

Regional Management Team
HANDBOOK



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2006, 2007, 2008, 2009, 2010, 2011, 2012, 2013, 2014, 2015, 2016, 2017, 2018, 2019

MISSION STATEMENT

Elevating women singers worldwide through education, performance, and competition in barbershop harmony and a cappella music.

VISION STATEMENT

Inspiring and empowering voices to joyfully harmonize the world.

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Introduction

The fact that you have been given a copy of this handbook indicates that you are a leader in this organization. It is important that you read and study the sections in this handbook that pertain to the team as a whole, and to your specific areas of responsibility. You also may find it useful to become familiar with the sections pertaining to the other team members' responsibilities. In a form of government where all team members have an equal voice, knowledge of the subject matter is critical to making informed decisions.

The purpose of the Regional Management Team (RMT) Handbook is threefold:

- To act as a starting point and as a resource for general team-oriented information
- To provide a compendium of tools for the whole team as well as for individual team members
- To provide guidance on specific subjects and areas of responsibility for individual team members

The first section of this handbook contains a collection of tools for the whole team. The following sections provide information specific to each team member's responsibilities. The final sections include guidelines for the election/appointment process, information on contracts, and various appendices. A vodcast outlining each RMT Coordinator's duties has been created and can be found in the Leadership section of the Members Only portion of the Sweet Adelines website.

The information in this handbook can be condensed to five major points—the five Cs:

Cooperation: Each team member must be willing and able to cooperate for the good of the team and the organization as a whole, which includes delegating tasks as appropriate so that the work can be accomplished effectively.

Cooperation in a team environment requires each team member to be willing to set aside her own preferences and to accommodate input from other team members.

Communication: Without complete, accurate, and timely communication, the team is doomed to mediocrity at best.

Consensus: Consensus is new to some, a challenge for all, and a means for achieving synergistic solutions that have buy-in from all team members.

Confidentiality: The atmosphere in team meetings must be such that team members feel free to discuss sensitive topics openly. However, participating in these discussions carries an important responsibility for being circumspect. Team members should be mindful not to disclose sensitive information as it can harm the team or other individuals.

Continuation: Team members are responsible for seeking out and grooming the potential leaders of tomorrow.

Although the handbook is intended to provide “one-stop shopping” for regional management team information, this edition of the handbook falls short of that goal. The handbook is a living document; it will continue to grow and evolve to satisfy your information needs.

You can greatly assist your team and others by identifying information gaps, inconsistencies, and any other suggestions for improvement. Address your suggestions and comments to the corporate secretary at international headquarters.



Acknowledgments

Volunteers:

Tina Aseltine, Alberta Heartland Chorus, Region 26
Patricia Cobb Baker, Harborlites Chorus, Region 21
Lorraine Barrows, Coastline Show Chorus, Region 1
Sue Beck, Chapter-at-Large, Region 13
Marcia Bosma, Verdugo Hills Chorus, Region 11 and Harborlites Chorus, Region 21
Marilyn Cox, Velvet Hills Chorus, Region 8
Debbie Curtis, Channelaires Chorus, Region 11
Betsy Eck, Post Road Chorus, Region 1
Lynda Elliott, Rhythm of the Rockies Chorus, Region 26
Linda Fairleigh, Spirit of the Gulf Chorus, Region 9
Ruth Flint, Velvet Hills Chorus, Region 8
Judy Galloway, Hood River Valley Chorus, Region 24
Pat Haertel, City of Lakes Chorus, Region 6
Carolyn Healey, Cincinnati Sound Chorus, Region 4
Rita Hull, Vienna-Falls Chorus, Region 14
Julie Kendrick, Melodeers Chorus, Region 3
Nancy Kurth, Pride of Portland Chorus, Region 24
Erin Lunn, Voices Unlimited Chorus, Region 11
Janie Macchiaroli, Houston Horizon Chorus, Region 10
Bev Miller, Capital City Chorus, Region 4
Cindy Minter, Golden Triad Chorus, Region 14
Marykaye Morgan, Chapter-at-Large, Region 10
Diane Porsch, Buffalo Gateway Chorus, Region 16
Joan Roberts, Metro Mix Chorus, Region 5
Euretta Sorenson, Chapter-at-Large, Region 6
Mary Ellen Stepanich, San Diego Chorus, Region 21
Georgia Sutherland, Bay Area Showcase Chorus, Region 12
Dorcas Thomas, Buffalo Gateway Chorus, Region 16
Sharon Vitkovsky, Ramapo Valley Chorus, Region 15
Sally Wallace, Couer d'Alene Chorus, Region 13
Patty Warren, Pacific Sound Chorus, Region 13
Judie Wykoff, Bay Area Showcase, Region 12
Marge Zimmerman, Vermillion Valley Chorus, Region 5
Paula Davis, Velvet Hills Chorus, Region 8
Therese Antonini, Chapter-at-Large, Region 26
Jana Gutenson, Scottsdale Chorus, Region 21
Lynda Hill, TuneTown Show Chorus, Region 4

Team Tools

Job Description

- Develops and implements 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, Chapter-at-Large and Members-at-Large.
- Maintains a supportive and positive working relationship among team members.
- Defines specific areas of responsibility for each coordinator and the areas in which coordinators have 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.

The Effective Team

Being a member of and contributor to an effective team has definite benefits. Most team members enjoy the rewards of being involved in major decisions. They pride themselves on the service they perform, and in their ability to solve problems and innovate change. Given the proper training (and provided that the person enjoys working in a team), anyone can become an effective team member.

The Characteristics of an Effective Team

Effective teams can be recognized by the characteristics that make them successful. Clear goals are established, and all team members are committed to working toward the same goals. Members trust the actions of their teammates because they have taken time to get to know each other through listening and sensitivity to others' needs. As a result, the effective team enjoys working together and recognizes that team achievement is a

higher priority than achievement of an individual.

While effective team characteristics seem logical, they are not easy to attain. Team coordinators have experienced and acquired various interaction styles, and in order to change those habits, training and practice in the new skills are needed. Following are specific areas that should be addressed when considering training in team skills:

- **Communication, or lack thereof, is often the basis for misunderstandings and mistakes.** Team members should address this area early in the team's life. Learning how to communicate effectively through active listening and learning how to give and receive feedback are skills that will prove invaluable in team interaction.
- **Trust**—Team members should do their part to create a climate of trust and open communication that allows individual members the freedom to learn and take risks. They should promote opportunities for sharing insights, feelings, and experiences as the team develops common solutions.
- **Conflict**—An effective team should feel comfortable handling conflict and differences of opinion by attacking the problem, not the person. Team members should value the growth and development of each other and offer support through coaching, counseling, and advising, when asked. Above all, team members should be able to acknowledge and to reward each other's achievement.
- **Decision-Making**—Making decisions requires taking risks rather than waiting for the course of events to make decisions for you. The probability of better decision-making increases when it is carried out by a team. If members on your team resist making decisions, training in this area is advised.

Stages of Group Development

An understanding of team interaction at the different stages of a team's life will assist the team in working through challenges. During the creation of a new team, members begin to ask, "What guidelines will we follow?," "What contributions will each person make?," and "Who will perform which roles?" As these questions emerge and are addressed, teams evolve through a series of stages:

Forming: Members share personal information, begin to know and accept one another, and turn their attention toward the group's tasks.

Storming: Members compete for status, jockey for position of relative control, and argue about appropriate directions for the group. Tensions arise as individuals assert themselves.

Norming: The team begins moving together in a cooperative fashion, and a tentative balance emerges. Group norms evolve to guide individual behavior, and a cooperative spirit begins to blossom.

Performing: The team matures and learns how to handle complex challenges. Roles are performed and exchanged among members as needed, and tasks are efficiently accomplished.

Effective Meetings

Acquiring the knowledge of how to conduct an effective, productive meeting is beneficial to all, but especially to those members who have never before worked in a team setting. An understanding of and adherence to the following keys to conducting a productive meeting

will ensure success at your next team meeting:

- **Create an agenda.** An agenda is your meeting road map. Distribute it in advance. Doing so will multiply the meeting's effectiveness many times over. Team members will have time to prepare for discussions.
- **Start and end on time.** Hold fewer, but better meetings. Call a meeting only when it is absolutely necessary. Would a conference call or email communication serve the same purpose?
- **Maintain the focus.** Ruthlessly keep meetings on track at all times. If you finish early, those interested can stay and talk about other things.
- **Capture action items.** Establish a system for assigning action items to individual members.
- **Ask for feedback.** Take a few minutes to allow members time to discuss the effectiveness of the meeting, what didn't work well, and ideas for making future meetings more productive.

One must possess a variety of skills in order to be an effective contributor to the regional management team, and the team must possess certain characteristics if it is to be successful. New team members and new teams are not expected to have all these proficiencies in the beginning. Team management is a learning process, and each team member adds to the team's repertoire of skills. While some skills can be acquired through careful observation and trial-and-error methods, it is recommended that teams investigate those areas where training is advised. The advantages derived from improved skills will make all the training worthwhile.

Communication

Communicating Effectively Within the Team

Communicating effectively within your team is vital to its success. To quote Price Pritchett, author of *Teamwork*, "Communication breathes the first spark of life into teamwork, and communication keeps teamwork alive. Nothing else is so crucial to coordination of effort. No other factor plays such a precious role in building and preserving trust among teammates. Communication is the make-or-break issue."

To ensure effective communication within your team, consider the following pointers:

Choose your words carefully. Join in the conversation, but think before you speak so that you present your ideas as clearly as possible. If you are called upon to give an opinion, but are undecided, it is appropriate to say you would like to hear further discussion from others to help you weigh the issues. If you do not agree with others' opinions, state the reasons why and present alternate solutions/ideas. Remember to attack issues, not people. Use "I" statements when presenting your point of view. Avoid personalizing issues.

Pick up on nonverbal signals. Body language communicates a lot more than people realize. Tone of voice, facial expressions, posture, gestures, physical

proximity, and the speed and volume of speech all contribute to meaning. Be sure you observe the nonverbal signals of others and be careful that those you give add to your message, not detract from it.

Let down your guard at meetings. Be open, friendly, and expect the best of your teammates; trust that the team is making decisions in the best interest of the region. Defensive actions put the team on edge and lead to communication breakdown. Develop an awareness of your own reactions. If you begin to feel defensive, take steps to diffuse any rash statements you may have made.

Timing is important. When you have an important message to convey, select a time when your audience is ready and willing to listen to you. When people are bored, depressed, angry, distracted, rushed, or frightened, they don't listen well.

Minimize distractions at team meetings. It's difficult to concentrate with multiple conversations occurring, or people arriving late or leaving early.

Take responsibility for clear communication. You are responsible for yourself when you are communicating. You cannot control the words or thoughts of others. Though you can't force anyone to understand you, you can take steps to clarify your message by summarizing your thoughts or asking, "Am I making myself clear?" On the contrary, if you cannot understand the communications of others, it is up to you to ask for clarification. You can say, "I'm sorry, I'm not understanding you. Would you repeat that, please?" or "What I think I hear you saying is... Am I hearing that correctly?"

The Art of Conversation

Is it ludicrous to present regional leaders with guidelines for making conversation? Maybe not, considering that all regional coordinators are not born with the "gift of gab." It may surprise those extroverts on the team to learn that making conversation isn't always easy for some. According to Letitia Baldrige, Tiffany & Co.'s first female executive and, according to *Time* magazine, "Arbiter of America's New Manners," becoming an expert conversationalist requires some essential traits. Her recommendations are:

- Use appropriate humor and have a smile on your face. Greet everyone warmly and use gentle humor when necessary.
- Be a giver, not a taker. You'll get the most pleasure from making those around you have a better time and enjoy the conversation.
- Be a wonderful listener. You'll flatter everyone who speaks to you, which enables them to learn the great gifts of good communications too.
- Speak in an attractive, clear voice. Don't speak too loudly nor annoyingly weak, and not too fast, either. Keep your audience with you at all times.
- Keep the conversation fresh. Inject a new topic when the current one has grown tiresome or if an offensive or inappropriate subject is raised.
- Be the referee. You'll need to protect the feelings of people who are belittled by others when a disagreement occurs.

- Honor a deserving individual. Make it known if someone has received an honor, so that she (he) can be properly congratulated by you and everyone else.

Here are some conversation don'ts:

- Don't tell insider jokes or use insider jargon. Not only will this information not impress people, it will make them feel uncomfortable.
- Don't be a conversation hog. Let others speak, even if you know more about the subject than anyone else present.
- Don't sit in a group and talk to just one person. Let your eyes sweep everyone in the group so that all present feel involved and important.
- Never make fun of your colleagues or customers (teammates or regional members). It will almost always get back to that person and then you will have ruined any chance for a harmonious relationship.
- Don't discuss inappropriate topics. Match the topic to the occasion. For example, don't discuss illness and related topics during a meal.

Active Listening

Communication isn't just talking, it's listening, too. According to research studies conducted by Dr. Paul Rankin at Ohio State University, the average person spends 70 to 80 percent of his or her waking day in some form of communications process. Of this time, nine percent is spent writing, 16 percent reading, 30 percent talking, and 45 percent listening. In other words, the average person spends six hours a day listening!

Since most people have never received any instruction or training in how to listen, many of us are not effective listeners. Research conducted at Minnesota University by Dr. Ralph G. Nichols indicates that the average person is only 25 percent effective as a listener. In other words, only two minutes out of every 10 minutes of spoken communications directed toward a person is received. Fortunately, communication scientists tell us that listening is a skill that can be taught, learned, and improved. However, becoming an effective listener requires concentration and practice.

Active listening is the process whereby the receiver of the message clearly communicates the intention of wanting to understand the ideas and feelings of the sender. An active, effective listener establishes eye contact and a posture which clearly indicates he or she is listening. The key to active listening is to focus on the feelings of the other person in the communication process. The receiver puts the message into her own words and sends it back for verification. The receiver does not send a message of her own (evaluation, criticism, advice), only what she perceives the sender's message to be. An active listener is open, rather than judgmental. Following are some effective listening techniques:

Concentrate. Really listen to the speaker. Don't formulate your own opinion or reply while the sender is talking.

Attitude. Your own attitude and level of interest in hearing the sender's message is vital to the process.

Feedback. It is important not to parrot (return the person's exact words), but to paraphrase, conveying the deeper meaning of what is being said. You can

be tentative in your response: “What I think you mean is...” or “Here’s what I understand your feelings to be; am I accurate?”

Question. If you are unsure you are understanding the message, ask for clarification or expansion of the subject.

Emotion. Control your own emotions as they affect how messages are directed to you.

Silence. Silence is the only way you can listen to an entire message being sent and interpret its meaning. Remaining silent during active listening is difficult for many people, but practice will make silence more effective and tolerable.

Interest. When a sender can sense that you are interested in the message, she will work harder to communicate with you. Indicate your interest with body language and appropriate feedback when the sender is ready to receive it. Only eight percent of any message comes from words, while 37 percent comes from vocal intonation, and nearly 55 percent from body language.

Networking

Being a good leader is about building relationships, and networking is one stepping stone to building those relationships. Networking allows peers to share creative ideas, present new insights into old problems, or just add empathy to problems and concerns. The ability to put yourself in a position to meet new people and then develop those relationships is a skill worth acquiring.

Sweet Adelines International functions present opportunities during the year for networking with other regional and international leaders: activities at international convention and, of course, your own regional conventions. Make the most of those opportunities to expand your network. Following are some networking tips excerpted from the book *Solid Gold Success Strategies for Your Business* by Don Taylor:

Initiate the contact. Put a smile on your face and extend your hand. Most people are just a little shy about making the first move. Your warm, friendly overtures will put them at ease.

Gather information. Ask polite, open-ended questions, then listen.

Arrive at gatherings early. Social hours are usually first, and are great for networking times. If a meeting is worth attending, it’s worth an early arrival.

Develop a 10-second introduction. People will remember you and what you do.

Give your full attention to one person at a time. Politicians are notorious for looking past one person to see if someone more important has arrived. Such an action will demonstrate the insincerity of your intentions.

Although networking is important to you as a regional coordinator, don’t overdo it. Too much visiting may interfere with more important work. Remember whom you’ve met, and what you’ve promised. If you agreed to send information or material, do so as soon as your schedule permits.

Confidentiality and Communication

Communication is critical to the success of any organization. It affects each member, especially since technology has increased the speed and frequency with which we can disseminate information and opinions to one another. It is important for each regional team member to ensure that others who need to know certain information receive copies of appropriate one-to-one communications.

Learning to trust that others have the best interests of the organization at heart, rather than their own personal ambitions and goals, is a challenge. Openness and honesty among team members is crucial; disagreements should be addressed within the team, not through private conversations away from the group.

The other side of communication is confidentiality. Certain information available to regional management team members, such as performance evaluations, is obviously not for general knowledge. Other information and discussion topics may not be so clearly identifiable as confidential. In some cases, premature or unplanned communication can complicate an issue immensely, can lead to interpersonal difficulties, and can damage team relationships and the team's credibility with regional members. To prevent such communication mishaps, committee chairs should state at the beginning and end of each meeting that all discussions are considered confidential unless and until a plan of communication has been established for that subject. When every team member is "singing off the same page," the opportunity for a harmonious outcome increases.

Conflict Management

Constructive Controversy Improves Productivity

Most people have a negative concept of conflict and controversy. Often regarded as undesirable and as signs of sickness in group functioning, conflict and controversy are natural and desirable parts of any problem-solving situation that should not be avoided or repressed.

Controversies are inevitable if members are involved in and committed to the work of a team. If differences of opinion, interest, and values are not dealt with directly, the work of the team will deteriorate. Unresolved feelings create biased, nonobjective judgments and actions. When controversial discussions are handled successfully, team members become increasingly involved with and committed to one another.

Group discussion with a high rate of constructive controversy is more productive than individual thinking. Working through differences of opinion often leads to more creative solutions to problems than what could have been achieved by any single person.

Controversies allow team members to express emotions such as anger and indignation that would interfere with the team's work if repressed. Expressing emotions can greatly reduce the natural tension and frustration of working together, enabling team members to interact with fewer inhibitions and avoidances. Because almost all team members

have aggressive feelings toward each other at one time or another, they should employ controversy to express aggression directly and constructively and prevent a deterioration of relationships.

Controversies bring information to team members about what is important to each of them, how teamwork can be improved, and how their relationships can grow. Opposition can lead to greater understanding and closer relationships, not rejection and dislike. All team members profit from effective controversies, both in terms of accomplishing team goals and bettering the relationships among team members.

Ground Rules for Constructive Controversy

Constructive controversies require that a team agree upon standards for arguing. There are no rigid rules for constructive controversy, but the following guidelines can help team members dispute more constructively and transform disagreement into a positive team force:

Choose the right time for controversy. Beginning a dispute five minutes before a team meeting must end, or bringing up an issue when other members with opposing ideas are absent, is bad timing. Setting a time for a controversy in addition to stating the issues in advance will ensure the full disclosure of both sides of an argument at the same time. Proper timing of a controversy will help prevent misinterpretation of emotions expressed during the conversation.

Focus on win-win solutions. Strive for no winners and no losers at the end of a controversy, only successful, creative, and productive solutions to a problem.

Allow each team member to actively take part in the discussion. Every member should be free to express her ideas and feelings without defensiveness. Open, honest, accurate, complete, and effective communication should be worked on continually as it will improve the quality of the team's work. Intuition, hunches, and feelings about team actions should become regular topics for discussion.

Value and respect each other's contributions. Enthusiastically listen to all ideas, and graciously acknowledge all team members' contributions.

Be critical of ideas, not of people. Arguments should concern ideas, not personalities. When disagreement does occur over a member's ideas and contributions, she should treat it as an interesting point of view from which something can be learned. Members should express disagreement without rejecting their fellow teammates.

Balance time spent bringing out differences of ideas with time spent putting the different ideas together. Different points of view must be presented and explored before new, creative solutions can be sought.

Members who disagree need to understand the positions and the frames of reference of their opponents. All participants should regularly talk about what their perceptions of others' positions and frames of reference are, what they are feeling, and

how they are reacting to controversy.

Keep the power of all participants equal. Perceptions of inequality in power undermine trust, inhibit dialog, and decrease the likelihood of a constructive outcome from controversy. Every team member should have equal rights to participate, and contributions should be evaluated on their soundness and helpfulness in sparking thinking, not on the basis of who proposed them. Influence should be determined by ability rather than by status. People who have helpful information and interesting ideas should be listened to, regardless of formal power.

Keep tension at an optimal level throughout the controversy. A person's ability to integrate and use information occurs at some level of tension. If too little tension exists, a sense of urgency in resolving the controversy is lacking. If there is too much tension, distortion and defensiveness can block the resolution of a controversy. A period of substantial stress followed by an easing of tension is often the best way to achieve a productive resolution to a controversy.

Incentives for resolving controversies creatively must be present in order to motivate all team members to participate and contribute.

Strategies for Effective Conflict Management

Below are some strategies to help manage conflict situations effectively:

Confrontation—Discuss an issue openly, face-to-face. Use your best communication skills.

Problem-solving process

- Define the problem and clarify basic issues
- Explore alternatives
- Evaluate alternatives
- Decide on mutually acceptable solutions
- Implement solutions
- Follow up and repeat the process if necessary

Brainstorm—Suspend evaluation and allow ideas to develop freely on a particular issue.

Role reversal—Instruct persons or teams involved in the controversy to take the opposite side of an issue to develop empathy and understanding.

Mediation—Involve an objective third party to facilitate problem-solving with opposing sides.

Negotiation—Look at what is at stake—winning or losing. Try to widen areas of agreement by employing cooperative interaction. Emphasize concern not only for self-interest, but for the good of the team.

Education—Help members develop a change in attitude through knowledge and understanding toward conflict and its value.

Anatomy of Constructive and Destructive Controversy

Controversies may be classified as constructive or destructive depending on the process by which they are managed and their outcomes. Below are the attitudes and behaviors that are most conducive to creating the kinds of environment that produce constructive and destructive controversies.

In Constructive Controversy:

Define the controversy as a mutual problem

Participation by all team members

Open and honest expression of ideas and feelings

Effective sending and receiving communication skills used

Differences of opinions and ideas sought out and clarified

Underlying assumptions and frames of reference brought out into the open and discussed

Disagreement not taken as personal rejection by some or all team members

Adequate differentiation of positions; differences clearly understood

Adequate integration of positions; similarities clearly understood and positions combined in creative syntheses

Equal situational power among team members

Moderate level of tensions

Incentives present for creative problem resolution

Mutually satisfying solution worked for and arrived at

High creativity of decision

Members feel understood and noticed

Members believe they exercised considerable influence on other members

Members feel responsible and committed to team decision

Members highly satisfied with the decision, their participation, and the teamwork

In Destructive Controversy:

Define the controversy as a win/lose situation

Participation by few team members (self-censorship and withdrawal)

Closed or deceitful expression of ideas and feelings

Effective sending and receiving skills not used

Differences of opinions and ideas ignored and suppressed

Underlying assumptions and frames of reference not brought out into the open and discussed

Disagreement taken as personal rejection by some or all team members

Inadequate differentiation of positions; differences not clearly understood

Inadequate position integration; similarities not clear, positions not combined in creative syntheses

Unequal power among members

Tension level too low or too high for productive problem-solving

Incentives present for domination and winning

Conflict-reducing procedures used (tossing a coin, voting, negotiating)

Lower creativity of decision

Members feel misunderstood, ignored

Members believe they had little or no influence on other members

Some members feel no responsibility for, or commitment to, the decision

Members highly dissatisfied with the decision, their participation, and the teamwork

Cohesion of team members is high	Cohesion of team members is low
Members feel accepted and liked by other members	Members feel rejected and disliked by other team members
High level of trust among members	Low level of trust among members
Feelings are released and dissipated; tension is decreased; positive feelings dominate	Feelings are repressed, suppressed, still present; tension is increased; negative feelings dominate
The ability to manage controversy is increased	The ability to manage controversy is decreased
High level of learning about the issue under discussion	Low level of learning about the issue under discussion

Handling an Angry Person

Here's a conflict quiz: When an irate person yells at you, what do you do?

- A. Exert a soothing influence by telling the individual to "calm down."
- B. End the conversation as quickly as possible.
- C. Sit still, keep quiet, and let the speaker rant and rave for as long as it takes.
- D. Yell back.

If you answered A or B, nice try. Both responses seem logical. Although D may be how you would like to respond, don't! You never want to lose control just because the other person has already lost it. The correct answer is C. The best communicators know exactly how to respond to an angry or upset person—remain silent and outwardly dispassionate. They wait until the person runs out of words and has nothing more to say. When an angry person blows off steam and vents, her fury dies down. Only then is she ready to listen. Some individuals may storm longer than others. Be prepared to let an angry person vent at her own pace.

Granted, it isn't easy to sit there and take it, especially when the offending party is loud and hostile. But, if your ultimate goal is to make her receptive to what you have to say, then you can win the individual over only after she has regained at least some of her composure. The toughest part of allowing others to rant and rave is resisting the urge to fight back verbally or interrupt them to try to improve the situation.

Monitor your body language when tempers flare. Your facial expressions, posture, and gestures can work for or against you. Avoid crossing your arms like a drill sergeant.

Loosen facial muscles and relax your jaw. If you can show that you're willing to listen to others without becoming visibly upset, then they'll work through their negative emotions faster and grow more receptive to hearing your side of the story.

Steps to Follow When Confronted by an Angry or Upset Individual:

Time to talk. Defuse the anger of an upset person by giving them time to talk. Let the individual say whatever is on her mind, no matter how long it takes. If you're on the phone, remain completely quiet. Be a good listener and let the sender know you are interested in hearing the message. Don't be tempted to reply or defend yourself

from accusations. Try to remember that arguments are won on who commands silence, not on who yells the loudest. Control your thoughts; you will need a resilient attitude to withstand the attack and keep your nervous system intact.

Reflect back. Listen until the angry person runs out of steam and a few seconds of complete silence have passed. When you think you have heard the entire message that the angry or upset person is trying to send, reflect it back in your own words, giving the individual a chance to confirm that you received the message, or to correct your misconception.

Explain and/or discuss. After you have convinced the angry or upset person that you heard the message as clearly and concisely as possible, and have defused her anger, you can begin to explain and/or discuss the situation in a logical and rational manner. If you sense that the emotion is not defused, it may be necessary to prolong the above steps in order to reach a situation that is stable enough to carry on a discussion.

Morey Stettner, author of *The Art of Winning Conversation*, suggests that when the decibel level of the conversation returns to normal and you feel the other person is ready to listen, the first words out of your mouth should express your intent. Following are examples:

“It’s not my intent to cause problems. It is my intent to solve them, and that’s my goal right now.”

“It’s not my intent to make you mad. It is my intent to please you and take care of this situation.”

“It’s not my intent to argue with you—you’re right. It is my intent to deliver on my promise and give you the information that you need.”

An intention statement is designed to reframe a conflict and defuse lingering animosity. If you’re sincere in expressing your goal, you can advance the conversation toward a mutually agreeable outcome.

If action is requested. Many people, in their eagerness to end the conflict, start advising or offering solutions prematurely. If you promise a solution, be sure you can carry it out. Sometimes it is best to promise to look into the situation, then report back on your findings within 24-36 hours. If the upset person believes that you have promised something specifically, she will expect you to carry it out exactly as she thinks it was promised. Failure to produce the expected results could lead to angry outbursts later.

Reaching Consensus

“You think you understand the situation, but what you don’t understand is that the situation just changed.” Putman Investments advertisement

Regional leaders meet as a management team and decisions are made through consensus. Consensus often is easier to define than to put into practice, and for many, consensus is a new decision-making process. Although reaching consensus may require a longer discussion period, the outcome is usually positive for participants.

What Consensus Is:

- 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.
- Consensus is flexible. The process of reaching consensus 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 targeted. Often groups find routes to agreements that no one recognized when discussion first began.
- Consensus 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 brings people together rather than polarizing them, as voting often does.

What Consensus Is Not:

- 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.
- Consensus does not mean 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 over lunch or in the parking lot, 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.
- Consensus is not majority rule. When the minority is forced to go along with the majority, subtle and overt resistance may occur. Consensus decisions require a degree of discussion and interchange that doesn’t occur in voting.

Trouble-Shooting

Sometimes the consensus process becomes stuck, a decision can't be reached, and team members become frustrated. What can a team do at times like this? Here are some tips:

- Return to the beginning of an issue. Ensure that team members have a clear understanding of the issues under debate and that they are not disagreeing over different issues. It is the responsibility of each team member to keep sight of the group's objective.
- Ask each member to state her opinion; establish a compromise position based on these opinions. If the team is willing to discuss and change one or more parts of a proposal, all members of the team may feel comfortable with the outcome. For example, if the issue is whether or not to hold a music camp, team members might agree on the need for education, but some might be hesitant to appropriate funding, think it too late to hire desired faculty, or feel that the region should devote time and funding to other projects. By changing one of the elements in the disagreement, such as holding the music camp with another region that would share expenses and provide several excellent faculty members, consensus might be reached.
- Take a short break to provide private time to think about the issue before beginning the discussion again, or leave the issue and return to it later. When emotions are high, it may be easier to achieve consensus after a cooling-off period.
- Assign a task force, including the individuals who have the strongest opinions, to reach consensus. This strategy allows the team to continue its work while a smaller group works on a consensus position. Present the smaller group's recommendations for the team to consider.
- Change the facilitator. Sometimes the inability to achieve consensus is associated with the facilitator. Selecting another member to facilitate the discussion may alter the group's outlook and expedite the process.
- When consensus is not achieved, it may be appropriate to return the proposal to the recommending group for more study and revision.

Counseling

As a regional leader, you may find yourself in the role of "counselor." It is a difficult role because it demands a certain depth of self-knowledge, empathy toward others, skills in communication, and an acceptance of and belief in yourself as a person who has something to offer in a counseling situation.

Counseling skills are usually required for situations in which the goals of the organization, or of individuals in it, are threatened, and the persons in the situation are unable or unwilling to resolve the problem themselves. In most cases, you should wait to be asked for your help, but sometimes you may feel compelled to intervene before an invitation is extended. Check with other members of the regional team to discuss the issue and determine the most prudent action.

Sometimes, a chorus or individual may select you personally to be the counselor. Some counseling situations may require coordinators to refer a person to someone outside the team who is more highly skilled. Before agreeing to help, you must decide whether the situation is within the realm of your duties. Communication is vital among your team members in this aspect. If the area of contention could best be addressed by another member of the regional team, notify her, explain the situation, and then remove yourself from the situation as tactfully as possible. Never be afraid to seek assistance with a problem situation.

Counseling is a relationship that involves someone seeking help, someone willing and capable of helping, and a setting that permits help to be given and received.

Counseling includes these characteristics:

- A basic acceptance of the perceptions, feelings, and values of another
- Confidentiality and privacy
- Voluntary participation by the counselee
- A focus on the counselee rather than the counselor
- Communication, awareness, and sensitivity

Counseling is not:

- Giving information, though information may be conveyed
- Giving advice
- Trying to change an individual's attitudes, beliefs, and behaviors by persuading, admonishing, threatening, or compelling
- Selecting and assigning individuals to jobs
- Interviewing, though interviewing may be involved

In your role as counselor, you may function in various capacities:

- You may intervene in a conflict situation
- You may serve as mediator, helping factions hear and understand each other
- You may serve as a negotiator, helping bring about certain results or behaviors

Regardless of the situation and its seriousness, you can follow certain logical steps to prepare yourself to act as a counselor:

- Find ways to develop and polish your communication skills, such as reflective listening, giving "I"-messages (I think..., I feel..., What I think I'm hearing is...), interpreting nonverbal communication, etc.
- Become familiar with problem-solving and goal-setting processes and with conflict management and facilitation techniques
- Enlist people whose opinions and ideas you respect as sounding boards. Sometimes just verbalizing your thoughts and strategies will help solidify your thinking. Your sounding board also may bring out other viewpoints that you may not have considered
- If possible, accompany a seasoned counselor on a counseling visit and observe how she handles the situation and what skills she uses

- Last but not least, develop self-confidence by practicing the skills you learn. Then, when a tough situation arises that requires you to act as counselor, you will be prepared to do so.

Attitudes and Actions of a Chorus Counselor:

- There is no one right or wrong answer
- Listen
- Acknowledge feelings
- Be yourself
- Trust your intuition
- Get help! Members of your team or the staff at international headquarters can be resources to you

Following is an outline for making a chorus counseling visit. Note the importance of laying the groundwork before the visit. Following these recommended steps can assist you in preparing for a chorus visit that is both productive and satisfying.

Outline for Chorus Counseling

I. Chapter Visit

A. Preparation for visit

1. Talk to the president/team coordinator and director before your visit.
2. Be familiar with the chapter's standing rules before your visit.
3. Assure both sides that you will take charge, keep order, and be fair.
4. Tell the president/team coordinator that all members are to be informed of the meeting (preferably in writing).
5. Keep in close contact with appropriate headquarters staff to seek background information, to discuss options for possible resolution, or to express concerns.

B. The visit

1. Format/climate

- a. Meet with the president/team coordinator and the director separately and/or together, as indicated before the meeting.
- b. Inform chorus members present that you are going to take charge of the dialog.
 - All persons must speak in "I" statements ("I feel," "I want," "I am angry").
 - Statements made otherwise ("you should," "you haven't") will be interrupted and the person will be asked to rephrase into an "I" statement.
 - No accusatory or sarcastic tone of voice will be allowed.
 - After an initial opening dialog, all persons who have not spoken will be asked to state an opinion. It is all right to "pass" if desired.
 - Conduct the discussions with a nonjudgmental attitude.

- c. Provide an opportunity for members to state their own thoughts and to hear the thoughts of others. No one is allowed to speak for others (“I heard her say...”).
 2. Outcome of visit
 - a. Develop a plan of action with the chorus members. Before leaving the meeting, decide on the next step to be taken and how it will be implemented. (Note: If you feel stressed in the situation, ask for more time before recommending a plan.)
 - b. Stimulate open dialog and teach the chorus how to proceed to a healthy resolution in the future. Don’t expect to “fix” or resolve the conflict in one meeting.
- II. Post visit
1. Follow up with the director and president/team coordinator for feedback on the visit.
 2. Follow up on the implementation of the action plan.
- III. Confidentiality
1. Assure all chorus members that their comments are confidential.
 2. Do not share details of chorus counseling visits with friends, other regional or international personnel, etc. The valid line of communication is to other persons counseling the chorus, team coordinators involved in the situation, and your designated headquarters contact.

Chorus Splits

Sometimes, regardless of your best efforts, a chorus splits and the members separate into two choruses. The decision to start a second chorus often devastates many of the members involved. Hard feelings will abound and a long healing process may follow. Frequently, it is the members left behind who experience the most difficult adjustment, watching the members who have left enjoy the challenges and goals of building a new chorus. Realize that both groups need your support and assistance.

When those leaving a chorus wish to begin a new prospective chorus, the subject of chorus asset division frequently arises, especially when a significant percent of the total membership resigns. Though policy states that the original chartered chapter retains the assets of the chorus, the chorus board of directors/management team may divide the assets with the departing members following the rules listed below:

- Appropriate laws and tax rules must be followed.
- The group leaving must be at least a Sweet Adelines prospective chapter in order to receive part of the assets.

When a split occurs, some chorus members may decide to take a different path and transfer to another established chorus or join Chapter-at-Large (CAL) or Member-at-Large (MAL). Remind members to transfer their membership before resigning from the chorus to which they currently belong. Members of the regional team should be ready to answer questions regarding membership options and transfers.

Evaluation Process

Peer Review

Peer reviews help individual team members see their strengths and weaknesses as perceived by those they work with the most. The reviews also provide team members with additional insight that will assist them with personal growth and interpersonal relationships.

The regional management team should conduct peer reviews once a year. Each region is responsible for designing its own evaluation form (see sample form in the *Appendix*), which is distributed to each regional leader. After completing one form for each team member, the coordinators submit the original plus one copy to the Communications Coordinator. The Communications Coordinator sends each team member a complete set of the seven evaluations that she received from the others on the team. A set of evaluations is retained in the files to be used only if the team member chooses to run for a team position. The Communications Coordinator will then write a summary of this information and provide it to the nominating committee, and to the Regional Leadership Committee as appropriate, as part of the confidential potential nominee appraisal summary.

Chapter Review

April is the time of year when choruses are asked to evaluate the regional management team's overall effectiveness, review its strengths, and identify areas for improvement, including regional education programs, regional conventions, and general efficiency of operations.

International headquarters distributes copies of the "Annual Regional Evaluation Report" to each chorus in each region. After soliciting information from the chapter membership the chapter management team/board completes the evaluation based on their perception of the Regional Management Team as a whole. Once the survey is completed it can be accessed by International headquarters and a copy of the compilation is sent to each member of the Regional Management Team and Regional Leadership Committee.

