, Festival, and Guild auditions guidelines and chairs, and update entry and audition deadline dates.
9. Revise and edit, as needed, current Historian's submission.
10. Confer with VP of Programs again, as well as Student Recitals Chair, respectively, to confirm date and location of Teachers Concert, the two student recitals, and the Honors Recital.
11. Make any other changes necessary looking through each page and check to be sure all information has been updated and revised as needed (e.g., 2007-2008, omitting "GMTA Mission Statement" page, by vote of the 2007 annual Executive Board at the annual business meeting.)
12. Send all documents to typographer as they are finalized
13. Proofread! Proofread! Proofread before printing.
14. Consult Immediate Past President as needed.

## **NEWSNOTES Editing**

### **Last Week in August: NewsNotes Preparation**

1. Begin newsletter preparation for first mailing no later than two weeks before September association meeting.
  - A. Compose President's message.
  - B. Make short list of upcoming Calendar of Events. (Compare with Yearbook page.)
  - C. See "Newsletter Preparation" document in computer files for topics. Make notes in space below for each point, as needed.
  - D. Confer with newsletter typographer for timeline for receipt of the newsletter.
  - E. Compare with other GMTA newsletters for ideas for content and wording.
  - F. Consult Immediate Past President as needed.
  - G. Decide when/if to mail the scholarship guidelines. If they have been revised *extensively* or the entry deadline has been moved up, publish a summary of important changes, especially regarding repertoire and age divisions, in the September newsletter. [Note: We have been mailing out, **all** the scholarship guidelines and applications, adjudicator forms, etc., no later than November, as a matter of form, although we used to do that with the October newsletter.]
2. Plan on two mailings. Buy stamps as needed.
  - A. USPS Mail: For members and prospective members/friends without e-mail addresses. **(Make labels** from the updated databases.)

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- B. E-mail: After you have again updated your e-mail group distribution list for both members and prospective members/friends, e-mail NewsNotes.
- C. As a courtesy, send one copy to MTNA Southern Division Chair.

## **PRESIDING SCHOOL-YEAR MONTHLY CHECKLIST**

### **September**

#### **Newsletter**

- 1. Finish composing newsletter; e-mail to typographer for formatting.
- 2. Proofread newsletter prior to final publishing. Note: If *you* are the typographer, ask someone else (Immediate Past President) to proofread.
- 3. Mail newsletters via e-mail or US Postal Service. (See August, #1 & 2 above.)

#### **Preparation for Association Meeting**

- 1. At least two weeks before first meeting of year, e-mail secretary a list of all current members in order for her to make name tags available then.
- 2. Approximately one week before meeting, e-mail officer and chairs to see if anyone has items which need to be included in the agenda for the business portion. Give them a deadline, so that you will have enough time to include their business or announcements in your written agenda.
- 3. Prepare meeting agenda. See computer files for monthly agendas as a guide to what to include, feeling free to edit as necessary.
- 4. Prepare attendance roster for association members; see computer document and update.

#### **Association Meeting Day**

- 1. Bring two extra copies of the agenda to the meeting, one for the secretary, one for the VP of Programs.
- 2. Arrive by or before the 9:30 social hour; check to be sure the meeting room is in order:
  - A. Podiums set out for speaker/yourself; attendance rosters set out.
  - B. Be sure all chairs are in the front; remove back rows in last half of room, if necessary.
  - C. Leave an aisle on the A/C thermostat side of the room so you can move freely from front to back as needed to adjust air/heat; close doors, pass out papers, etc.
- 3. At 10:00, begin the business portion of the meeting, following your written agenda as closely as possible. Turn the program over to the VP of Programs by 10:20, if possible, and no later than 10:30.

### **October, November, January, March, and April**

- 1. First week of the month, compose newsletter in time for publishing deadline. See August and September above for a reminder of details.
- 2. Prepare agenda. See September for details.
- 3. Prepare meeting hall on meeting day, as usual. See September details.

## **SPECIAL EVENTS**

### **February Teachers Concert**

- 1. Plan to preside over/emcee the concert. Prepare remarks in advance. For ideas, see computer file named "Remarks for GMTA Feb. 4, 2006, Teachers in Concert."

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2. Confer with VP of Programs and Hospitality Chair a few days before the concert to confirm all arrangements.
3. Because this is a large event, the Executive Board helps provide refreshments.
4. The VP of Programs should at least prepare order of program.
5. Arrive **at least** 30 minutes prior to the concert to check the following:
  - A. The doors are unlocked! Programs are in the lobby.
  - B. Concert hall: Podium's placement, piano uncovered, organ unlocked, music stands readied for instrumentalists, lighting and air/heat (See VP of Programs - P&P page; see #2 above.)
  - C. Reception area: Hospitality Chair and any assistants are there; assist if needed.
6. Stay to help the Hospitality Chair clean up after the reception. With her, be sure the room is left in *at least* as good a condition as it was found, if not better!
7. Make final check of the concert hall before leaving, to be sure all put back in pre-concert condition.

### **Spring Scholarship Auditions**

1. Confer with all scholarship chairs prior to the scheduled auditions to be sure all is ready and to see if they need any assistance with monitors, refreshments, etc.
2. If necessary, be on hand to assist on audition day.
3. If you do not hear who the winners are within a day or two of the auditions, contact the chairs. Make sure all winners are planning on performing in the Student Honors Recital.