The Art of Giving and Receiving Feedback

Providing constructive feedback is not easy. To start, compliment the person you are evaluating for what they do well. As you proceed with your feedback, keep the number of negative comments or issues to a minimum. Always provide more positive than negative feedback; you will achieve better results by reinforcing positive or acceptable behavior.

When you evaluate someone, criticize the behavior, not the person. Don't tell that person why you think she is performing poorly because she will only react to your judgment. Sticking to the specific action or behavior and the negative effects that are the result will allow the person you are evaluating to focus on correcting the poor performance. Do not

overwhelm the person with every mistake she has ever made; provide her with a small number of relevant, and recent, examples. Do not give advice on how to fix the problems unless you are asked. Though offering assistance may be appropriate, don't be surprised or hurt if the offer is refused. If your offer is accepted, be gracious in presenting your ideas, and work with the person to achieve the desired results. When providing written evaluations, remember that your comments may seem more severe because you were unable to use body language or tone of voice to enhance communication.

Receiving feedback, especially negative, is extremely difficult for most people. When you know you are going to be evaluated, remind yourself to keep an open mind. Determine for yourself how you are going to react. You may decide to follow some suggestions; you may decide to take some information under advisement and follow your own course of action; or you may decide to ignore the feedback entirely.

If you receive input that you do not agree with, do not discount it completely. Try to determine why the person evaluating you has such a different perception of you than you do. You may find the evaluator is right. If not, look at what you do that gives the evaluator the wrong impression. Examine what you can do to change that perception. Nine times out of 10, you will find that miscommunication, untimely communication, or no communication is the problem.

People rarely criticize with the intent to hurt. Usually criticism is given with the best intentions, however it is not always expressed in the most productive manner. Look for what is useful and act on it. Most people have no idea that their method of communication is not always successful.

Sweet Adelines International is a volunteer organization. Our members give willingly of their time and expertise. We want them to continue giving and feeling good about themselves. Since our members and leaders tend to be high achievers, they continually look for ways to improve themselves. You should make every effort to ensure that the feedback you provide is delivered in a kind and caring manner. Work toward building up, not tearing down.

Governing the Region (Committees)

As the brain of the regional body, the Regional Management Team (RMT) provides the vision, strategic plans and makes the rules and decisions for the region. However, it is not the sole responsibility of the RMT to implement these areas. To accomplish the work of the region, the RMT should establish a reasonable and effective system of committees. These committees are the arms and legs of the regional body. They give life to the ideas developed by the RMT. Alone, neither the RMT nor the committees can function successfully; together they become whole. Each is dependent upon and supported by the other.

Choice of Committees

It is up to the RMT to determine how many and what kinds of committees are needed, which will vary from region to region. Per the *Standard Form Regional Bylaws*, each region must establish at least three committees. They are:

- Nominating
- Finance
- Bylaws and Rules

Other committees may be added at the discretion of the RMT. **Each coordinator is encouraged to assemble a committee or staff to assist her.** Following are some typical standing committees found in the regional structure:

- Awards
- Budget
- Chapter-at-Large Liaison
- Distribution/Duplicating
- Facilities Coordinator
- Long-Range Planning
- Membership Retention
- Public Relations
- Young Women In Harmony Coordinator
- Arrangers Coordinator
- Chapter Coordinator
- Chair of Regional Convention
- Director Certification Program Coordinator
- Historian
- Membership Growth
- Newsletter Editor
- Ways & Means

Special committees, which function only until their tasks are complete, also may be appointed.

Once the committees have been determined, the RMT can appoint either the entire committee or appoint the chair only, allowing the chair to select her own committee members. Some committees may require only a chair with no supporting committee. The RMT will need to predetermine the following before appointing committee chairs and/or members:

- The size of the committee (three to five members is considered the most effective)
- Funding for the committee and its members (determined early enough to be part of the regional budget)
- Term for the committee and its members (generally one-year appointments are best)

Expectations and Responsibilities

Once a committee is established, its members will want to know exactly what is expected of them. Providing a job description to each committee, whether in paragraph form or as a bullet point list (see Sample A) will help the committee understand the rationale for its function. Defining expectations will foster member buy-in and commitment to the committee's purpose.

Effective Use of Committees

Committees must be empowered in order to do their jobs, and it is the RMT's responsibility to delegate this authority. (For related information, refer to the ***Don't Wait, Delegate*** heading in this section.) Regional committees will be as effective as you expect them to be, so long as you provide them with the proper tools:

- Clear responsibilities
- Reasonable funding
- Regional resources and support

Reporting

All committees, staffs, chairs, and other appointees should report to the RMT on a regular basis, which should be stated when the committee is appointed and given its job description. Reporting guidelines should be provided to the committee chairs, though due to the different natures of committees, they will not all be able to report in the same manner. Functioning under the auspices of one of the regional coordinators, the committees should report directly to that coordinator, who will then make the report available to the entire team. Committee reports fall under two categories:

Verbal Reports. Made directly to the regional coordinator or to the team, verbal reports are best when presented in conjunction with a written report. However, there may be instances when only a verbal report is necessary.

Written Reports. These, too, may be presented directly to the regional coordinator or to the team, as requested. It is helpful to the RMT if all reports use a similar format and are distributed in advance to the team members. Written reports are best for several reasons:

- Written reports require careful thought in order to include all of the information necessary to recount what happened at the committee meeting.
- Written reports allow team members to prepare properly for the discussion at the meeting.
- Written reports are historical documents that can be attached to the minutes as a permanent record.
- Written reports often help keep meetings brief, yet effective, by minimizing unnecessary conversation and discussion.
- Written reports may prevent your team from “reinventing” what a committee has already presented.

Reports should include, but not be limited to:

- The committee's vision
- Financial considerations
- Discussion/decision requests
- Actions/accomplishments
- Future plans

Sample A - Job Description

Example #1

The chair of this committee works directly with the Events Coordinator. This committee is responsible for ordering chorus medals and ribbons, and securing them to the proper cords. The committee determines the physical arrangement for the awards presentation and notifies the Chair of Regional Convention (CRC) of any needs associated with that presentation. It makes sure that all awards are present at the distribution sites. If applicable, this committee purchases director recognition awards and any other special awards. This committee also oversees selling extra medals to eligible choruses.

Example #2

The chair of this committee works directly with the Events Coordinator. Committee responsibilities include:

- Ordering chorus medals, all divisions, and all applicable chorus ribbons.
- Stringing chorus medals on cords long enough to fit easily over contestants' heads. Colors are royal blue for first place, red for second, white for third, yellow for fourth, and green for fifth. Knots should be secure. Medals should be bunched in groups of 10 for easy counting and distribution.
- Attaching quartet medals to ribbons (same colors as above).
- Determining physical arrangements for awards presentation.
- Notifying CRC of needs associated with awards presentation at least 90 days prior to the convention (e.g., tables, chairs).
- Working with Events Coordinator to ensure that all awards are at the appropriate distribution sites.
- Purchasing director recognition awards, if applicable, and any other special regional awards.
- Verifying per item cost, selling extra medals to eligible choruses, and turning over extra supplies to appropriate personnel.

Meetings

Meetings take time, so it's important that they are held only when necessary. Meetings by conference call are acceptable because they save travel time and money. However, physical meetings are practical and necessary when agenda items are complicated and plentiful. Physical meetings also are desirable when team or committee members are unfamiliar with one another. Watching the interaction among meeting attendees is valuable in understanding the differing points of view of those around the table.

Following are some guidelines for scheduling and holding successful meetings:

Purpose

- Ensure the meeting is necessary. A meeting is a team activity where coordinators gather to perform work that requires group effort. Do not hold a meeting for committee work unless it is a committee meeting. Use your time at meetings to work on the vision of the organization. Meet if you require buy-in from other team

members on an issue, want to use the consensus decision-making process, or want to brainstorm new better ideas with the team.

- Write out the purpose and goal of the team. The team's purpose is the overall reason why the team exists ("to provide musical and administrative education to the region"). Goals are the short-term actions the team must carry out to fulfill its purpose ("to design a training plan for the next three years involving directors, choruses, and individuals"). Once the purpose and goals have been identified, write them out and post them. Coming back to these items throughout the meeting will ensure that the discussions stay focused.
- Determine what needs to be accomplished at the meeting. The team should decide before the meeting what must be accomplished. Using the example above, if the goal is to design a training plan for three years, maybe in this meeting you can realistically outline only the process over the next three years; another committee will have to be appointed to determine the faculty based on the topics chosen.

Preparation

- Obtain reports from all team members that include activities to date as well as a summary of their committees' reports. Reports can be submitted on a form as shown in Sample B.
- Prepare an agenda. Based on the discussion and decision items listed in the reports, prepare an agenda using the acronym S.M.A.R.T:
 - Be **Specific** when stating the goals (discussion and decision items) for the meeting.
 - List who is responsible for each of the action items.
 - Include **Measurable** items, where possible, that tell you whether you achieved your goal.
 - Make goals **Achievable** within reason providing enough of a stretch to move forward.
 - Ensure the items are **Relevant** to the meeting and setting.
 - Provide the **Time** allotted for each goal and each agenda item.
- Determine length of meeting. Include a time estimate for each agenda item, then review to ensure the meeting is the appropriate length for the items requiring decisions and discussion. It may be necessary to call a special meeting or extend an additional day if there are more discussion items than time.
- Distribute agenda. At least one week (preferably two weeks) before the meeting, provide team members with the agenda and all attachments necessary so that they can come to the meeting prepared.
- Read all material. As a responsible team member, it is critical that you read all materials provided for the meeting. If you need clarification on any of the items, speak with the party responsible for the agenda item prior to the meeting. Being prepared will help make the meeting shorter and more productive.

Sample B

Team Member's Name _____

Team Member's Title _____

Date _____

Regional Team Meeting Report

Accomplishments since last team meeting:

- Accepted coordinator's position
- Appointed committee chairs and established introductory meetings

Projects in progress:

- Preparing outline for upcoming directors' training session

Items to be discussed at team meeting:

- The three-year training plan

Items requiring a decision from team members:

- Need consensus that committee outline accurately reflects the purpose of our next regional meeting.

Environment

- Size of room. The room should be large enough to accommodate all participants comfortably, as well as any presentation equipment such as flip charts, white boards, or overheads. Consider requesting additional tables to display the vision/mission statement, mailboxes, and handouts.

- Type of table/seating. The table must be large enough to accommodate all of the paperwork required as well as any reference material. Theater-style (chairs in straight rows) and classroom-style (straight rows with tables) are best for presentations and instructional situations where one person, up front, is the focus. U-shaped seating is good for training and audio/visual presentations as it is more interactive than classroom-style. Hollow-square (a closed square with open space in the middle) works well for participation, but is not suitable when audio/visuals are used. Boardroom-style (large, oblong table) works well for participation, but may not be well suited to audio/visuals. Camelot-style is excellent for participative training sessions and small (eight-10) groupings, and allows the facilitator to see all participants clearly at all times. Any special requirements of the participants might dictate seating setup.

- Temperature. It is important to keep a comfortable temperature in the room. Be particularly sensitive to allergies (open windows can cause reactions in allergy-prone people), the effect of being too warm (tends to put people to sleep), and the dangers of being too cold (people could focus more on getting warm than on the conversation).

- Equipment. When using a recorder to aid in minute taking, be sure to bring extra batteries and tapes. A backup recorder might prove useful as well. Position any microphones where all voices will be easily picked up. If a computer is used, make sure the operator is comfortable, and that sufficient disks and electrical outlets are available. Cords should be taped to the floor, if possible, to avoid accidents. Make arrangements in advance for special equipment and power cords. If using flip charts, white boards, or

overheads, make sure erasers, appropriate markers, equipment, and transparencies are within reach.

Content

- **Agenda order.** Format the agenda in a logical progression, grouping discussion or decision items of like nature together. Action items need to be first on the agenda, followed by problems, planning items, and then information sharing. Change the agenda only if the entire team agrees. End the meeting with a summary and next steps.

- **Ground rules.** Ground rules keep the focus of the meeting on the issues, not the people. Once the rules have been established, either follow them or change them. Some sample ground rules are: be an active listener, refrain from interrupting each other, one speaker at a time, be punctual, and be prepared. Post the ground rules at each meeting and refer to them as needed.

- **Training.** Establish some time during each full meeting day for training. Even short, five-minute segments can help the motivation and productivity of the meeting.

- **Brainstorming.** If possible, set aside time during team meetings to brainstorm. Establish the topic and generate new ideas. Take turns to ensure everyone has a chance to give her input. Hold comments or criticisms until all ideas have been recorded. Post ideas for easy viewing throughout the session.

- **Establish mood/setting.** Setting a theme for each meeting helps bring people back to the table as well as make it more fun for all involved. For short meetings, a song or motivational saying at the beginning and end may be all that is needed. Encourage creativity and flexibility by providing stress relievers and exercises that enhance the theme of the meeting. After a team has met together a few times, try playing musical chairs—ask everyone to sit next to someone they don't normally sit beside. This type of activity will help keep cliques from forming on the team.

Process

- **Facilitation.** Start and end the meeting on time, and take breaks every hour to hour and a half. Begin the meeting by stating the goal and review the agenda in case of any changes. Encourage team member involvement by asking questions such as, "How do you feel about this?" and "We haven't heard from you yet on this issue." At various points in the meeting, ask someone to summarize where the discussion is and ask if the issue has been resolved. Paraphrase what others are saying for clarity; if necessary, ask for specific examples. Move the team toward action by asking, "How would you propose we get started?" Get the team on track by relating the topic back to the agenda or to the team's goals. Ask for differing opinions by saying something like, "I think we're trying to avoid disagreeing with each other. Who would be willing to voice a different opinion?" Test for consensus by asking if the decision is something everyone can support. Move toward a decision by indicating that both sides of the issue have been voiced and that the time has come to make a choice.

- **Participation.** As a team participant, it is crucial that you come to the meeting prepared. Read all materials sent in advance and ask for clarification of issues prior to the meeting. Actively listen to the issues, even those that do not interest you, and help move the conversation along. Ask some leading questions to encourage participation if you

feel it is not as interactive as it should be. Offer alternatives and feedback at appropriate times.

- **Side conversations.** The meeting facilitator can ask those involved in a side conversation to share their comments with the rest of the team. Also, a break can be called and the facilitator can approach those involved, letting them know how disruptive their side conversation is to the meeting. If this issue is a major problem, it can be added to the ground rules and referred to when necessary.

Consensus - Follow these 10 steps for reaching consensus:

- Submit the topic to the team for discussion along with data.
- Discuss topic, bringing up questions and solution options.
- The team decides whether to attempt consensus, length of time to be spent on the issue, and what to do if consensus cannot be reached.
- Differences and disagreements are explored and encouraged.
- Suggestions and modifications are recommended.
- Based on the discussion, a new approach is created by the team.
- The facilitator checks for consensus.
- If consensus has not been reached, a variation of the idea is requested from the team and consensus is checked again.
- If there is still no consensus, alternatives are sought.
- If a trial period is agreed to, the test for consensus is again made.

Feedback

- **Preview next meeting.** Upon announcing the next meeting date, preview some of the items that will be on the agenda. Outline unfinished business from the current meeting, then ask if team members know of any issues that need to be addressed at the next meeting.
- **Summarize the current meeting.** Briefly summarize the key points of the current meeting (possibly captured by the Communications Coordinator), especially if specific action items were involved.
- **Critique the current meeting.** Ask the team to evaluate the meeting and make suggestions on how to improve the next one.

Follow-Up

- **Action list.** On a flip chart or white board, capture the action items from the meeting, including parties responsible and due dates. As soon as possible after the meeting, send the action list to the team. Incorporate the action list into the minutes.
- **Minutes.** Set a deadline for distributing the minutes to all team members. The quicker the minutes packet is distributed, the stronger the commitment to completing the tasks will be.
- **Status.** Following through after the meeting is just as important as participating in the meeting. Regularly check on the people to whom you delegated projects. Foster open communication by periodically updating the team on the status of items for which you are responsible.

PLANNING FOR THE FUTURE

“Would you tell me, please, which way I ought to walk from here?” asked Alice.

“That depends a good deal on where you want to get to,” said the cat.

“I don’t much care where,” said Alice.

“Then it doesn’t much matter which way you walk,” said the cat.

Strategic Planning

Being a regional leader is a rewarding and challenging role, and in today’s world, it is complicated by the speed of change in modern life. The question is not whether a group will change, but how?

The goal of the strategic planning process is to organize the future. A good plan can help close the gap between “what is” and “what is wanted.” Preparing a strategic plan is one of the most important processes any organization can undertake. Why? Focus, direction, and consistency are difficult to obtain—and even harder to preserve—in our environment of change and changing leadership. Strategic planning, if done well, provides for all three. Strategic plans are not intended to be “all things to all members.” **They are designed to develop clarity of purpose and to determine how resources should be targeted and used for maximum results.**

Begin the planning process with an environmental analysis, an exercise that identifies the key external issues and/or trends that could impact the region in the future. When thinking about the future, it is important to study emerging trends as well as understand the current reality of how the region operates—its strengths and weaknesses. Another step in planning for the future is envisioning the end result. Skipping this step is like Alice in Wonderland hoping to find her way. The region will, absolutely, find its way, but, without a clear understanding of where it wants to go and a road map to help in getting there, who knows where it will be?

The final element in effective strategic planning is the development of a clear implementation plan which links the written strategic plan with the current operational calendar. It is crucial to remember that a strategic plan is a living document that needs to be reviewed and updated on a regular basis so that it can be adapted to meet the group’s changing needs.

Identify Guiding Principles

Guiding principles are core values in action. Identifying and prioritizing core values is the first step in determining guiding principles. The following questions may help you and your team members focus on your values:

- *What are the qualities that make your Sweet Adelines life better?*
- *What helps you survive, thrive, and prosper?*
- *What would you like to have more of in your Sweet Adelines life?*
- *What would you miss if it were eliminated from your Sweet Adelines life?*
- *What qualities define the person you want to be?*

Once you and the other regional leaders determine the core values of the region's membership, you can formulate guiding principles for the region. Containing words such as trust, respect, discipline, loyalty, honesty, and friendship, guiding principles will help keep the region on track toward its goals. Here are examples of one group's guiding principles:

- We will respect and care for each other.
- We will work together as a team to be on the cutting edge of medicine.
- We will continually reassess what we do and how we can better serve and make the most of our resources.
- Our actions will consistently reflect our core values of honor, commitment, and courage.

It is important to write down your region's guiding principles. Each team member should post a copy of the guiding principles in a visible location as a reminder.

Create a Shared Vision

The world in which we live is the combined image of all of our human minds. We fly in airplanes, own cars and houses, sleep in beds, enjoy air-conditioning, spend money, go to work in the morning, not because these actions are a part of the natural order of the universe, but because we invented them. First we visualized the next step, then we collectively caused it to exist.

Vision is the ability to see beyond the present reality, to invent what does not yet exist, to picture what we want, to imagine the future. We all have some vision of ourselves and our future. If our vision is limited (if it doesn't extend beyond the next Monday night rehearsal or the next regional meeting), we tend to make choices based on what's right in front of us. A good example of vision is U.S. President John F. Kennedy's statement about space: "To the moon and back, safely, by the end of the decade." Vision can be as vague as a dream or as precise as a mission statement. In either case, it describes a realistic future of something that currently does not currently exist.

Formulate a Mission Statement

A group vision sets long-term direction and inspires action. A mission statement is a condensed written form of that vision. Mission statements define the groups (distinguishing them from other groups), set boundaries, and guard against over-extension. In writing a mission statement for the region, consider the following:

- Fundamental reason(s) for the region's existence
- Scope of the region's activities
- Overall direction for the region
- General and specific objectives as well as program plans
- Other publics

Following is the mission statement for Sweet Adelines International:

"Elevating women singers worldwide through education, performance, and competition in barbershop harmony and a cappella music."

Does this mission statement answer these questions:

- Why does this organization exist?
- In whose interest does this organization operate?
- What is this organization trying to accomplish?

Develop Long-Range Goals (Five-Seven Years)

Goals that flow from the mission statement define what your region will do during the next five to seven years. Your team should try to limit goals to no more than five. In writing long-range goals, consider the following:

- A goal statement is a timeless, unbounded statement that describes the condition or attribute that we seek to attain.
- A goal statement does not describe what we will do.
- A goal statement describes how the world will be different, at least in part, because we exist.

After formulating your regional goal statements, evaluate each one by asking:

- Is each one necessary? (by itself)
- Are they sufficient? (as a group)
- Are they feasible?
- Are they appropriate? (to be doing)

A good example of a goal statement is as follows: *“Sweet Adelines International will be recognized throughout the world as the leading organization for women’s four-part barbershop harmony.”*

Develop Strategies

With a mission statement and goals in place, the challenge to the group is to describe how to achieve the region’s vision by writing strategies for each goal. This task will allow the group to organize and focus its resources for maximum results. When creating strategies, use words such as:

- | | |
|-------------|------------|
| • Assess | • Expand |
| • Revise | • Advance |
| • Develop | • Enhance |
| • Explore | • Promote |
| • Upgrade | • Identify |
| • Integrate | • Create |

Each goal should have several strategies or approaches to lead to its accomplishment.

Smart strategy statements are:

- Specific
- Measurable
- Achievable
- Relevant (do the guiding principles support this project?)
- Time sensitive (does it have a deadline or is it one of those things you’ll “get around to.”)

Problem-Solving

One of the most challenging aspects for the regional management team is problem-solving. At times, the team will have ample opportunity to discuss problems or to plan strategies. At other times, there may be little time for deliberation and debate; the team will need to act quickly, cohesively, and decisively. The following strategies can help your team respond as an effective problem-solving unit:

- **Identify and define the problem**—This step is the most important one in problem-solving. Be sure to examine all sides of the problem or issue. If necessary, redefine the problem as you go to ensure team members agree on the core issue(s).

- **Generate solutions**—Concentrate on solutions to the problem, not on the causes. It may be difficult to determine a viable solution right away. Initial solutions are seldom adequate, but they usually stimulate better ones. Look for solutions that meet the needs of all involved, if possible.

Every team member should help brainstorm possible solutions, no matter how unlikely they seem. Do not evaluate these solutions at this point. If the discussion slows, restate the problem. Once the team has established a number of feasible solutions, or when one solution appears to be far superior to the others, it is time to move on to the next step.

- **Evaluate the solutions**—This critical step requires special care. Complete honesty is essential. Do any flaws exist in any of the solutions? Are there reasons why a solution will not work? Will implementing the solution be too difficult? Is it a fair solution for all?

- **Decide on the best solution**—When all the facts are exposed, more often than not, one solution clearly emerges as superior to the rest. The team's commitment to one solution (consensus) is necessary. Don't try to push a particular solution on someone else. If the solution is not freely chosen and accepted by all, chances are that it will not be carried out. When the team appears close to a decision, again state the solution so that all understand what is about to be decided.

- **Implement the solution**—Once a solution has been agreed upon, set a timeline for fixing the problem. If possible, lay out the solution in a series of specific steps. Creating a plan will make monitoring progress easier.

- **Designate a person responsible for monitoring the solution**— Involving the entire team in constant follow-up or supervision of the solution would be inefficient, so appoint one member to monitor the job and give periodic progress reports to the team. The solution should be open for revision, but one individual should not be allowed to modify the solution without consulting with the team and reaching a group agreement.

- **Evaluate the effectiveness of the solution**—Group follow-up will enable team members to learn about the outcome of their efforts. Not all solutions turn out to be wonderful—sometimes weaknesses are discovered. This learning experience will help the team avoid making mistakes in the future.

Problem-solving is not always easy. Even under the best conditions, the team may run into frustrations. Finding an acceptable solution may take more time than expected. Individual team members may become irritated or angry with others who will not open up and express their ideas and feelings, who are too frank in their criticism of others' ideas, or who are too stubborn in defending their own. However, problems solved by teamwork often have longer-lasting and more comprehensive results than those solved by one person alone.

Managing Paperwork

What's in Those Files?

A new regional leader once stated: "The scariest part of my job was inheriting my predecessor's files." Though said in jest, there is an element of truth. New volunteer leaders often shake their heads in wonder as they look through newly acquired files containing years of outdated material. Unfortunately, not knowing where to begin, these same women may pass along the files at the end of their service now fattened by another year's collection of paper.

Isn't it time you found out what's in your files? Take a look. Before you begin, ensure that you have the supplies you might need such as new hanging files, file folders, file tabs, etc. Locate a basket or recycling box for discards. You should aim to discard about 70 percent of the paperwork in your files. Don't panic! Research has shown that people ignore up to 85 percent of the documentation they retain, and that 45 percent of filed material could easily be obtained from duplicate material filed elsewhere. Shout down the little voice inside your head that says, "Don't throw it out. You may need it someday." Chances are you never will.

Start the cleaning process by discarding files which contain obsolete information. This step alone will eliminate a large proportion of your stored paper. Examples of obsolete regional files might include projects that never got off the ground, copies of routine correspondence, outdated newsletters (unless they contain historical documentation), and other information no longer relevant. After discarding obsolete information, go through the files and ask yourself:

- Can I tell immediately by looking at each file label what the file contains?
- Can subject folders bulging with documents be easily subdivided into smaller categories?
- Can folders containing almost no paper be merged under a broader category?
- Are there files with the same or similar subject labels causing confusion?
- Are the files organized so that information can be retrieved quickly and easily?
- Is there an obvious classification system or are the files organized in a haphazard fashion?

Your files will most likely be organized into one of several classification methods:

- By subject matter. Many people find it logical to keep documents which contain similar types of information together in one file. In setting subject categories, beware of defining the category too narrowly.

- Alphabetically. Subject categories are normally arranged alphabetically for ease of retrieval.
- By color. Files can be color coded to identify them as belonging to a particular category.

While reorganizing the files, you might find paperwork that logically belongs in the filing system of someone else. If you think the documents would be more appropriately filed elsewhere, ask the person who will receive the files if they want or need them. Although cleaning the files can be a laborious task, know that you have improved future information retrieval, reduced frustration, and created room for all the new paper you will be generating.

Retaining Pertinent Information

While holding a regional office (or chairing a committee), each coordinator is responsible for maintaining the records in her custody. The responsibility of determining the future value of any record, whether or not it is covered here, rests with the team member. When in doubt, consult with your team about which 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, or could aid a successor in these areas:
 - Performing her duties
 - Making decisions
 - Arriving at timely and accurate solutions to problems

Following is a recommended list of the documentation that should be included in every regional coordinator's files:

- | | |
|---|--|
| • <i>Regional Management Team Handbook</i> | • Regional standing rules |
| • <i>Standard Form Regional Bylaws**</i> | • Regional strategic plan |
| • <i>Policy Book*</i> | • <i>Chapter Guide*</i> |
| • Minutes of team meetings (one year) | • Correspondence pertinent to your position |
| • Regional budget | • Regional and international directories |
| • A list of international staff contacts** | • Last several issues of the regional newsletter |
| • Listing of all Sweet Adelines International Regional Coordinators | |
| • Last several issues of the <i>Regional Leaders' Newsletter**</i> | |

Additional documentation should be kept by regional coordinators pertinent to their position. Examples include:

Communications Coordinator

Rules for Reaching Consensus by Steven Saint

Internationally generated publications (last four issues of each):

*The Pitch Pipe***

*Forward Motion Newsletter***

*Pipe Line Newsletter***

International Beat (combined newsletter for International Music Arrangers, Judges and Faculty)**

Minutes of team meetings (on-going file)

Directors' Coordinator

*Standard Form Chapter Bylaws***

Internationally generated newsletters (last four issues of each):

*Forward Motion Newsletter***

*Pipe Line Newsletter***

*International Beat***

Education Coordinator

*Real Guide to Growth**

Steps Toward Chartering (program for prospective chapters)**

Meetings Made Easy by Gregory Carter

Competition Handbook (a copy of which is included in the *Chapter Guide*, Competition section)

Events Coordinator

Meetings Made Easy by Gregory Carter

Guidelines for Regional Conventions

Finance Coordinator

All tax and financial records

Team minutes from the last 12 months

Reports pertinent to the office of Finance Coordinator

Marketing Coordinator

*Real Guide to Growth**

Membership Coordinator

*Real Guide to Growth**

Steps Toward Chartering (program for prospective chapters)**

Rules for Reaching Consensus by Steven Saint
*Standard Form Chapter Bylaws***
*Prospective Quarterly***
Chapter officer lists (current fiscal year)
Chapter newsletters (current issues)

Team Coordinator

Meetings Made Easy by Gregory Carter
Rules for Reaching Consensus by Steven Saint
*Standard Form Chapter Bylaws***
Robert's Rules of Order, Newly Revised
A master calendar

*Available from the international sales department, 877-545-5441, 918-622-1444 or
www.sweetadelineintl.org/shop.cfm.

**Available online at www.sweetadelines.com.

Tips for a Clear Desk

Getting organized—it seems like a daunting task. What will you do with all the information you receive from regional training sessions, not to mention the daily flow of mail from your own mailbox? Here are some tips:

- Find one location in your home from which to operate, whether it's an entire room converted to an office or a card table in the corner of your kitchen (by the phone). Conduct as much of your Sweet Adelines business as possible from this location and alert your family that the space is off-limits.
- Find a location for your files near or in your office area. Your system can be as sophisticated as a four drawer file cabinet or as creative as stacked plastic file crates.
- Beware of writing notes on the backs of envelopes or little pieces of paper. What happens to them? If you're like most people, you'll lose some of them or wonder who you were supposed to call at the phone number labeled "important." Save yourself a headache and place the information where you'll be able to find it. Quickly label and file the information in a folder under a specific category, or write information needed for quick reference on a post-it note and display it on a bulletin board near your phone. Use your desk calendar to remind you of important deadlines and upcoming actions that you can't do today.
- Open your mail promptly, read it, and sort it using the TRAF system. Make it your goal to handle a piece of paper only once.
 - **T = Toss.** We keep more than we need. More than 80 percent of papers that are filed are never retrieved.
 - **R = Refer.** Communicate with the person who should handle the request. Follow up with that person to ensure items were completed.

- **A = Act.** Reply via phone, fax, or email to the request. If your schedule will not allow you to act today, mark on your calendar the deadline for the task, and note in which file the background information can be found.
 - **F = File.**
- Keep a running record on a notepad of phone calls made and received. Date the calls and briefly describe them. You'll be amazed at how many times this record will serve as a reference or jog your memory about some action that needs to be taken.
 - Keep a photocopy file handy for items to be copied; make copies weekly to distribute or file.
 - Pace yourself. Don't let paperwork stack up and then look at it in a panic a month later. Set aside a couple of hours per week to keep on top of your mail and reports.

Your Relationships

The kind of memory that your term as a regional coordinator will evoke in the years to come depends more on how you do your job rather than what you do in the job. Your relationships with the other leaders on your team as well as with your chorus and international contacts can help or hinder your ability to do your job.

Relationships with Team Members

Finding team harmony takes time, but it is an important goal to pursue. If team members are having trouble getting along, they will not come close to achieving their true potential as a team. You can help group interaction by being positive, developing a sense of fair play, showing respect for others' opinions, and keeping a sense of humor.

One of the first steps you can take toward forming good relationships with your team members is to become familiar with each coordinator's job description. (See Matrix of Responsibilities located in the *Appendix* section of this handbook.) It is essential that you and your teammates define specific areas of responsibility early in your terms, while at the same time acknowledging the overlap among your responsibilities. The key is mutual understanding about who will do what. Once primary responsibilities are agreed upon and understood, play your position. Learn what's expected of you—duties, standards of performance, time frames, and deadlines.

Teamwork, by definition, implies interdependence. Others on the team depend on you for their success, their effectiveness. Because teamwork carries an element of risk, even in the best of circumstances, it's important to protect and nurture the trust level. If others can count on you to be there and fulfill your responsibilities, the team will grow. If you are careless about covering your assignments, teammates will have to abandon their duties to bail you out, lowering their trust level in your abilities. When each member of the team does what's expected of her, the team achieves a coordinated effort.

Sometimes you will need to cover for teammates, since everyone needs a little help now and then. Show grace by forgiving teammates who make a mistake, and share the spot

light when you've achieved success. Be willing to compromise and share some of the time, rather than insisting on having your own way.

Relationships with Regional Staff/Chairs

Be understanding! Be encouraging! After all, Sweet Adelines is a hobby, and personal problems can play havoc with even the most efficient Sweet Adeline. Always appreciate the effort put into a job, even if the results are not as complete as you had hoped. If someone goofs, point it out with as much understanding as possible.

If a regional staff person assists you with your responsibilities, put your coaching and delegation skills into practice. Each person on your staff is a potential regional coordinator. Help her grow by assigning her a valuable project, making sure she understands/knows how to do it, and giving her credit when the job is complete. Don't be offended if a worker has ideas completely opposite to yours in how to get the job done. Give her a chance to expound her ideas—they might work!

Relationships with Choruses

As a member of the Regional Management Team, you may have more opportunities to participate in chorus events and visits. As a representative of the region, each chorus in your region will expect you to be impartial and supportive when making a visit or attending a show or charter party. Before making a visit, communicate with other team members to learn more about the chorus and its activities. Sometimes an unwary regional leader becomes involved in a chorus conflict that she didn't realize was brewing! As a guest of the chorus, show dignity to your office by wearing proper attire and displaying a warm smile. Follow up your visit with the appropriate communiqué depending on the reason for your visit: a report, additional information, or a warm, friendly note of thanks. If you think the chorus would benefit from scheduling further regional assistance, talk with your Education Coordinator. (If you are the Education Coordinator, make a note to discuss with the team.)

What about your relationship with your own chorus? Chorus members were probably proud when you were elected/appointed to the regional team. However, don't be surprised if this glow felt by your fellow chorus members fades. They will become accustomed to your new office after a few months, and will grow tired if you expect special favors and recognition week after week. Make a mental note to save your advice on procedure until it is requested; then, everyone will be more likely to listen to you. Your duties as a member of the regional team will require much of your time and energy; you may have to slow down your chorus responsibilities. If you feel pressured to juggle more than you can handle, share this concern with your chorus members.

Relationships with International Headquarters and International

Committees Contacts at international headquarters are important as staff can provide you with invaluable information, service, and support that will help you in carrying out your responsibilities. You will find staff is approachable and eager to assist.

The Regional Leadership Committee (RLC) closely monitor regional affairs, and are instrumental in making recommendations for the appointment of the Education Coordinator. (The RLC reports to the International Board of Directors.) Regional coordinators are encouraged to keep in contact with members of the RLC and to bring to the committee's attention any regional concerns or suggestions.

While you are always free to communicate or consult with the International President, the International Board of Directors, and the Regional Leadership Committee, remember that these volunteer leaders do not reside in Tulsa, Oklahoma, but in many different areas, some far from headquarters. Also, some of the international leaders travel widely as coaches or as members of the international faculty. Therefore, for prompt response on routine information or requests, communicate directly with international headquarters.

Members of the regional team will have several opportunities to interact with the International President, the International Board of Directors, and with members of the Regional Leadership Committee at AHA and at international convention.

Relationships with Visiting VIPs

When an honored guest, such as the International President, a past international president, an international board member, or any other dignitary inside or outside of Sweet Adelines International, attends your regional event, treat her with the courtesy she is due:

- Upon learning that a visit by a VIP is scheduled for your region, contact her to let her know that the region is looking forward to the visit. Ask the visitor if she has any special needs: teaching aides, equipment, special dietary considerations, etc.
- Offer to make hotel reservations for your expected guest. Meet her at the airport, train or bus station, or at her hotel if she prefers.
- Inform the VIP of any unexpected changes to the schedule, or if you would like her to attend a special event. Don't be offended if the guest is reluctant to make the unexpected changes; search for a resolution that benefits all parties.
- Introduce the guest before and after your regional meeting or event. Latecomers may not have had the opportunity to meet the guest earlier. Also, introduce any other special guests from outside the organization who might be present.
- Seat the guest at a head table or in a reserved seating area.
- Take care of your guest until she leaves your city.