### **Spring Student Honors Recital**

1. Confer with Student Recital Chair regarding formatting of programs, honors certificates, and scholarship winner diplomas.
  - A. The Student Recital Chair will prepare the program order.
  - B. See GMTA logo, and H. S. Music Scholarship [will have to be renamed on document], and LHM Scholarship certificates in computer files.
  - C. Either the Student Recital Chair, the President, or the official typographer will purchase the certificates for formatting (check old supplies first).
  - D. Prior to the recital, the President must sign all certificates and diplomas to be handed out at the recital.
2. Confer with Student Recital Chair one week before event to confirm all arrangements.
3. Emcee the recital, preparing your opening and closing remarks in advance. Also, check the concert hall as needed: programs available, podium handy, all instruments and music stands ready, Heat/air, lights (See #2.)
4. There is no reception after this recital but stay to be sure all is put back in pre-recital condition.

### **April/May**

#### **Executive Board and Committee Chairs Annual Meetings**

1. Prepare attendance rolls for both annual board meetings.
2. (See document in computer files.) Update stationery for advertising chair and VP of programs.
3. Mail (e-mail minutes) of last year's meetings at least one week in advance, rather than have them read at meeting. Note: Could ask Secretary to do this for you.
4. Prepare agendas, including gathering of current year's meetings/votes, hard copies for archives. Make a summary of votes, for easy minute-taking and make copies for executive board members. (Consider mailing prior to meeting)
5. Mail agendas to all officers and chairs. (See computer files for documents to work from.)
  - A. Remind each one to plan on giving a report of the year's activities.
  - B. If anyone is unable to attend, ask for a written report to be mailed to you in advance of the meeting.

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6. Procure Greenville County Schools Calendar (Internet), for planning session at the Committee Chairs meeting.
7. Prepare the President's, NewsNotes Editor's, and Yearbook Editor's reports to be presented at the business meeting.
8. Ask each officer/chair to bring event dates for the coming year, or at least be prepared to suggest them for planning purposes. Ask them to confirm venue availability *first*.
9. Call any officers/chairs for meeting preparation as necessary.
10. Review *Robert's Rules*\* frequently to be prepared to conduct the meeting in an orderly fashion.

### PLEASE NOTE...

1. \*It is imperative that you own a copy of *Robert's Rules in Plain English* by Doris P. Zimmerman, and that you read it often in order to know how to conduct business meetings according to Parliamentary Procedure.
2. It is also imperative that you read through entirely and then consult frequently the *GMTA Bylaws* found in the *GMTA Yearbook*.
3. Notify any individuals of their status as honorary life member. Be certain to send a yearbook to each individual AND include on the *NewsNotes* mailing list.
4. Remind VP of Programs and Student Recital Chair of MTNA request for programs, per their ASCAP agreement.
5. Continually update database and e-mail group distribution list with any new members joining after yearbook publication, and publish their names and information, as they appear in the yearbook, in the next edition of *GMTA NewsNotes*.
6. Continually update list of potential members and non-GMTA persons (such as SCMTA state president, MTNA regional chair) who receive newsletter. Remove prospective members' names if they have attended several meetings but fail to join after receiving the newsletter for a year or two, at most.
7. Staple together and date label all Executive Board minutes by fiscal year and file.
8. Staple together and date label all special Executive Board votes taken via e-mail. File with Board minutes.
9. Staple together all association meeting minutes by fiscal year, attach date label, and file.
10. File all Treasurer's Reports in the same way.
11. See the President's Archives for other hard copies (recital programs, etc.) saved for posterity.
12. When you receive emails from MTNA regarding membership matters, forward these on to the VP of Membership FYI. Also, any other correspondence of interest to the general membership may be forwarded.
13. At end of your term, notify the SCMTA president and MTNA headquarters of the new president's name. Also, inform MTNA ASAP when there is a new treasurer.
14. The statement "**Member of South Carolina Music Teachers Association and Music Teachers National Association**" must appear on all printed literature.

### For Reimbursements....

Photocopy the reimbursement form found in the back of this notebook and submit completed form to the GMTA Treasurer. Save all receipts!

Revised (9/3/07, RHH)

# PRESIDENT-ELECT

## MONTHLY CHECKLIST (during last year of current president's final term)

### September-November

1. Begin to consider various individuals to serve as officers and committee chairs.
2. Purchase a copy of *Robert's Rules in Plain English* by Doris Zimmerman and begin to familiarize yourself with the basics of parliamentary procedure.
3. Begin observing procedure at each association meeting and all concerts where the president presides.

### January

1. Make suggestions for officers to the nominating committee.

### April-May

1. Begin filling committee chair posts.

### June

1. In preparation for officially beginning your term on July 1, meet with president to discuss yearbook preparation
2. Obtain computer files from the outgoing president. Participate in a "training session," as needed, to become familiar with the computer programs used and the content of the documents.
3. Begin editing the yearbook as soon as possible after receiving the computer files.

## PLEASE NOTE the following during your entire term of office:

1. Study the MTNA, SCMTA, and especially the GMTA Bylaws.
2. Become particularly familiar with Articles VI-XI.
3. The president-elect is automatically a member of the finance committee, ART. XI,3. Ask the president lots of questions!

Revised (9/1/07, RHH)

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## IMMEDIATE PAST PRESIDENT

1. During the transition from president to immediate past president, begin preparations to turn over all files, computer and hard copy, to incoming president.
2. By the end of June, make a disk copy of all GMTA files and transfer them to the new president's hard drive. Review the files with the new president (especially the ones that will be needed to begin writing/editing the upcoming yearbook).
3. By the end of summer, transfer all hard-copy files/archives to the new president.
4. Support and advise the current president and assist in all aspects of leadership in the organization.
5. Chair the nominating committee and serve on the finance committee.

Revised (9/1/07, RHH)

## VICE PRESIDENT of PROGRAMS

### PLANNING STRATEGY – Programs, including Teachers Concert

#### March/April

1. Pass program ideas/suggestions sheet at March and April meetings.
2. Also consider:
  - A. Workshops/recitals you have attended
  - B. Brochures from pedagogy conferences
  - C. Magazine articles from *Clavier, Keyboard Companion*, etc.
  - D. People you know
  - E. GMTA members who are knowledgeable about specific topics
  - F. Local college offerings
  - G. Publishing companies B will they do a free workshop?
3. Present suggested list of speakers/programs at the Executive Board meeting in April or May.
4. Also be prepared to suggest a date for the annual Teachers Concert to the Executive Board at the annual meeting. If you could suggest a location that is free for your proposed date, matters could be expedited quickly at the board meeting. Also be prepared to suggest a concert entry deadline, early enough to allow for time for public publication, as well as time to prepare the program.

#### April/May/June

1. Consult the treasurer regarding what speaker fees and related expenses were approved by the Executive Board in the last annual board meeting, since these fees are reviewed on a yearly basis. Only then will you be able to determine the number of outside speakers the fiscal budget will allow. It should be understood that GMTA members offer their services as program speakers as an honorarium.
2. Begin as early as you want to procure speakers – certainly no later than June (much earlier if you want a big-name speaker).
3. Confirm monthly meeting dates with Pecknel Music Co.
4. Contact speaker; reserve date/time.
5. If you have not already done so, confirm the location of the annual Teachers Concert, usually held in February. Be sure that the social parlor will also be available for the reception.
6. Consult the president regarding the yearbook deadline for information.

#### June/July

1. Discuss travel arrangements with speaker (*if applicable*).
2. Discuss potential supplemental travel funding with president and treasurer (*if applicable*).
3. Discuss over-night arrangements with out-of town speakers.
4. Discuss if any equipment (projector, power strip, etc.) is to be provided by the speaker, GMTA, or Pecknel.
5. Request a short bio of the speaker for introduction at association meeting.
6. Confirm fee first verbally then on confirmation form.
7. Discuss/confirm topic. (*Many times the speaker will take your recommendation or will send you a list of lectures they have given previously.*)
8. Send a GMTA speaker confirmation form clearly stating pertinent information above.
9. Once all details of the seven programs are final, send a copy of the speakers, dates, bios, topics, etc., to the president for yearbook editing and publishing. See a recent yearbook for an example of the information the president will need.
10. Provide speakers for GMTA meetings with specific requirements for length, content and hand-outs before they are contracted for upcoming meetings.
11. No outside speaker may be paid more than \$200 plus mileage unless approved in advance by the Executive Board.

## **ASSOCIATION MEETINGS**

### **One month before**

1. Remind speaker of date (e-mail, call, or snail-mail).
2. Review over-night arrangements with out-of-town speakers and give directions to Pecknel.
3. Make certain all necessary equipment is ready if provided by GMTA or Pecknel.

### **One week before**

1. Contact speaker once more to clarify any remaining questions.
2. Contact treasurer to ensure that check with speaker's fee will be ready on day of event.
3. If piano will be used extensively, as in a lecture-recital, check the tuning and offer on behalf of GMTA to pay for a special tuning if Pecknel will permit. (See below re. reimbursement form.)

### **One day before**

1. Familiarize yourself with speaker's bio.
2. Make a list of upcoming programs that you wish to highlight briefly during the announcements.

### **Day of event**

1. Arrive at Pecknel in time to set up any necessary equipment and greet speaker.
2. Bring extra tie or chic scarf in case speaker forgets this garment at home.
3. Create an atmosphere of calmness, anticipation, and gratitude.
4. Make announcements regarding upcoming programs according to the president's agenda.
5. Introduce speaker, mentioning all pertinent accolades.

### **Post-Association meeting**

1. Send speaker a personal and sincere thank-you note.
  2. Include check if not disbursed at end of association meeting.
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## **TEACHERS' CONCERT – FEBRUARY**

### **History**

Held at John Knox Presbyterian 2002 and 2003; also held previously at Furman in Daniel Recital Hall. John Knox contact is organist, Brenda Fairbanks, or secretary. As of summer 2007, John Knox has started charging a facilities use fee. Consider changing locations. Consider the various instruments most likely to be performed when selecting a location. (Perhaps poll members in the spring for this information.)

### **Fall**

1. Begin recruiting performers in the fall.
2. Remind members at association meetings of entry deadline (usually in January, one to two weeks prior to concert) and time limitations per performer (usually 8 minutes).
3. Check with the publicity chair regarding her media deadlines to publicize the event.

### **January**

1. Take teacher entrants in the order of "first-come, first-served," remembering to cut off entrants, if necessary, when the time limit is filled.
2. Notify publicity chair of recitalists' names and instrument/voice per the stated deadline.

### One week before concert

1. Re-confirm recital hall with proper person.
2. Check regarding, heat, key, and facilities manager.
3. Organize the program.
4. Type the program.
  - A. Take careful note of diacritical marks for composer names and titles.
  - B. Add birth and death dates. (*opt.*)
  - C. A good rule of thumb is to make at least 3 copies per teacher performing (more if publicized).
5. Photocopy on 24# laser paper.
6. Check for stand to hold programs in lobby area; stand for music in recital hall; podium for president as needed in recital hall; and piano duet bench, or alternate seating, as needed. If needed, advise duet performers to make their own arrangements for benches prior to concert day.
7. Arrange for a photographer to “snap” performers after the concert. Give/send picture to publicity chair and president for possible inclusion not only in the Greenville News, but also in the GMTA NewsNotes.

### Post-concert

1. To comply with MTNA’s agreement with ASCAP, please forward two copies of the recital program to MTNA, per MTNA’s request. (\*See note below.)
2. Save several copies of the program for GMTA files.
3. Write the church, etc., a thank-you for the use of the facility.