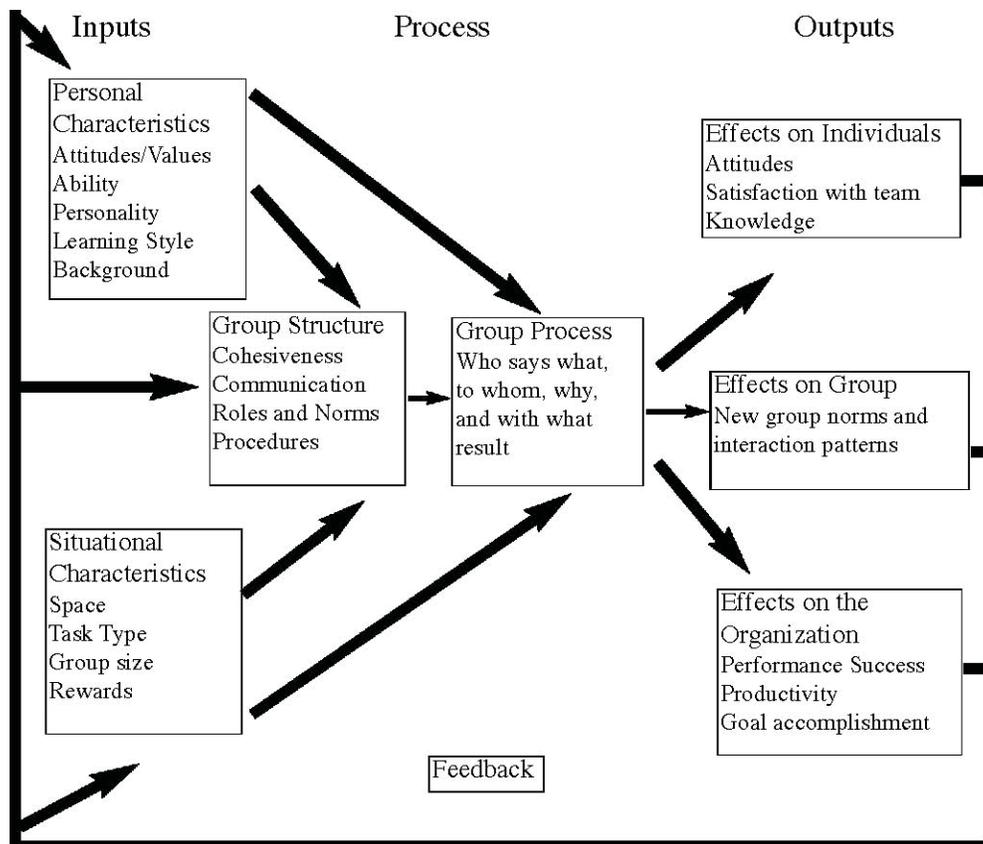
The End Result

The end result of nurturing your relationships is your own personal growth. You also will, undoubtedly, make many new friends and win the respect of your team and regional members. Remember that building relationships requires trusting others to give their best, having empathy and understanding, being flexible, and keeping a positive outlook! If you don't always meet your own expectations, forgive yourself and try again!

Team Development

Decision-making teams are among the most powerful forces on earth. Teams erected the Golden Gate Bridge, climbed Mt. Everest, unraveled the secrets of DNA, and launched spaceships to the moon. However, dysfunctional teams spawned the Bay of Pigs debacle, overlooked faulty equipment in the *Challenger* disaster, and blew up the Oklahoma City Federal Building and World Trade Center. It is obvious that effective decision-making groups can achieve synergy—that law-of-physics-defying state in which the whole is greater than the sum of its parts. What, then, are the critical elements to creating effective decision-making groups that also avoid group pitfalls such as “free riders” or “groupthink?” More importantly, how can our Regional Management Teams (RMTs) develop into powerful and effective decision-making groups that will accomplish great feats?

Before exploring issues of team development, it is essential that RMT members gain some understanding of group process. The following model of small group behavior is appropriate in depicting the inputs, process, and outputs of any decision-making group:



An Open-Systems Theory Model of Small Group Behavior

The following paragraphs discuss the principle elements of the small group model—personal characteristics, situational characteristics, and group process—and include suggestions for team development activities as RMTs implement the new team structure.

Personal Characteristics

Every member of the team brings her own set of experiences, personality, and problem-solving approaches to the decision-making table. The issue, then, for teams is heterogeneity vs. homogeneity. The more heterogeneous (different) the group members are, the more resources, talents, and perspectives that can be focused on the problems facing the group. Thus, heterogeneity generates creativity and synergy. On the other hand, a heterogeneous group is at a greater risk for internal conflict and lengthy meetings.

The more homogeneous (similar) the group members are, the more likely they will view a problem in the same way, allowing for quicker decision-making. Thus, homogeneity provides for team cohesiveness and quicker decision-making. On the other hand, a homogeneous group is a greater risk for “groupthink”—assumptions of unanimity, discounting of negative information, and pressures to conform to group norms. Which is best? Most experts agree that effective decision-making groups should be heterogeneous in perspectives, abilities, and problem-solving styles, but homogeneous in purpose and mission.

Activity:

Before convening the first RMT meeting, survey team members to determine their different approaches to problem-solving through such devices as *Kolb’s Learning Style Inventory*, the *Myers-Briggs Personality Inventory*, or the *Colors Personal Assessment*. (See *Bibliography* for information regarding sources of these surveys.)

Situational Characteristics

Size and Rewards

The most effective decision-making groups are small, about seven to 10 members. With eight members, the RMTs are appropriately sized. Rewards for RMT members are intrinsic—team members participate because of a personal need to contribute, and goal-achievement tends to be its own reward.

Type of Tasks

Group tasks can be categorized into three types:

- Additive—task in which the group’s performance is a function of all members’ efforts aggregated. An example is a tug-of-war team or a choral group.
- Disjunctive—task in which the group’s performance is a function of the best single performer (only one has to perform well). An example is a research team seeking the “one right answer.”
- Conjunctive—task in which the group’s performance is a function of the worst single performer (all members must perform well for the group to excel.) An example is a professional basketball team or a team of surgeons.

Tasks performed by RMTs are primarily additive, in terms of the roles or responsibilities of each team member, and conjunctive, in terms of the decisions that must be made at RMT meetings. Therefore, it is essential that each member contribute equal effort and view herself as an equally important member of the team.

Group Structure and Process

The critical elements of group process include cohesiveness, communication, decision-making procedures, task behaviors, maintenance behaviors, and group norms.

Cohesiveness is determined by the extent to which members desire to remain in the group and maintain the closeness of the group. Effective teams are typically “well-bonded,” and members see themselves as a unit. Two of the most effective group bonding agents are:

- Between-group competition (for example, the team jointly provides “rah-rah” support for its regional contenders at international competition)
- Frequent interaction (for example, team members frequently socialize and participate in other opportunities to get to know each other.)

Communication refers to the pattern of talking within the group (who talks to whom, how often, how long, who talks after whom, who interrupts whom, and the nonverbal messages that are transmitted, either consciously or unconsciously.) Effective groups display communication patterns that include minimal interruptions, a norm of allowing members to complete their thoughts, and frequent interaction and feedback.

Activities:

- Ask an observer to create a “sociogram” to identify communication patterns within the group.
- Facilitate *Listening Trios* to practice active, nondirective listening and feedback. (See *Bibliography* for details about sources.)

Decision-making procedures can vary from no decision at all to consensus. The decision-making procedure favored by effective teams is consensus. However, achieving consensus is time-consuming and requires careful attention to consensus-seeking guidelines such as the following:

- Avoid arguing blindly for your own opinions. Present your position clearly and logically, but listen to other members’ reactions and consider them carefully before pressing your point.
- Avoid changing your mind just to reach agreement or to avoid conflict. Support only the points with which you are able to agree. Yield only to positions that have logically sound foundations, and that do not compromise your principles.
- Avoid conflict-reducing tactics such as voting, tossing a coin, averaging, or bargaining.
- Seek out differences of opinion. Try to involve everyone in the decision process. Disagreements can enhance the decision-making process because a wide range of information and opinions are brought to the table, often allowing the group to find a more viable solution.
- Do not assume a win/lose outcome when discussion reaches a stalemate. Instead, look for an acceptable alternative for all members.
- Discuss underlying assumptions, listen carefully to one another, and encourage the participation of all members.

Activity:

Participate in several short exercises in creative decision-making. Helpful and fun exercises can be found on the internet and in books on decision-making and leadership.

Task-oriented behaviors are the actions that keep the group on track toward accomplishing its goals. Task behaviors include initiating discussion, seeking and giving information, clarifying and elaborating, and summarizing.

Maintenance-oriented behaviors are actions that focus on process issues as well as on keeping the group cohesive, happy, and harmonious. Maintenance behaviors include gate keeping, encouraging involvement, harmonizing, compromising, and testing for consensus. It is essential that members of RMTs adopt individual responsibility for ensuring that both task and maintenance behaviors are exhibited.

Group norms are standards of behavior that are expected of, and accepted by, group members. Group norms can be very beneficial to the team's success. For example, a norm of not interrupting while listening can help the team hear all points of view. Even a norm of playing devil's advocate can be very beneficial in helping a team avoid "groupthink."

Activity:

Any of several "values clarification" exercises will help a group understand the standards of behavior that are shared by its members. A simple exercise is to ask the team members to brainstorm all the behaviors or issues they believe are important to the group, post the results, and vote on the top 10 items. Individually, sort these 10 items into four categories:

- A - I value this behavior highly, and the group exhibits it strongly.
- B - I don't value this behavior as highly, but the group exhibits it strongly.
- C - I value this behavior highly, but the group does not exhibit it strongly.
- D - I don't value this behavior as highly, and the group does not exhibit it strongly.

Category A represents the group's culture, or shared values, while Category D is actually of little concern to the group. Category B is an issue for the individual team member because she does not share that particular group value. Category C should become the focus of any team development activity because it represents values that need to become a part of the standard behaviors of the team.

Sources of Conflict Within Groups

Groups, or teams, develop in stages, from forming (the initial getting together), storming (conflicts arising because of struggles over roles and power issues), norming (acceptance of roles and standards of behavior), and performing (the accomplishment of team goals). Effective teams work through the storming phase as quickly as possible, moving steadily to norming and performing.

Reducing the storming time requires focusing on four potential sources of conflict within groups: goals, roles, procedures and interpersonal issues—in that priority. By focusing on mutually established goals first, then clarifying roles and responsibilities, while allowing members to follow their own methods for accomplishing tasks, most teams find that the interpersonal issues take care of themselves. Unfortunately, groups in conflict tend to place more emphasis on procedures and interpersonal issues rather than on the more important goals and roles. Remember the “80/20 rule”: we spend 80 percent of our time working on issues that only pay off in 20 percent of our results.

Using Technology

Over the past 100 years, technology has progressed far beyond what any of our grandmothers could have ever imagined! Yet, as far as we’ve come in this century, our current technological state will at least double in the next few years. Just to keep up with our children’s technical capabilities will be a challenge.

Using and understanding the technology now available is not an option, but a necessity for busy members of the Regional Management Team. To facilitate your job as regional coordinator, make the most efficient use of the technological tools available today:

Email

Email is now a way of life. Whether you are someone who is online all day, or a person who checks email only a few times a week, email has improved the way we communicate with our regional members. Many RMTs now conduct business and make decisions by email, rather than waiting until the next meeting. Please refer to the *Communications Coordinator* chapter of this handbook for more about emailing.

Telephone

- Check your voice mail regularly and respond in a timely manner.
- Conference calls are less expensive and sometimes more efficient than making arrangements for and traveling to physical meetings. Here are some general steps to follow when setting up a conference call:
 - Making the connection – Conference calls can be connected by two basic methods. One way is to reserve a call through a teleconferencing contractor. You specify the date, the time (including the time zone), and the names and telephone numbers of the participants. A second method which you may find more convenient allows participants to call an 800-number from wherever they are to be connected to a reserved call. This call-in feature provides maximum flexibility to all participants because they do not have to be tied to one phone to participate in the call.

- Preparing the agenda – As with any agenda, ensure that the discussion items are assigned and that knowledgeable people report on those items. Distribute the agenda in advance so that participants have adequate time to study the topics.
- Initiating the call – Start the call on time. If necessary, the facilitator can update a tardy participant following the call. Begin the call with an enthusiastic opening and a reminder of teleconferencing protocol (stating names before contributing to the discussion, keeping background noise to a minimum, and keeping comments concise and focused). Provide instructions on what to do in the event of a disconnected call.
- Planning participation – Plan the content and format of the conference call in a way that encourages active participation. Stay focused on the agenda, and limit the call to an hour-and-a-half. If participants begin to lose energy and focus, allow them to take a phone break by setting the phone down for five minutes.
- Staying on track – Using direct language such as, “Please turn to page 8 of Sylvia’s report,” involves participants and focuses everyone on the same material. Call participants by name when asking questions or responding. Occasionally, ask open-ended questions such as, “Before we end discussion on this agenda item, do you have questions or comments?”
- Assign a participant to take minutes – It’s just as important to keep a record of what was said, who said it, and what action was taken during a conference call as in a physical meeting. The question often arises of whether to tape the meeting for the purpose of the minutes. Because the legality of taping phone calls varies from state to state, it’s probably not a good idea to tape these conversations unless participants are notified in advance and everyone is in agreement.

Fax

Although no longer as common as in the past, faxes are handy for agendas, schedules, forms, and similar documents. Most fax machines will send a confirmation notice to let you know the fax was sent successfully. Computers often include internal fax programs, so it is not necessary to print a copy and fax it. Simply select the fax command instead of the print command.

Internet

- Host a regional Website. Include maps and directions to each chorus in your region. This site should also include information about upcoming regional events such as schools and contests. Link the page to Sweet Adelines International (<http://sweetadelines.com>) as well as choruses and quartets within your region. Link up with other regions and share as much information as possible.
- The Internet is a great resource for all kinds of educational materials. Learn to use it as if it were an “in-house” library.

- Use Facebook and YouTube as valuable marketing and communication tools — a great way to reach out to younger potential members.
- Establish e-groups within your region to make communication more efficient and faster. Types of e-groups to consider:
 - Full region (all members) e-group
 - Directors e-group
 - Presidents/Team Coordinators e-group
 - Finance Coordinators e-group

Hardware and Software

- If the regional budget allows, purchase a laptop computer for your minute taker. Laptops are invaluable tools, and greatly speed up the process of taking the minutes of a meeting and publishing them for all the participants. Amazon and Tiger Direct are great sources for buying laptops at lower costs.
- Your team should discuss what kinds of computer software it wants to use for the recordkeeping of the region. The options are plentiful, but you will want to consider purchasing software for accounting/bookkeeping, word processing, data processing (database), and presentations.
- Remember that not every member of your region has or wants a computer. Be mindful to keep everyone in the communication loop. If you send a message to all chorus directors and you know some do not have email, print the message and fax it or put it in regular mail.

Technology Tools

The following is a collection of helpful Websites:

Software Education

lynda.com Software instruction site – for \$25/month, learn just about any software application

creativecow.com Tutorials for practically every creative software application used today from desktop publishing to photography to web design.

Communication

www.EasyConference.com Free conference call-in numbers - no setup fees
 ww.freeaudioconferencing.com Free conference call-in numbers - no setup fees
 www.skype.com Use your computer to call anywhere in the world

Photographs Clipart, and Fonts

iStockphoto.com	Inexpensive royalty-free stock photography
dreamstime.com	\$1 stock photography
shutterstock.com	\$159 per month (as opposed to \$225 per picture). You can download 25 photos per day. Best if you have a need for a large quantity of photos.
fresherimage.com	Large selection of clipart
dafont.com	Download unusual fonts – see what your text will look like before you buy
whatthefont.com	Upload a scanned image of an unknown font and find the font name or a close match

Proofreading/Editing Help

editavenue.com	Direct access to hundreds of professional copy editors and proofreaders
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Printing Services

cafepress.com	Inexpensive color printing
48hourprint.com	Inexpensive color printing
Gotprint.com	Inexpensive color printing
Vistaprint.com	Inexpensive color printing

Website Hosting, Domain Registration, and FTP

www.ixwebhosting.com	For hosting and domain registration - includes FREE Site Builder tool.
www.godaddy.com	For hosting and domain registration - includes FREE Site Builder tool.
www.dot5hosting.com	For hosting and domain registration - includes FREE Site Builder tool.
www.hostmonster.com	For hosting and domain registration - includes FREE Site Builder tool.
www.doteasy.com	For hosting and domain registration - includes FREE Site Builder tool.
www.smartftp.com	FTP (File Transfer Protocol) program for uploading files to hosting locations

Website Help

CTC_Forum@yahoo.com	Email group for Communication Coordinators
webstyleguide.com	Basic information about putting together a Website
http://ict.cas.psu.edu/Training/instrmats/BasicDesign/Begin.html	Basic information about Website development
webdesignfromscratch.com	Basic information about Website development

Time Management

Each of us has the same amount of time in a day no matter who we are or what position in life we hold—24 hours in a day, 168 hours in a week, and 8,760 hours in a year. Yet, some people accomplish much within a given period of time, while others accomplish little and bemoan their “lack of time.” Those who are most successful in effectively managing their time have a desire to do the task at hand, and have learned how to analyze, plan, and commit to a course of action. As basic as these time management principles may seem, they are not always easy to implement.

Establish Goals

Most people achieve because they have a plan. An important part of planning is deciding on a goal (or goals). A goal can be defined as “the end toward which effort is directed.” A goal should include the following elements:

- Goals should be specific, not fuzzy or abstract. For example, don’t say, “I want to be financially secure,” but instead say, “By January 31, I will enroll in a computer software class which will enable me to advance in my job.” State the goal positively; the goal should be something you are going to do as opposed to something you want to do.
- Goals should be achievable. Consider the necessary resources to achieve the goal such as money, time, or people to assist you.
- Goals should be measurable. Include in your goal some type of measurement so you can stop, evaluate, and in some way calculate your progress.

Once you have established your goals, determine tasks that will help you reach your desired result. Check occasionally that your tasks (activities) are leading to your goal. Make corrections to keep yourself on course. After listing the tasks necessary to reach your goal, arrange them in the most effective sequence. Sometimes the order in which a task is accomplished is not essential to the goal, while at other times it can be important to its success. Spend as much time as possible in activities that support your goals.

Get Organized

We have all uttered that well-worn phrase, “I’ve got to get organized!” Although we know that becoming better organized would make life smoother and less harried, we often fail to make the necessary changes. Following are conditions that affect your ability to organize:

Time Wasters distract us from completing projects that have more value and importance. We tend to blame others for wasting our time when it’s really our own fault; we blame our problems as being externally generated. Yet, when common time wasters are listed, it’s obvious many of them are internally generated: inability to say no, socializing, ineffective delegation, lack of self-discipline, personal disorganization, or indulging in perfectionism. Be aware of the habits you have acquired that hinder your progress, then take action to overcome them.

Biocycles—natural body rhythms—affect productivity. We all have times when we are highly productive and other times when we can accomplish little. Some individuals are most productive in the morning while others perk up in the afternoon. While many theories on the influence of biocycles exist, we have ample evidence of our own individual performance cycles. Try to accomplish your more difficult tasks during your peak activity time.

Procrastination—Most of us find it easy to do certain tasks and difficult to accomplish others. Tasks that appear to be too big, too hard, or just plain unpleasant are frequently postponed. However, avoiding unpleasant tasks does not make them disappear, and often assignments become more worrisome as time passes. Following are three ideas to help motivate you when facing those less than desirable tasks:

- Break the project down into segments. Once you complete part of the project, the remaining segments will seem more manageable.
- Take on a difficult or distasteful project when you are in a period of peak performance and are best able to concentrate. Keep distractions to a minimum.
- Announce publicly when you anticipate completing the task. The deadline will give you an incentive to achieve the goal to which you have committed.

Setting Priorities

Setting priorities is one of the most important aspects of time management. You may have heard of the Pareto principle, which was originated by Italian economist Vilfredo Pareto, that states that 80 percent of your results come from 20 percent of your activities. In other words, learn to concentrate your best efforts on the most rewarding results in order to make the most effective use of your time. Many time management experts use a box matrix divided into four parts (as seen in the following illustration) to evaluate and rank tasks by importance and by urgency. Although these two words may seem to have the same meaning, they are different. “Urgent” involves a short deadline, while “important” conveys a high payoff for completing the task. Therefore, what is urgent may not be important, and what is important may not be urgent.

Importance	High	Do it later	Do it now
	Low	Discard or ignore	Delegate or pass it on
		Low	High

Urgency

When prioritizing tasks, begin by visualizing or drawing the matrix, then identify into which of the four segments each task will fall. This activity will indicate where to focus the majority of your time and effort. For example:

High importance and high urgency: **Do it now!** The hotel contract for the regional convention has just arrived for your signature. The hotel is holding the space for one more week before releasing it to another association. Sign the contract today and take steps to ensure that it is promptly delivered to the hotel.

High importance and low urgency: **Do it later.** As Education Coordinator, you just received registration materials for the state NAFME (formerly MENC) convention in which you plan to exhibit. The deadline is a month away, and you want to discuss details with the YWIH coordinator next week. File the letter for action following next week's meeting.

Low importance and high urgency: **Delegate when possible.** You just received an urgent fax from a chorus president wanting some financial information for a board meeting the chorus is holding tonight. Call your Finance Coordinator and ask that she fax the appropriate information to the chorus president.

Low importance and low urgency: **Discard or ignore.** In today's mail, you receive a brochure titled, "Mexico: Your Vacation Destination." Realizing this vacation is presently a fantasy, you toss it into your waste-paper basket. The phone rings. It's a regional management team member who calls to say that she has decided she can't support a decision made at the recent meeting. You listen politely, but remind the member that the issue has previously been discussed at the meeting and you are sorry if the member has since changed her mind. After the call, hang up and turn your mind to more productive tasks.

Most people spend too much time doing tasks that are urgent, but not important, or tasks that have little urgency or importance. These types of tasks are usually easy, quick, and provide a temporary sense of accomplishment. However, it is more effective to tackle the urgent and important tasks first as they provide the greatest payback.

Don't Wait, Delegate!

Delegation is a key management tool, a skill that can make the difference between success or failure. The definition of delegation is getting work accomplished through the efforts of others. While delegating might initially seem like a method to avoid doing the work yourself, effective delegation is not only practical, but critical to effective management. No matter how much you enjoy watching your Superwoman cape flutter in the breeze, neither you nor the team can do it all.

When a job is delegated, another person benefits directly by being given the opportunity to grow and learn new skills. Delegating a project may involve some risk-taking such as acknowledging other ways of completing tasks, or developing a reasonable tolerance for occasional mistakes or unexpected outcomes.

To become a successful and experienced delegator, examine your attitude. The key is to be willing to delegate to others to obtain the best outcome; letting go is the operative action. Delegation is a learned process that takes thought and planning. Here are some guidelines for successful delegation:

- **Select the right person for the job.** Know what the job entails, then seek out the individual who is most skilled and willing. For example, give a chorus member an assignment on the regional level that would broaden her understanding of the regional structure. Show the volunteer that you are willing to let her try new tasks.

- **Once you select the individual to whom you will delegate, give that person all the information and resources she needs to get the job done successfully.** If she will be interacting with other committees or groups, give her the contact information.

- **Once you have delegated the assignment, let the person do it in her own way.** Don't impose your own methodology. Try to supervise from a distance.

- **Set specific deadlines.** Don't be vague about reporting and due dates.

- **Encourage free flow of information and keep communication lines open.** Ask for feedback to make certain the individual understands her assignment and your expectations. As her "supervisor," you cannot shed your final responsibility: The outcome of the delegated task is yours.

- **Give full authority to the person you have chosen to accomplish the task.** Turn over the entire job, not just the parts you don't want to do yourself. Be clear about who is accountable and responsible. Stand up for and support the people to whom you delegate. Let others know that your delegee has been given the authority to get the job done.

- **Offer guidance and advice without interfering,** but point out where the difficulties may lie or who the individuals are that may attempt to throw stumbling blocks in the delegee's path.

- **Establish a system of controls.** Set conditions and terms. If a delegated assignment is not meeting your expectations, make suggestions for a correction, but do not revoke the assignment. Work with the individual and ask for her recommendations to solve the problem.

- **When a delegated assignment is successfully completed, give full credit to the person who got the job done;** let her receive the recognition.

If delegation is so crucial to success, why are some leaders so reluctant to share the work load? Following are four common reasons:

- **Desire for Perfection.** Some people feel that no one else can do certain projects or tasks as well as they can. If this is your personality style, start by delegating tasks that do not require perfection. Or, find others who would be willing to develop the ability to perform a certain task to your satisfaction.

- **No time to train or explain.** While you may find that completing certain short-term or one-time-only projects is faster done yourself, spending time teaching others how to perform time-consuming or repetitive tasks is time well spent.
- **Lack of confidence in the abilities of others.** Begin delegating relatively minor tasks and observe the abilities of others. Assign increasingly responsible tasks to those who prove they can complete work in a timely and effective manner. This exercise is an excellent way to develop new leaders.
- **Personal satisfaction.** If you enjoy a task or receive recognition from others when you perform it, you may want to reserve the task for yourself when you should be delegating it. In such a case, look for other areas in which you might achieve personal reward and satisfaction.

The more frequently you delegate, the easier and more natural it will become. When you delegate, you are giving another individual the opportunity to participate, as well as to obtain a broader, more complete view. Effective delegation multiplies your success.

Finding and Recruiting New Regional Workers

Each region has members with valuable skills and talents. As these members work within their choruses, the most talented ones rise to prominence. Regional leaders must be on the lookout continually for members who have the potential to serve on the regional level. This requires the infusion of new talent and new ideas. Although a member has the ability to succeed as a regional contributor, she may not think of herself in that role. Often it takes a word of encouragement from a current regional leader to spur the member's interest in pursuing regional involvement. Once you have discovered promising members, appoint them to a regional committee where they can try their wings. By observing their methods and results, you can counsel them, train them, and groom them.

All members of the Regional Management Team may not know each individual who shows potential. A regional leader may know of a specific individual's strengths, talents, and interests, but that information must be shared with the other team members. By sharing the information, each region develops a pool of qualified members. These members can then be called upon for various tasks and assignments.

Those who submit an Application for Regional Position provide valuable information about themselves. It is important to capture this information and make it available for future use. Even when you believe you know someone well, you sometimes can expand your knowledge of that person by reading her application. She may have interests and abilities beyond what you currently know.

Not every individual who completes an Application for Regional Position will be interested in serving on the Regional Management Team. Some may prefer to serve on a regional committee or work group to gain confidence or insight, while others are willing to contribute but have limited time. Use the final page of the Application for Regional Position to gather information on these individuals including their interest preference.

Some regions ask their members to complete Talent Surveys in order to update regional information. Such a survey could be used to collect information about applicants for future RMT positions and the information captured and made available in the future. This information should be available to all RMT members.

The Communications Coordinator is responsible for creating and maintaining the database that contains all this leadership information. Data from each application must be entered into the database. The leadership data should be updated at least once a year.

Assessing Regional Needs

One of the most important responsibilities of the regional management team is developing an education plan for the region. The audiences are varied—chorus directors, section leaders, choreographers, quartets, Director Certification Program participants, administrative leaders, arrangers, and regional staffs. Where should you start in developing your plan? First, you must assess the needs of your region.

Evaluation Tools

Many resources are available to the Regional Management Team to use in determining what direction the education plan should take. Competition provides an excellent opportunity to identify areas where choruses need assistance. Membership and attendance data from regional events can indicate the success of regional programs.

- **Contest Scores.** In addition to receiving the quartet and chorus tabulation sheets from your regional contest, international headquarters sends data on how your region compares with other regions. Track the scores for several years, watching for emerging trends. Are all choruses scoring lower? Do you see an improvement in a specific area where you have been focusing? Look at the overall level of the region and at how many A-, B-, and C-level choruses you have in the region.
- **Judges Observation Sheets:** After regional contest, each judge will provide an observation sheet that can be used in developing future educational opportunities. Take the comments seriously, but don't design your program around those comments alone. Keep a record of the comments over the years to see if similar observations continue to be cited or if improvements are noted in areas that have been emphasized in your education program. Share these comments with the chorus directors in your region.

- **Membership Data.** International headquarters can provide you with statistics on the number of members in each of your region's choruses. Again, it may prove useful to study the trends in your region's membership over several years. Is your membership increasing? What about the size of your choruses? Are your smaller choruses getting smaller?
- **Attendance Data.** Use attendance figures from regional conventions, music schools, specialty workshops, and international events to evaluate degree of interest and effect of different locations.
- **Workshop Evaluations.** Review evaluations from previous schools and workshops for insight into members' educational experiences. What could be done better to reach more people? What classes would participants like to enroll in at future schools?
- **Director Certification Program (DCP) Self-Evaluations.** Each DCP participant submits a self-evaluation which could be useful in determining the needs for that particular specialty group.
- **Surveys, Questionnaires, and Focus Groups.** Surveys, questionnaires, and focus groups are tools that can be used to solicit input from directors, presidents/ team coordinators, and members about their perceptions of the region. Surveys and questionnaires should be short and concise. "Yes" or "No" answers and Likert Scales (completely satisfied, satisfied, and not satisfied) allow for quick completion and compilation. In examining the data, note how many surveys were returned and who returned them. Excellent for deriving opinions on more complex issues, focus groups can be held at a director's retreat or at a president's forum. Telephone conferences and e-mail also may help facilitate focus groups.
- **International and Regional Faculty.** Talk to members of the international and regional faculty to gather their perspectives of regional needs.
- **Strategic Plan.** Review the region's strategic plan to determine the direction of the region.

The Big Picture

All of the above-mentioned data should be considered in order to obtain a realistic picture of your region. As you formulate your analysis, you may require additional information. Answer the following questions as they pertain to your region:

- List programs that have been planned/developed for general membership, chorus directors, other musical leaders, quartets, arrangers, showmanship, and regional faculty and staff.
- Identify the programs that were successful in the past. Tell why they were successful.
- Indicate those programs that were not successful and why.

- What areas in your region seem to be strong at this point? Why?
- What areas seem to be in need of the most attention?
- What is the musical caliber of the region overall?
- What percentage of chapters/members participate in regional events other than competition?
- What percentage of chapters and quartets compete in regional competition?
- How many registered quartets are in the region?
- What is the status of the Director Certification Program in your region? How does it affect the choice of programs/classes?
- Which regional members are available as resource people in specialized areas? (judges, international faculty, international champions, international music arrangers, etc.)
- What environmental factors, such as geography or the economy, affect members in your region? How have they affected regional music education programs during the past two or three years?

Once you have assessed the region's needs and set your priorities, outline a plan for the next three to five years. You also may want to create a matrix that details the scheduled events and audiences these events will target.

Team-Building

Team players are in high demand! When managers in one study were asked to name the most important traits of a perfect staff member, being a “team player” ranked highest, ahead of factors such as dedication, problem-solving, experience, and good communication.

We all know that teams don't “just happen” and a person doesn't come to the table a “certified” team member. Several ingredients are necessary for the team to evolve into an effective performing group. First, a team needs a supportive environment that includes adequate time for meetings as well as an expectation that members will function as a team. Team members also must have clarification about their expected roles, and a goal to keep them oriented toward achieving a mutual objective. Most of all, team members need regular opportunities to interact with each other and learn from the interactions.

Team-building games can help accomplish the following objectives:

- **Build team morale.** Team-building exercises provide a sharp contrast to “business as usual” by injecting an element of competition, cooperation, and/or fun into team meetings.
- **Trust each other.** Games provide opportunities for sharing insights, feelings, and experiences as the team develops common solutions.
- **Become more flexible and adaptive.** Team members soon understand and appreciate the many ways to solve a problem.

- **Reinforce appropriate member behaviors.** When cooperation is displayed, when creativity is demonstrated, or when interpersonal barriers begin to break down, a leader can show appreciation for the desirable responses elicited from a team-building game.
- **Relieve boredom.** Games provide breaks from intensive focus on team tasks.

When selecting team-building exercises, look for the following unique features:

- **Quick to use.** May range from a one-minute activity to an exercise that stimulates a one-hour discussion.
- **Inexpensive.** Nothing has to be purchased; outside facilitator need not be hired.
- **Participative.** Games should involve team members physically (through movement) or psychologically (through visual or mental activity). Games should help people focus their attention, think, react, speak, and have fun while learning how to be better team players.
- **Use of Props.** Add realism and variety to the activity with the use of props or outside materials.
- **Low-risk.** Games should be user-friendly with few risks.
- **Adaptable.** Tailor the game as much as possible to fit your goals, your group, or your organization.
- **Single-focus.** Games should be designed to demonstrate or illustrate one major point, or to accomplish one significant purpose.

Team-building games may be used to improve both the content and process objectives of a team meeting. Most importantly, they facilitate member learning and the development of trust while also making the meeting itself more enjoyable. The games included in this Handbook will be useful in helping your team become a stronger unit. Enjoy!

GAME #1

Objective:

- 1) To learn more about teammates.
- 2) To build trust among people who work together.

Materials:

Stopwatch or watch with second hand

Procedure:

- Ask members to gather in groups of three and label themselves A, B, C.
- A question (see below) will be asked, and when the stopwatch starts, members within each group may share information with each other.
- Inform participants that they may choose not to speak on a subject if it is uncomfortable for them.
- Facilitator will time the interactions and notify participants when it is time to move on to another group (one-and-a-half to two minutes works well for a group of three participants).

- At the end of each group interaction, “A”s are asked to move clockwise to the next group. (This rotation makes for a constant change of group personnel. For more of an opportunity to mix in larger groups, have “B”s and “C”s take their turns moving, perhaps counter-clockwise.)
- Possible questions to ask:
 - How did you become a member of Sweet Adelines?*
 - Share something about your family.*
 - Tell us about a time in your life when you felt very proud.*
 - What is your idea of a dream vacation?*
 - Other than singing, what do you like to do?*

GAME #2

Objective:

- 1) To learn more about teammates.
- 2) To build trust among people who work together.
- 3) To develop a “personal profile” sheet on team members.

Materials:

Copies of “Getting to Know You” forms for each participant

Procedure:

- Explain that each team member has special skills, knowledge, and talents that will help make the team stronger as a unit.
- Distribute a copy of the “Getting to Know You” form to each team member.
- Collect the complete forms, duplicate them, and bring copies for each team member to the next meeting.
- Records may be kept manually or stored on a computer.
- If you have more time:
 - At the meeting, distribute one copy of the form to each member.
 - Ask members to pair up and conduct five-minute interviews of each other, using the form as a worksheet.
 - Tell members to be prepared to introduce their partners to the rest of the group by spotlighting three interesting pieces of information learned during the interview.

Getting to Know You

Name _____ Job Title _____

Significant Other’s Name _____ Children _____

Hometown _____ Hobbies _____

Favorite (or Dream) Vacation _____

Best Accomplishments: Family _____ Personal _____

Childhood _____ Work _____

Most Memorable Moments: Family _____ Personal _____

Childhood _____ Work _____

Favorite Color(s) _____ Favorite Holiday _____

Favorite Food(s) _____

Strongest Feelings Shared During the Interview _____

GAME #3

Objective:

- 1) To provide innovative ways of introducing members to each other.
- 2) To build team spirit by helping members learn more about each other.
- 3) To help establish self-disclosure as a team norm.

Materials:

None

Procedure:

- Instruct participants to remove two items (family pictures, credit card, rabbit's foot, etc.) from their purses, wallets, or pockets.)
- When introducing themselves to the group, they should use whatever item they took out to help describe themselves in at least two ways (“I am superstitious;” “I’m such a tightwad that this is the first dollar I ever earned.”).

Tips:

Allow one minute per person. (This activity is not limited to newly formed teams. It also can be effective as a meeting warm-up with established teams. When introducing the activity, point out that team members can always learn something new about each other that will increase rapport and make team members more aware of each other’s strengths and applicable experiences.)

GAME #4

Objective:

- 1) To provide innovative ways of introducing members to each other.
- 2) To build team spirit by helping members learn more about each other.
- 3) To help establish self-disclosure as a team norm.

Materials:

None

Procedure:

Ask each team member to state her name and an adjective that not only describes a dominant characteristic, but also starts with the first letter of her name (Mathematical Mary, Creative Cathy, Intense Irene).

Tips:

Allow one minute per person. (This activity is not limited to newly formed teams. It also can be effective as a meeting warm-up with established teams. When introducing the activity, point out that team members can always learn something new about each

other that will increase rapport and make team members more aware of each other's strengths and applicable experiences.)

GAME #5

Objective:

- 1) To demonstrate teamwork for support, leadership, and cooperation.
- 2) To build support and trust.

Materials:

Bandannas

Procedure:

- Divide the group into teams of four. Participation should be voluntary.
- Blindfold one person in each group; select another group member (leader) to verbally instruct the blindfolded person to walk from point A to point B in the room or adjacent area. The leader must not touch the blindfolded person, but two other group members may assist the leader to make certain the blindfolded person doesn't bump into anything. When the walk (two to three minutes) is completed, switch roles and repeat the exercise using a different route.
- Repeat as time allows.

Discussion Questions:

How did you feel while blindfolded? (uncertain, frightened, dumb, etc.)

Did you trust your leader? Why or why not?

Did you trust your team members? Why or why not?

What did you need when you were blindfolded? (support, assurance, advice, etc.)

How does this activity apply to your organization? (need help, counsel, affirmation, etc.)

How about your new team members? How does this activity impact your relationship with them?

Tips:

Be sure to make the area safe and clear of hidden obstacles. Do not encourage haste or competition to see who can finish first.

GAME #6

Objective:

- 1) To demonstrate that people often have more in common than not.
- 2) To create team identity.