### **PLEASE NOTE...**

For **Reimbursements**...photocopy the reimbursement form found in the back of this notebook and submit completed form to the GMTA treasurer. Remember to keep phone records and other receipts for reimbursement.

\*This message was received by GMTA President Rita Hassig 2-15-06, from Rachel Kramer, Director, Educational Services, MTNA, clarifying whether or not local associations were **required** to send MTNA copies of all programs. Kramer stated, “At this point, it is still ‘your choice’ to send the programs in or not, but by sending them, you know that if there were to be any issues at some point, your program would have been ‘covered’ by the MTNA agreement . . . . As part of MTNA’s agreement with ASCAP we ask all states, locals and divisions to forward copies of the programs to us.”

Revised (9/1/07, RHH)

Updated (8/27/08, DCM)

## VICE PRESIDENT OF MEMBERSHIP

The Vice President of Membership shall serve as a membership promoter for GMTA, SCMTA, and MTNA. He should consult with the President regarding new members and write welcome letters, call, or email them. It would also be thoughtful to make a special welcome for renewing members who have been out of GMTA for a while.

Possible tasks:

The VP Membership could assist the President in compiling the computer database and/or compiling the membership list for the annual publication of the GMTA yearbook.

He could also assist the Secretary in making the member's name tags.

He could suggest ways to conduct a membership drive.

Revised (9/5/07, RHH)

## SECRETARY

### MONTHLY CHECKLIST

#### August/September

1. Prepare nametags. Confer with president when majority will be available.
2. Prepare database for attendance sheets.

#### September, October, November, January, March, April

1. Record association minutes as noted below in the *Robert's Rules* excerpts, under "A Guide..."
2. Send meeting minutes to President within one week.

#### February

1. Record Teachers Concert by filing a copy of the program in the records.

#### Pre-Association meetings

1. Hang name badge banner in hall at Pecknel.
2. Place attendance sheets and pens on music stands near banner.
3. Leave blank nametags available for visitors.

## MINUTES

**Excerpts from *Robert's Rules in Plain English*\***, which secretary should own and refer to frequently:

*Taking Minutes* \_\_\_\_\_

"The secretary is responsible for the minutes of an organization, both the meetings of the membership and those of the executive board. Minutes are a written record of the meetings. Accurate minutes are of vital importance as they constitute the permanent record of proposals, decisions and reports of the members and the executive board. Minutes are the *legal* record of the meetings of an organization and may be subpoenaed. Minutes should be written as concisely as possible. [Include the first and last name when stating individuals.]

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*A Guide for Writing Minutes* \_\_\_\_\_

DO RECORD:

- All adopted and Alost@ or defeated motions
- Name of the maker of the motion
- Names of all members reporting (officers, committee chairmen, etc.)
- Names of all those elected or appointed
- Number of votes on each side in a ballot or counted vote

DON'T RECORD:

- Discussion or personal opinion
- Name of the seconder of a motion
- Motions withdrawn

Entire reports (state, "MR. Y, CHAIRMAN OF THE PERSONNEL POLICY COMMITTEE REPORTED. THE REPORT IS ATTACHED TO THE ORIGINAL OF THESE MINUTES.").

OTHER RESPONSIBILITIES:

- Write the minutes as promptly as possible. Your notes will be easier to decipher.
  1. Promptly send a copy to the president.
  2. Alert the president to items of unfinished business.
- Prepare a summary of the Executive Board meetings and be prepared to report motions to the membership.
- Sign the minutes and record the date of approval.
- Be specific in recording corrections, noting the date, page, and line in which the correction appears. All corrections are made in red. Do not obliterate the original. Note the date of the correction. Minutes are usually corrected at the time of the reading, but may be corrected at any time provided the correction receives a two-thirds vote. (Remember, you are changing something already adopted which requires a two-thirds vote.)

*Contents of Minutes* \_\_\_\_\_

FIRST PARAGRAPH

- Kind of meeting (regular or special)
- Name of the organization
- Date and place of meeting
- Presence of the president and secretary or the names of the substitutes
- Presence of a quorum
- Time the meeting was called to order
- Whether the minutes of the previous meeting were approved or corrected

BODY:

- Reports given, including:
  1. The name of the reporter
  2. Any related action taken
- All main motions (those that propose action be taken)
- All points of order or appeal
- Important announcements, such as the top of the program and the name of the speaker (Do not try to summarize the address.)

FINAL PARAGRAPH

- The adjournment and the time of adjournment

\*Taken from *Robert's Rules in Plain English* by Doris P. Zimmerman, HarperPerennial 1997

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**Personal Concerns**

At the discretion of the President/Secretary, a plant will be sent to members who have a death of their child or male spouse; a card will be sent to members or husbands of members who have a death of their female spouse. Purchase and arrangement for delivery of plants and cards will be the responsibility of the GMTA secretary.

*By vote of the GMTA Executive Board, May 5, 2008*

**PLEASE NOTE...**

For **Reimbursements**, photocopy the reimbursement form found in the back of this notebook and submit completed form to the GMTA Treasurer.

Revised (8/27/07, RHH)

Updated (8/27/08), DCM)

# TREASURER/FINANCE COMMITTEE CHAIR

## MONTHLY CHECKLIST

### April-May

1. Meet with Finance Committee prior to annual Executive Board meeting held each spring. The Treasurer/Finance Committee Chair officiates this meeting.
  - A. Review each GMTA Scholarship and the GMTA Competition Fund—guidelines, scholarship amounts, judges' fees, etc.
  - B. Review the past year's income and expenses: current financial status of checking account and any CDs.
  - C. Discuss budget proposals for the next fiscal year, beginning July 1, including dues amount.
  - D. Discuss preparations for the annual audit.
2. Prepare a budget for the next year, based on the finance committee's decisions, and present your proposed budget to the Executive Board for their approval at the annual business meeting.
3. Prepare a Finance Committee report, based on the recommendations of the Finance Committee, and present it to the Executive Board at the annual business meeting, noting that any recommendations made by the committee will have to be approved by the Executive Board.

### July-August

Type the budget page for the upcoming yearbook and send to President by deadline, announced at annual board meeting.

### May-throughout year

1. Send copies (hard copies or a scanned attachment on e-mail) of membership renewal forms received from MTNA headquarters to the President as soon as possible for inclusion in either the GMTA Yearbook or NewsNotes. (*During the summer, when renewals are the heaviest, bulk-mailing them to the President through the U. S. Postal Service may be easiest.*)
2. The Treasurer receives annually a dues form from MTNA National. Alert the President when that comes in, so that any dues changes voted upon in the most recent annual Executive Board meeting may be implemented in a timely fashion.
3. Plan to write checks for all non-member association speakers at the monthly meetings in which they make their presentations, per agreed upon rates at Executive Board meeting.
4. At each of the Association meetings, excepting the Teachers' Concert, prepare a brief report, which may be given orally or in hard copy, or both.
5. Be prepared to give reimbursements to all officers and chairs that present the proper reimbursement forms and receipts.
6. Update the reimbursement form as necessary and distribute to officers and chairs in hard copy by the September association meeting or as an attachment on e-mail.

### PLEASE NOTE...

In addition to **reading the GMTA By-laws**, keep a copy of **Robert's Rules in Plain English**, Doris P. Zimmerman, handy for reference. Familiarize yourself **especially** with the following excerpts:

*"The treasurer is responsible for the fund of the organization. He receives and disburses the monies as prescribed in [GMTA Bylaws].*

*He maintains a permanent record book with a detailed account of all money received and all money paid out.*

*continued next page*

*The treasurer should give a brief report at each [association] meeting. This report should be a summary of the collections and expenditures, calling attention to any unusual items. (Cont'd)*

*The treasurer's report is not adopted. The presiding officer should allow questions and then state that the report will be filed for audit...*

*The treasurer [shall] be responsible for the preparation of a budget, which is an itemized summary of anticipated income and expenses for the upcoming fiscal. . . year. The budget is prepared based on experience and facts as recorded in the financial records."*

Revised (8/24/07-RHH)

# Greenville Music Teachers Association

Greenville, South Carolina

## FINANCIAL INFORMATION

The Greenville Music Teachers Association (GMTA) affiliated with Music Teachers National Organization, Inc. (MTNA) Cincinnati, Ohio is a Code Section 501 (C) (3) organization.

### General Information

- 1) Income is derived from: Dues rebates from Music Teachers National Organization, Inc.; grants from Music Teachers National Organization; grants from Metropolitan Arts Council (MAC) of Greenville, South Carolina; GMTA yearbook ad sales; and designated and undesignated contributions.
- 2) GMTA operating costs include: postage; printing/reproduction; speaker honoraria/meals; refreshment supplies; telephone charges, and judges fees.

### Designated Contributions Policy

Greenville Music Teachers Association appreciates the generous support of private contributors to this local association. These contributions allow us to perpetuate the general activities of GMTA, as well as scholarship funds, the Laurence Hamilton Morton Piano Scholarship Fund, and financial aid fund for MTNA competition entrants. Please apply the guidelines of the following designated contributions policy.

#### **Purpose of this Policy:**

This policy is intended to clarify circumstances under which a donor may designate a contribution for a specific use. Because of strict IRS rules, GMTA cannot function as a mere conduit for gifts to individuals with the expectation that such gifts would always be tax deductible.

#### **Statement of the Policy:**

Contributions to Greenville Music Teachers Association (GMTA) are given with the understanding that contributions are made to and for the use of this organization. GMTA will assume complete control of the contribution with respect to its final disposition in the conduct of the organization's purposes.

April 2002

# ADVERTISING CHAIR

## MONTHLY CHECKLIST

### June

#### **Solicitation Letters to Advertisers/Donors**

1. Make any necessary revisions on advertisement contract. Coordinate deadline with printer/copier deadline.
2. Prepare/revise two solicitation letters—one for “new recruits” and one for repeat advertisers. (*Also consider having advertisers for the GMTA NewsNotes.*)
3. Have President approve solicitation letters.
4. Brainstorm with president, board, and members regarding prospective advertisers.
5. Send solicitation .pdf letters via e-mail to all former advertisers in mid-June or early July. Include .pdf advertisement contract.
6. **Ads must be .pdf files transmitted via e-mail.**
7. Give former advertisers another opportunity to respond if they missed last year.

### July/August

#### **Ad Contracts/Ad Monies/Donations**

1. Keep all ad contracts in alphabetical order.
2. Keep careful, dated records of who wants front/back and inside front/back pages. Full-page ads should be placed in yearbook in order of ad date confirmations. Half-page and quarter-size ads should be placed with printing costs in mind. *Note: You may need to call the majority of advertisers a week or two in advance of this deadline to be certain all contracts have been received and are returned promptly.*
3. Keep records of payments as they arrive.
4. Record institution, contact name, check number, and amount paid.
5. Immediately forward check to GMTA Treasurer for deposit.
6. Contact President with names and amounts of donations, if any.
7. Forward all .pdf ad files to yearbook typographer.

### September

#### **GMTA Thank You's and Yearbooks**

1. Send a .pdf thank-you letter to all advertisers via e-mail.
2. Send each advertiser a copy of the new yearbook. (*Buy small manila envelopes/stamps.*)
3. Include an invoice for any advertiser who has not submitted payment.

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## PLEASE NOTE...