Materials:

Copies of the "Commonality Exercise" form
Whistle or bell

Procedure:

- Distribute copies of the “Commonality Exercise” form to each team member.
- Ask team members to break into pairs quickly.
- Instruct team members to find out as many things as possible that the two of them have in common. Ask them to write down their partners’ names and jot down, in the first column, the items that they found to be in common. At the end of two to three minutes, call time and ask team members to find new partners and, at your signal, repeat the process. Call time after two to three minutes.

Discussion Questions:

How many team members found more than 15 things in common?

What were some of the unusual items discovered?

How did you uncover these areas of commonality?

Is it likely that in most situations, you may find similar results (that people have much more in common than we otherwise might think)?

What implications does this have for members of the team?

Tips:

- The noise level can get high during this exercise. Blow a whistle or ring a bell to signal the end of each round.
- To speed up the exercise, shorten the “Commonality Exercise” form from 15 to seven or 10 items.
- To make the activity fun, award prizes to the two people who found the most in common. Have extra prizes in case of a tie.

COMMONALITY EXERCISE

List the things you find in common with three other people.

Name _____	Name _____	Name _____
1. _____	1. _____	1. _____
2. _____	2. _____	2. _____
3. _____	3. _____	3. _____
4. _____	4. _____	4. _____
5. _____	5. _____	5. _____
6. _____	6. _____	6. _____
7. _____	7. _____	7. _____
8. _____	8. _____	8. _____
9. _____	9. _____	9. _____
10. _____	10. _____	10. _____
11. _____	11. _____	11. _____
12. _____	12. _____	12. _____
13. _____	13. _____	13. _____
14. _____	14. _____	14. _____
15. _____	15. _____	15. _____

GAME #7**Objective:**

To quickly immerse group members into a task-oriented activity so they can begin developing a team identity and initial cohesiveness.

Materials:

A previously developed list of items (note that the number of copies provided—one or more—to the team might also serve as a contributing factor to various team approaches).

Procedure:

- Specify a time period for completing the task and a minimal set of rules to follow (such as staying within certain physical boundaries).
- Provide team members with a comprehensive list of objects to obtain (for example: a 1969 coin, a clover blossom, a live ant, a roll of bath tissue, a comb, a lined piece of paper, etc.). Include items that are feasible to obtain, but that may require either ingenuity or a collaborative effort within the team to accomplish. Score team members based on the number of items obtained, and possibly award them a prize.

Discussion Questions:

How did the team organize to conduct its task? (Were individuals or pairs assigned to specific items, or did everybody try to do everything?)

How was this method chosen?

How successful was it?

What will you do differently when the team is assigned a more serious task?

Tips:

This exercise works best when the team is preparing to work on assignments, and would benefit from “loosening up.”

GAME #8**Objective:**

- 1) To warm up a team and break down inhibitions.
- 2) To provide an opportunity for members to work as a team and explore the dimensions of teamwork.
- 3) To energize a team meeting.

Materials:

None

Procedure:

- This exercise works best with a team of six to eight members.
- Have the group members move to a location that allows them to stand in a small circle.
- Instruct team members to extend their hands across the circle, grasping the right hands of members approximately opposite them with their left hands, and grasping the left hands of any other members with their right hands.
- Inform team members that their task is to unravel the spider web of interlocking arms without letting go of anyone's hands. Time them as a way to place pressure on working together.

Discussion Questions:

What was your first thought when you heard the nature of the task?

What member behaviors detracted from the group's success in achieving its goal?

What lessons does this exercise have for future team-building?

Tips:

Solving this exercise depends on a team member's capacity to see the whole picture, assume a leadership role, and communicate clearly. The key lies in stepping over others' arms to disentangle themselves until a circle is complete. It is recommended that team members wear casual clothes.

GAME #9**Objective:**

This brainteaser is just for fun. Introduce it halfway through a long meeting to reenergize your team and practice creative thinking.

Materials:

Copies of the "Scrambled Cities" quiz

Procedure:

Distribute copies of the quiz to each participant. Each item can be unscrambled to identify a city. Award an inexpensive prize to the first person who completes the quiz correctly.

Scrambled Cities Quiz

- | | |
|----------------------|-----------------------|
| 1. OIAPER _____ | 11. REEDVN _____ |
| 2. ITSUAN _____ | 12. TEEATSL _____ |
| 3. LE OASP _____ | 13. LUULONNH _____ |
| 4. WNE ALROESN _____ | 14. SNA TANNOOI _____ |
| 5. AKNSSA ITCY _____ | 15. SOL SEELGNA _____ |
| 6. SNA SEJO _____ | 16. ULBOCKB _____ |
| 7. ACHIWTI _____ | 17. XNOIEPH _____ |
| 8. AAPTMT _____ | 18. ULTAS _____ |
| 9. GACOHIC _____ | 19. NAS GOIDE _____ |
| 10. THOUSNO _____ | 20. PROTLDAN _____ |

Answers: 1. Peoria 2. Austin 3. El Paso 4. New Orleans 5. Kansas City 6. San Jose
7. Wichita 8. Tampa 9. Chicago 10. Houston 11. Denver 12. Seattle 13. Honolulu 14. San
Antonio 15. Los Angeles 16. Lubbock 17. Phoenix 18. Tulsa 19. San Diego 20. Portland

GAME #10**Objective:**

To end a team meeting on a positive note.

Materials:

Envelopes
3 x 5 cards

Procedure:

- Provide each team member with one blank 3 x 5 card.
- At the beginning of the meeting, instruct members to observe their teammates' behaviors closely and write one positive remark about each person on a card.
- Toward the end of the meeting, collect the cards (be sure the intended recipient's names are on them), sort them into appropriate envelopes, and distribute to each person.
- Allow adequate time for each person to scan quickly through the set. This exercise allows all to leave the meeting with some positive feelings about themselves, even though the meeting may have been stressful.

Discussion Questions:

If time permits, ask each member to read aloud the single card that made her feel the best.

Ask each member to read aloud the single card that surprised (or confused) her.

Ask each team member to provide each teammate with "One tip for your success."

Ask each team member to complete this sentence for each other member: "I wish you would..."

Tip:

This process also can be adapted to focus on the whole team (instead of individual members). Ask members to write down what they like about the team, or what went well that day. Collect and share the anonymous cards. Later, as the team gains comfort with the method, the process can become oral.

Sharing the Information

Each RMT member at one time or another will find a need for a flyer, a publication, or an ad for sharing information — announcing a workshop, providing competition information, sharing a financial report, preparing a regional newsletter (whether printed or e-news), sharing chorus news, advertising a regional show, etc. Ask for help, or find an assistant(s), if you are not comfortable with building a flyer, designing an ad, producing regular publications, or building Websites, etc.

Flyers, Regional Publications, Advertisements, Media, etc.

This section offers some guidelines for building effective flyers, publications, and advertisements for use within your region.

- Determine the focus and target audience
- Gather accurate content (information)
- Decide the best methods for presenting the information
- Designing the flyer, publication, ad, etc
- Using writers and designers
- Putting it all together
- Getting it printed
- Distribution options

Determine Focus and Target Audience

Before you start designing a flyer or putting words on a page, you need to determine what is really needed.

Questions:

What is the flyer, publication, ad (etc.) to accomplish?

Possible answers:

- Educate or inform members
- Increase interest in a directors' workshop
- Gather information from members (survey)
- Build excitement for a regional leadership training
- Announce a choreography workshop
- Build public interest in attending an "open" regional event

Who, and how many, are you trying to reach? Identify your target audience.

- All members (including CAL)
- Directors and Asst. Directors (50-100)
- Chorus leaders (boards and teams)
- Public (media, music-related, women, everyone in a geographic area, youth, etc.)

- Where are they to be found? In each chorus
 Individuals throughout the region
- What are some ways to get the information out to the target audience? Printed and distributed flyers, brochures, newsletters
 Use local media: newspapers, radio, TV, Web events
 Email notices, e-newsletters (both are basically free)
 Website announcements (also basically free)
 Phone calls (one-on-one communication)
 Word of mouth

Gather Accurate Content (Information)

Depending on what you are “building,” you need to know what information **MUST** be included. From the start, *make sure the information is correct*, and that you know all you need to know before you start building the flyer, ad, or publication.

People will need to know at a glance: What’s happening, when it is happening, where it is being held (even a map could help with directions), what is the cost, who is the faculty, what is provided (lunch, room, PVIs), what’s the purpose or what’s the benefit in attending, and do attendees need to bring anything?

Decide the Best Methods for Sharing the Information

You need to get the information out in a way that will be noticed (regardless of design features). Often using several methods together will effectively accomplish your goals.

- Flyers are great for sharing key information about a specific event at a glance — like for shows, workshops, membership drives, etc. They can be copied and distributed quickly for minimal costs.
- Printed ads, like flyers, provide key, accurate information in a limited, pre-determined space (depending on cost and availability) whether in local newspapers, chorus newsletters, regional newsletters, etc. They need to be prepared and submitted before publication/print deadlines.
- Printed publications, like regular regional newsletters, provide plenty of space for giving all the information you want to share — along with providing space for other timely regional information to your members. Documents like yearly regional competition bulletins should be reviewed yearly for updates, deletions, and changes as needed.
- Digital means emails, e-newsletters, Website options. Sharing information digitally is a fast way to send information. The number of people who see and read the information in a timely fashion is totally out of your hands. People read emails and go to Websites when they have time and the inclination. Some people don’t have e-mails or Internet connectivity. Some use it once in a while and others are “connected” all the time. Know your target audience; always ask readers to share the information with their friends and chorus members.
- Radio and TV. Community calendars, public service announcements, and live appearances on local talk shows and during local news times, might be available for little (if any) cost, if you plan well in advance. Radio and TV stations might

have lower advertising rates for short local ads run only at certain times during the day.

- Personal contacts like phone calls, personalized letters, and one-on-one conversations are great ways to share information (if shared accurately). Do not rule out using personal contacts in some fashion to share information and build interest.

Designing the Flyer, Publication, Ad, etc.

Now that you have identified your target audience, gathered accurate information, and decided which methods would be best for sharing the information, you are ready to make five overall decisions regarding the publication's **tone** (friendly or strictly business), **writing style**, **language** (level of using specialized vocabularies), **content** (the type of information the readers want or need to know), and the **graphic design** (what the look will be). These five decisions will help you remain focused as you start the final steps of your project.

Using Writers and Designers

Seek volunteer writers and designers. As newsletter editor, you can schedule guest writers for each edition of your publication. Keep in mind as you delegate some (or even all) of the writing for your project that you are still responsible for the final product and the accuracy contained therein. Be sure to enlist volunteers who have the skills necessary to complete the job, and allow them a reasonable amount of time to research and write their assignments.

As an RMT member, you probably will be working on future regional publications, articles, or flyers. Make notes of ideas, potential sources, and quotes for upcoming publications as you come across them in everyday life. This exercise will save you time and legwork when you begin to work on your next project. Store your pieces of information in a specific folder for future publication.

Interview (in some fashion) possible volunteer designers (sometimes called editors or publishers) and ask for samples of work that they have done in the past. It will be their job (or yours) to take all of the gathered information and expectations and build the flyer, ad, publication, etc. All flyers, ads, etc. represent your entire region and should look appealing and professional. In order to save time, energy, and sometimes money, work closely with the designer to make sure that expectations will be met along and that accuracy is evident.

Putting It All Together

Now that you have collected all of the copy from your volunteer writers (or yourself), gathered photos, logos, and artwork, and picked a designer, it is time to put the pieces together in a way that flows and is compelling to read. Once again, think of your readers and how they would like to encounter the information.

If, at this point, you are not already working on a computer, you should consider creating flyers, ads, regional publications, etc. electronically for the following reasons:

- A computer allows you to produce a professional-looking document that is camera-ready
- A computer eliminates time-consuming paste-up by allowing you to incorporate all of your publication's graphic elements into one document;
- A computer allows you to save an editable copy of your work for future use and reprints. If you do not have a computer at your disposal, check with other members in your region who would be willing to take on that part of the project.

Editing

Editing your content for typos, misspelled words, grammatical errors, and word choice before putting it into the desired format will save you time and energy down the road. Sometimes adding or deleting one word after a publication has been formatted can alter the design enough that the layout has to be reworked.

Below are some grammar tips to help you edit like a pro:

- Use active voice (Passive: Sue was invited to the party by Mary. Active: Mary invited Sue to the party.)
- Use active verbs (Passive: Joan was responsible for selecting the music. Active: Joan selected the music.)
- Cut out unnecessary modifiers (very, really, the, a, an, etc.)
- Watch word choice (why use three words when one specific word will do?)
- Use language appropriate for your audience
- Review the rules on punctuation
- Be concise (excessive words tire readers)

Design & Presentation

Create an eye-appealing publication by incorporating graphic elements such as photographs, line art (clip art), and white space. The key to good design is balance and scale. Lots of graphics or lots of words on a page without proper spacing can make a reader feel dizzy. Whether you will be designing the publication yourself or will be working with a graphic designer or a fellow member who has a way with layouts, be sure the graphic elements you choose are of the highest quality possible. Graphics lose crispness each time they are duplicated. For creative inspiration, peruse other similar publications for design ideas.

The graphic design of a publication is not the only aspect of its presentation. Placing handbooks in binders and press materials in folders adds professional flair without great expense. Be on the lookout for creative ways to package your other regional publications.

Getting It Printed

Many variables must be considered before deciding how your publication should be duplicated. For most of the publications produced by your region, you will be looking at two categories of duplication: printing on a press and photocopying. Below are several check points to help you determine which method of duplication is right for your project.

Printed on a press (or high-end printer):

- if high quality and resolution are desired
- documents that feature photographs, complex graphics, or more than one color
- large quantities
- requires longer lead time

Photocopied:

- documents that are one color with simple graphics or none at all
- small/medium quantities
- usually can be completed in a few hours or overnight

Work with the printer (vendor) you select to duplicate your publication to determine the best format in which to submit your publication. On flash drive? Laser copy? Negative? The world of printing is complex, and each print shop works in its own way. Ask questions. Lack of understanding on your part can affect the quality of, and your happiness with, the final product. Remember to allot funds in your region's budget for duplicating costs.

Should you shop around for a printer to handle your regional needs? If you have time, definitely check out what is available. If you have several local printers to choose from, you might want to have them give you a "bid" on a project. You can also do an online search for affordable printers.

Distribution Options

- In most cases, the best way to distribute printed materials to the regional membership is through your country's postal service. In the United States, discounted bulk rates are available to nonprofit organizations willing to presort their mailings (if the quantities are large enough). Visit your local post office and ask for suggestions to hold down your postage costs.
- Mailing companies are becoming common. Often they can handle everything from printing to labeling and delivery. You might have at least one member of your region who operates or works for a mailing company. They are very familiar with bulk rates, and other ways to ship documents and can provide you with good suggestions.
- If a majority of your members have (and use) access to the Internet, then you could take advantage of sending email announcements, e-newsletters, and/or posting flyers, ads, publications on your regional Website.
- Your region can save postage funds by physically distributing publications at general membership meetings or at regional retreats.

- Another distribution option to reach most of your members is to send a package to each chorus containing enough copies for that chorus to distribute to each chorus member — plus sending to individual CAL members.
- Don't forget to designate funds in your region's budget for any mailing costs. (Envelopes and labels cost money, too.)

Email – A Blessing and a Curse

Email is 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.”

1. 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 e-mail messages a day, so they may only skim your message if it's too long.

2. 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.

3. 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.

4. 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 5-8 words. And never leave the subject line blank.

5. Threads (topics)

Once you send that first e-mail, 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.

6. Threads – changing the subject

If you change subjects, be sure to change the Subject line.

7. 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 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 one another.
- 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.

8. 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 she'll be great!*

The '>' in front of the text indicates to the recipient that this is quoted material from his/her 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.

9. 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 e-mail 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 e-mail address off another infected computer belonging to someone they communicated with. Or your friend may unknowingly be infected and not aware of the virus on her system that has just spawned an email that has her 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.

10. 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.

11. 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@scarrier.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.

12. Respond promptly

People send an email because they want to receive a quick response. Try to respond to emails within two days — even just to tell the sender that you received it and that you will get back to him/her.

13. 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 is pretty small. On the other hand, if you schedule the meeting for the next day, the chance that the message will be read is pretty high.

14. Receiving and/or sending confrontational emails

In the world of e-mail, 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, 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 e-mail 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.

15. 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 e-mail address is “live.” Confirming this will generate more spam. Therefore, hit the delete button or use email software to remove spam automatically.

More Email Pointers

- **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 e-mail 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 e-mail and you are sure that it is exactly the way you want it.
- **Never share phone numbers or personal information** without confirming you are communicating with a reputable party. Never share the personal contact information of others without their specific permission to do so.
- **Don’t forward virus hoaxes and chain letters**
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 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.

Communications Coordinator

Job Description

- 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 Secretary at international headquarters.
- In consultation with the RMT, prepares and submits year-end State of the Region Report to the Corporate Secretary at international headquarters by established deadline.
- Maintains contact with appropriate staff members at international headquarters.
- Maintains comprehensive records and forwards materials to successor.
- Appoints staff to assist in the implementation of responsibilities.
- Trains her successor.

A vodcast outlining each RMT Coordinator's duties has been created and can be found in the Leadership section of the Members Only portion of the Sweet Adelines website.

Creating a Regional Newsletter – From Concept to Distribution

Developing an effective plan is a vital part of the newsletter creation process. The plan provides direction for what needs to be done and when.

Naming your Newsletter

The name will influence the appearance of your newsletter. The number and the length of the words in a newsletter name greatly impact the design of the newsletter. It is best to select newsletter names consisting of two to three words. Long words require smaller type than a title made up of short words. Short titles with only a single short word or two have far more impact than long titles.

Newsletter Content

Create a list of the content you want to include in your newsletter. The number of articles and types of content that will be needed will vary. It will depend on the length of your newsletter and the length of individual articles. Below is a list of types of content to consider.

- News articles (from choruses and quartets)
- News briefs (announcements from the region or international organization)
- Announcements (director searches, new regional awards)
- Profiles (about regional leaders or outstanding chorus members)
- Letters to the editor
- Table of contents
- Helpful information (list of key signatures, song pitches, tips for learning music)
- Editorials
- Regional calendar (including annual chorus shows)
- FAQs (answers to frequently asked questions)
- Surveys and polls
- Photos
- Ads

Do it Yourself? Or Find a Designer?

Determine who is going to create the newsletter. Do you have the skills to put together a page layout with text and graphics? If not, delegate the task of designing the newsletter to someone else in the region. Depending on your budget, consider using a professional graphic designer.

Choosing the Layout Software

The software application you use will depend on the skill level of the designer. The most common page layout software programs for newsletter publishing are:

- Microsoft Word
- Microsoft Publisher
- Adobe PageMaker or Adobe InDesign
- QuarkXpress

Determining the Design

Look at other newsletters to see what elements appeal to you. There are also design books that present different layouts to help achieve different objectives. Go to your local bookstore and look through books that give you practical ideas for layout and design. When you find a layout you like, you can try incorporating some of the design elements into your newsletter. Looking through magazines, brochures, and other newsletters is also a good way to learn about colors, font choices, and layout.

Keep the design of your newsletter simple. This can be achieved by limiting the number and sizes of typefaces, as well as the number and sizes of graphics (clip art and photos). You do not want every square inch of your newsletter to scream, “Look here!”

Choosing typefaces/fonts

Typography has a major impact on the overall look and image of your newsletter and its overall quality. Determine the image you want to project with your publication and choose fonts with personalities that fit that image.

A typeface refers to an entire family of letters of a particular design. An example of a typeface is the Arial font family, including: Arial, Arial Light, Arial Narrow, and Arial Black. Usually, a computer has a set of built-in fonts that have come with its software. Additional fonts can be downloaded from font sites (such as www.dafont.com) on the Internet or purchased on CD in a typeface software library.

- *Sans Serif* - San Serif typefaces do not have finishing strokes at the ends of the letterforms. The name comes from the French word sans, which means “without.” Helvetica and Arial are the most common Sans Serif typefaces. San Serif fonts are typically used in larger sizes (for headlines or subheads).
- *Serif* - Serifs are lines or curves projecting from the end of a letterform. Times, Palatino, Bookman, and New Century Schoolbook are common Serif typefaces, which are most often used for smaller body copy.
- *Script and decorative fonts* – Script and decorative typefaces should be reserved for novelty or a special effect. They are usually harder to read than standard fonts, so use them sparingly and in large sizes – never as text. Zapf Chancery and Brush Script are common Script typefaces. Beesknees and Curlz are examples of decorative fonts.

Limit the number of typefaces you use in a publication. Many experts say to use a limit of two typefaces, but occasionally this will vary. Too many typefaces can create an unprofessional, jumbled image. Look at various publications for ideas about which typefaces work well together and the images they project. When using two typefaces, make sure they are very different. One typeface will probably be used for display type, such as headlines, and the other for text. Strive for definite contrast between the two.

Font Sizes

Text on a printed page should typically be 10-point or 12-point in size. Any type below 9-point is very hard to read. Headline sizes can vary – from 18-point to 36-point, depending on the importance of the article or the impact you want to make on the page.

Font Styles

You can selectively emphasize certain words, sentences and paragraphs by varying type styles. Most body copy is set in normal type (no bold, no italics). Other styles – used for

emphasis or variety – include boldface type, italics, bold italics, underlining, and small capitals.

1. **Boldface** and *italic* type should be used in small doses within body copy. Boldface type can draw attention to names within columns, but it can also make it harder to read adjacent words. When more than a few words are set in boldface type, the text block tends to dominate the page.
2. *Italics* should also be used with discretion. The slant of italicized type slows reading down and makes it harder to correct typographical errors. ***Bold italics*** darken a page and take up even more space.
3. Underlining should generally be avoided in desktop publishing. It reduces readability by obscuring the bottoms of lowercase letters.
4. SMALL CAPS (approximately 80 percent of the height of uppercase letters) can add emphasis to a few words, perhaps the title of a song, without darkening the page the way boldface type does.
5. **NEVER ever use all caps for the body of text in your newsletter** – it is extremely difficult to read. Since headlines are shorter by nature, you can sometimes get away with it for design purposes. Some typefaces, such as Old English, should never be used in all caps.
6. Even if you prefer condensed typefaces, they are not a good choice for body copy when you have adequate space for regular type. Condensed type should be reserved for instances where space requirements are limited.

Choosing Colors

The best newsletters use at least two colors – black and a contrasting color. If your budget allows for it, use colors consistently. For example, if you use a specific color for an important headline or a border around an important article, repeat the same color throughout your newsletter for other elements of significance.

Organizing Your Layout

Good layouts are easy to follow and provide clear reader cues to help readers easily find their way through a publication. Arrange and emphasize your information to make your message as clear as possible. Decide what you want the reader to see or read first and position it accordingly, then decide what you want the reader to read or see next. Continue arranging and emphasizing the information until you've included everything. The quality of your layout determines how quickly your readers will be directed through the publication and how fast they will be able to read it.

- Make the most important element you want your readers to see the largest and the least important element the smallest.
- Use rules (lines) to separate information into groups.

- Use different weights of type.
- Use white space for design purposes in your publication.
- Position important information in the upper left corner. The upper left corner is usually read first.
- Place a box around important information.
- Call attention to lists of items by placing bullets in front of them.
- Use colored or reversed type (white type on a dark background) to separate or emphasize. Be careful, though, not to use reversed type with large blocks of text or text that is small. Studies have shown that reverse type cuts down on readability and comprehension.

Formatting Paragraphs

Another decision to make is how to start new paragraphs. You have the options of indenting the first line of each paragraph or adding extra line space for separation with no indent. You should do one or the other (not both) and be consistent throughout your newsletter.

- If you choose to indent, you must determine how deep you want the indent to be. Indented paragraphs are often considered more intimate and conversational and are often the preferred choice for flush left/ragged right type. If you indent the first line of each paragraph, be sure the depth of the indentation is proportionate to both the type size and the column width you've chosen.
- Extra space between paragraphs can impart a dignified, formal atmosphere, especially when used with justified type. Adding paragraph spacing equal to a little less than half of your normal line space is more pleasing than the exaggerated paragraph spacing created by double-spacing. The lines are far enough apart to indicate the start of a new paragraph, yet not so far apart unnatural horizontal bands of white space appear on your page.

Formatting Column Grids

- *Two-Column Grids* – This type of structure is a classic in newsletter design and useful if you need something simple and that can be done fairly quickly. Articles in this simple design flow one after the other until the pages are filled. No particular emphasis is placed on any article and both long and short articles fit equally well into this design. No jumps are necessary because the articles appear one after the other, and each article is completely finished before the next begins.

A disadvantage of this type of grid is that photos are restricted to a near-square, horizontal shape because they are restricted to the width of a column. If they were much larger, the photos would overwhelm the page and if they were smaller, you would have to wrap text around them and complicate the layout process.

- *Three-Column Grids* – This is the most popular type of grid for newsletters and many other printed publications, such as magazines. One reason for this is the flexibility that is gained in placing articles and pictures with this format. Three-column grids allow you to run headlines over one, two, or three columns to control emphasis. Smaller pictures that are the width of one column can be used without requiring a text wrap.

Spacing and Alignment

- *Sentence Spacing* – Decide whether to set type flush left/ragged right or justified. Alignment affects appearance and readability. Flush left/ragged right type is more readable because the equal word spacing helps reader move more quickly through the body copy. More importantly, in flush left/ragged right copy, word spacing is tighter, leaving less white space between words and more white space at the ends of lines.
- *Paragraph Spacing* – Leading is the vertical space between lines of type. It is measured in points and is expressed as the sum of the type size and the space between the two lines. Generally, it is at least the size of the type, and usually more. For example, 10-point type typically has 12 points of leading. Type with a generous amount of space between lines is said to have open leading.
- Watch for widows and orphans, which can cause unsightly gaps in text columns. A widow is a single word or line at the bottom of a column, paragraph, or page. An orphan is a single word or line isolated at the top of a column or page.

Adding Photos and Graphics

Photos and graphics add interest to newsletters. They draw the reader into reading an article. You should select various types of visual images to include in your newsletter.

- *Graphic images* – Use graphics to add interest to your pages, but be ruthlessly critical in choosing illustrations. Clip art works best when a few well-chosen pieces are used to add character to a publication. It loses its effectiveness when too many small pieces are used on a page. Check online clip art sites (such as www.fresherimage.com) for free or inexpensive images. Or invest in a clip art software package, which often also includes free photographs.
- *Photos* – Photos taken by digital cameras are stored in JPG format, so they can be used as graphic images in your newsletter.
 - Every photo should have a clean, clear center of interest. Photos should be easy to read and clearly focused. The important elements should stand out.
 - Every photo should have a caption. Identify everything including faces, places, and activities.

- Plain, thin, 1-point lines are commonly used to frame a photo.
- Close-ups are much more interesting than far-away, large-group photos (like a photo of a large chorus). Instead, consider using a photo with a few individuals spotlighted.
- When cropping a photo, avoid cutting off a person at a joint (elbow, knee, waist) so you don't give them the "amputated limb" look.
- *Box-itis and rule-itis* – Avoid overusing boxes and rules. Too many bordered elements on a page lead to overly compartmentalized pages. The result is a busy effect that interferes with easy reading.

The Importance of Proofreading

Proofreading is the single most important element in the creation of any publication. The professionalism and overall effectiveness of your newsletter is at stake if you are careless with your attention to this detail.

The term *proofreading* means to review any text – either online (electronic copy) or hard copy (on paper) – for typographical and formatting errors. *Copyediting*, on the other hand, is reviewing text for grammatical errors, inconsistencies, and sentence structure, for example.

- Pay special attention to the spelling of people's names (Ann vs. Anne, Cathy vs. Kathy). Nothing upsets your reader more than having her name misspelled.
- Double-check that you have dates and times correct.
- You will catch more typos and errors by proofreading a hardcopy proof of your newsletter, rather than proofing on your computer screen.
- Read your text out loud. By hearing what you have written, you will easily determine if it "sounds" correct.
- Try reading what you've written ... backwards (right to left). This forces you to say each word and see exactly what you have typed. Your brain will not "automatically" fill in words as it sometimes does when reading normally (left to right).

The most successful proofreading is carried out by fresh, impartial eyes—eyes that will pick up things you might miss because you've looked at it too many times.

How Will Your Newsletter Be Printed?

Newsletters can be printed using ink jet printers, laser printers, quick copy services, and commercial printing services.

- *Personal Ink Jet Printers* – Unless your distribution quantity is very small (20 or fewer copies), don't consider using your personal ink jet printer.
- *Laser Printers* – Laser printers can be used to print newsletters. Many laser printers print only in black and shades of gray. Those that print color are expensive to run. Laser printers have many of the same limitations as ink jet printers – paper size and expense.
- *Photocopiers* – Photocopying newsletters is an inexpensive way to print a newsletter. Be aware that you will lose some crispness in the look of the newsletter. Some images will appear faded. Photos do not copy well.
- *Quick Copy Services* – Quick copy places (like Kinko's) are convenient to use for printing newsletters. If you are printing 2,000 copies or less, quick copy services are usually less expensive than professional printers. For 2,000 to 4,000 copies, prices for quick copy services and commercial printers are usually similar. For over 4,000 copies, commercial printers are usually less expensive.
- *Commercial Printers* – Commercial printers are expensive for small jobs. A large part of the cost is the initial setup to print a publication. Because of this, price per piece usually decreases with quantity. That means that if you want to print 100 copies of a newsletter, the per-piece price would likely be quite high, but if you want to print 1,000 newsletters, the price per-piece would be much less.

Choosing a Printer

Not all printers are created equal (and neither are newsletters!). Be sure to shop around for the best price for printing your newsletter. The yellow pages in your phone book are the best place to begin your search. Family members and friends also can recommend printers they've worked with on other projects. Ask to see samples of other newsletters. More often than not, the printer is proud to show off samples of work! Then, whatever you decide, be sure to get a detailed, written estimate or quote for the final product.

Things Your Printer Will Need to Know

Since costs can vary dramatically depending on your printing needs, try to take a sample of a newsletter similar to the one you will be publishing. This will help your printer give you the most accurate estimate.

Also let the printer know whether you will be providing "camera-ready" copy, or whether you need to take advantage of in-house typesetting services. Information you need to discuss with your printer includes number of pages, size, quantity, paper, ink color(s), photos/graphics/special effects, and any finishing work (including stapling, folding, etc.).

Don't forget to ask how long it will take to have your newsletter printed – most shops are extremely busy and deadline schedules are tight. If you are in a hurry, they may allow for rush jobs, but you will be charged accordingly. A good rule for planning purposes is one to two days to receive a proof, with final delivery about five days after proof approval.

Distributing Your Newsletter Electronically

A very inexpensive way to distribute a newsletter is to use electronic distribution. In other words, you can send your newsletter via email or post it on a Website.

Many commonly used software packages, such as Microsoft Office, work closely with Adobe Acrobat. Files can be converted easily into PDF format within these software programs on computers that also have Adobe Acrobat installed. Use the program's Print command to create a PDF.

Once a file has been converted to PDF format, it may be attached to emails or posted on a Website. If you want to send it by email, consider creating an email distribution list or e-group to easily distribute your newsletter.

Electronic Newsletters

Many regions are opting to convert existing print publications into electronic newsletters (e-newsletters)—and for good reason. E-newsletters can be developed for a fraction of the cost of their print counterparts and delivered to a large audience instantly.

One of the most difficult decisions when launching an e-newsletter is whether to use HTML or plain text format. Again, assess your audience: are your readers likely to have an email program that supports HTML emails? Though HTML e-newsletters may look more impressive and offer interactivity, they also come with slow download time, which may deter your audience from reading your message.

You may also want to let members of your audience decide their preferred format. Though some users may use email programs that support HTML, they may prefer plain text. By letting individual readers decide, you foster a sense of empowerment and trust. The drawback: do you have the time to develop two formats?

There are many websites where you can find help to develop an e-newsletter. Or find a freelance designer with Web programming experience.

Guidelines For Documenting Team Meetings

It is important for the Communications Coordinator or her designee to document the discussion, decisions, and actions taken at team meetings. Minutes should provide a record of what was done at the meeting, not what was said by the members. The recorder's opinion, favorable or otherwise, should never be reflected in the minutes.

Content

The first paragraph of the minutes should contain the following information:

- Kind of meeting: (regular, special, etc.)
- Name of the group meeting
- Date, time, and location of the meeting
- Who is in attendance
- Approval of minutes of the previous meeting
- Approval of email decisions.

The body of the minutes should contain a separate paragraph for each subject, stating:

- The main points and ideas (including alternative solutions)
- Decisions made
- Action items (the next steps that will be taken to implement decisions or make progress and assignments to members/committees)
- Future agenda items
- Date, time, and location of next meeting

Format

You may use the meeting agenda as a format for the minutes. Be sure to summarize the conclusion reached on each topic, including a brief rationale for any decisions made. It is helpful for the reader if decisions, assignments, discussion topics, etc. are set out in the right margin or otherwise delineated. See samples below for formatting ideas.

Example #1

The team asked that the Education Steering Committee discuss how it sees these new groups functioning.

ESC Discussion
Topic

Decision: Established five new groups to oversee chapter

education.

Decision

The Communications Coordinator was assigned to write instructions for the Nominating Committee.

Assignment:
Communications
Coordinator

The Nominating Committee will review the instructions at its next meeting.

Nominating
Committee Agenda
Item

Example #2

The team asked that the Education Steering Committee discuss how it sees these new groups functioning.

Decision: Established five new groups to oversee chapter education.

The Communications Coordinator was assigned to write instructions for the Nominating Committee. The Nominating Committee will review the instructions at its next meeting.

Finalizing Minutes and Approval

Minutes of team meetings must be read, corrected, and approved by the management team. This is easiest to accomplish within a week or two of the actual meeting while memories and notes are still fresh. Temporary approval can be given via email or some other system determined by your RMT, and then officially approved at the next meeting. (Committee minutes are generally approved by the chair of the committee.) Approved copies of the minutes should be filed in a notebook and kept indefinitely. Each coordinator should retain copies of the minutes for the current year plus the previous two years.

Accomplishments and Assignments

If your minutes are lengthy, consider creating a separate list of accomplishments for each of the team meetings. Attach a separate list of all the assignments made during the meeting in addition to including them in the body of the minutes. This should prove helpful to team members.

**Conferencing:
Teleconferencing, Video Conferencing, Web Meetings****Teleconferencing**

A teleconference is a telephone meeting between two or more participants in two or more locations at the same time. Two of the major advantages of teleconferencing are the potential to reduce the cost of group meetings (travel, facility for meeting, meals, etc) and to save participants' time.

Planning a Conference Call:

Adequate preparation is critical to the success and effectiveness of a teleconference.

- How the teleconference will be billed/paid, must be determined ahead of time.
- The host/moderator must be designated. That individual makes preparatory calls or sends emails to each participant, establishing a specific time for the teleconference, and makes the calls to assemble the group if participants are not calling in on their own. The same person should be in charge of setting an agenda based on issues brought up by individual participants.
- The time and length of the teleconference must be established.
- Any materials being discussed should also be prepared and distributed ahead of time.

- Ground rules need to be set for an orderly presentation of ideas and flow of the agenda items.

Note: Speaker phones allow several people to use one phone and/or they allow the callers a hands-free way to take notes and turn pages.

Teleconferencing Calls Can Be Set Up in at Least Two Ways.

1) An 800# can be purchased (rates vary depending on the service used, length of the call, and number of callers calling in), and all callers call into that number for free. Callers can use a land-line without incurring any long-distance fees. Callers using cell phones would have minutes billed according to their individual rate plan.

2) Another service emerging on the scene is FREE conferencing numbers, where there is no cost to setup the call, but each caller is billed at her standard long-distance rate. Callers can use their cell phone minutes to call in, incurring no additional fees.

Two websites providing the free conference numbers are: www.EasyConference.com and www.freeaudioconferencing.com.

What Are the Costs?

New companies and/or new services are always popping up vying for your business. A quick Web search for “cheap conference calls,” “free conferencing numbers,” or similar keywords will produce pages of possible choices for you to pick from which will work in your area or country. Shop until you find one that meets your needs, most of the quality ones have a phone number for answering your specific questions.

Other Conferencing Methods:

Conferencing via Computers. Just as we use computers for messaging and emails, you can also use computers for conferencing as an affordable way to make calls, including conference calls.

You can also use computers for video conferencing, and Web meetings. In order to work properly, each computer used (or each video-conferencing location) must be setup to function in the conferencing environment (speakers must be on, connection established, and optional cameras connected). This can be much more difficult than it sounds to set up, and will require test runs.

Video Conferencing can transmit pictures as well as voices through video cameras and computer modems. Video conferencing technology is developing rapidly, capitalizing on the increasingly powerful capabilities of computers and telecommunications networks. Video conferencing centers and equipment are available for rent in many locations.

The cost for video conferencing services through the Internet is much higher than for teleconferencing.

Web Meetings are wonderful inventions, but they also currently are quite expensive to conduct online. One feature is that documents can be viewed and edited by all

participants (video only). Costs include a setup fee, plus additional per minute fees per each caller, based on whether they are using the video feature or just audio.

Collecting Leadership Information in a Database

Instantly this title conjures up ideas and concerns about finding the perfect database program in which to collect and store member information. It just might not take that much work.

The word “database” can be used to define any method for storing related data. A cookbook or a recipe box are examples of databases for keeping recipes that you might use. A dictionary is a database of words. A list of guests invited to a party, or a spreadsheet listing all of your secret passwords can be considered databases.

In order to determine the best way to start collecting leadership information, you must think first about how the information will be used when the database is complete. Here are some steps to help you prepare for this project: First, why do you need to build a list of regional leaders/workers; Second, what do you need to store; Third, how can you collect the initial information, then edit and update it over time; Fourth, how can you share the information easily with the RMT members; and Fifth, which data-collecting system will work best for you and your region?

1. Why do you need to build and maintain a list of regional and potential leaders and workers?

Each region has members with valuable skills and talents. It is almost impossible for one person to know who can do what for the region - in committees, as future RMT members, or as women to serve at the international level. It makes sense that we are in a position to gather such information and build a list of previous and current workers within each region, but also to search-out additional women with skills that can benefit the region now and in the future.

2. What do you need to store?

We need to gather, in an easy-to-use format, information about our past (yet still active), current, and future leaders along with their talents and skills. Suggested content includes:

- Contact info: name, ID#, chorus, phone number(s), email address
- Sweet Adelines International leadership (both admin and musical) experience: former or current chorus, region, and international positions
- Other talents/skills which could benefit choruses, the region, and/or international
- Profession(s) (past, current)
- References (and how to contact them)

One point that should be considered in what you store — is to remember that time passes on — and people do change. It would not be good to record that a member “should

not be considered for an RMT role ever because she ...” — and then in four years for her, as the new Communications Coordinator, to read that note about her in the files.

An understood rule should be — no negative information will be included. (If there is a negative, remove her name from the list until a later time when her situation has changed.)

3. How could you collect the information?

The easiest way to gather a lot of information quickly is to ask your members to complete a survey about themselves and to return the information to you by a certain date. In a short period of time, you would have information to work with.

A Talent Survey can be used yearly as part of the RMT election application process. The document could also be available online for the members to fill in, as part of an ongoing search for new talent.

Surveys seeking information for your region could be included in regional newsletters (whether hardcopy or digital format), asking members to return the information requested within a certain time frame.

Online forms (if the information can be made secure) could be designed to collect needed information.

4. How will you share the collected leadership information with the other RMT members?

It would be great if every region had RMT members, who along with their other skills, were comfortable using their computers on a regular basis to communicate and move information around. That’s not always the case, so you will need to determine what is the best “common” method which will work for your RMT and region each year, as new members come onto the RMT.

It does not seem practical for you, the Communications Coordinator, to spend a lot of time creating a fantastic data-collecting system, if your RMT cannot use or appreciate what it offers. Here are several solutions, which might help your specific situation.

A) Yearly Report: Hard Copy/Printed Document (could also be emailed)

A yearly, hard copy list of all women who could be considered for regional work in a given year, along with their contact information, could be prepared by the Communications Coordinator for the last RMT meeting of the year, and made available to the RMT for consideration for committee positions, and for the Nominating Committee to select possible candidates for the coming RMT election/appointment process. Members should be notified that this database is used at a specific time each year, giving them a deadline to meet.

Advantages: No matter how, or how often, the information is gathered and stored, the printed document would be available to each RMT member when she needs it most. Does not require the RMT to be computer savvy.

Disadvantages: Possibly none. However, frequent updating could be required.

B) Quarterly or Semi-Annual Reports: Hard copy or Email

Same as above, but done more frequently. Could require mailing or emailing if the RMT does not physically meet.

Advantages: Information could be more up-to-date with each issue.

Disadvantages: More work. Definitely would add one or more additional deadlines to the annual communications schedule.

C) Ongoing Digital File Availability: for posting, downloading or emailing to RMT members

This will require some level of computer savvy on the part of all RMT members.

5. Which data-collecting system will work best for you and your region?

Think over your responses to the previous four questions, and then read this section with those answers in mind.

Simple and Good Idea:

Word-like programs: If the RMT can download and use a Word document, then design your collected information in Microsoft Word or a program that allows you to save as a Word document. You may need to limit the amount of information that you collect and save, since Word-like programs are limited to page dimensions more than other options. Here's an example of what you might collect, and how it might look.

Name (address and additional info on file)	Phone	Email	Chorus(es)	Leadership Roles								Special Skills, talents, etc	
				RMT Experience	Intl Experience	Chorus P/TL	Chorus Finance	Chorus Director	Chorus Other	RCT Team	CRC		Other Reg Comm.
Smith, Mary	541-333-2424	msmith@msn.com	NWSingers	X		X	X		X			X	Bookkeeper, Section Ldr (bass), Reg. Mkting Team
Jones, Ann	422-333-1234	aj@hotmail.com	Baltimore			X			X			X	Website designer, Communication Team, CAL Coordinator

With this simple format, you could identify members with finance experience, then go to their files. This method probably would mean keeping a paper file with individual information or a folder in your computer with scans of their surveys so additional information is accessible when needed.

Better Ideas:

A) Spreadsheets like Excel: Spreadsheets allow information to be arranged in column format with information hidden or available to view quickly. Spreadsheets are easy to edit, sort, and share. The look would be similar to a Word document, but with much more accessible information.

	A	D	E	F	G	H	I	J	K	L	M	N	O	p
1	Name <small>(address are hidden in columns B & C)</small>	Phone	Email	Chorus(es)	RMT Experience	Intl Experience	Chorus P/TL	Chorus Finance	Chorus Director	Chorus Other	RCT Team	CRC	Other Reg Comm.	Special Skills, talents, etc
2	Smith, Mary	541-333-2424	msmith@msn.com	NWSingers	X		X	X		X			X	Bookkeeper, Section Ldr (bass), Reg. Mkting Team
3	Jones, Ann	422-333-1234	aj@hotmail.com	Baltimore			X			X			X	Website designer, Communication Team, CAL Coordinator

The spreadsheet provides more columns for collecting additional information.

B) Database programs such as File Maker Pro, Access, Contact, etc. A full-fledged database program often does require an outlay of money to purchase it and a commitment of time to learn how to use. If you are comfortable with using databases, you already know that they will give you great flexibility in how you enter, display, and use the information. If you are not familiar with how database applications work, you will have to allow for learning time.

Here’s a sample of a data-entry screen, from which a variety of information can be pulled for a report (i.e., just those women in a certain state, or just the directors, or a combination of grant-writing and bookkeeping skills).

Regional Database

Name

Address

City/State/Zip

Past RMT/Reg. Ldr: Yes Positions:

Director: Certified:

Chapter Positions:

Regional Positions:

Intl. Positions:

Special Talents:

Grant Writing Website Designer Music Educator Leadership Trainer

News - Editor Software Trainer Bookkeeping Organization/Planning

Fundraiser Membership Marketing Event Planner

Other

Education

Employment

Other special skills we should know about:

Advantages: Depending on the information that you collect, a database allows you to run a variety of reports for the region—a quartet list, a list of member anniversary dates, mailing labels, a list of members by voice part (for educational school purposes), etc. Once data is entered, it can be manipulated into various formats without retyping.

Disadvantages: Your successor will also need to know how to use your program, and/or move the information into a format with which she is familiar.

In conclusion, the process of building your database will be much easier to complete (and remodel) than the work needed to keep it up-to-date. Once it is built, and you are comfortable with how it works and confident that it will meet the needs of your RMT members, you might consider creating a small committee to maintain the database. The committee would be responsible for scheduling when to survey members (or perhaps just new members), doing the actual data entry, and preparing reports for the RMT and Nominating Committee, as needed.

Creating an E-group

An e-group provides an effective and simple method for communicating electronically with a large group. Instead of typing email address individually, you type just one address (that of your e-group), and your message goes out to everyone on the distribution list.

Consider setting up an e-group for any or all of these internal groups:

- Chorus
- Music staff
- Choreography team
- Board or management team
- Front row
- Region
- All regional directors
- All regional presidents/team coordinators

Creating a Yahoo account

1. Go to groups.yahoo.com. Look for a “New User” link on the opening page.
2. Fill out the registration page. Type in an ID. Use something easy for you to remember. Try a combination of your name (such as, MLSmith), or something more creative (such as, hav2sing).
3. Click on “Check Availability of this ID.” If your ID is not available, try another – you may have to try quite a few until you find one that works!

4. Once you're successful, enter your password – twice!
5. You ***DO NOT*** need a Yahoo email address. If you see a checkbox, click to remove the checkmark!
6. Next you need to activate your account. After completing the above steps, you should receive an email message from Yahoo. To verify your email address, click on the link. Your email address has now been linked to your Yahoo ID.

Creating a Yahoo E-group

When you establish a new e-group, you become the Owner and Moderator. These titles can be transferred if you want to leave the e-group. You can also set up multiple moderators.

1. Go to: www.groups.yahoo.com and click on “Start your group today” (or similar wording).
2. Sign in with your Yahoo ID and password.
3. Select your categories by following the prompts on the screen (suggestion: Music > For Musicians > Singers). Click on “Put my group here.”
4. Select the name of your group, and then the name that will appear in brackets in the subject line of every e-group message. Keep it as short as possible, while still making it distinctive.
5. Type in the description of your group. For example: *This e-group is for all members of the Harmony Chorus front row.*
6. Select which email address you'd like to have e-group messages come to.
7. Type in the text to verify your registration.
8. Click on “Customize Your Group.”
9. Click “Get Started” and walk through the process as you are prompted. Here are some setting suggestions:
 - Make your list unlisted so the general public can't search for it.
 - Select “People can join only with my approval” – you don't want strangers joining your group.
 - Select “ Only group members” so strangers can't post inappropriate messages.

- Consider the need to approve messages before they are sent to the entire group. If your group is small (20 or so), it probably isn't necessary to approve messages first. With large groups, however, you run the risk of people sending jokes ("just this once because it is so funny") or other spam, messages with unrelated topics, etc.
- The "message replies go to" field is your choice. Consider carefully which would be best for your group. Many inappropriate responses have been mistakenly sent to a whole group instead of to the single individual for which it was intended. This setting can be changed later, if necessary.
- If you never intend to use the site for Web services (uploading photos or storing files on the Yahoo groups site), then consider limiting it to just an email group.
- Click "yes" to store messages in the archives.
- Click "Go to Group" and you'll be taken to your e-group's opening page.

10. Other settings to choose:

- Click on "management" located on the left panel of the opening page of your e-group.
- Under Group Settings, select "Description & Appearance," and use the various "Edit" links to change the appearance of your e-group page.
- Under Group Settings, select "Messages," and use the various "Edit" links to change how messages are received. NOTE: this is where you decide if attachments can be sent. Allowing attachments is a nice feature of an e-group – choruses can send show flyers to the region, the region can send forms to the members, etc. However, it is recommended that if you allow attachments, you pre-approve messages before they are distributed so you can stop anything that looks suspicious or inappropriate.

11. E-group membership

- *Inviting* – you may invite an unlimited number of people to join your e-group. Invitees receive an email message, inviting them to join. They must click a link to activate their membership and start receiving emails from the group. The disadvantage is that the invitation expires after a few days, and you might need to re-invite them.
- *Adding* – adding people is the most convenient method (for invitees) of activating their membership in an e-group. They don't have to take any action at all – they receive a message that they've been added.

NOTE: use this method of membership sparingly. In many cases, it's quite logical to add people – if you are requiring every member of your chorus to be on the e-group, just add them and you can begin discussions immediately (rather than waiting until each person responds). However, if you are setting up a chat-type group, then it's better to invite people and let them decide if they'd like to join.

A disadvantage to using the “add” feature is that Yahoo permits only 10 members to be added per 24-hour period. If you have a large chorus, it could take several days to get everyone added.

To add members or invite people to join the e-group:

- Click on “Invite” located on the left panel of the opening page of your e-group
 - The first page you see is “Invite People to Join” – if you are planning to ADD people instead, scroll down the page and click on “Add Members.”
 - Add email addresses and names according to the formatting instructions.
 - Write an introductory message. Click “OK” or “Continue.”
 - Review the email address and names and click “Continue.”
 - Scroll down and click “Add” or “Invite.”
- *Bouncing* – occasionally, Yahoo Groups unexpectedly bounces people off the e-group, which means they can no longer send and/or receive messages. Check the “Bouncing” page at least once a week so your members won’t miss important information.

There are many features and settings to explore on the Yahoo Groups site – as moderator you have the ability to customize the e-group for your own requirements! Have fun!

Website Information

Communication Coordinators might be, but are not expected to be, website designers; however, you are assigned the responsibility for your regional Website. Your job description reads, “The Communication Coordinator is responsible for regional website and database design, implementation and maintenance, with input from the Marketing Coordinator.”

That’s a big responsibility. Don’t try to do it by yourself; build a team that understands Website construction, whose members have time to review the site regularly and suggest improvements, and that will keep the website up-to-date with new content and new ideas. You might also ask the Marketing Coordinator if she’d like to be on your team.

The words “website” and “database” might or might not belong in the same sentence for your region, and that’s all right. For some regions a database is an underlying feature of a website, allowing for ways to collect, store, share, and display information; for other regions it would be in the way or add confusion. If you’d like more information about incorporating a database into your website design, ask the Communications Coordinators’ YAHOO! email group for advice and help.

Learning Website Basics

Before you can go very far in understanding how to build a new website, update or replace an old one — you need to understand the language. The best way to do this is to jump in and start reading information about websites. The more you read the language the more you'll begin to understand what it means.

A good place to start is at the beginning, so a Web search for “website design basics” will bring up multiple sites offering online tutorials for building or considering your first website. Here are three sites to study:

1. <http://www.Webdesignfromscratch.com>
2. <http://www.Websitedesignbasics.com/index.html>
3. <http://www.asiostudio.com/website-design>

Keep a notebook of interesting things you learn along the way, websites that provide ideas and advice that you'd want to refer back to, sketches of website layouts that you find especially pleasing, etc.

Building a quality website starts from the inside out; how it works is much more important than how it looks. If it's slow to open or awkward to operate, viewers will just move to another site before they realize how gorgeous the site is. Also, keep in mind that the viewer determines how your website is used, which order the pages are viewed (if any), and which content is read.

A Glossary of Network Terms

(provided from the University of Oregon Information Services Website)

Here are some basic terms and meanings to get you started. Don't worry if you don't understand them at first.

bps (bits per second). A measurement of the speed at which data travels from one place to another. A 57,600 bps modem can transmit about 57,600 bits of data per second.

DNS (Domain Name Service). DNS servers translate symbolic machine names (such as **www.uoregon.edu**) into numerical IP addresses. For example, **www.uoregon.edu** is translated by DNS to **128.223.142.13**. Symbolic names are a great convenience because they are easier to remember than numerical IP addresses.

download. The process of transferring files from another computer to yours via a modem or local network.

email (electronic mail). Messages sent and received via a computer network.

ftp (file transfer protocol). A way to transfer files from one computer to another via the Internet. Many sites on the Internet have repositories of software and files that you can download using an **ftp** client like *SmartFTP*, *Fetch*, or *WS_FTP*.

home page. The “main” or leading Web page of an organization’s or individual’s website.

host. A computer that provides services to other “client” computers on a network. On the Internet, a single computer often provides multiple host functions, such as processing email, serving Web pages, and running applications.

HTML (HyperText Markup Language). The language of the World Wide Web... a set of codes that tells a computer how to display the text, graphics, and other objects that comprise a Web page. The central functional element of HTML is the “HyperText link,” which is a word or picture you can click on to retrieve another Web page and display it on your computer screen.

index.html. The name used for the opening (first) page of most websites. (Other variations could include *index.php*, *index.htm*) After the first page, the Web pages can be named whatever you want with commonly an “.htm” extension (i.e., *choruses.htm*).

IP address. A computer’s unique Internet address, which usually looks like this: 128.223.142.14. Most computers also have a “domain name” assigned to them, which represents cryptic IP addresses with words that are easier to remember (e.g., **password.uoregon.edu**).

network. Two or more computing devices connected together by wiring, cable, digital circuit, or other means. The Internet is a network that connects thousands of computer networks.

pixel. It is defined as the smallest area of the monitor or print which can be independently colored.

protocol. A precise definition of how computers interact with one another on a network. In order for the Internet to work reliably, participants agree to set up their systems in accordance with a specific set of protocols, ensuring compatibility between systems.

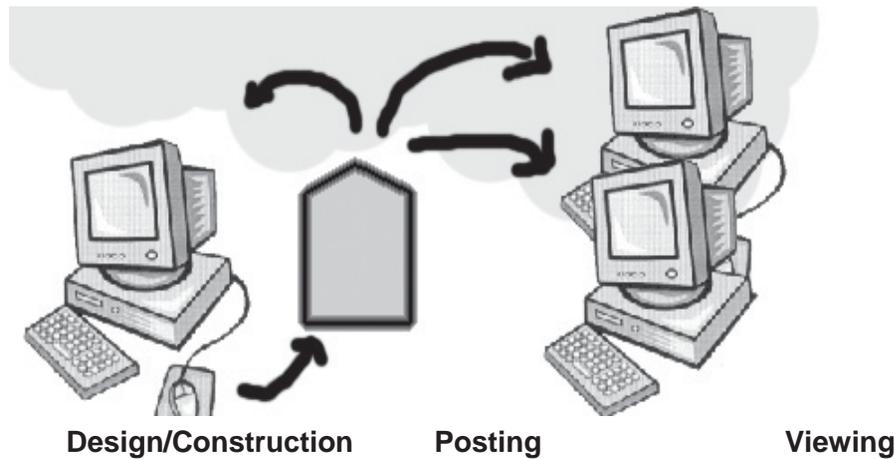
server. A computer, or application, that provides files, data, or some other central body of information to multiple “client” computers by means of a network.

TCP/IP (Transmission Control Protocol/Internet Protocol). These are two of the main “protocols” of the Internet. To connect a computer to the Internet it must have some kind of TCP/IP communication software installed on it.

URL (Uniform Resource Locator). A fancy term for the address of a World Wide Web page or other resource.

Web address. Your individual name on the Internet (*www.mychorus.com*). Also known as a URL or domain name, a Web address could end in *.net*, *.org*, *.biz*, etc.

World Wide Web. A system of linked servers that distribute text, graphics, and multimedia information to users all over the *world*.

How does it work? — Simple Answer

First, a lot of planning goes into deciding what a website will contain and do. Second, a website name must be decided upon and registered. At the same time, it's convenient to decide which hosting service will “house” the website. Third, the website pages are designed, built, and tested on a computer (or perhaps more than one). Fourth, the Web pages and all related files need to be posted together (uploaded) to a hosting site (server). This posting can be done using an FTP (file transfer protocol) program. Fifth, now that your website is posted on the World Wide Web, viewers from around the world can find your website.

Picking a New Website Address and Hosting Site

If you already have a website address (www.something.com) then you could skip this section.

It is important to know what the website address will be for your site, so you will need to register a domain name and also go ahead and decide where your site will be hosted. The website, <http://www.doteasy.com>, can help you find out which website addresses are available for your name. For example, you'd like your website address to be www.singers.com — but a quick search or test shows you that website address is already in use. You will have to search for similar names that fit your needs, perhaps www.SingersFromBaltimore.com.

Web Hosting: All of the files related to your website must be available at any time. You could set up a computer to be the server for your website, but a hosting company is more often used to store your website-related files, and to provide ongoing security checks and backups to ensure that your website is working.

Domain Name Registration: The actual name of your website must be registered for a period of time (usually at least 1 year).

Costs for Hosting and Domain Registration:

The cost to register the name can vary - some Web hosting packages include free domain registrations if you use (and pay for) their hosting services. Other Web hosting sites will host your website for free if you register your domain name with them for a period of time.

For 2013, the following large Web-hosting companies are listed as your best choices.

1. www.ixWebhosting.com
2. www.dot5hosting.com
3. www.hostmonster.com

Each offers at least 200GB of disk space (which is important with sites that feature a lot of photos), multiple emails with an account, additional domains within the same account, low monthly rates, quality support, and added features like shopping carts, etc.

There are also small Web hosting companies that offer similar features at very affordable pricings; one is: <http://www.doteasy.com/>.

Transferring a Website to Another Hosting Company

If for any reason or at any time, you decide that you'd like to move your website to another hosting company, you should be prepared to allow at least one-week for the process to be completed. Contact your new hosting company and it can help you with the process, often with few if any delays. Understand what is involved before starting a transfer.

Posting Your Website

If you move a website, or when you're ready to upload all of your files to the hosting site, you might need to use Windows' "Add Network Wizard" (which would connect directly from your computer to the hosting site's folder for holding your website files) or you might need to use an FTP program.

You will need to log in to your hosting site (this is a security measure to protect your website). You will need several pieces of information when you log in: the domain name (i.e. www.aname.com), the user ID, and password which you picked when you purchased the hosting location. Write the information down and store in a safe place. Once you have logged in the first time, your FTP program or Your Network Places will remember your log in information. If you have more than one person making updates to the website, both will need to use the same user ID and password.

A nice, easy to use, and affordable, FTP program is SmartFTP (www.smartftp.com), which you can download and try before purchasing it. A Web search will reveal choices of FTP programs.

Designing Your Website

A thorough pre-construction phase for your website will save you time in the long run. Identify possible obstacles before you build them into your website. Start with the basics.

- 1) Decide what you want your website to contain
- 2) Make a site map (one or more) to study how the site will hold the information
- 3) Collect samples from websites that you like (or make notes about them)
- 4) Sketch possible layouts for your Web pages

Planning - Deciding what you want in your website

Some pointers to keep in mind:

- List what you'd like your website to do and feature (see sample ideas below).
- Keep the plan (thus your website) simple and neat. It will be easier for viewers to navigate (move) around your site, and for you to keep your site's information up-to-date.
- Link to information on other sites rather than adding it your site.
- Avoid causing users to click more than three times to find important information.
- Use regional pictures, group shots, etc. in your website. People like to see themselves.
- Run tests frequently to analyze how visitors are using your website.

Ideas

Following are some ideas/questions to consider when deciding what should be in your website (new or a revision).

Web page	Content Ideas
Opening/Home/Index	<ul style="list-style-type: none"> <input type="checkbox"/> First impression - counts!!! <input type="checkbox"/> Establish your region's image <input type="checkbox"/> Front page could possibly include: Logo, Mission Statement, overview of the region, contact information, picture <input type="checkbox"/> Links to other related Web pages <input type="checkbox"/> Footer or some consistent spot for contacting someone in the region for additional information
About the Region	<ul style="list-style-type: none"> <input type="checkbox"/> Map, motto, goals, etc. <input type="checkbox"/> Photos <input type="checkbox"/> Reaching the RMT, information about the RMT roles, including application information
Your Choruses	<ul style="list-style-type: none"> <input type="checkbox"/> About the choruses (rehearsal days, times, locations, director, leadership, contact info.) <input type="checkbox"/> Map showing where the choruses meet <input type="checkbox"/> Pictures
Your Quartets	<ul style="list-style-type: none"> <input type="checkbox"/> About the quartets (all quartets, just registered quartets, just champion and top quartets) <input type="checkbox"/> Pictures <input type="checkbox"/> Information pertinent to quartets, links to at least some quartets
Regional and Sweet Adelines International Events	<ul style="list-style-type: none"> <input type="checkbox"/> Regional events, competition information, chorus events, other barbershop events <input type="checkbox"/> Registration forms for regional events <input type="checkbox"/> Links to additional information

Directors	<p>This page could be dedicated to providing directors with things they might appreciate having, such as:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Links to arrangers' websites <input type="checkbox"/> Downloadable handouts for their chorus <input type="checkbox"/> Links to sites with warm-up ideas, vocal lessons, vocal health information
Membership	<ul style="list-style-type: none"> <input type="checkbox"/> Materials provided by your membership manager <input type="checkbox"/> Membership forms
Marketing	<ul style="list-style-type: none"> <input type="checkbox"/> Materials provided by your marketing manager <input type="checkbox"/> Templates for flyers - to help choruses
Communication	<input type="checkbox"/> Newsletters, flyers, etc.
Regional Library	<input type="checkbox"/> List of what's available
Regional Boutique	<input type="checkbox"/> Could be an online store for your members
Bulletin Board area	<input type="checkbox"/> For choruses, quartets, and members to advertise items or search for a baritone
Photo Gallery	<input type="checkbox"/> Pictures and brief descriptions

Sorting out the pieces: Sample Site Map

A site map makes it easy to place the pieces of information and to assign specific pages for it. Make site map worksheets to test your placements.

Each column represents a click or level. Avoid using the fourth level.

Opening Page	1st Level	2nd Level	3rd Level	4th Level
Home	Region ____	Regional info		
		RMT info and contacts		
		Job Descriptions	Applications Member Surveys	
	Our Choruses	Champ Chorus pictures and links		
		List of choruses with contact info, etc		
	Our Quartets	Champion quartet photos and links List of quartets		
	Events	Upcoming events		

Layout: Giving shape to your ideas

Before you start your Web page, you will want to have an idea of what it will look like when complete. Sketch several options for the home page and remaining pages. Get a feel for what you like and what you don't like.

1. Page sketches show where the logos, pictures, navigation areas, and text blocks will be placed.
2. Select colors and fonts for major design elements on the pages.
3. Build or clean up the logos you plan to use.
4. Collect the elements (documents, pictures, text, link information, etc.) that will go into the website's pages.

Deciding how to proceed

Building a regional site can be a complex project. Depend on your team, and ask for help. Building a website is like building a tower with blocks...one small, well-planned step at a time. Otherwise, the finished product will not function or look like your vision.

Some regions have hired outside designers to build, or rebuild, their websites. The advantage is that you have someone committed to finishing the project in a timely fashion and someone who knows what she is doing from the start. Experienced designers also have the appropriate software, so your region is spared that expense. Some regions have website designers within their choruses who can help or manage the project.

Which software should you use, if you're going to try it yourself?

You and your team should decide which of the following options is the best in your situation.

- Some programs you already use may have simple templates for building Web pages. Publisher has a wizard and templates to help you get started. Check the manual and online help for instructions.
- Some Web hosting companies (including those previously listed) offer free site building services featuring templates that are easy to work with. These are simple and affordable for a regional chorus or quartet with websites of four or five pages in length.
- There are also website building applications which, although expensive to purchase, can also do a lot for you later on. Macromedia's Dreamweaver (and accompanying applications) is one of the leading website construction packages.

Building Your First Web Page or Website

The method or software you decide to use will determine how you construct each page. This section will not tell you to put this here and that there. Instead, it provides general rules that you should follow regardless of the method or software you plan to use.

Dimensions of Website pages

A good width for a website page is 800 pixels, which looks decent on most monitors (including older, lower resolution monitors). You can scroll down a Web page for viewing more information than fits on a screen. Avoid making any page too long. If you use a ready-made template, you may not be able to control the width of your Web page. Most pages can be as long as you want.

Other Tips

If you are using ready-made templates, some of the following tips might not be available to you.

- Insert a table that measures 800 pixels wide as a good start. Then insert additional tables or rows and columns inside the table. The outer table can be centered or left justified, depending on how you want your website to fill the screen.
- Test your final design, by building the Home Page and only one of the secondary pages. Include all features of the pages, especially working navigation.
- Use a consistent font for all text. Arial is a popular font.
- Use animation in a website only when it supports a point you want to make.
- Size all photos and save for the Web (if you have a photo program with that option). Saving photos in the size you plan to use online will save hosting space, and also make inserting the photos easier to control. If a website is 800 pixels wide, then most photos should be no wider than 250-300 pixels.
- Collect every element you want to use in one folder.
- Test your site as often as possible during the construction phase. Ask friends with Macs, PCs and other platforms to test how your early files display on their hardware.

Taking Care of the Website - Maintenance and Backups

This is an important area, and one where your Web team can play a crucial role. As you build the website and add information, make a list of those items (documents, text, links, etc.) that will become dated or out-of-date. You want to make sure to remove or update these items in a timely fashion.

It is important to run regular maintenance checks on the Web pages to make sure links work as planned, photos are visible, and attachments remain available. Pick one week each month to perform your maintenance routine.

Along with the regular maintenance, look for areas that need to be updated. You may need to update the entire site, or at least a few pages of it, more than once a month.

Keep a working copy of all website files in a folder on a computer that you can use for updating the site. The hosting site, if you post all of the website's files in that location, will serve as your first backup. It is also recommended that whenever changes are made to the website, that a CD or DVD is used to store all of the website files.

Dividing the Workload and Responsibilities

Other members of the RMT have vested interests in the regional website. They should care what is on the website so they can refer members to specific sections for the information they need. You may find that some members of the RMT will want to provide information for specific pages on the website. You can build your website so RMT members can also update content.

Develop a plan and schedule for how the team can be involved in construction and maintenance. You'll save time and energy and the website will be up-to-date and alive.

Questions

Ask for help or assistance before you waste hours figuring something out. Website designers are creative people, and creative people like to share (sometimes for free) what they've learned along the way. Information on the Internet changes as new sites are built and old ones are updated. Do regular Web searches to find current helpful information.

Consistency is the best tool to use when it comes to website maintenance. Regular check-ups and timely updates are essential. Provide opportunities for members to give feedback and make suggestions for improvements. A website will take on a life of its own, if it is kept fresh and appealing.

If you have questions, ask—don't struggle.

Getting More Public Exposure

YouTube.com

YouTube is a video-sharing website that is changing American culture. It seems that every day, a short video clip on YouTube makes headline news. YouTube is a way to get your videos to the people who matter to you. With YouTube, you can:

- Upload, tag and share your videos worldwide
- Browse thousands of original videos uploaded by community members
- Find, join and create video groups to connect with people with similar interests
- Customize your experience with playlists and subscriptions
- Integrate YouTube with your website

Go to YouTube.com and type "Sweet Adelines" or "barbershop" and see all the videos that come up!

Here are some instructions for getting your YouTube.com page started:

1. Establish a Music Account

Go to the "Signup" page (<http://www.youtube.com/signup>), choose a username and password, and enter your information. Then click the "Sign Up" button. Select the type of account you want to set up (suggestion: use musician for choruses/quartets). All accounts share basic YouTube features, such as uploading, commenting, sharing, video responses, etc. Each specialized account type offers different customization options. A musician account allows custom logo, genre and tour date information, and CD purchase links on Profile.

2. Upload your video

Once you have established your YouTube account, you can upload video(s) to your site. Go to <http://www.youtube.com/> and enter your username and password in the Member Sign-In section, and click the “Login” button. At the top of the next page, click the “My Account” link. On the next page, click “Upload New Video” in the “Videos” section. Fill in the information on this page to identify your video (i.e., Title, Description, Tags, Video Category). Then click the “Go Upload a File” button. From the next page, click the “Browse” button and select a video file to upload. Follow the instructions for uploading your file.

YouTube accepts video files from most digital cameras, camcorders, and smart phones in the .WMV, .AVI, MOV, and .MPG file formats. All videos uploaded to YouTube have a 100MB file size limit. The longer the video is, the more compression will be required to fit it into that size. For that reason, most videos on YouTube are under five minutes.

Facebook.com

For choruses and regions a Facebook and Twitter fan page should be an integral part of your social media campaign.

Setting up a Facebook page and Twitter account for your quartet, region or chapter is way to drive potential members to your website and to your chorus rehearsals.

Let’s face it, one of the main things we all do on Facebook is flip through photos. Facebook is one of the largest photo sharing sites, and its browsing capabilities are easier to manage than most.

Think outside the box and bring a camera with you everywhere, no matter what kind of Page you are trying to promote.

Perhaps the greatest thing about Facebook is that you don’t need a ton of technical skills to make and promote a great Page. Facebook provides you with all the tools, for free; you just have to know how to use them.

Link your Facebook Page to your blog or website and Twitter, Flickr or YouTube accounts, as well. Upload new content as often as possible, and automate it where you can using third party applications. Learn a little basic HTML and you can create interactive boxes on both the Wall and Boxes tabs of your Page. It may take time, but you don’t need to hire a fancy developer if you’re willing to do the work.

Another major benefit to using Facebook Pages is that they can often be executed faster and cheaper than a website. By building off existing technology and functionality, you can save yourself a lot of time, money and hassle. You can also tap into an existing network much more easily.

Social media changes daily, so it's important to keep up with the trends, as this information will likely be outdated by the time you read it. Keep up with social media by searching trends and reading articles online.

Liaison to International

The Communications Coordinator is the communication link between the international organization and the region. Your mailbox will be full of correspondence from international, much of which will need to be distributed to others in your region. Your region will need to determine which of the coordinators or their delegates will receive the correspondence.

Additionally, the Communications Coordinator will need to provide to international many forms throughout the year.

Deadline for Submitting	Paperwork Due at Headquarters	Coordinator Responsible
March 15	Submit RMT Information to International	Communications Coordinator
May 1	Distribute Request for Five-Year Regional Convention Schedule	Events Coordinator
May 1	Request Regional Competition Info Sheet	Events Coordinator
May 15	Nominations for NAFME Award	Education Coordinator
May 31	Request for Revitalization Status	Education Coordinator and Membership Coordinator
May 31	Regional Liability Insurance Payment	Finance Coordinator
June 30	State of the Region Reports Due	Communications Coordinator
July 15	Verification of Audit Form	Finance Coordinator
July 15	Regional Financial Fact Sheet	Finance Coordinator
September 15	Copy of IRS form 990	Finance Coordinator
October 15	Education Coordinator Recommendations and Applications Transmittal Form	Communications Coordinator
November 15	Proposed Schedule of Events	Events Coordinator

Sweet Adelines International - Regional Reports

Headquarters maintains a database in which information about our members is gathered. This database has a feature which allows the Communications Coordinator, Membership Coordinator, and/or the Finance Coordinator in each region to access member information from each chapter.

Accessing the Sweet Adeline International Information for Your Region

1. Go to www.sweetadelines.com

2. Log in:

Go to the members only log in area. User name is your last name and first initial (i.e., smithn), and your password is your Sweet Adelines Member ID# (on your membership card).

3. Opening Screen for your chapter report options.

Chapter Members - provides a list for ALL members from all chapters (including CAL) or you can select a specific chapter from the dropdown menu.

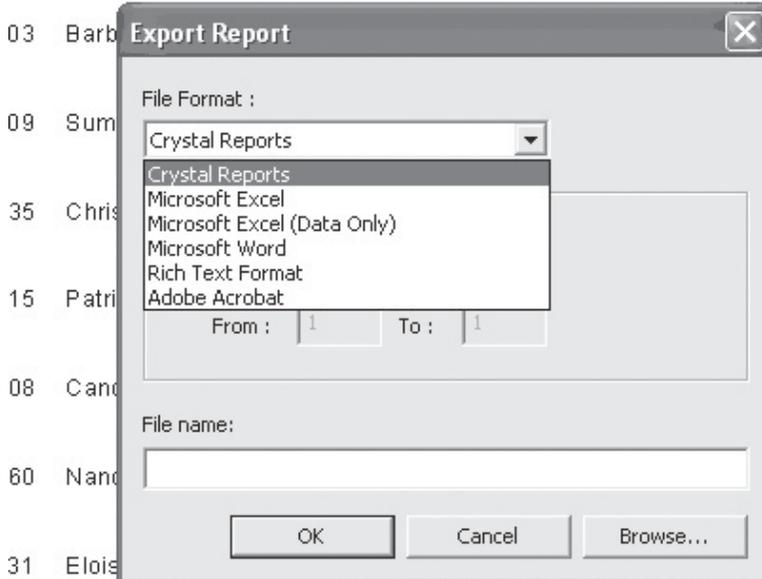
Chapter Activity - provides information about renewals, transfers, etc. that have been recorded by international headquarters during a given period of time. You can set the start/end dates (m/d/yyyy format - 12/2/2013 - 2/25/2014) for all of your chapters or for a specific chapter.

Chapter Totals - provides a list of the chapters in your region with their current membership numbers.

Chapters Totals by Region - provides a list of all the regions showing their current total membership numbers.

5. Downloading the information in the report to your computer.

Along the top left side of the window, click on the small icon of an envelope with a down-arrow, this will bring up the following Export Report window.



Medford, OR 97504

There are currently six format options for downloading the reports.

- Crystal Reports (if you have Crystal capabilities).
- Microsoft Excel (Excel document that exactly looks like the window you viewed online. This document is appropriate for printing/viewing only – it cannot be easily sorted).
- Microsoft Excel (Data Only) - provides a simple data file which can be opened as a spreadsheet with member information arranged in rows. This option can be easily sorted and rearranged as a spreadsheet. The data can also be moved into other programs such as Word, etc.
- Microsoft Word - provides a non-sortable, but printable view of the report's information.
- Rich Text Format - provides the information also in a non-sortable format.
- Adobe Acrobat - converts the information into a PDF file for easy viewing, storage, and emailing.