Consider contacts of GMTA members as potential advertisers/donors. Where do husbands/wives work? Would their business support GMTA? Consider soliciting MAC or Greenville Symphony, etc. supporters. When all work is completed for the season, staple together all advertisement-related materials for current year and clearly date as has been done for previous years.

#### **For Reimbursements...**

Photocopy the reimbursement form found in the back of this notebook and submit completed form to the GMTA treasurer. Save all receipts!

Revised (8/23/07 RHH)

Revised (11/27/08 JMF)

## PROJECT/GRANT CHAIR

The **Project Chair** works to provide opportunities for GMTA members and their students to pursue musical and educational goals through various events, such as special concerts, festivals, masterclasses, and workshops; building a music, video, book library, and many others. The Projects Chair would propose ideas to the GMTA Executive Board of Officers for their approval, this chair outlining each project being considered, fleshing out the personnel and expenses needed to make the project a reality. Once a proposal has been approved, this chair working with a committee would spearhead the new project. Specific procedures would be determined according to the nature of the project.

The **Grant Chair** works to secure grants for GMTA through various organizations which give grants to further music education.

The GMTA Executive Board determines:

The purpose of the grant.

The asking amount of the grant.

The Grant Chair works within the guidelines set by the various granting organizations, i.e., grant deadline dates and stated requirements.

The Grant Chair determines which granting organizations might be willing to fund the project and then submits the required paperwork.

Grant organizations GMTA has considered to date:

Greenville Metropolitan Arts Council (MAC)

South Carolina Arts Commission

Music Teachers National Association (MTNA)

Revised (8/22/07, RHH)

# HISTORIAN

## MONTHLY CHECKLIST

### June-July

Prepare a written report of the preceding year's history noting the following:

1. Name of the president
2. Location of association meetings
3. Program speakers of the year
4. Scholarship winners
5. Competition Fund recipients
6. Teachers Concert participants
7. Newly elected officers
8. Special projects
9. Special approvals or votes taken by the Executive Board. (*Confer with the president after the Executive Board's Annual Business Meeting for pertinent information.*)

### August

Submit material to President by deadline for inclusion in GMTA Yearbook.

## PLEASE NOTE

**For Reimbursements...** Photocopy the reimbursement form found in the back of this notebook and submit completed form to the GMTA treasurer. Save all receipts!

### **Handling personal comments about GMTA members and SCMTA colleagues:**

“The purpose of [GMTA] is to promote music education, not be a social organization or a society support group. If comments are to be made [by the Historian in the GMTA Yearbook] about members who are **not** presenting programs or receiving some other significant award, those comments should be short and to the point, such as: ‘GMTA lost five members this past year to deaths and those moving out of the area. The members were: 1, 2, 3, 4, 5.’

“[The Historian] might consider two histories: One that is succinct for publication in the yearbook, and a larger one that resides with the historian that can record whatever perspective the historian chooses to write.

“[Since] these other matters [e.g., births, deaths, etc.] are covered in other areas of print and since.....they are archived, most likely in more than one place by several members, that would serve as a history record if someone ever wanted to go back and do ‘research’ on GMTA.”  
(Phil Lehman, Immediate Past Treasurer, GMTA)

Revised (9/12/07, RHH)

# HOSPITALITY CHAIR(S)

## MONTHLY CHECKLIST

### March

1. Photocopy refreshment sign-up form, or ask President to do so. (*See next page.*)
2. Pass form during association meeting.
3. Ask for volunteers after meeting if you still need slots filled.

### April

1. Pass form during association meeting.
2. Ask for volunteers after meeting if you still need slots filled.

### Summer

1. Call for volunteers if you are still missing slots.
2. Provide president with a photocopy of completed sign-up form in time for yearbook deadline.
3. Check our GMTA inventory of plates, cups, napkins, etc. at Pecknel Music Store.
4. Confer with President and/or Treasurer regarding amount budgeted for Hospitality.
5. Find out where supplies are stored for us at Pecknel\* Music Company.

\*Note: Pecknel Music Co. is kind to provide a special place for all our GMTA supplies, as well as a table and coffee pot!

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## MEETINGS (September, October, November, January, March, April)

### **Pre-meeting**

1. Call the three volunteer hosts/hostesses at least one week before.\*
  - A. Ask them to decide among them what they will provide for food.
  - B. Ask/suggest specific menu ideas.
  - C. Advise them that they should arrive no later than 9:25 with their refreshments, and would they please put their names on the serving trays and utensils.
  - D. Also caution against bringing too much food. The current trend seems to be smaller portions.
2. On the day of the meeting, arrive at Pecknel no later than 9:00 a.m. to be ready by the 9:30 social time.
3. Place cloth on table.
4. Prepare any hot/cold drinks.
5. Bring small container of ice if necessary and a pitcher for water.
6. Set out paper goods, and arrange food attractively.
7. Ask a Pecknel employee for the large trash can.

\*If needed, delegate set-up/clean-up responsibilities.

### **Post-meeting**

1. Clear area of all food and trash.
  2. Give "extras" to Pecknel if the provider says "Keep it!"
  3. Return all unused plates, cups, napkins, and unopened beverages to supply cupboard.
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*continued next page*

## RECEPTION (following February Teachers Concert)

### Pre-concert day

1. Confirm with the Vice-President of Programs that the Social Hall has in fact been reserved; then call the facility to be sure they still have our reception listed.
2. At least two weeks before the concert, contact the three hosts/hostesses plus the Executive Board.
  - A. Discuss/ask suggestions for the menu.
  - B. Inform each host/hostess that they may provide a cash donation, if necessary, in lieu of food or beverages.  
give instructions regarding what time and day you need their contributions and where to bring them.
3. Visit the facility ahead of time to familiarize yourself with the layout and what will be provided by way of tables, kitchen space, etc.
4. Feel free to ask another GMTA member to assist you in preparations.