6. How can you, as the Communications Coordinator, use this information?

Once or twice each year, use the Excel data only file to provide each chapter with a list of the members' names that international shows as belonging with each chapter. This is a way to encourage chapters to ensure that members keep their personal information updated with Sweet Adelines International. The information can be beneficial to chapters and to CAL members as they prepare for competition each year.

This information also could be used as a starting point for building your Regional Leadership Database which is one of your job description items.

7. Regarding Regional Databases containing the names and contact information for all regional members.

Prior to international's new database, several regions developed their own regional database systems for keeping information about all of their members as up-to-date as possible. Regions have used their database information to publish a complete regional directory every year or for mailing labels. One region (at least) uses an online database (updated by the members themselves) for online registrations for regional events (competition, schools, workshops, etc).

International's database is becoming more up-to-date, and as time goes on it will become even more accurate. Depending on what you want to do with the contact information for your members, you will be able to determine if it is worth your time and energy to build and/or maintain a separate regional database, or to just use the information provided from international on a regular basis.

If you want to build your own database (or list) read the section on "Collecting Regional Leadership Information in a Database." The information given in that section can be applied to building a database system for your entire regional membership.

Directors' Coordinator

Job Description

- Represents the interests of the regional directors on the Regional Management Team.
- Communicates with directors in her 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 her successor.
- Appoints staff to assist in the implementation of her responsibilities.

A vodcast outlining each RMT Coordinator's duties has been created and can be found in the Leadership section of the Members Only portion of the Sweet Adelines website.

Maintain Lines of Communication with Directors

The key to success as a coordinator is communication. It is important to remember that not only does the coordinator dispense information to the directors but she must be a good listener. In some cases, it may be necessary to “read between the lines” of what is said. The options for keeping lines of communication open may include phone calls, forums, structured classes, newsletters, and certainly email.

Ways to foster communication:

- Call or email on a monthly or bi-monthly basis to listen and advise.
- Inform the directors of “trends” noted by the judges following each competition.
- A “Directors' Column” in the regional newsletter for reminders of special dates, etc.
- A private newsletter.
- A private (Front Line Directors Only) e-group for exchange of ideas or to post coaching dates that might be shared.

Represent the Directors' Interest

As the Director's representative on the RMT, the DC is charged with protecting their interests in team decisions. Likewise, their educational concerns should be addressed through close cooperation with the Education Coordinator.

It is, therefore, important to gather input from the Directors regarding those topics most important to them. This may be done in the following ways:

- Provide an opportunity for the directors to gather at each regional meeting.
- Use of surveys and questionnaires (either paper or online) for needs assessments.
- Provide a topic for discussion on a chat room.
- Encourage contact with the coordinator to voice opinions.
- Ask for information related to impending decisions by the team.

The DC should work closely with the Education Coordinator to ensure that the educational needs of the directors and their choruses are being met.

- Consult with the Education Coordinator to outline goals for the term:
 - Separate classes at regional event
 - A “retreat” weekend (may include: assistants, DCP members, other musical leaders)
- Discuss choice of faculty
- Assist the Education Coordinator in providing aid to directors experiencing difficulty in their role as educational leaders for their chorus:
 - Low scores
 - Membership loss through dissatisfaction (include Membership Coordinator in these discussion – she may be the first to hear of the problem)

How to Conduct a Directors' Forum

One important function of a Directors' Coordinator is to provide opportunities for directors to get together for various purposes, and to manage those meetings in a way that will promote ongoing inspiration, education, and harmony among the directors in region.

Determine the Structure of the Forum

Before planning the format of the forum, its structure must be determined. Consider the goal of the forum and how that goal is to be accomplished before selecting one of the following structures for the meeting:

- **Informal networking** creates an atmosphere of safety and camaraderie for the purpose of exchanging ideas and methods of dealing with mutual problems. An informal networking structure may be desirable if some of the directors are new and would benefit from contact with other directors. This kind of meeting is best held in a casual setting with a comfortable ambiance. An open-ended time frame may best accommodate the flow of conversation and exchange of information.
- **Formal meeting** is more structured and used to disperse information needed by the directors. This kind of meeting may be held in a formal conference-type setting with a set time frame.

- **Education-based meeting** is held for the purpose of director education. The setting for this meeting depends on the kind of education to be given (a class in directing techniques may require more open space than a class in rehearsal planning). Depending on the type of education, this meeting may be held over a longer period of time such as a daylong seminar.

You may find that a combination of meeting structures works best. For example, begin an informal meeting with the more formal activity of dispersing information.

Determine the Time and Place of the Forum

Most forums will occur at regional meetings as that is when most of the directors are together in one place. The informal meeting could be planned outside the time frame of the regularly scheduled classes while the educational meeting could be scheduled as part of the weekend classes. The requirements of the forum such as room size, set up and microphones, flip chart needs should be made known to the Events Coordinator.

Determine the Content

The subjects to be discussed or taught during the forum should be based on information gathered from various sources. A questionnaire is one of the most direct methods of determining what is wanted and needed by the directors. In addition to questionnaires, evaluations by the directors from prior meetings can be useful sources of information. Phone calls or emails to directors may provide free-form input. *Forward Motion* and *Pitch Pipe* articles, and other educational materials available from international headquarters also are good sources of ideas for discussions and education.

Conduct the Meeting

Any meeting should begin with introductions of all present, with special emphasis on new directors and invited guests.

Depending on the structure of the meeting, an agenda might be appropriate. Written agendas should be sent to directors prior to the meeting, giving them time to study the subjects and prepare for the discussions. Though the informal networking structure may not require an agenda, it is a good idea for the Directors' Coordinator to prepare some interesting topics.

It is the job of the Directors' Coordinator to guide, but not interfere with discussions, and to keep the discussion on track. The structure and the time frame of the meeting also will determine how strictly the coordinator keeps to the agenda. A written agenda affords the coordinator a ready tool for keeping the meeting moving forward in a focused manner.

Education Coordinator

Job Description

- 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 marketing events.
- Coordinates regional faculty visits to choruses.
- Maintains five-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. This position could be shifted to the responsibility of the Directors Coordinator depending on what would provide the most effective program development and oversight for the region.
- Maintains contact with appropriate staff members at international headquarters.
- Maintains comprehensive records and forwards materials to her successor.
- Trains her successor.
- Appoints staff to assist with the implementation of responsibilities as needed.

A vodcast outlining each RMT Coordinator's duties has been created and can be found in the Leadership section of the Members Only portion of the Sweet Adelines website.

Developing Education Plans

Each region tailors its educational offerings to suit the needs of its membership. Regional education weekends or training sessions are scheduled throughout the year as a service to its members and as a means of generating income for the region. Since the mission of Sweet Adelines International places education as its fundamental purpose, the responsibility for regional education is a serious undertaking.

Long-range educational needs are planned in response to some or all of the following:

- Common trends in regional competition scores (Consult judges' comment sheets.)

- Evaluation forms distributed at educational events
- Information provided from international headquarters
- Questionnaires to directors/members
- The region's strategic plan

Also consider who will be targeted for training: arrangers, directors, quartets, section leaders, chapter leaders, etc. Each group will need individualized training with emphasis on its specialty.

The coordination of subject areas and the responsibility for continuity in planning will be the responsibility of the Education Coordinator with input from the Directors' Coordinator, the Membership Coordinator and other members of the regional management team.

A long-term educational plan should assess the following:

- Determine the groups currently being educated.
- Review subject matter being covered.
- Analyze the time-frame for subject introduction and dissemination of information.
- Determine follow-up needs.
- How often and by whom?
- Establish administrative needs and responsibilities.
- Determine subjects missing that need to be added to curriculum.
- Develop a plan for assessment and evaluation of programs.
- Look for areas of educational programs overlap. What information needs to go to whom? How does training for one group change the information that needs to be passed on to other groups?
- Define plans that need to be made to address the future needs of the region and of its members.

Once this information is compiled, it can be used as a reference by all seminar chairs, class presenters, and committee chairs.

Since Sweet Adelines International's mission statement includes "elevating women singers worldwide through education, performance and competition," a music education plan should define a sequential curriculum for each of the target groups identified for education. Once the needs have been identified and an educational plan written, a schedule should be set for faculty selection and class offerings.

Although the regional team cultivates a pool of resource people to teach, coach and advise choruses at the regional level and to make chapter visits, for a special event you may wish to hire outside faculty. Remember that most members of the International Faculty are booked several years in advance.

There are a number of methods for finding the right person to teach your event. One place to begin is to look in the International Faculty résumés (available on the Sweet Adelines International Website) to match faculty interest with the subject matter of your class. This is also a good time to use your communications network with other Education Coordinators and ask them for faculty referrals. Don't forget the obvious: ask for input from your region's leaders and grass root members.

It is important that the Education Coordinator keep the regional management team informed. Once an educational event has been set, the Team Coordinator should add the event to the regional calendar and other members of the team should begin promoting the event according to their position, for example, when making chorus visits, through regional newsletters, etc.

It is the responsibility of the Education Coordinator to ensure that the curriculum plan is updated and reviewed every two years (or as needed) to maintain the region's continuing focus on quality music education.

Planning and Scheduling Regional Events

Successful events take long-range planning, lots of teamwork and specific job descriptions or guides to achieve the results you want. Each chorus and region is unique. Geography and the size of the group play a role. Financial considerations are a reality.

Event planning and project planning use the same process. Complex events or projects require the use of all the tools that come with the process; simpler projects generally use only a few. The tools are flexible, but the process remains the same.

Successful project leaders are the ones who know how to create a vision that engages everyone involved in the project. They will be able to define expected results, delegate responsibility, break the project down into manageable chunks, develop achievable schedules, communicate concisely, clearly, and rapidly, adjust to changes, monitor progress, and accept nothing short of project success.

The four basic steps for project management are:

- **Visualize**—What is the project (or event) supposed to look like when it has been completed? What is to be accomplished? If it is an educational event, what will the learner learn?
- **Plan**—What tasks need to be completed? Who will do which tasks? When and where will they do them? How much time is required? How much will the event cost?
- **Implement**—The process of communication, coordination, monitoring and adjusting to keep a project on track toward successful completion.
- **Close**—Compare the outcome of the project with the intended results. Celebrate, honor, and reward the efforts of everyone involved. Use evaluation as a learning opportunity to improve future events.

Educational Event Checklist

2-3 Years Out (or as long-range as currently possible!)

- Planning committee meets
- Finalize dates
- Determine target group
- Invite faculty or coach
- Select facility—negotiate contract
- Set up master notebook

1 Year Out—minimum

- Contract reconfirmed with meeting facility
- Reconfirm faculty
- Finalize purpose and learning objectives
- Prepare tentative schedule
- Finalize budget
- Develop marketing plan
- Plan for special events: parties, entertainment, opening and closing sessions

9 Months Out

- Send confirmation letters to faculty or coach
 - outline what was agreed to in the initial discussions
 - include a draft schedule
 - include the Hospitality Form to be completed and returned to you
- Contact any demo or performing groups if appropriate
- Design registration form
- Begin marketing

6 Months Out

- Prepare final schedule
- Confirm schedule with facility
- Make special events arrangements
- Continue marketing to members
- Locate equipment for audio/visual needs

3 Months Out

- Confirm meal arrangements if appropriate
- Contact faculty and confirm schedule
- Organize faculty transportation if appropriate
- Finalize arrangements for faculty housing and meals
- Prepare evaluation form or online survey
- Confirm status of handouts if appropriate
- Continue marketing to members and public

1 Month Out

- Prepare name tags and all registration materials
- Finalize preparations for classes (handouts duplicated, equipment, seating, etc.). Upload handouts to web/email for home printing to save cost of duplication.

Event

- Have fun

1-3 Weeks After Event

- Write thank you letters to faculty, staff, and anyone else appropriate
- Send International Faculty Program Evaluation to International headquarters
- Review evaluations, make recommendations for future
- Prepare final report
- Take a vacation

Creating an Event Timeline

Once the big picture is identified, outline and break down the project into smaller levels of detail, as far as necessary to identify who is doing what. It may be easier to do this outline in a nonlinear form such as a mindmap rather than completing a traditional outline, but either method is equally effective.

- **Major Pieces**—Begin by identifying the major pieces of the event. Some major pieces, such as budget or facility, are standard for most events. Major pieces should cover all the work to be done on an event. If you can think of any task, no matter how small, that does not fit under one of the major pieces, you have not yet determined all of the major pieces.
- **Minor Pieces**—Most major pieces can be further divided into smaller pieces to help make the project clear and manageable.
- **Tasks**—Once an event project is broken down into major and minor pieces, the individual tasks begin to be apparent. A task is a small and manageable activity that can generally be done in a short time by one person.

Once it is understood what needs to be done, look at the logical sequence of the tasks. This is critical, since certain tasks may have to be completed before the next ones can be started. Tasks can be divided into two groups:

Parallel—a task that can be done during the same time frame as other tasks.

Dependent—a task that cannot begin until certain predecessor tasks are complete.

It is likely that there is an interdependence which makes careful sequencing important. (Hint: To speed up the sequencing process, put each task on a “Post-it” note. Then just move the notes around until you have them all lined up in order.) Once the sequence has been determined, the tasks can be entered on a project timeline in order.

Using a project timeline can be very helpful because the timeline provides important information in visual terms that most people can understand. Project management software and many sophisticated timeline forms are available. The project timeline form included in this component is a simple tool that you may find helpful. It is similar to a Gantt chart, which is a visual guide that shows the relationships between tasks and time. It was created by Henry Gantt around the turn of the century to help manage some of the early industrial projects.

Project timelines are invaluable for keeping everyone involved on the project aware of deadlines. It is important to decide who is going to take responsibility for each task and to enter that information on the project timeline. This makes the timeline an effective tool not only for planning but also for communicating. Everyone is aware of deadlines and can see her part in the big picture.

Actual completion dates can be entered on the form as each task is completed. This becomes helpful information when you evaluate the event.

Project Timeline

Event Title: Singwell Chorus Retreat

Dates: March 15, 20XX

Time Line - Month/Date				20XX May	June	July	Sept.	Nov.	Dec.	Jan.	20XX Jan.	Feb.	Feb.	Mar.	Mar.	Apr.			
√	ACTIVITIES/TASKS	Delegated To:	Predecessor	Finish	15	1	1	15	15	15	10	20	1	15	1	5	1	Actual	
					1. Facility				→										
√	1.1 Get bids (two or more)	Chair		20-May	→														
	1.2 Management Team selects facility		1.1	1 June															
	2. Budget				→														
√	2.1 Prepare	Chair		15-Jun	→			→											
√	2.2 Approved by Management Team		2.1	1-Jul	→			→	→										
	3. Schedule	Director																	
	4. Coach				→														
√	4.1 Hospitality form sent	Mary	1.2	15-Jun	→			→											
√	4.2 Hospitality form returned			15-Aug	→			→	→	→									
	4.3 Make transportation arrangements	Mary	4.2		→					→									
	4.4 Send confirmation letter & schedule	Mary	3		→			→	→	→				→					
	4.5 Make meal arrangements	Mary	4.2																
	5. Meals				→			→											
	5.1 Choose caterer & menu for event meal	Sue	1.2		→			→	→	→				→					
	5.2 Arrange for coffee, rolls, paper cups, etc.	Sue			→									→					
	5.3 Collect money for evening meal	Sue	5.1		→			→	→	→				→					
	5.4 Make final arrangements with caterer	Sue			→									→					
	6. Entertainment				→			→											
	6.1 Sign-up sheet for quartets and skits	Cindy			→			→											
	6.2 Get emcee	Cindy			→									→					
	6.3 Prepare order of performances	Cindy	6.1		→														
	7. Equipment Chair				→			→											
	7.1 Appoint equipment coordinator	Chair			→									→					
	7.2 Tables and chairs for meals	??	1.2		→									→					
	7.3 Lavalier mic	??	1.2		→									→					
	7.4 Make arrangements to move risers	??	1.2		→									→					

Project Timeline

Event Title: Singwell Chorus Retreat

Dates: March 15, 20XX

Time Line - Month/Date				20XX May	June	July	Sept.	Nov.	Dec.	Jan.	20XX Jan.	Feb.	Feb.	Mar.	Mar.	Apr.	
√	ACTIVITIES/TASKS	Delegated To:	Predecessor	Finish													Actual
					15	1	1	15	15	15	10	20	1	15	1	5	
	8. On site Stuff																
	8.1 Appoint set up and clean up committees	Chair															
	8.2 Prepare name tags	Chair															
	8.3 Prepare evaluation form	Chair															
	8.4 Distribute and collect evaluation forms	Chair															
	9. Information to chorus																
	9.1 Begin announcements in weekly "hot sheet"	Barbara	3														
	9.2 Information sheet and schedule to chorus	Barbara	3														
	10. Chorus																
	10.1 Thank you notes	Chair															
	10.2 Final report to Management Team	Chair	8.4														

Working with Out-of-Region Faculty

Members of the Sweet Adelines International Faculty are some of the most energetic, most musically and administratively talented people in the world! As a result, their skills are highly valued and their services are much in demand. Booking these busy people is often easier said than done. Here are some important tips to ensure a minimum amount of frustration during this process.

Obtain Updated Avenues of Communication

Contact international headquarters in order to update all available telephone numbers, current mailing addresses, email addresses, fax numbers, cell phone numbers, etc. In this fast-changing age of technology and transient living, information becomes outdated quickly.

Follow-up all Telephone Contact with Written Confirmation

The addition of email technology has proven to be an invaluable tool in reaching faculty members. Should you or the faculty member not have email, you will most likely make your initial contact by telephone. If you do reach faculty member(s) this way, be sure that you take accurate notes of the result of your discussion, document them and send written confirmation to the faculty member(s) of any bookings you have made. Remember also to provide copies of this confirmation for fellow regional leaders, international headquarters and/or your files, etc.

Written Contacts

Email and facsimile technology are convenient ways to contact faculty members. Letters by traditional mail provide sure but very slow means of contact. Should you make written contact, consider the following:

Traditional Letters—Include a form which allows the faculty member to answer your questions with a simple check mark or a yes or no. The less time consuming the form appears, the more likely you are to get it back. **Always include a self-addressed, stamped envelope.**

Facsimile Letters—This is a fairly convenient way for a regional leader to make contact, but this type of contact can prove to be inconvenient from the faculty member's perspective. Fax machines are often available through a work environment and not always conveniently available for use.

Email—This form of contact is considered, by far, the most convenient way to reach most members of the international faculty. Faculty members and regional leaders benefit the most from this form of communication because it is efficient, fast, private and can be handled by both parties at their convenience.

Your contact with the desired faculty member(s) should include questions about availability, fees, anticipated flight costs, etc. The following information and questions should be standard and included as a part of your initial telephone call, email, or letter or fax inquiries:

- State the dates of the meeting and the teaching hours you would like the faculty member to provide. Ask, "What is the anticipated fee?"

- Indicate the location of the facility and the anticipated arrival airport. Ask, “What are the parking fees? Mileage costs?” from the departing airport.
- Be sure to include extra quartet or chorus coaching hours, which may be requested outside of prepared class material. Ask, “What is the anticipated additional fee?”
- Request an update of the faculty member’s credentials. (This is important for regional publicity purposes.)
- Ask if there are additional classes that have been added to the faculty member’s lists that don’t appear on their online faculty résumés.
- If you need a specific class developed, be sure to inquire whether the faculty person is able and willing to do it. If so, ask what type of materials and lead time is required for new classes to be developed.

Once you’ve confirmed availability and secured answers to the questions above, begin planning a preliminary schedule of classes which best satisfy the needs of the region. Feel free to communicate your insights with the faculty member. She may have helpful suggestions regarding class order, subject matter, etc.

You’ve done your job. You’ve secured quality faculty, two years have passed, and now your regional event is at hand. Hosting out-of-region faculty is an important job and one that should not be taken lightly. Consider appointing a regional guest faculty host coordinator who specifically concerns herself (and/or her committee) with faculty transportation to and from the airport, updated flight arrival and departure times, special dietary needs of the faculty member(s), transportation of guest faculty throughout his/her stay, hospitality snacks or beverages, etc. The little amenities are wonderfully appreciated by every faculty member and are easily managed with an organized, caring person in charge.

Check-in at a hotel, retreat site, campus, etc., is best handled in advance of the faculty member’s arrival. **Put your guest faculty on a master account or pre-pay the account before he/she arrives.** Confusion with accounting issues can and should be avoided at the time of the faculty member’s arrival.

Whenever possible, provide a private room for your guest(s). “Down” time is an important part of “up” time, and energetic, enthusiastic faculty members appreciate and need a few hours of uninterrupted rejuvenation. This courtesy is so important.

Following the event, complete a General Evaluation form for International Faculty (found in the Document Center of the SA website) and submit it to International headquarters.

Regional weekends come and go, each of them offering special memories, classes, faculty teaching styles and personalities, etc. Be proud about your part in all of it. You’ve helped plan and implement events that affect hundreds of people... maybe forever.

Working with the Education Coordinator's Staff

Two questions you've most likely given a lot of thought to since learning about your appointment are, "What does it mean to be the Education Coordinator?" and "What will I be doing?" You should be pleased to learn that you aren't responsible for carrying out the tasks of every function that falls under your umbrella. As the regional team member in charge of the education focus, it is your responsibility to see that all functions are executed. Fortunately for you, some tasks can best be handled by your staff with you as the manager.

Managing Your Staff

Management is a people job. You will need to work with, help, listen to, encourage, and guide those whom you appoint to carry on the work of the region. When you want to get a task done through someone else, you employ an entirely different set of skills than when you do the task yourself; you introduce an interpersonal element into your equation. No matter how good you are at "doing" the job, you will need good planning skills, organization skills, leadership skills, and follow-up skills. In other words, in addition to being a good doer, your goal is to be a good manager of doers.

Assuming that you've already selected your staff according to the education and training needs of your region, define the expertise of each of these individuals and the way in which their talents can be used to fulfill the goals of the region's education program.

Select personnel who are capable of handling the various functions necessary to carry out the plan. There are basically two types of functions they will need to fulfill:

- **Faculty**- those who teach, facilitate, and coach choruses and quartets. These are the personnel you will rely on to provide educational training at regional workshops and to assist you with chorus visits that require coaching and/or instruction in the barbershop style.
- **Administrators**- those who carry out programs under the Education Coordinator structure. Program administration can be successfully delegated for the Director Certification Program, Young Women in Harmony Program, Quartet Promotion, and Arrangers Program.

A third optional function might be a resource or visionary team composed of experts in your region who are actively involved in other areas in the organization, such as judges, program, arrangers, international faculty, etc. While these women already have busy lives, they also have a pulse on what is happening in the organization and can assist you in keeping up-to-date with barbershop standards and current trends in the organization.

Communicating With Staff

Being a good manager is by no means an easy task, and you will find that in order to get the job done efficiently, you will need to exercise, on a consistent basis, good communication skills. In addition to a current job description, your staff members will need to know your expectations of the functions they are to perform. If there are specific deadlines they need to meet, let them know, preferably in writing. Talk with each staff member one-on-one about what she thinks she can do in her assigned position as well as what you expect of her. It is important to get ideas from your staff; they may come up with something you haven't thought of. And, if it is their idea, they will have an even greater commitment to good results.

It is also necessary to communicate the procedures that are involved with the tasks they will be performing. If someone is assigned to make a chorus visit, who is responsible for setting up the visit? Can your staff member expect to receive reimbursement for her mileage? Will it be paid by the region or by international through an internationally funded visit? Will she be expected to write a report on the visit? Are there specific forms to be used? How do you want her to report back to you? If you haven't already established procedures for chorus visits, for faculty who will be teaching at workshops, or for various other events that occur during the course of the year, be sure to do so as soon as possible so that everyone will know what to expect.

Budget Constraints

Another area that needs to be communicated to your staff members is the dollar amount that has been budgeted to their operation. A Quartet Promotion Coordinator needs to know how much she can spend to rent a facility and invite potential quartet members or if she has money to plan a novice quartet contest and provide a reception for the contestants following the contest. Give your staff a budget and hold them accountable. They will increase their own creative skills and appreciate you for trusting them.

Leading Your Staff

Great managers are experts at taking their current organizations and optimizing them to accomplish their goals and get the job done. For an organization to be great, it must also have great leadership. Leaders have vision and share a common trait. They look beyond today by painting compelling visions that grab the imagination of their followers, and then they challenge them to see the potential and achieve these visions. Within the vision, both short-term and future goals are established. Goals help provide direction and tell you how far you've traveled. They also help make the overall vision attainable and clarify everyone's role. It is believed that people are more motivated when challenged to attain a goal that is beyond their normal level of performance. Not only do goals give people a sense of purpose, but they also relieve the boredom from performing routine jobs.

Inspiring Your Staff

The skills required to be a leader are no secret: it's just that some have learned to use them and others haven't. While some seem to be born leaders, anyone can learn what leaders do and how to apply these skills, such as inspiring action. People want to do a

good job, a creative job, and if they are provided the proper environment, they will do so. Use your influence to help your subordinates create energy in their responsibilities by creating the vision, providing the training and skills necessary to complete the task, delegating the bigger and better challenges that make a difference, and sharing your knowledge. Knowledge is power. If you are in the know, you have a clear advantage over someone who is left in the dark. In a cooperative work environment, teams must work together and share their areas of knowledge and expertise. The wise leader acts as a role model by sharing the information that will give her subordinates the edge on excellent work.

Empowering Your Staff

Great managers and leaders allow their subordinates to do great work by empowering them with the freedom to apply personal creativity and expertise. Have you ever worked for someone who didn't let you do your job without questioning every decision? Despite rumors to the contrary, when you empower others, you do not stop managing. What changes is the way you manage. You still provide vision, establish goals, and share knowledge. But, then get out of the way so that your subordinates may tackle their responsibilities with creativity and pride.

Motivating Your Staff

As a busy manager, you'll need to motivate your subordinates so they'll continue to do the good work you appreciate. The most motivating incentives are recognition from one's own supervisor or manager and recognition for the job. The following incentives are simple to execute, take little time, and are among the most motivating:

- Personal thank you's; one-on-one or in writing, or both
- Public recognition; on regional weekends or in the regional newsletter
- Ask for their opinions and involve them in decisions
- Morale-building meetings to celebrate the successes
- Increased responsibility as a result of good work

Giving Feedback to Your Staff

Another critical area that provides recognition is giving feedback. Your subordinates need to know if their performance meets your expectations. Whether it's your own personal evaluation of their work, feedback from a presentation made at a regional workshop, or peer evaluation, the information should be shared in a setting that is non-threatening and constructive. Ask your staff members how things are going and whether they have any questions or need help to do their work. Thank them for doing a good job. The more feedback you give, and the more often you give it, the better able they are to respond to your needs and the goals of the organization.

End-of-year performance evaluations should also be given and this information should become one of the resource tools for making future decisions regarding regional personnel appointments.

Director Certification Program

The Director Certification Program (DCP) is an educational program designed to provide additional training and further develop skills for Sweet Adelines International directors, potential directors, and musical leaders. The program provides opportunities to validate the skills and knowledge required to direct a Sweet Adelines chorus. The DCP should not be viewed as the only source of training for directors, but rather should be seen as one component of each region's director development program.

The Education Coordinator is responsible for administering the program in her region. She does this by appointing a DCP Coordinator who is responsible for maintaining records, administering tests, answering questions, communicating with international headquarters, and tracking advancements. The Education Coordinator needs to coordinate within her long-range educational plan the needs of program members so that appropriate regional training occurs on a consistent and timely basis. Analyzing the results of the DCP testing can provide specific areas that need more emphasis and attention for the region as a whole.

The Education Coordinator is provided with a complimentary copy of the DCP resource material and an administrator's guide. The administrator's guide presents a detailed overview and instructions for administering the program. This set should be given to the DCP Coordinator. The Education or DCP Coordinator is responsible for giving this copy to her successor.

Young Women in Harmony Program

Mission Statement: *The Young Women in Harmony program reaches out to young women through the American musical art form of barbershop harmony. Its goal is to provide educational and performance opportunities and to offer music educators a means of including the study and performance of barbershop harmony in school music programs.*

Regional YWIH Coordinators are appointed by the Education Coordinator to facilitate youth outreach activities and education. The coordinator's position is mainly administrative. She receives information and suggested activities through the international education department at international headquarters. Her focus is to help chapters inform their local school districts of the availability of the Young Women in Harmony materials and to ensure the visibility of the program by organizing representation at state conventions of NAFME; the National Association for Music Education (formerly MENC).

The Young Women in Harmony coordinator's position includes publicity for the Rising Star Quartet contest, held annually in conjunction with a regional event. The contest is open to female singers 25 and younger. Regions are encouraged to bid for the ability to host the Rising Star Contest. Regional coordinators encourage participation and may organize preliminary contests at regional educational events. More information about the Rising Star Quartet contest can be attained by contacting international headquarters.

The Young Women in Harmony materials are provided at no charge in an introductory packet to music educators by requesting them from international sales. Assistance with festival planning, teaching at regional weekends, funds for NAFME booth rentals and general information may be obtained through the international education department

Making Chorus Visits

One of the highlights of a chorus' year should be a visit from a member of the regional management team or a regional faculty member. It is the Education Coordinator's responsibility to coordinate regional faculty visits and, in conjunction with the Membership Coordinator, to schedule internationally funded visits to choruses. There are different types of chorus visits:

- **To Chartered Choruses**
 - Coaching Visits (administrative or musical)
 - Evaluative Visits
 - Revitalization Visits
- **To Prospective Choruses**
 - Step One Visit – Musical and Administrative
 - Step Two Visit – Musical and Administrative

The purpose of any visit should be to provide musical or administrative education and guidance or to help with issues regarding membership. The visit might be made in conjunction with your region's program which is designed specifically to help small choruses, choruses that scored below a certain level in competition, or those that haven't competed for the past year or two. Or it could be made to provide regional support and assistance for choruses anticipating major changes and/or challenges, such as loss of a director or planning for international competition. Regardless of the purpose for the visit, a record of what transpired should be made and copies sent to the regional management team for its review.

Funding from Sweet Adelines International for visits to choruses is for the purpose of education in both the musical and administrative areas, membership development, assessment of the health, stability and/or needs of the chorus, building relationship and connection with regional choruses and their members, and for discovering and developing potential leaders. The Corporation pays mileage at the current rate for the Education Coordinator or her representative to make visits to chartered chapters. Effective May 1, 2013, a maximum of eighteen (18) visits per region are funded per fiscal year. Any questions about appropriate usage of internationally funded visits should be directed to the International corporate services department at International or to a member of the Regional Leadership Committee.

One of the primary responsibilities of the Education Coordinator is to assure that chapters, prospective chapters and Chapter-at-Large quartets have been approved for public performance. If Sweet Adelines International is to be respected in the music and entertainment world, all choruses and quartets must present a positive example of the organization and its style of singing. What the public sees and hears will determine its attitude toward four-part harmony barbershop style.

Preparations for the Visit

- Contact the chorus to set a date and time.
- Confirm in writing and, depending on the purpose of the visit, work with the chorus leadership to set up a time schedule and make plans for what will be accomplished.
- Review chorus files, making note of potential problems/areas of strength, and ascertain contest scores and placement, perhaps asking for a recording of a performance in order to plan for specific areas on which to work.
- Contact the region's Chapter Coordinator (appointed by the Membership Coordinator) and/or Directors' Coordinator for any background information they may have.
- Establish a definite plan with a tentative schedule for the visit.
- Determine guidelines to be used in any analysis or critique: e.g. Basic Criteria for Public Performance, international or regional report information. Review any paperwork to be filled out to ensure that you obtain all the information needed.

During the Visit

Even under the best circumstances, some tension on the part of chorus members, as well as administrative and musical leaders is inevitable when a regional visitor makes an official visit. Therefore, it is important that the visit be structured to help everyone feel at ease.

Suggestions for the Visitor

- Meet with chorus leaders before the rehearsal/meeting to review plans for the session, get acquainted with the leadership, and give them an opportunity to discuss what they perceive to be areas needing work. It's important that they understand your role is not to "police" them but to provide regional support and/or assistance for their chorus.
- If the visit is at a rehearsal, have the chorus follow its usual rehearsal routine for 20-30 minutes as you observe. Hopefully, this will allow chorus members to relax.
- If the visit is for musical evaluation, the chorus should be told in advance to be prepared to present a sample package for a public performance. The evaluation should happen early in the rehearsal so the members can concentrate on any coaching that follows. During the presentation, the visitor should be as attentive as possible using positive, encouraging body language—watching, not writing most of the time—to put the chorus at ease.
- Spend most of the planned schedule working with the chorus on specific areas to help it reach its musical potential. Having observed the chorus, you will be able to ascertain which areas, when improved, will make the most significant difference in the ability of the chorus. If problems are numerous, work on only a few during this first visit, because if all problems are discussed, the chorus and director will be overwhelmed and could become discouraged. Often, solving one major problem results in improvement in other areas.
- Be sure to provide sufficient time for members to ask questions about any topics on which they desire more information. You can use this time to promote regional and international programs and activities.

If the musical caliber is low, the visitor should guide the discussion so that goals for improvement are established. Specific objectives and timelines could be suggested, and offers for continuing regional assistance can be noted and passed on to the proper regional coordinators.

Often during a question/answer or rap session, the visitor will discern a definite conflict between the chorus and certain leaders or find that there are definite factions in the chorus. If this occurs, she must maintain calm control of the discussion and not be drawn into the conflict. Hopefully, prior to the visit, any contacts that have been made regarding this chorus will have alerted the visitor to possible areas of conflict so that she can be prepared with problem-solving techniques.

After the Visit

As soon as possible the visitor should:

- Thank the chorus for its hospitality and again praise the chorus' strengths and determination.
- Confirm in writing any verbal critique and suggestions, reiterating specific areas that need improvement, giving any additional suggestions for making those improvements and suggesting any additional deadlines. Attach a copy of the letter to any official report form that may be required and distribute as appropriate. Necessary reports and a follow-up message to the chorus are critical to the success of regional visits and should be completed as soon as possible following the visit.
- Contact the chorus leadership on a regular basis to assist in monitoring progress. Show a genuine interest in the chorus' progress. Hopefully, this will help encourage the chorus to seek advice on a more regular basis.
- Schedule a follow-up visit, within a few months if necessary, so that the chorus has a definite short-range goal toward which to work.

Evaluating Readiness for Public Performance

Unfortunately, not all choruses and quartets realize the importance of singing in tune, being neat in appearance, and using material that presents themselves and the organization in a tasteful manner. Therefore, the Education Coordinator must evaluate the abilities of choruses and prospective chapters to publicly perform at a level that promotes the positive image of barbershop harmony and Sweet Adelines International. In addition, quartets composed of four Chapter-at-Large members must be evaluated by the Education Coordinator before performing publicly.

Quality Control

To provide Education Coordinators and performing groups a common basis for evaluation, the International Board of Directors adopted the Basic Criteria for Public Performance. This basic criteria sets out the minimum standards that must be met; often-times, groups perform above that standard and are to be congratulated.

Although the Education Coordinator, or her representative, must make two visits to prospective chapters to evaluate their musical progress before chartering, she is not required to evaluate every chorus in the region. However, there are certain instances

when it becomes obvious that a visit and perhaps an evaluation of the chorus' readiness for public performance needs to be done. For instance:

- after analyzing the tabulated results of the regional chorus competition
- after viewing a show or singing engagement
- after hearing comments from the public regarding performance material or quality
- after hearing that a chorus might be considering not competing or performing for evaluation only for the third year in a row (which would mean loss of its charter).

If any of these situations exist, it is time for an evaluative visit to be made. The chorus will, of course, feel uncomfortable, even threatened, so it is up to the Education Coordinator or her designee to do whatever she can to lessen the atmosphere of fear that may be created. In addition to the aspects of chorus visits previously discussed, the Education Coordinator should:

- Notify the chorus of a planned visit to evaluate its readiness for public performance. Include a copy of the Basic Criteria for Public Performance and make sure the chorus understands the expectations.
- Devote time during the visit to explain why the standards are important and should be met. Stress the benefits to the chorus.
- Work hard to establish a trusting atmosphere with the chorus director, the administrative leadership and the members. Give positive comments about their performance and use language that denotes recognition of their attempts to achieve what you're asking: e.g. "Continue working on....", "You've made a good start, now build on...". In particular, stress that chorus improvement will come with each member's individual attention to the basics of good singing.
- Contact the chorus leadership with confirmation of the comments made during the visit.
- Work with the chorus director to define musical targets that must be reached, set a time frame for reaching them, and inform the director and chorus what help the region will provide to aid the chorus in reaching those targets.
- Maintain contact with the chorus, offering assistance to meet the deadlines that have been set.
- Ensure all chartered chapters comply with the policy requiring that they compete or perform for evaluation every three years. If the Education Coordinator determines that this experience would be detrimental to a chapter, she may submit a written request to the International competition department at international headquarters asking that the policy be waived. This request should include rationale for the request and an explanation of what has been done regionally to assist the chorus with its musical progress.