### Concert Day

1. Plan to arrive at the concert hall at least 30-45 minutes prior to the concert, in order to begin setting up the Social Hall or set up earlier in the day if possible. *(Tables should already be set up by the host location. Check to see that the host has provided a wastebasket and that it is handy.)*
2. Set out tablecloths, centerpieces, paper goods, utensils.
3. As refreshments are brought in prior to the concert, refrigerate if possible and as needed. All else arrange attractively.
4. Depending on the beverages, provide punch, water, ice, and/or coffee.
5. Plan to leave the concert 10 minutes before its conclusion to complete making the beverage, setting out ice, etc., plus setting out all refrigerated items and making last-minute re-arrangements of food.
6. After the reception, clear area of all food and trash. Clean up the kitchen as well.
7. Divide up extra food, as able.
8. Save all unused GMTA supplies for next year.

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## STATE CONFERENCES

Note: In the years that SCMTA Conferences are held in the Greenville area, GMTA will be expected to provide refreshments. The procedure to follow is much the same as that of the Teachers' Concert, except for the following:

1. Members will be given the opportunity to sign up to help when the Conference Refreshments sign-up sheets are passed around in the September and October meetings (forms in President's computer files). You will need to call members if all the slots are not filled. Members willing to help but unable to attend the conference may make a donation instead.
2. You will want to confer with the SCMTA Vice-President for Conferences regarding the exact BREAK times, in order to know how much food will be needed. Consider advising those who sign-up that they should not bring huge amounts of food since there are several conference meals close to the times of the refreshments.
3. During the September and October meetings, members will also receive a sign-up sheet to volunteer their time as host/hostess during the breaks. Call each one at least one week prior to the conference to confirm his day and time.
4. It is advisable to check out the hosting university's facilities at least a month in advance.
5. Gather supplies left over from previous conferences (see former chair or President) and/or purchase supplies, as needed.

## PLEASE NOTE...

For **reimbursements**... Photocopy the reimbursement form found in the back of this notebook and submit completed form to the GMTA treasurer. Save all receipts! Revised ( 8/22/07, RHH, DCM)

# PUBLICITY CHAIR

The Publicity Chair works to raise community awareness of the Greenville Music Teachers Association. Two possible ways to do this are:

1. Submit press releases announcing the annual GMTA Teachers Concert and winners of the Scholarship auditions. *The Greenville News* now makes it possible to do this online at [www.greenvilleonline.com](http://www.greenvilleonline.com). Besides posting the press release online, they will route it to *The Greenville News* and other relevant print publications for their consideration.
2. Create and distribute flyers or posters announcing special GMTA events, as requested by the President.

## MONTHLY CHECKLIST

### April or May

1. Attend the Annual Committee Chairs Board meeting and give a report regarding the success of publicity attempts.
2. If you are unable to attend the Annual Board meeting, send your report to the President at least one week in advance.

### Summer

1. Contact local newspapers, radio and television stations regarding their deadlines and requirements for submissions—length, for example.
2. Keep a record of contact information—name, e-mail address, and phone number for each of the above.

### September–May

1. Take note of the various events published in the GMTA NewsNotes which are particularly open to the public, especially the Teachers' Concert and the Student Honors Recital.
2. Based upon the requirements from the local media, set your own deadline for receiving information from the GMTA Chair or Officer responsible for events deemed newsworthy.
3. Inform those personnel of your deadline and of the information needed.
4. For the Teachers' Concert (in addition to the date, time, and place), get a list of the composers and instruments which will be featured in the program.
5. For the Student Honors Recital (in addition to the date, time, and place), send in the names of the scholarship winners performing, **if** the scholarship auditions are held early enough to meet the media's deadline. Otherwise, send in the names of composers, instruments, and include the fact that all the GMTA Scholarship recipients will be performing as well as the students being honored by their teachers for their outstanding achievements.
6. When written articles appear in the newspaper, please make copies and file one with the President for the archives and one with the Publicity Chair's files.

**Please Note:** Some news items may be published after the fact, such as the winners of GMTA Scholarship Auditions, but concerts, master classes, and workshops should be submitted to the media before the event occurs in order to invite the public's attendance. Confer with the President if you are unsure which events not named above would be considered newsworthy.

### **For Reimbursements...**

Photocopy the reimbursement form found in the back of this notebook, and submit completed form to the GMTA Treasurer. Save all receipts.

Revised (8/21/07, RHH)

# SCHOLARSHIP CHAIR

## MONTHLY CHECKLIST

### April or May

1. Attend the Annual Committee Chairs Board meeting and give a report regarding the scholarships.
2. Be prepared to suggest dates and possible locations for the next year's scholarships, as well as an entry deadline.
3. If you are unable to attend the Annual Board meeting, send your report to the President at least one week in advance, including suggested dates, etc. (See previous line.)
4. Check with person in charge at possible locations for availability.

### May through September

1. Consult with GMTA president and/or treasurer to learn amounts of scholarship disbursements and judges' remunerations, including mileage, approved by the Executive Board at the annual spring Executive Board Meeting. (These disbursements are based upon available funding and must be approved by the Executive Board)
2. Determine audition date(s) and entry deadlines. (These may already have been tentatively selected at the Committee Chairs' Annual Business Meeting. Consult with President)
3. Revise entry form as needed and include new audition dates and any new scholarship guidelines.
4. Revise adjudicator form as needed.
5. Procure judge(s) according to instrument/vocal categories.

By vote of the GMTA Executive Board, May 2003, no judge may adjudicate two consecutive years. By vote of the GMTA Executive Board, August 2007, no judge may be a GMTA member and should not be familiar with GMTA teachers or students.