Basic Criteria for Public Performance

Musical Performance

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.

Public performances should include the following musical skills

- Correct notes and words
- In synch and in tune
- Energy and forward motion

Visual Performance

- Correct stage stance and posture
- Even spacing between chorus and quartet members
- Synchronization of planned movement
- Display of appropriate facial expression and poise
- Energy and emotional connection with the audience

Appropriateness

- Subject matter, lyrics or presentation should not be offensive to members and/or audience
- Length of performance should fit the occasion and the audience
- Emcee material is planned ahead and relevant to the audience
- Delivery enhances the performance and creates a sense of continuity throughout the program
- Use appropriate material in good taste. Good singing is the emphasis; joke telling should be minimized and used with caution

Unit Appearance**Costume**

- Proper fit
- Clean, pressed and in good repair
- Appropriate for venue and audience

Grooming

- Hair that is neat, clean, and styled suitably for the costume
- Appropriate stage or street makeup applied in a uniform manner

Members as Ambassadors

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.

Each chorus and quartet member should be aware that any interaction is a chance to make a positive impression. Of particular importance are:

- Interaction between the performance coordinator and those who hire the group to perform
- Interaction between the performing group and the audience, before, during and after the performance
- Interaction with personnel at the performance site

Quartet Evaluations

Most chapters have established audition procedures to determine a quartet's readiness for public performance. Since the primary responsibility for auditioning quartets is with the chapters, the Education Coordinator should encourage a quartet not approved for public performance to re-audition with its chapter. Work with the chapter to establish effective audition procedures. Maintain contact with the quartet, be encouraging, remind the members of deadlines (if necessary) and offer help. However, questions arise now and then concerning auditioning quartets whose members are not affiliated with a chapter or are in a chapter position that precludes an honest evaluation of performance ability. Some instances in which the Education Coordinator may be called upon to evaluate the musical abilities of a quartet are:

- All four members of the quartet belong to Chapter-at-Large
- The Education Coordinator has heard the quartet in a public performance that did not meet the basic criteria as outlined previously
- A quartet's contest score indicates that it may not be meeting the basic criteria
- The chorus director or chapter to which the quartet members belong has asked the Education Coordinator to evaluate the quartet's readiness to perform.

At best, these situations can be awkward. As Education Coordinator you do not want to be viewed as sitting in judgment waiting to render a verdict. Instead, you will want to help the performers see and understand the basic criteria; then (if necessary) develop the desire to make improvements with a plan to achieve or exceed the standards of the basic criteria. You may want to use the following suggestions:

- Contact the quartet in writing. Focus your comments on information, observation, time, place, the "what" and "how." Avoid conclusions, judgments, advice, and the "whys."
- Ask the quartet to send you a video recording of a 15-20 minute performance package, in costume and including emcee material, just like an actual performance.
- Ask another qualified person (judge, former Education Coordinator/DMA, etc.) in your region to give you a confidential evaluation of the video recording. Let the quartet know that both you and the other person will be watching the recording. Use her evaluation along with yours to make a decision regarding permission to perform in public.
- No matter what the decision, when you return the video and results of the evaluation, also send comments directly related to the songs and video. Note specific strengths as well as areas that need improvement, giving suggestions for making those improvements.
- If the quartet is not approved for public performance, offer suggestions for coaching help. Work with the quartet to define musical goals and develop a plan and timeline for reaching those goals.

As you watch the video, imagine that you are in the audience for the performance. What is your overall impression of the barbershop style as evidenced by the performance? Now, watch the video again and imagine that you are the coach for this quartet. Your job is to help the members improve their skills by becoming aware of their strengths and errors. Awareness of strong points brings confidence, motivation, and satisfaction. However, it is only awareness of weaknesses that allows the quartet to improve.

Avoid generalizations and assumptions and be able to give specific comments about the following:

- Correct notes and words sung together and in tune
- Body language and poise
- Appropriate, attractive and well-fitting costume on all quartet members
- Appropriate grooming, makeup and hairstyles
- Emcee work content and delivery

No one performs poorly on purpose. The members of our quartets and choruses are constantly looking for ways to change, improve, and learn. Awareness is the key to learning. Performers need to be aware of what the basic criteria mean and how their performance compares. Even though awareness is essential to improvement, we often resist it because it can be so disillusioning. Sometimes, as performers become more aware of what needs to be learned, they feel as if they are getting worse, and so they quit just at the time when they could become more proficient. A competent, caring, positive teacher can help the quartet through this period. The Education Coordinator can assist the quartet in finding this person.

When you return the video and comments to the quartet, ask the members to:

- Watch the video while reading the comments.
- Invite a competent coach or “fifth ear” to join them as they watch the video. (The Education Coordinator may need to help them find outside assistance.)
- Write down some specific short-term goals, including a step-by-step plan. (Almost any accomplishment can be broken into a series of steps, which makes the process of achievement much more manageable and enjoyable.)
- Contact you to set up a telephone conference with each member on a different extension so that all can ask questions and hear the same responses.

The Education Coordinator should remain in touch with the quartet in a timely manner, as the members work the plan to successfully re-audition.

Congratulate and celebrate with the quartet when it successfully re-auditions!

Sample Letters

Date

The ABCD Quartet Name, Contact
Address

Dear ABCD:

As Education Coordinator, it is my responsibility to evaluate the musical abilities of choruses and quartets including their readiness for public performance.

I know that you are working hard to learn and grow as singers and performers. However, it has been brought to my attention that some of your performances may not meet the standards required by our organization for public performance as a Sweet Adelines quartet. I heard you perform at _____ in _____. Because this was only one song (or performance), it is unfair to use that as a basis for evaluation.

Therefore, this is a request that you send me a video recording of your entertainment package. I would like to receive the video before _____. If that date is a problem, please let me know and we'll work out a different time schedule. You should wear a costume, include emcee material, and sing four or more songs as in a normal 15-20 minute performance. The purpose of this video is to assure that you are prepared musically to give fine barbershop performances. If there are some areas that need specific help, I will work with you to find someone who can help you develop those skills.

Making a video recording may seem stressful to you, but you can be sure that I will evaluate the video as a friend. Most of us look back in gratitude to those tough teachers who insisted that we meet our potential. The purpose of this evaluation is to help the ABCD Quartet succeed, sing well, and have fun. I will do everything I can to assist you in that effort. If you have any questions, please call.

In harmony,

Name, Education Coordinator

cc: Team Coordinator
Chorus Director(s)
International Headquarters Competition Department

Sample letters

Date

The ABCD Quartet Name, Contact Address

Dear ABCD:

It was good to talk with all of you on the phone last night. Thanks for calling and for being so cooperative.

Approved Judge _____ and I evaluated the video you sent on _____. Enclosed are the notes and comments written by the two of us as we watched and listened. Based on that evaluation, we recommend that the ABCD Quartet not accept any further public performances until you have re-auditioned and been approved for public performance.

(Note: The following paragraph refers to correspondence coaching. This isn't meant to imply that it is the preferred method, but is an option if other coaching help is not available. If the quartet chooses this option, make sure the members understand that it is slow.)

Regional Staff Member _____ is willing to coach you by correspondence with the use of audio recordings. In addition, I recommend that you also find someone in your community who can be a good "fifth ear" for you. This person doesn't have to be an experienced coach but should have a good ear for accuracy. Let her know what specific skills _____ has asked you to work on and she will be able to help you progress much faster. Correspondence coaching can be very helpful, but it is also very slow.

Invite your "fifth ear" to meet with you and watch the video as you read the enclosed notes and comments. Then work together to develop a detailed plan to improve your musical skills. Enclosed you will find a sample action plan that may help you in this endeavor.

Once the plan is in place, it is a matter of disciplining yourselves to carry out that plan one step at a time. Please keep in contact with me. I am looking forward to your success and wish you the best of luck as you prepare to re-audition.

In harmony,

name, Education Coordinator

cc: Team Coordinator

Chorus Director(s)

International Headquarters Competition Department

Internationally Funded Visits

The Education Coordinator, in conjunction with the Membership Coordinator, is responsible for scheduling the internationally funded visits. Funded visits are allocated as follows:

- A total of 18 internationally funded education visits to **chartered chapters** is allocated. The focus of internationally funded visits is in-Region personnel providing education in both the musical and administrative areas, membership development, assessment of the health, stability and/or needs of the chorus, building relationship and connection with regional choruses and their members, and for discovering and developing potential leaders. Persons outside the region (faculty, judges, etc.) are not eligible to be reimbursed using Internationally funded visits.

As each member of the regional management team has differing areas of expertise, the region will determine which of the coordinators or her in-Region designee will make each visit.

Your region will be able to download reporting forms from the Sweet Adelines International Website for use in internationally funded visits. The form includes request for reimbursement. Worldwide regions may be issued reimbursement in their country's currency if they choose that option.

Many regional leaders determine which chapters could most benefit from internationally funded visits and then schedule these visits as early in the fiscal year as possible. This gives the visiting leader time to plan for her trip and gives the chapters time to confirm a date convenient for their members.

- **Prospective chapters** require two musical and two administrative visits in order to fulfill their chartering requirements. Typically, one visit would occur when the chapter is in Step One and one would occur when the chapter is in Step Two. (If determined necessary, a third musical visit may be granted with permission from international.) The musical visit should be made by the Education Coordinator or her designee. The administrative visits are made by the Membership Coordinator or her designee.
- Two internationally funded visits are available per year (maximum two years) for chapters in **revitalization**. The regional management team chooses the visitor based on chorus need.

Of course, the region may plan visits funded by the region in addition to those funded by international.

To receive prompt reimbursement for internationally funded visits, please comply with the following:

- Always use the appropriate funded visit form. Additional forms are available upon request.

- If a designee is assigned to make the visit, the form must be signed (approved) by the appropriate coordinator (Education Coordinator or Membership Coordinator) before being forwarded to international.
- Round-trip ground transportation is reimbursed at the mileage rate approved by the International Board of Directors for the current fiscal year. Ground transportation reported in kilometers will be converted to miles.
- When considering funded visits, please note that hotel nights and food are not included as part of reimbursable expenses.
- Any chapter visit requiring transportation in excess of \$600 must be pre-approved. Phone or email the Chief Operating Officer at exec@sweetadelines.com, or the Corporate Secretary at corp_secy@sweetadelines.com or 800-992-7464 or 1-918-622-1444 to obtain pre-approval.
- Regions must use Journey House Travel Service to purchase tickets for internationally funded visits.

Journey House Travel Service charges are billed directly to the Sweet Adelines International master account. Following is information on Journey House Travel Service:

- Call Journey House Travel Service at 800-251-6559 (or outside the United States call 1-918-524-5249) Monday-Friday 8:30 a.m. – 5:00 p.m. Central Time.
- Identify yourself as a Sweet Adeline.
- Tell the agent handling your call that you are booking an internationally funded visit and give the applicable code:
 - Code # 7660 - Visits to prospective chapters
 - Code # 7670 - Visits to chartered chapters
 - Code # 7675 - Visits to revitalizing chapters
- Make the visit and complete the appropriate funded visit form. Attach the airline ticket stub to the visit form and submit it to international headquarters.

Prospective Chapters and Steps Toward Chartering

Early and continued communication is essential in the development of a prospective chapter, administratively and musically. When notice is received from international headquarters that a prospective chapter has received the Step One materials, the Education Coordinator should write to the prospective chapter, welcoming the chapter to Sweet Adelines International and to the region. The letter should explain the Education Coordinator's position as it relates to extension and tell the prospective chapter what is expected of it musically.

The Education Coordinator is required to make two visits to each prospective chapter before the chapter may charter. A third visit may be made upon request to international headquarters. The Education Coordinator's approval is required before the group may perform in public and before the charter is granted. If the Education Coordinator is unable to make a visit, a representative may be assigned to do so.

The first musical visit should take place in Step One to ensure that:

- The group understands the barbershop sound.
- Singers are singing correct notes.
- Prospective members are being auditioned.
- The chorus director has good musical potential.

If the chorus director does not have a barbershop background, the Education Coordinator or a representative may provide assistance in directing and teaching techniques. Directors of prospective choruses should be encouraged to attend regional musical events and to familiarize themselves with materials available through international.

The first musical visit is the most important. Since time is limited, the Education Coordinator must be prepared to make efficient use of time with the prospective. The Education Coordinator should write to the chorus director, with a copy to the chapter president or contact person, to establish the plans for the visit. It is best to meet early with the chorus director and/or officers, if possible.

When the Education Coordinator meets with the chorus, she should:

- Give them time to get to know her. She should tell a little about herself and her Sweet Adelines experience.
- Tell the group about how and when Sweet Adelines International was organized.
- Explain the organization's educational programs.
- Explain the difference between the barbershop style and other forms of choral music. It is helpful to use visuals and recorded examples of the styles of music so that the members can hear and see the differences.
- Teach a song, a part of a song, or a tag, so that they get the feel of barbershop harmony.
- Explain some of the new words members of the group will be hearing (for example, lock-and-ring, swipe, tag).
- Emphasize the importance of good vocal production. Demonstrate correct breathing and vocal exercises. The Education Coordinator might recommend books or other publications of benefit to the prospective chapter.
- Discuss the role of the director and chorus-director relationship. Remind the group that areas of responsibility and specific duties should be spelled out in the director's agreement.
- Allow time for questions and discussion.
- Tell them what will be expected of them for the next Education Coordinator visit.

To whet their appetite, prepare a table of literature, pictures, handbooks, and other materials for prospective members to examine during breaks, or provide a live demonstration of the Education Center tools from the International members only website. The Education Coordinator should keep in mind that the typical prospective chapter will be at a beginning musical level. Pictures, recordings, and remarks about the accomplishments of the Education Coordinator's chorus should not lead prospectives to feel that such achievements are beyond them.

Every musical visit should include singing. The first visit provides the Education Coordinator the opportunity to work with the group on the basic components of balance, blend, and vocal production. Also, she can observe the director working with the chorus and offer constructive feedback. Any criticism of the director should be given privately and not in front of the group.

The second visit should occur during Step Two, to evaluate the group's readiness for public performance. The prospective group should be told to be ready to present a sample performance of five or six songs, complete with costumes, makeup, and emcee material. The Basic Criteria for Public Performance should be reviewed so that the group will understand the standards of measurement. It should be determined at this visit whether the group is to be approved musically for charter. If the group is not "charter ready," a third visit may occur if approved by international headquarters.

Though it may be difficult to deny approval for public performance or charter, the long-term effect must be considered. If chorus members realize from the very beginning that musical standards must be met, they will be more likely to demand more of themselves musically.

For the required visits, international reimburses the Education Coordinator, or her representative, for travel at the current rate approved by the international organization. If the transportation costs exceed \$600, the Education Coordinator must seek prior approval from the Chief Operating Officer or Corporate Secretary.

After each visit to a prospective chorus, the Education Coordinator must complete a Prospective Chapter Musical Progress Report and submit it to international headquarters before being reimbursed. If the visit was made by a representative, the Education Coordinator must cosign the report. As part of the report, the Education Coordinator is asked to specify whether or not the group may perform in public and whether or not the group is approved musically for charter. When the Education Coordinator approves a group to charter, a copy of the report must be sent to the Team Coordinator.

Often the Education Coordinator feels it necessary to monitor a prospective chapter's musical progress between the required visits. Many Education Coordinators have developed an evaluation program in which the group is requested to send an audio recording at regular intervals. The Education Coordinator listens to the recording and provides a written or oral critique. Most regions provide funding for an interim visit.

Occasionally the Education Coordinator will feel that an additional visit is necessary because of unusual circumstances. For example, there may have been a change in directors, the membership may have changed significantly, or musical approval for charter was not granted following the second visit. If the Education Coordinator wishes to make an additional visit to be funded by the international organization, prior approval by International headquarters must be requested. Of course, the Education Coordinator is not limited to making only the required visits. Additional visits may be funded by the region.

The Education Coordinator can provide other educational opportunities for prospective chapters. All prospectives should be included in regular mailings regarding regional and international schools and other regional events. Directors of prospective choruses should receive copies of all regional newsletters. Some time should be set aside to meet with and recognize prospectives during regional weekends. Another possibility is for a competing chorus and director to host the director of a prospective chorus during the regional competition. This provides an opportunity to gain exposure to competition through the competitor's eyes.

The Education Coordinator should remain in touch with each prospective chapter. Choruses, both prospective and chartered, that feel they have been sought after, that they have received regional assistance, and that the Education Coordinator sincerely cares for them, are more likely to participate in and support other regional programs than those that feel they've been left on their own to do the best they can.

A prospective chapter that has been provided a firm foundation of music education will be a strong chorus musically after chartering. The responsibility for laying that foundation lies with the Education Coordinator.

Script Writing

"It takes three weeks to prepare a good impromptu speech." -Mark Twain

Have you ever written a script? Well, get ready! In your position as Education Coordinator you'll undoubtedly need to write a script for an upcoming class at one time or another. How do you feel when presented with such a request? Do you know where to begin? Whatever your initial response, the thought of composing a script can be somewhat daunting. To assist you, remember the three "P"s of script writing:

Preplanning

When faced with the task of writing a script, remember the following information:

- Topic/subject of script
- Class objective or purpose
- Number of attendees
- Time frame (start at . . . finish by . . .)
- Time of presentation
- Setting (proactive/formal or interactive/informal)
- Special instructions

The time frame, time of presentation and the setting will have a big impact on the content of the script you will eventually write. The informality of a group of 20 on a college campus will lend itself to a different type of presentation than will an audience of 500 in a hotel ballroom. A different type of script may be needed for a class given at 9:00 a.m. as compared to a class given in the evening after a full day of education.

Before putting pen to paper or turning on your computer, sit down and visualize your audience. To do that, you'll need an "audience snapshot." Some of the things you'll want to know:

- Gender
- Age group
- Special interest group (i.e., directors, board members, choreographers, general membership)
- Barbershop experience
- Mood and expectations

Sometimes you may not have specific information about a class made up of general members. In that case, remember the rule of "Predominantly." Most audiences are composed of people who are "predominantly" something. In our organization, most are predominantly adults, are predominantly female, and are predominantly chorus members. All are singers!

Once you have the audience profile, approach your subject from the audience's point of view. Many script writers make this common mistake: they approach their subject matter from one point of view—theirs. Your message, however, must speak to the needs of the listeners; to achieve that, you must structure the script from their point of view. Your script doesn't need to be meaningful to you; it needs to be meaningful to your audience! Imagine listening to you from their perspective. Then ask yourself the following questions:

- How do I want the audience to perceive me (or the presenter)?
- What's important to them? What will "speak" to them from their perspective?
- How can this topic be approached to make it meaningful and memorable to this audience?

Once these questions have been answered, you're ready to begin working on the script.

Packaging

The first question you'll face is "What type of script should I write?" Which type you choose generally depends upon your own preference; another important influence, however, is whether you will be the sole presenter of the script or if you're writing the script for other people to present.

One type of script is the narrative. In narrative style, a script is written word for word the way it will be presented. The advantages of this style are that it forces the writer to organize every detail and allows the presenter to actually present what is written. That, too, is its disadvantage. Visually, page upon page of written material can be overwhelming to another presenter. In addition, it's written in a style unique to the writer with that individual's nuances and vocabulary. That often makes it more difficult for other presenters to "make it their own."

The opposite end of the spectrum is the outline type of script. A formal outline forces the material into a specific framework, breaking down the content into smaller and smaller

subsections. It's the type of outline you probably had to do in school, where if you have an "A," you must have a "B;" if you have a "1," you must have a "2." It's that specificity that makes this type of script somewhat cumbersome and limiting. In today's jargon, a formal outline is not "user friendly."

A third type of script lies somewhere between narrative and formal outline and that's the lesson plan. In a lesson plan, the items to be discussed are presented, but without all the wording of the narrative. The writer still includes all the aspects discussed in the "Preparation section," but it will be written in incomplete sentences and notes. This works well if you're the sole presenter; if someone else is to present your script, however, you must make sure you've included all the pertinent information. Visually, this type of script packaging is not as overwhelming as the narrative.

Preparation

The first thing to know about preparing a script is that it isn't usually written in the same order as it will be presented. Every presentation begins with some type of introductory opener. That's not the place to begin, however. You'll prepare the script in one order and present it in another order.

Prepare a script in stages. Don't try to sit down and write the entire thing at one sitting. The writer needs to:

- Outline each component
- Develop the narrative
- Design supplemental materials (audiovisuals, handouts, etc.)
- Practice

Objective

Your first task is to write—yes, write—a brief statement that answers the question, "What do I want to accomplish by writing this script/delivering this presentation?" This is the foundation of your script. It is the first element to prepare because all the rest of the script must be designed to support your objective. If it doesn't support your objective don't include it in the script!

One way of formulating your objective is to complete the sentence: "By the end of my presentation, people will . . ." When preparing a script, you typically want the audience to:

- Understand something
- Be able to do something
- Do something

Key Points

Once you have the objective, develop the body of the script by determining which key points will best support the objective and be meaningful for the audience. In organizing key points, remember the rule of three. Try to group your material into one, two or three key points, but no more than three. (This doesn't mean that you'll always have three key points; sometimes you may have two and in rare instances you might have four.) This

forces you to organize your material into a clear, logical order which will be easier for your listeners to understand and remember. It also keeps it simple for your listeners so they'll be able to retain more.

To best determine your three key points, try answering these questions:

- What points will best lead to my objective?
- What points do I most want the audience to remember?

There are several ways to organize key points once they are determined. Make sure to put them in a sequence that's easy to follow. Here are some suggestions:

- Chronological order
 - Past, present, future
 - First, second, third
- Spatial arrangement
 - Major, minor, symmetrical chords, for example
 - Chorus size
 - Chorus level (A, B, C, etc.)
- Topical: from the least important to the most important

Concerns and Solutions

If your script and your subject matter lend themselves to an easily remembered mnemonic device, use it; it helps your audience remember the key points. Don't let the search for cute memory devices take up the bulk of your time, however.

Supporting Material

Once the key points are determined, gather the supporting material which will substantiate those points. There are a variety of sources from which to gather information:

- **Internal:** all Sweet Adelines' website, various manuals and publications; faculty members; regional personnel; handouts you've collected over the years; headquarters staff; audio and video recordings.
- **External:** local and university libraries; outside experts; multi-media (TV, audio, video); computer database; newspapers and magazines.
- **Personal:** your own experience; your personal library.

As you collect the supporting material for your key points, think about the most effective ways of presenting it for that particular audience in that particular setting. Supporting material could take any of these forms:

Examples: Examples provide support based upon experience, using a person or event to prove a point. Sometimes, instead of using a factual example, ask the audience to visualize a scenario of what might occur given certain parameters. For example, visualize what might be the outcome of trying to prepare a script an hour before you're scheduled to present it!

Comparisons: Sometimes you can compare the point you want to make to something with which the audience is familiar. Comparisons can be either similar or contrasting. In writing a script on judging levels, for example, you might compare a chorus which spent time perfecting vocal production skills with a chorus which did not. If a direct comparison isn't available, use an analogy: "Not teaching vocal production skills is analogous to trying to build a house without a foundation."

Quotations: If you present a quote from some famous person, the audience will usually assume that it's true. Who are some "quotable notables?"

Findings: Findings are factual, quantitative data. If findings are used, make sure they are current and accurate. Comparing membership figures for the past three years would be appropriate use of data in a class evaluating the effectiveness of the *Singers Wanted* and *Ready, Set,...Grow* programs.

Audio/visual: Audio/visual materials provide vocal or graphic substantiation for supporting material. Certainly visual images can have a longer lasting impact than words alone. They are not intended to be your entire presentation, however; they should merely support it. Visual aids should be just that: visual. They are not intended to be mere representations of words on an overhead. Instead, they should support your material pictorially.

Attempt to strike a balance when researching supporting material: consult various sources, combining internal, external and personal, and choose varying ways of presenting it, using as many of the ways listed above as fit naturally into the script. The supporting material will be the bulk of the script. When first starting your script, don't get bogged down in research or in trying to be cute or creative. Just jot down some ideas; once you begin writing, you can add more "flesh" to those "bare bones." Avoid the temptation of using too much supporting material. Either there won't be enough time to present the script in the time allotted or the presenter will end up with a shopping list of information.

Now that the supporting material is written and the bulk of the script is prepared, you're ready to lead the audience from one point to the next by writing transitions.

Transitions

Transitions are merely mini-summaries of the key points made and mini-previews of where you're heading. Transition statements don't have to be long; they make your message easier to follow and they help keep the audience on track. Each key point should end with some type of transition statement. If you get stuck and can't think how to write a transition, try following this formula: "Having considered point number one, let's now take a look at point number two."

Preview and Summary

The preview and the summary are the next two pieces of the script that you write. Basically, the preview tells the audience what you're going to tell them and the summary tells them what you told them. Apply the formula of:

T x 3:

- T-1: PREVIEW: Tell them what you're going to tell them.
- T-2: BODY: Tell them.
- T-3: SUMMARY: Tell them what you told them.

The summary statement is the opposite of the preview statement; it looks back and shows where the writer's been.

Opener

Every presentation begins with some sort of an opener. If you're the one presenting your script, include the opener in the script. If someone else is presenting the script, she may opt to come up with her own opener. The opener is not actually the beginning of the content of your presentation, but instead is a way of opening up the audience. It should capture the audience's attention while foreshadowing the upcoming theme. Wait to prepare the opener until after you've developed the body of the script. There are several different types of openers:

Quotation: Any quotation should come from a recognized authority on your subject. The authority should also have universal recognition, so that everyone knows the name. The person whom you quote should be an attention-getter.

Rhetorical question: A rhetorical question involves the audience immediately in the subject matter, it instantly focuses attention to the matter at hand and the audience becomes involved by formulating a mental response.

Declarative statement: This is a bold, emphatic statement of fact. It needs to be interesting to the members of the audience and grab both their attention and their imagination. To open a class on Pythagorean tuning, the declarative statement might be, "She who makes the most overtones wins! This class will teach you how to do just that."

Scenario: Make up something to create a picture in the mind of your audience. Scenarios are already used often in choruses as the members visualize themselves in a competition or performance situation. One type of successful scenario is to lead the audience members through a visualization in which they already know the material you are about to present. Through such a scenario, they can see themselves as knowledgeable, successful, professional, or whatever you want the outcome of your presentation to be.

Anecdote: An anecdote is usually a personal story that relates to your upcoming material. It can be entertaining, humorous, or emotional, but above all it must be brief.

The best openers are usually a combination of two or more of the elements just discussed. Whatever type of opener you choose, it should fit your own personal style so that your beginning is comfortable and natural. Once you've decided upon an opener, the only piece left is the closer.

The Final Response

The closing comments in the script are used to remind the audience of what the objective was. Present what you want the audience to do after the summary, either as a reminder, an application, or for approval. Here's an example of each type of closing:

- **Approval:** We witness the best example of approval every time we watch a champion quartet perform. Invariably, after their performance, one member will say something like, "If you liked our performance this evening, you'll enjoy it just as much in your living room. We will have CDs available for sale in the foyer immediately following the show." That's an approval closing.
- **Reminder:** "By using the three P's—preplanning, preparation, and packaging—you will be able to write an effective, cohesive, well organized script that will be the envy of all the participants."
- **Application:** "Now that you have the tools necessary for writing a good script, take the last few minutes to jot down two or three new organizational skills which you'll use the next time you're invited to write a script."

If you follow the three "P's" for script writing, you'll appear more confident, better organized, and more professional and you'll truly give a "thumbs-up" presentation!

Events Coordinator

Job Description

- 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 the 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.
- Oversees registration for all regional events.
- Maintains contact with appropriate staff members at international headquarters.
- Maintains comprehensive records and forwards materials to successor.
- Trains her successor.
- Appoints staff to assist in the implementation of her responsibilities.

A vodcast outlining each RMT Coordinator's duties has been created and can be found in the Leadership section of the Members Only portion of the Sweet Adelines website.

Planning and Scheduling Regional Events

A successful regional event rests in your hands! While that may sound daunting, the key to successful event planning is attention to details and negotiating a contract that meets regional needs.

There are at least a hundred ways to impact event planning ranging from temperature control to sound equipment, maps and directions to the event, schedules and agendas—every detail involving the event. These details are your responsibility, and done right, they spell success! Whether you are planning a regional event for a few or for the entire region, details can make or break the event, and most of the same details apply to any size meeting or event.

Before you begin searching for the appropriate facility for the event, consider the following background information to determine your facility requirements:

Know your region

- Where are the choruses located?
What are the highways the membership will travel?
- Does membership travel to meetings by plane? If so, airport proximity should be considered in site selection.
- Which choruses usually support this type event?
- What influences attendance by the regional membership?
- Advance promotion, cost of rooms, faculty, class topics, time of year (i.e. weather), etc.
- What is the priority of these influences?
- What are the membership's preferences?
- Hotel versus college campus facility, two to a room versus triple or quad, two to a room preferring two double beds, etc.

Know your requirements

- How many attendees are expected?
- Anticipated number of sleeping rooms required for overnight attendees?
- Will the event have multiple classes in session at the same time?
- How many attendees are expected in each class?
- What other spatial needs does the region usually require, such as a separate registration area, ways and means area, etc.
- Will there be a need to take continuous notes or record any class?
- Are risers needed? How many sections or sets?
- Are there enough nearby restaurants to feed the attendees in a timely manner?

Considerations When Selecting a Facility

Once you have narrowed down the list of possible locations using your logistical and/or geographical requirements, you can begin the second phase of your facility selection process. This involves the selection of the actual facility.

For a larger scale meeting (and smaller scaled meetings depending on the geographical location), you may have better results by approaching the selection process within the context of a "bid." Contact the local convention and visitors bureau (CVB) and ask them for a request to all facilities to be sent on your behalf. You will need a list of your requirements; number and size of meeting rooms to be used, anticipated attendance, and anticipated number of sleeping rooms to be used. Remember that the more detailed information you can supply, the better the responses will be and the easier it will be to narrow down your choices.

You may already know the city and general location of the facilities you want to consider. In this situation, you need only contact the facility and ask for a meeting planner's kit in order to evaluate the facilities before you inspect them. Even though you already know which facilities you want to consider, it may be a good idea to contact the local CVB to arrange an inspection tour of the facilities you want to investigate.

Either way, you have narrowed down your location search and you will need to arrange an inspection visit in order to evaluate the properties. As mentioned, you can contact each facility yourself or you can allow the CVB to arrange an inspection tour for you. Properties involved in overnight accommodations and meetings are familiar with the practice of inspection tours. An industry standard is to allow access to meeting rooms, an example of a sleeping room, an example of a suite, and a candid discussion of what the facility is willing to do in order to win your business. You can also expect one of the properties to offer complimentary (comp) overnight accommodation for you and/or your inspection team. It may be tempting to abuse this privilege, so be careful not to do so; your actions reflect on the whole organization.

Regional Convention

The Events Coordinator oversees all of the activities and business relating to the regional convention. In conjunction with the regional management team, she has the ultimate responsibility for ensuring that the regional convention proceeds in accordance with international and regional policies and procedures. Your specific responsibilities are described in detail in the *Guidelines for Regional Conventions* (GRC). You will find it necessary to read the GRC in its entirety in order to fulfill your role as Events Coordinator as it pertains to the regional convention.

Site Selection and Inspections

The Events Coordinator oversees site selection for all regional meetings and events, including regional convention. This includes making the appropriate site inspections to determine suitability. Section D of the *Guidelines for Regional Conventions* provides specific details regarding this function with respect to regional conventions. With appropriate modifications, this will also serve as a blueprint for other regional events, such as meetings and workshops.

While a regional convention may require the most complex facility requirements, each will have its own specific facility needs that will require your skills and attention to detail. Following are considerations when selecting a site.

Before the Initial Contact

- Gather your region's history of previous events and put it in an organized format. Include your "no show" history.
- Determine events to book: sleeping room needs, meeting space and events needs. Determine what extras you need such as suites, upgraded rooms, or rooms for those on your committee. It will be helpful if you can enter this information in a chart or spreadsheet format for easy viewing.

The Initial Contact

- Establish a sales department contact. Talk with your contact to begin establishing your relationship. A good relationship with the facility contact is really important. However, you might have had a great contact at a facility and when you return for

another event, that person has left. Hotel sales staffs usually don't leave the business, they just move to another facility. Try to develop a good relationship with them and keep in touch. They might be an excellent contact for you at a later date in a different facility.

- Send the information on the upcoming event to your contact requesting a proposal
- Set up a visit if you are still interested after you receive the proposal. Remember, this is the first offer and you may be able to negotiate a better deal.

Site Inspection and Selection

- Site selection involves determining the physical requirements, the attendees' interests and expectations, selecting the general area and type of facility, and evaluating the choices.
- Your purpose is to look at the facility when making a site inspection and to build a relationship and alliance with your contact person.

Negotiating a Win-Win Deal

- Determine what rates other groups are getting at your same time of year. Each facility has a peak, shoulder (mid-season), and low season. Know in which of these "seasons" your meeting will occur. Most facilities also have days of the week when business is the strongest, and this may affect your negotiations.
- Recognize that your meeting has a "value" to the hotel or other meeting site. For example, your meeting may have a greater value to a new hotel that's trying to establish itself or to a hotel that needs to fill its sleeping rooms.
- Know what is negotiable. Some examples of items you may want to negotiate include the size of the sleeping room block, rate for sleeping rooms, complimentary rooms, food and beverage considerations, parking, deposits, cutoff dates, and attrition/cancellation clauses.

Communicating On-Site Needs

- Refer to the written copy of your setup needs and review them with your on-site contact. Keep the communication lines open; be available for last minute questions or necessary changes. Review the banquet event orders (BEOs); check meeting rooms for temperature comfort and necessary audio/visual equipment.
- Keep your on-site office staffed. Members need to know where they can find assistance with questions, or last minute problems. Be sure the office is staffed during announced time periods.

After the Event

- Collect event statistics and review the pick-up report (the number of facility guest rooms actually used out of a room block).
- Write thank-you letters.

Successful Negotiations

As the Events Coordinator for your region, you are responsible for negotiation with hotels and facilities for regional meetings. There are many books available on the art of negotiating and your local bookstore can supply you with these. They will give you tips on the psychology involved in negotiating and you may want to investigate this. The information provided in this chapter will give you some of the basic information you need for successful negotiating. Consider what other resources are available to assist you with negotiations. There may be other members of the RMT or regional members who already have negotiation skills. You may also want to consider researching the services of event planner organizations.

Successful negotiations should lead to mutual respect and a win-win situation. To negotiate effectively, you must know the value of the meeting to the suppliers of the facilities. You are not only a buyer in this situation, you are a seller; their perception of the meeting value determines the cost to the meeting organizer and attendees. To do this, give them as much information about the meeting as possible and present it in a concise and logical format.

It is very important to have the history of the meeting from past years. The salesperson will want to contact the facility where the meeting was held previously and verify information, so be prepared to supply a contact and telephone number if possible. One possible format for providing either the projected needs of the meeting you want to book or the history of a previous one is included in this chapter.

Hotels determine the value of your meeting by considering several things including:

- The number of sleeping rooms needed
- The arrival/departure pattern
- The no-show factor (the percentage of people who make a reservation but don't show up and don't cancel the reservation)
- The amount of catered food and beverage
- The usage of their outlets (restaurants, bars, gift shops, etc.)
- The number of people likely to use room service

A hotel whose largest market segment is business travelers on Sunday through Thursday nights is more likely to value a weekend meeting to complete their week. Room rates vary from city to city. Costs will generally be higher in larger cities than in smaller towns. Resort properties can be quite costly during the "season," but offer good buys in off-season.

A hotel's largest profit center is its sleeping rooms. Approximately 75 percent of the room rate is profit while food and beverage generates 20 percent to 30 percent profit. In today's market, hotel rates are high and good deals on rates are difficult to get. If you can't get the room rate you want, you may be able to get other concessions that will at least help reduce the cost of what the region will be funding. An example might be special rates

(usually 25-50 percent off the group rate) on rooms used for committee members, faculty, judges, or whomever the region is funding to attend. Complimentary suites, upgraded rooms for VIPs, complimentary meeting space, and amenities in VIP rooms are just a few of the concessions you might get. If you have flexibility in your dates, you are in a better negotiating position.

Negotiating with a convention center or a theater as a site for a competition or a show is a different experience. Some of the things they look at to determine rates include:

- Type of event (rock concerts are sometimes destructive to a facility)
- Nature of sponsoring organization; many have a lower rate structure for nonprofit groups
- Staging, lighting, sound, and video setup
- Amount of revenue likely to be generated in the concession area
- Amount of time required for move-in and move-out
- Show hours
- Amount of backstage space needed

Convention centers and theaters often have a printed rate structure for various types of groups and they won't negotiate those rates. They may be willing to make concessions on move-in and move-out time, backstage space, house equipment or staging provided, or other things that might reduce your costs. Provide them with as much information as possible at the beginning so they can help you determine how to create a win-win situation.