By vote of the GMTA Executive Board, May 2008, the LHM Memorial Scholarships Chair will procure two judges for the piano auditions and the Music Scholarships Chair will procure two judges for the vocal division of the auditions.

6. Reserve audition site(s).
7. Reserve audition site(s).

### October and/or November

Send revised forms (*see samples on next page*) to President for inclusion in the October or November GMTA NewsNotes:

1. GMTA Music Scholarship form
2. GMTA Laurence Hamilton Morton Memorial Piano Scholarship form
3. Adjudicator form
4. Teacher's Summary Form (*if being used*)

## AUDITIONS

### **Pre-auditions**

1. Schedule auditions noting any special requests.
2. Notify teachers of student audition times.
3. Make sure all entrants are available to play in the GMTA Student Honors Recital should they win a scholarship. If an entrant is not available to play, they are ineligible to participate.
4. Give Treasurer all collected application checks.

*continued next page*

### **Post-auditions**

1. Return adjudicator sheets to teachers.
2. Notify GMTA President of winner names, categories, teacher names, etc.
3. Notify GMTA Treasurer of judges' names, addresses, and number of hours judged, plus distance traveled. (*Consult Treasurer or President for current guidelines regarding mileage.*)
4. Remind teachers that it is **their** responsibility to notify the GMTA Recital Chair of **their** winners' names, instrument/voice, teacher name, and name and composer of piece to be performed, as well as length.
5. Notify Publicity Chair of names, particular award (if more than one available), instrument/voice, and teacher names.
6. Be prepared to give a summary of your particular audition at the annual Committee Chairs Board Meeting.

### **PLEASE NOTE...**

By vote of the GMTA Executive Board, May 2003, no judge may adjudicate two consecutive years. By vote of the GMTA Executive Board, August 2007, no judge may be a GMTA member and should not be familiar with GMTA teachers or students.

For **reimbursements...** Photocopy the reimbursement form found in the back of this notebook and submit completed form to the GMTA treasurer. Save all receipts!

Revised (7/24/07, RHH)

Updated (8/27/08, DCM)

# STUDENT RECITAL CHAIR

## MONTHLY CHECKLIST

### April or May

1. Attend the Annual Committee Chairs Board meeting and give a report regarding the student recitals and honors recital.
2. Be prepared to suggest dates and possible locations for the next year's recitals, as well as an entry deadline (one to two weeks prior) for each.
3. If you are unable to attend the Annual Board meeting, send your report to the President at least one week in advance, including suggested dates, etc. (See previous line.)
4. Check with person in charge at possible locations for availability.

### Summer

Confirm Recital Locations if not done by the Annual Committee Chairs Board meeting.

### September-May

#### **Pre- student recitals**

1. At least three days before the recital, type the program.
2. Take note of diacritical marks for composer names and titles.
3. A good rule of thumb is to make at least 3 copies per student performing.
4. Re-confirm recital location at least one week in advance!
5. To comply with MTNA's request that local associations assist ASCAP composers, mail two copies of each program to MTNA. (*May do this at the end of the year, in one packet.*)
6. The statement "**Member of South Carolina Music Teachers Association and Music Teachers National Association**" must appear on all printed literature.

#### **Pre-honors recital**

1. Follow 1-5 above.
2. Photocopy on 24# laser paper.
3. Give name, instrument/voice, and teacher name to the president (or person designated) to make certificates for this recital. (Purchase pre-framed certificates)
4. Give name of scholarship winners and specific placement in to the president (or person designated) to make certificates for this recital.

#### **Recital Day**

1. Take or make sure program copies (and certificates for honors recital for president) are brought to recital hall. Pass them out, ask an assistant, or set them by the entry doors.
2. Adjust chairs in hall if necessary. Check air/heat for comfort level.
3. Emcee at all student recitals except honors recital.
4. Secure podium and or music stands, as needed for both emcee and performers. If piano duets are planned, be sure performers will have either a duet bench or a suitable alternative.

#### **Post-Concert**

To comply with MTNA's agreement with ASCAP, please forward two copies of the recital program to MTNA, per MTNA's request. (\*See note below.)

#### **PLEASE NOTE...**

1. Regarding Honors Recital, be aware that only **one** student per teacher per discipline is allowed to play in this recital, unless the teacher also has a scholarship winner playing, in the interest of time.

*continued next page*

2. For **Reimbursements**, photocopy the reimbursement form found in the back of this notebook and submit complete form to the GMTA treasurer. Save all receipts!

\*This message was received by GMTA President Rita Hassig 2-15-06, from Rachel Kramer, Director, Educational Services, MTNA, clarifying whether or not local associations were **required** to send MTNA copies of all programs. Kramer stated, "At this point, it is still your 'choice' to send the programs in or not, but by sending them, you know that if there were to be any issues at some point, your program would have been "covered" by the MTNA agreement. . . . As part of MTNA's agreement with ASCAP we ask all states, locals and divisions to forward copies of the programs to us."

Revised (7/21/07, RHH)

# GMTA Expense Reimbursement Form

	GMTA Operations	Scholarship/ Financial Aid
Copies		
Personal Concerns		
Phone		
Postage		
Refreshments		
Supplies		
Recital: Student		
Recital: Teachers		
Recital: Refreshments		
Scholarship: Copies		
Scholarship: Judge		
Scholarship: Postage		
Scholarship: Phone		
Speaker: Honorarium		
Speaker: Airfare		
Speaker: Meals		
Yearbook		
Other:		
Other:		
Other:		
<b>TOTAL</b>		
TOTAL Reimbursement (Sum of above two columns)		

Signature:

Date:

For Office Use: Reimbursement Ck. No. Date Amount
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