For hotels and other facilities, a multiyear contract can put you in a stronger negotiating position. Remember that you may not be able to get the low rates available a few years ago. Hotels and facilities have much more business than they did then and they are picking and choosing the groups they take. It is sometimes difficult to book your preferred site, much less get favorable rates. It is important to project the image of being financially conservative. Be professional when you explain your financial parameters for the meeting and for your attendees. Be organized, prepared, and dressed in business attire for the negotiation session. Enthusiastically sell yourself and your meeting and expect the best.

Sleeping Rooms and Meeting SpaceName of Meeting: Sweet Adelines International Region X ConventionLocation: Any town, USA Phone #: _____

Day	Wednesday	Thursday	Friday	Saturday	Sunday
Date	April 3	April 4	April 5	April 6	April 7
Block	20	225	350	350	Out

Agenda	Time	Function	Set-Up	# of People
Day 1 THURSDAY	3:00 p.m. - 10:00 p.m. 5:00 p.m. - 10:00 p.m.	Registration Exhibits	Tables (20) 10 x 10	Flow Flow
Day 2 FRIDAY	9:00 a.m. - 6:00 p.m. 9:00 a.m. - 6:00 p.m. 10:00 a.m. - 10:45 p.m. 1:00 p.m. - 2:45 p.m. 3:00 p.m. - 4:00 p.m. 10:30 p.m. - 11:00 p.m.	Registration Exhibits Quartet Reception President's Lunch Annual Membership Meeting Mass Sing	As set (20) 10 x 10 Reception Rounds Theater Open space/misc	Flow Flow 120 60 500 400
Day 3 SATURDAY	7:00 a.m. - 11:00 a.m.* 8:00 a.m. - 11:30 a.m. 8:00 a.m. - 11:30 a.m. 10:30 p.m. - Midnight	Chorus A** Chorus B** Chorus C** Chorus D** Chorus E** Chorus F** Chorus G** Chorus H** Chorus I** Chorus J** Exhibits Registrations Afterglow-Cash bars	Rounds Rounds Rounds Rounds Rounds Rounds Rounds Rounds Rounds Rounds (20) 10 x 10s As set Rounds	50 30 90 60 25 75 150 40 125 80 Flow Flow 600

* Most banquet space can be reset for a second chorus. There will also be heavy room service usage during this time.

**Chorus Breakfast/Rehearsal

Negotiating a Contract

Excellent information on negotiating a contract can be found in the *Contracts* section of this handbook. Please refer to this information for the legal aspects of contract negotiation. The following information is intended to assist you in discussing points to be covered in the contract.

- Dividing room panels are not soundproof.
- Discuss the necessity of designating the assignment of meeting room space to be used and include it in the contract.
- Discuss the effects of loud music or rhythmic beating of drums placed next door to an a cappella group or to a speaker, and try to include some type of protection in the contract. It is important to educate facility personnel on plans for the event, particularly when a speaker will be addressing the region in the evening when louder groups may be convening.
- Discuss placement of the region's registration area, ways and means area, etc. and include it in the contract.
- Discuss availability and any cost associated to tables, linens, chairs, easels, etc. and include it in the contract.
- Make sure you understand all deadlines and requirements for receipt of information and especially for acceptance of changes (e.g. required room blocks for attrition).
- Be prepared to provide information pertaining to past events of the same nature and provide contact information at previous facilities used for these events.
- Be prepared to provide information on previous events regarding number of sleeping rooms booked and number actually used. If you can provide written documentation on the facility's letterhead, it would be even more helpful.
- Be sure to address a facility's tendency to overbook due to their experience with no-shows. Providing information regarding number of sleeping rooms booked to number actually used will prove this point.
- During negotiation discussions, be sure to give as much information as possible and be as honest as possible.
- Document, document, document because you can be totally assured that facility personnel will change and change in facility ownership is highly likely. Also, be aware that change in facility ownership does not entitle new owners to change a contract. When a facility is purchased, the facility's booked contracts are purchased as is at the same time. You may, however, include a clause that gives you the right to cancel in the event of a change of ownership or management.

On-Site Management

By the time you arrive on-site for your meeting, most, if not all, of the details have been taken care of with the facility. Your primary purpose is to see that the instructions you have given the facility personnel are carried through.

One of the most important things to do is make sure at least one person in addition to yourself knows the details of the meeting. In case of an emergency, this person could carry on without you. You will also need people to monitor meeting rooms and staff an office, if you have one.

You and your assistant should plan to arrive at the facility one day prior to your attendees. This will give you an opportunity to have a pre-event meeting and walk through your program with the facility personnel. You will have received a résumé and event orders from the facility listing your requests. The pre-event meeting is the time to verify that all of your plans are in place. If there are any last minute changes, they should be covered at this meeting. The following areas should be discussed in the meeting:

- number of sleeping rooms blocked each night and the rooms picked up
- what meeting space is blocked when
- meeting space setup
- audio and visual equipment scheduled for each room
- catered functions
- miscellaneous functions
- bus pickup/drop-off – competitors and audience members – be sure an area in the parking lot is “roped/coned” off for bus pickup/drop-off

It is important to know who your contact is for each of the above-mentioned areas as well as how to reach them. Some facilities prefer that you call each department’s extension and some prefer that you call the facility’s operator and let her contact the correct person for your needs. At some facilities you will work directly with your primary contact for all of your needs. (This could be a sales person or a convention services person.) Check with your contact to see how the facility wishes to handle your requests.

When attendees arrive, you will want to be available for any check-in challenges that may occur. You might also want to have a central office or check-in point for your attendees where they can come if they have questions or concerns.

Meeting rooms should be checked at least 30 minutes prior to the start of each function to make certain the setup is correct and that the audio/visual equipment is working properly. It is also important to make sure the instructor/speaker has the supplies she needs and has water to drink. If you have multiple facilitators using the same room, ensure that you have included any transition requirements and timing in your planning. Check on the availability of a “Business Office” to make copies.

Meals should also be checked at least 30 minutes prior to their start. You will want to check the set-up and the number of seats available. You might also want to check on any special meals that were ordered such as vegetarian meals.

Sometimes a change from what was originally scheduled is needed on-site. Again, know who to call and how to reach her. When your contact is away from the facility, it is important to know who is on call. Be sure to share cell phone numbers with onsite staff, judging panel/panel secretary, faculty and committee members.

It is essential that you have an emergency plan in place. Where is the nearest medical facility? How will emergency situations be handled? How will non-emergency situations be handled? Who will be on call to handle these situations?

Following the meeting and prior to the time you leave the facility, you might want to meet again with your contact to go over the bill. This post-convention meeting is a good time to take care of any billing challenges you may have. Send a follow-up letter to the facility to let them know the level of success you had at the property and to give them any final

information they may need. Then, once the bill is received, you will want to review it for accuracy before final payment.

A final report of the meeting to the regional management team and for your files is a good way to look back and see if the property is one that you want to use again in the future.

Site Visit Check List

The Destination

- Accessibility
 - Ease and cost
 - Proximity to airport
 - Adequate taxi/limousine service
 - Sufficient parking space
 - Availability/cost of shuttle busing, if required
- Environment
 - Availability of local attractions
 - Shopping
 - Recreation
 - Restaurants
 - Weather conditions
 - Appearance
 - Safety of area
 - Economic health of community
 - Reputation of area/facility for hosting meetings
 - Support and services available from local CVB
 - Availability of experienced suppliers such as audio/visual firms, exhibit service contractors, temporary help, and security

The Facility

- Efficient, friendly doormen and bellmen
- Attractive, clean lobby
- Registration desk easy to find
 - Sufficient space and personnel in relation to guestrooms
 - Ability to handle check-in/check-out times for major groups
 - Efficient front desk personnel
 - Place for people in wheelchairs to check-in
- Modern elevators in sufficient number to serve guests when the facility is full
- Accessible, fully staffed message and information desk
 - Rapid response to telephone calls
 - Quick delivery of messages
- Availability of guest services
 - Drugstore
 - Gift shop
 - Concierge
 - Safety deposit boxes for guests' valuables
 - Internet access

- Comfortable, clean bedrooms
 - Furniture in good condition
 - Modern bathroom fixtures
 - Adequate lighting
 - Adequate closet space and hangers
 - Smoke detectors in room
 - Fire exit information clearly posted
 - Availability of refrigerator and/or wet bar, if important to your group
 - Cleanliness of hallways, including prompt removal of room service trays from halls
 - Availability of beverage and ice machines on the floor
 - Service elevator accessibility
 - Size of standard room versus the deluxe room
 - Availability of an executive floor offering special guest services, if important to your group
 - Number and types of suites and availability of floor plans showing parlor and bedroom size and types of beds.

- Reservations procedures and policies
 - Room category classifications, such as higher floor versus lower floor, ocean view, or mountain view
 - Number of rooms in each category available for the meeting
 - Number of rooms available, if needed, for early arrivals and late departures
 - Current convention rate and current rack rate for individual guest (not part of a group)
 - When the hotel will provide firm rates for the meeting
 - Guarantee and deposit requirements
 - Check-in and check-out hours
 - Cutoff date when rooming block is released to the hotel for direct sale to others
 - Check-cashing policies
 - Types of credit cards accepted
 - Refund policy in case of cancellation

Meeting Space

- Size (dimensions of meeting space, noting oddly shaped rooms)
- Capacities when set in various configurations
- Quality, condition, and soundproofing of airwalls used to divide a room into sections
- Separate light, heat, and air-conditioning controls in each section divided by air walls
- Time required to put airwalls into place
- Acoustical quality of rooms and availability of good sound system, if needed
- Built-in equipment such as whiteboards and screens, and permanent furniture that cannot be moved
- Obstructions such as columns

- For audio/visual presentations
 - Ceiling height of room
 - Obstructions which would block audience view of screen
 - Chandelier placement
 - Decorative mirrors which might reflect light
 - Blackout drapes for rooms with windows
 - Location of lighting controls and options for dimming
 - Location of fire exits
- Accessibility from a service corridor
- Cleanliness and general quality of public space
- Accessibility of meeting space from main lobby
- Relative proximity of meeting rooms to each other—all on one floor, or spread on various levels
- Availability of house and public telephones
- Location, number and cleanliness of restrooms
- Location and number of checkrooms

Equipment

- Tables
 - Six feet long
 - Eight feet long
 - Schoolroom width—15 to 18 inches
- Chairs
 - Comfortable for long meetings
- Platforming
 - Steps for various platform levels
 - Carpeting and skirting for platforms
- Lecterns
 - Standing lecterns
 - Tabletop lecterns
 - Lectern lights
- Whiteboards and bulletin boards
- Sign easels
- Wastebaskets and trash containers
- Spotlights and auxiliary lighting equipment
- Remote control lighting capability if lights are to be controlled from the lectern or from a projection table that is not near a wall switch
- Registration counters
- Microphones
- Laptop, computer equipment and connections
- LED projector or other equipment as requested by faculty

Food and Beverage Service

- Public outlets
 - Appearance and cleanliness
 - Cleanliness of food preparation areas
 - Adequate staffing at peak time
 - Attitude of personnel
 - Prompt and efficient service
 - Variety of menu
 - Cost range
 - Reservations policy
 - Possibility of setting up additional food outlets for continental breakfast and quick luncheon service, if necessary
 - Receptiveness to singing in public areas
- Group functions
 - Quality of service
 - Diversity of menus
 - Creativity
 - Costs
 - Tax and gratuities
 - Projected price increases before date of event
 - Extra labor charges for small group functions
 - Liquor laws
 - Disallowed serving times
 - Cash bar policies
 - Bartender costs and minimum hours to be paid
 - Cashier charges
 - Refreshment break pricing
 - Guarantee policies
 - When guarantee required
 - Number of meals prepared beyond guaranteed number
 - Special services
 - Tailored menus
 - Theme party ideas
 - Unique refreshment breaks
 - Food substitutions for those with dietary restrictions
 - Availability of table decorations
 - Availability of dance floor
 - Size of banquet rounds
 - For eight people
 - For 10 people

- Room Service
 - Diversity of menu
 - Prompt and efficient telephone manner
 - Prompt delivery
 - Quality
 - Prompt removal of trays

Suggested Timelines

Three to five years in advance of the event

(Important Note: This date depends entirely on the region's Education Coordinator and the regional education plan. Every scheduled regional meeting/workshop/seminar should have a location selected for it, along with a signed contract.)

- Select facility and have contract signed. Read and re-read the contract. Remember that the hotel will protect itself and will not be looking out for your needs. Amend the contract when you feel you need to define expectations.
- Serve as counsel to the region's Finance Coordinator who will sign the final contract. Keep her informed about contract negotiations and be available to answer her questions about contract clauses.
- Confirm with the region's Education Coordinator that faculty has been secured and booked before a contract is signed. It is difficult to get out of a contract when the desired faculty does not have that specific date open.
- Highlight any deadlines on your copy of the contract. Make extra copies of the contract in the event the original is lost.
- Publish the date and location on the regional calendar. This is especially helpful to regional members who need to reserve future dates in order to attend.

Eighteen Months to Three Years

- Review contract to check deadlines.
- Check with region's Education Coordinator to confirm faculty availability.

One Year to 18 Months

- Check regional regulations or procedures regarding dissemination of information pertaining to this particular meeting/workshop/seminar/etc.
- Choruses usually do not require detailed information about an event at this time. However, for planning purposes, chorus members need to know the event's date, location, faculty, cost, and intended subject(s).
- Determine physical requirements from region's Education Coordinator which may affect the size meeting room needed, such as risers or staging area, and determine if additional facilities negotiations or contract amendments are needed.

One Year

- Review contract to follow up on any deadlines.
- Most facility contracts will stipulate that rates be set at this time.
- If not already done, check on regional regulations or procedures regarding dissemination of information pertaining to this particular meeting/workshop/seminar/etc. Chorus members usually want to know just the event's date, location, faculty, cost, and intended subject(s).
- Check the contract for any obligations or information requirements to be supplied by the region to the facility.
- If designation of assigned meeting space is part of your contract requirements, the contract will stipulate the designation at or around this time.
- If not already stipulated in the contract, set deadline for reservations to be received by the facility.
- Supply pertinent information, including rates and deadlines, to the region's Marketing Coordinator, or her designee, for publication and/or promotion to the regional membership. Timing and type of information required depends on the region's procedure(s).
- Revisit or verbally verify with facility personnel any structural changes the facility may have undergone or are anticipated to occur, as well as any organizational changes that may have taken place or are anticipated to occur.

Six to Eight Months

- If the facility agreed to supply reservation cards, you need to request the cards in order to have them ready to distribute with the event's promotional materials.
- Revisit or verbally verify with facility personnel any structural changes the facility may have undergone or are anticipated to occur, as well as any organizational changes that may have taken place or are anticipated to occur. Even if you contacted the facility one year before the date of the event, you will need to contact them again.
- If a meal function is planned for the event, contact the facility for menus, make menu selections, and negotiate a price. When planning a meal function for a large number of people, carefully consider the pros and cons of a served meal versus a buffet.

Four to Six Months

- According to the region's procedures, supply specific information to regional personnel responsible for dissemination. This should include maps and verbal directions, menu and costs of a meal if a meal function is included, any facility-related requirements, etc.
- Unless designation of assigned meeting room space at an earlier time was part of the contract, work with facility personnel to do so and obtain names of these rooms.
- Obtain from region's Education Coordinator, or her designee, any equipment needs or physical/room configuration requirements needed by faculty. International's sample form titled "Faculty Information Sheet" is an excellent means to obtain this information.

- If making reservations for sleeping room(s) for the faculty is a responsibility of this position, make them at this time.

Two to Three Months

- Work with facility personnel regarding equipment needs and room configuration requirements.
- Remember that the word “risers” does not mean the same thing to facility personnel as it does to you. To people in the hotel industry, a “riser” means a platform that creates a stage or dais.
- Remember that projector use typically requires the use of a screen. These two items are separate and you need to request both from facility personnel.
- Work with facility personnel on any problems or concerns.

One Month

- Make sure that assigned meeting room space is still assigned to your meeting.
- Provide meeting room names to regional personnel in charge of printing the event’s program.
- Check with Education Coordinator regarding any hospitality requests from the faculty and take steps to handle these requests.
- Provide a copy of the tentative or final schedule of events to facility personnel in order for them to distribute it to department managers and staff for planning purposes.
- Follow up on any questions or concerns from the facility personnel.
- Follow up on equipment requests and the possibility of any problems.
- Discuss possible situations that could impact the facility or its personnel, such as attendees remaining on the property for meals, room service requests, bar usage, etc.
- Make sure a master account is set up at the facility, unless this is a responsibility of someone else on the region’s management team. If there is a question, make sure someone is handling this matter.

Upon Arrival

- Have a copy of the contract with you at all times.
- Check on the setup of the master account and what charges are authorized to be posted to it, unless this is the responsibility of someone else on the region’s management team.
- Provide an extra copy of the contract for the Education Coordinator in case there is a problem and you are not readily available. Take time to familiarize the Education Coordinator with the layout of the facility.
- Introduce yourself to the facility’s banquet personnel who will be handling or working on the event. Remember that shifts change and you will need to reintroduce yourself to all other shifts. Wear something that identifies you as the organization’s point of contact, such as a certain color of name tag or a distinguishable pin.
- Make sure the region’s registration area, ways and means area, etc. are setup correctly, and that the setup does not hinder traffic flow within the facility.

- Check in and obtain room keys for the sleeping room for the faculty, unless this is a responsibility of someone else on the region's management team.
- Check that equipment is on-site and operable. If batteries or bulbs are necessary for the equipment, make sure that replacements are available.
- Test the sound equipment.
- Make sure that fresh water will be available for speakers at all times.
- Make sure that announcements are made periodically regarding hotel policies on food and drink in the meeting room(s) and smoking.

Upon Departure

- Check with the facility's banquet personnel and the facility contact to see if there were any problems stemming from your meeting.
- Check out and return room keys for the faculty, unless this is a responsibility of someone else on the region's management team.
- Settle the region's master account, unless this is the responsibility of someone else on the region's management team. If there are questions or problems, make sure someone is handling the matter.
- Write a letter to the facility contact to thank her/him for her/his cooperation and cite any successes or problems as a matter of documentation to the file. Whenever possible, try to obtain the name(s) of any of the facility's banquet personnel who were helpful to you and cite them in the letter as well.
- Request a letter from the facility contact to document your own files regarding the number of sleeping rooms booked and used, as well as any other information that would be helpful in future negotiations.
- Write a letter to the manager of the facility to recognize individuals who were especially helpful to you and cite any successes or problems that occurred.
- Write a short summary of the region's experience at this facility to document the file for future reference.

Other Tidbits

- When preparing directions to the facility, remember that some people need verbal directions while others respond better to a map.
- There is usually a lot of discussion regarding the temperature of a meeting room. It has been proven that mental activity thrives in a cool atmosphere. So keep the room on the cool side. A setting of 60 to 65° F (15 to 18° C) is most conducive to learning. In promotional materials about the regional event, remind cold-natured individuals to bring a sweater.
- If you are using a community building, a church, or a building on a college campus, etc., remember that it is not part of the hospitality industry and amenities that come with using a hotel, convention center, etc. will not be available to you.
- If you do not currently negotiate designation of which meeting room(s) will be assigned for your use, consider doing so. This way, you may be better informed about what is happening on the other side of the dividing wall at the facility. No matter what facility personnel say, most dividing walls are not soundproof.

- Remember that hardly any meeting/workshop/seminar goes without some kind of mishap. Always appear cool, calm, and collected; you can scream some other time, behind closed doors. The best meeting is one where the audience has no idea that there has been a mishap.

Trade Show Basics

To have a successful trade show, the most important ingredient is a good “Show Team.” The team members should represent the four primary job functions involved in any show/conference: sales to drive revenue; marketing to drive attendance and support sales; operations to make sure the show is produced successfully; and finance to organize and keep track of the budget. This group should be led by a show manager or director and needs to be aided by a support staff made up of sales, marketing, operational, and financial assistants.

Keep in mind that the above represents an ideal situation where time and resources allow for a complete staff. Before launching an event, it is important to develop a show profile: who is the target attendee? Who should exhibit? What is the reason for the show? Is there competition? Once this is decided, the basic structure should be adhered to in order to make the event successful. If there is a conference or educational program tied in with the trade show, there should also be a conference or education manager. This position should also be supported by an assistant(s).

The following paragraphs will define each of the four functions thought necessary to ensure a successful trade/public event. It should be stressed that organization and time management are of paramount importance. At least one year is needed to plan for a show. Cutting short the sales or marketing cycles can prove to be detrimental. Also, the budget needs to be developed in advance in order to know what resources are available and what risks are involved. The operations staff needs to know what is taking place in advance in order to set up contracts with the venue (building), hotels, etc.

Sales drives revenue. The **sales manager** is responsible for the sale of all exhibit space, advertising for the show program (given out to all who attend the show), and the newsletters published before or after the show. Another responsibility is sponsorship sales, which can include title sponsorships (companies that might want to share the limelight with the organization having the event), banners, billboards, aisle signs, special events (breakfasts, luncheons, and cocktail parties), or sponsorship of a special speaker or of the conference program. These are all excellent sources of revenue for any show. The sales manager is responsible for submitting a sales budget to the financial manager and for making sales projections to determine what the total show revenue might be. The sales staff should also be responsible for all customer service until growth warrants appointment of a customer service department. Forming and maintaining good relationships with all exhibitors, advertisers and sponsors is a major sales responsibility. Without these people, there is no show! The show director will depend on the sales manager to set the price of exhibit space, advertising, and sponsorships as sales is the team link with the customer.

The **marketing manager** is responsible for making sure that the show is well attended and for supporting the sales effort with pre-show, at-show, and post-show sales materials. Another major responsibility of this function is the production of all the materials, ads, press releases, and Websites that promote the show to attendees. The main function of the marketing manager is to attract attendees to the show! After sales has sold all the exhibit space, the effort would be in vain if there were not sufficient attendees to visit the exhibits. At the same time, marketing produces the sales pieces to help the sales staff sell the exhibit space, advertising, and sponsorships. Marketing works closely with sales to create these pieces. The marketing manager forms relationships with the press and the media. Additional responsibilities are the ads necessary to promote the show and the show program. Exhibitor and attendee surveys used to conduct research are the responsibility of this function. Sales and marketing are both responsible for investigating competitive industry events.

The main function of the **operations manager** is to ensure that the show is produced and runs smoothly. Registration of both exhibitors and attendees falls under the operational umbrella as well as the relationships with the venue and the contractors. It should be noted that registration is one aspect of a trade show that can make or break it! A smooth registration process for exhibitors and attendees will make a show successful while an unpleasant experience can be a nightmare. The more preregistration that can be done, the better. This is encouraged through the advance marketing material. At the show site, it is preferable to have experienced registration staff people. Additional responsibilities are hotel, travel arrangements, and the production of the exhibitor's manual. Operations aids sales with customer service and marketing helps operations with the design of the manual. The exhibitor's manual is a vital tool for exhibitors. Exhibitors depend on this resource for comprehensive information to have a smooth at-show experience. The more information that operations can provide to the exhibitors, the fewer questions and problems there will be! The manual should reach the exhibitors three months prior to the show.

Operations directs all show vendors (concession, contractors, florists, cleaning people, electricians, telephone technicians, audio/visual, registration staff, any temporary help needed, etc.). Again, if there is a conference/educational program, operations works with the conference manager to see that participants' needs are met, rooms are ready, etc. The operations manager ensures that the move-in and move-out are smooth experiences for the exhibitors and, in this way, contributes to the customer service effort directed by sales. Another function of operations is to facilitate the communication that the exhibitors and sponsors might want to have with the building and the contractors and to act as an intermediary in this regard.

The **financial manager's** duties are to see that the budget is developed and followed. Finance is also responsible for invoicing exhibitors, advertisers and sponsors, and should help with collections when necessary. Another responsibility of the financial manager is the revenue generated from registration and from all paid conference/educational programs. The financial manager communicates regularly with all functions in order to keep track of the finances and to ensure that all bills are paid. The financial manager

works with sales, marketing and operations in order to be able to develop the budget and to make financial forecasts. Sales and finance should communicate regularly to see that all exhibitors fees are paid before the show. No company should be allowed to exhibit and no ads should be run if the bills are not paid in advance!

Finally, the **show manager or director** should oversee all of these functions and is responsible for regularly scheduled meetings to see that everything is kept on track. Each of the four managers should submit a monthly report so the director can see that goals are being met. The show director should work with each department to set the goals for each year and a team goal should be set. Each year, the show should be able to grow by a specific percentage along with the attendance. Research should be continued and the show director should analyze and interpret the data collected on surveys.

Trade shows are a lot of fun and can be very profitable if conducted properly. Remember that the exhibitor base and the attendee base need to grow together. The team approach to producing a show works well. Communication, as always, is the key! All four of the above-named functions should communicate regularly. Keep in mind that both the exhibitors and the attendees are customers and the better the customer service, the more successful the event.

Finance Coordinator

Job Description

- 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 or files any tax forms required by their respective countries on the date appropriate for their local governance and submits evidence of such to international headquarters.
- Provides advice and training to chapter treasurers and serves as a resource to chapters with financial questions.
- Provides financial information necessary to complete applications for corporate gifts/grants.
- Maintains contact with appropriate staff members at international headquarters.
- Maintains comprehensive records and forwards materials to successor.
- Trains her successor.
- Appoints staff to assist in the implementation of her responsibilities.

A vodcast outlining each RMT Coordinator's duties has been created and can be found in the Leadership section of the Members Only portion of the Sweet Adelines website.

Financial Management

Although the Finance Coordinator is primarily responsible for administering and monitoring the region's financial resources, financial management is the responsibility of the entire Regional Management Team. 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. Financial planning concerns the variables that make each region unique: size, location, personal incomes of members, local economic climate, and attitudes of individual members. Ideally, organizational programs, funding, and allowances for cash reserves should be planned in three- to five-year increments. By establishing overall regional goals and objectives, the long-range planning process provides the framework within which financial plans and budgets are developed.

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

Establish Goals and Objectives. Establish new goals and objectives and decide if they can realistically be achieved within the three-to five-year plan. 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.

For new programs or activities, it may be helpful to prepare a business plan which assists in determining if the new program will meet the goals and objectives of the long-range plan. Example A in this section is an outline of the components of a business plan. Additional information and sample forms may be obtained by contacting international headquarters.

Other considerations may include:

- In what educational experiences will the members want to participate?
- At the chapter level? At the regional level? At the international level?
- If the region meets its goals for increased membership, will the present competition or meeting sites be adequate?
- Will new equipment be needed within the next year or two? How will purchases be funded?

Estimate Sources of Revenue. Forecasting revenue serves as the starting point in developing financial plans and budgets. Revenue budgets should always be prepared before expense budgets.

When estimating sources of revenue, be conservative. Considerations for estimating revenue include:

What is the membership growth?

- Decrease or increase?
- Determine percentage of decrease/increase over previous five years and project accordingly.
- Goals established for increasing membership should be conservatively incorporated into the projections.

Establish fees for self-supporting events and project attendance.

- Separate budgets for self-supporting events should be developed, correlating costs to revenue.

Project cash available for investments and estimate interest income accordingly.

Determine non-dues sources of revenue

- Grants
- Fund-raising projects

Example A—Business and Marketing Plan

Each program, service, and product adopted by the region must be consistent with the mission statement of the organization, and with one or more of the goals and strategies developed in the region's strategic plan. To ensure that the program, service, or product is consistent with the mission statement and goals, a business and marketing plan should be developed. The following is an outline of the process for developing the business and marketing plan.

I. Needs Assessment

- A. State purpose of product, service, or program.
- B. Identify which goal and strategy of the region's strategic plan this product, service, or program supports.
- C. Identify targeted groups for products, service, or program.
- D. Conduct research regarding the attractiveness, competitive position, and alternative coverage of the product, service, or program. (Is this program available elsewhere?)
- E. Identify pricing philosophy (for profit, break-even, funded, partly subsidized).

II. Administration

- A. Identify groups, committees, and/or individuals responsible for implementing and monitoring the product, service, or program.
- B. Determine timeline for development, marketing, implementation, evaluation, and measurement of results.
- C. Identify methods for measuring results (surveys, financial analysis, etc.).

III. Marketing

- A. Identify marketing and promotion strategies to achieve purpose.
- B. Identify tactics to achieve marketing strategies (direct mail, advertising, telemarketing, etc.).
- C. Determine timeline.

IV. Finance

- A. Prepare budget for research, development, production, marketing and implementation costs, and direct and indirect costs including staff time.
- B. Pricing
 1. Assess affordability to targeted groups.
 2. Establish member and nonmember prices (if applicable).
- C. Projections
 1. Prepare three-year income/expense projections (if applicable).
 2. Prepare break-even analysis (if applicable).

V. Implementation/Evaluation

A. Evaluate periodically.

1. Measure results.
2. Compare results with projections.

B. Recommend continuance, modifications, elimination of program or service.

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 eight to ten percent of revenue for the previous five years, project expenses for the next three years at ten percent. A three-to five-year projection can be developed using the same format and percentage trends as established in the historical data. Variables (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 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. 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 administrative and operating expenses for sustaining the business needs of the region. 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. Capital expenses include video equipment, copiers, computers, risers, 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.

Establishing Cash Reserves. The importance of establishing cash reserves cannot be overly emphasized. A common misconception is that accumulation of cash surpluses will jeopardize the tax exempt status of the regions and chapters. The United States Internal Revenue Service’s position on accumulation of cash surpluses is that as long as monies held are for the purpose of conducting the activities of the organization, as specified in the IRS determination letter, it is legal to maintain these cash surpluses.

Cash reserves are vital for maintaining a healthy financial position and may be established for several purposes:

- To offset the effects of unexpected expenses or shortfalls in revenue;
- Capital expenditures;
- Special educational events.

Building cash reserves involves long-range planning and if no reserves are available it may take five to seven years to build desired reserves. Specific means by which to build cash reserves must be identified and maintained to achieve the desired results.

Examples include:

- Conducting an annual fundraising project and place proceeds in cash reserves.
- Designating a portion of the regional assessment to cash reserves.
- Designating portions of educational or regional competition fees to cash reserves.

How much should be maintained in cash reserves? There should be enough funds available to fund the operating and administrative costs of the region for a minimum of one year. It may be necessary to modestly increase assessments or other fees and designate the increase to cash reserves. 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.

Analyze Projections. Once the projected financial plan is completed, analyze the projected financial status of the region. Ask the following questions:

- Will current assessments and fees sustain the plan for the next three to five years?
- If not, when will increases in assessments or fees be needed? Plan carefully and far enough ahead so that the membership is prepared for the increase. Most chapters escrow assessments and dues so two years is recommended.
- Rather than raising assessments, 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. Each year, compare actual revenue and expense to the projected budget. Determine if any variances are significant enough to adjust the plan for future years. 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.

Audit Controls and Procedures

An important component of good financial management is to establish audit controls and procedures that safeguard the region's financial resources from misuse and ensure that financial records and reports are accurate and reliable. See Example B in this section.

Example B—Audit Controls and Procedures

- If feasible, accounting procedures should be documented in flow charts and in an accounting manual. The Regional Management Team should review and update this documentation annually.
- Expenses and costs should remain under budgetary control. An analysis for all accounts should be prepared to investigate and explain all significant variances from budget.
- Petty cash should be test counted on a periodic basis.
- Paid checks should be reviewed monthly to verify proper signatures and to search for any alterations.
- Reconciliations on all bank accounts should be done each month. Any significant outstanding checks and other reconciling items should be investigated.
- Bank statements and online account information should be reviewed monthly to confirm that any electronic debits or credits are authorized.
- If possible, someone who has no cash receipts handling duties should prepare the bank reconciliations. Non-electronic bank statements should be delivered, unopened, to the person responsible for the reconciliation.
- Cash receipts and deposits should agree and deposits should be made regularly.
- All invoices and check vouchers should be scanned for:
 - Proper account distribution
 - Approvals
 - Clerical accuracy
 - Adequate support
 - Verification of math calculations
- Be sure that all members provide properly documented and receipted expense statements to prove all advances.
- Check requests, along with vouchers or other supporting documents, are presented with the checks submitted for signatures.
- All disbursements, except from petty cash, should be paid by check.
- It is advisable to require two signatures on all checks but certainly on significant amounts (determined by Regional Management Team). An example threshold might be any debit in excess of \$500.00.
- All unused checks are verified for proper sequential numbering and are held in safekeeping.
- Voided checks are properly defaced and held in safekeeping.
- Proper physical safeguards should be in place to protect assets.
- Ledger entries are reviewed for supporting data and significant or unusual adjustments.
- All significant accounts, disbursements, etc., should be reviewed in detail on an annual basis by an outside accountant or an internal audit committee.
- Debit cards should be used sparingly, if at all, and should never be used for online purchases.

Investments

Before investing regional funds, an investment policy should be adopted by the Regional Management Team defining the following:

- Who is authorized to invest the funds? (Finance Coordinator and/or other team members)
- Restrictions or limitations on investment authority
- Criteria for investments

A sample investment policy is included in this section. Please note the criteria are based on United States investment instruments.

Before making any investment, however, determine whether the investment is secure (i.e. insured) or not and make every effort to understand the extent to which the money may be at risk. Financial advisors who specialize in non-profit organizations may be a good place to start to gain additional information about investing wisely.

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 region receives most of its income and when expenses are anticipated, the region may structure investments accordingly.

When forecasting cash balances, operating revenue and expenses are considered, but so are other sources of revenue including deferred income, loans, and all sources of cash. Anticipated capital expenditures also are included in the cash projections.

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 can often be obtained just by asking. For example, a bank may quote 2.00 percent for a \$5,000 certificate of deposit for one year. Always ask for one-half percentage point more than quoted. 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.

Investment Policy

Each region must develop its own policy based on specific needs and cash resources available. The following is based on United States investment instruments and is presented as a sample of content that may be included in a regional investment policy.

Purpose

Reserve funds represent accumulated surpluses. The purposes of the reserve funds are

to provide funds for operating expenses, unforeseen future contingencies, and capital expenditures.

Investment Objectives

The objectives of the investment policy are to maximize interest and dividend returns on accumulated cash reserves while, at the same time, attaining a proper and responsible balance among the factors of safety, liquidity, and yield.

Reserve Funds

For the purpose of clarity, the following definitions will be used to identify the types of funds held by the region:

Operating Funds: Those funds expected to be spent in the normal course of business during the current budget cycle. Contingent upon cash flow needs, a portion of these funds may be invested in interest-bearing accounts.

Short-Term Reserve Fund: Short-term is defined as from one to three years. A portion of these funds are held to meet expenses from unanticipated activities required of the region to fulfill its purpose. The Regional Management Team, based on recommendations provided annually by the Finance Coordinator, sets the percentage amount to be used for these purposes.

Capital Expenditure Fund: This fund is to be used for future capital expenditures. The amount of reserves allocated for these purposes will be determined annually by the Regional Management Team upon recommendation by the Finance Coordinator. These funds may be invested either in short-term or long-term reserve fund portfolios depending upon anticipated use of the funds.

Long-Term Reserve Fund: Those funds in excess of operating funds, short-term funds, and the capital expenditure fund designed to maximize returns without exposure to undue risk and provide financial stability and cash flow.

Investment Guidelines

The Finance Coordinator (or other designated regional coordinator(s)) shall be authorized to invest the region's surplus funds. The services of a registered investment firm or advisor may be sought to manage portions of the region's funds. The following procedure shall be followed to engage a new or replace a current registered investment firm or advisor:

- The Finance Coordinator (or designated person(s)) recommends the hiring or replacing of an investment consultant to the Regional Management Team.
- The Regional Management Team may request an interview with the recommended consultant or representative of the recommended firm.
- The recommended consultant must be independent and should have no familial relationship with the RMT members. This will avoid any appearance of impropriety on the part of an RMT member if investment strategies or results are brought into question.

Operating and surplus funds may be invested as follows:

Operating and Short-Term Funds

- Federally insured checking and savings accounts not to exceed \$100,000 each, including interest, at commercial banks or savings and loan institutions
- Federally insured certificates of deposit not to exceed \$100,000 each, including interest, at commercial banks or savings and loan institutions
- Money market funds and mutual funds that invest in government-backed securities
- Direct obligations of the U.S. government, its agencies, and instrumentalities, which include treasury bills and notes, collateralized mortgage obligations (CMOs), Federal National Mortgage Association (FNMA), Government National Mortgage Association (GNMA), and Federal Home Loan Mortgages (FHLMC);
- Equity holdings, including mutual funds, may be selected from the New York Stock Exchange, American Stock Exchange, and NASDAQ market. The equity portion of the portfolio will be maintained at a risk level roughly equivalent to that of the equity market as a whole, with the objective of exceeding its results as represented by the S&P 500, net of fees and commission.
- Maturity and/or return to principal scheduled to maintain a consistent cash flow to meet the financial obligations in a timely manner;
- Generally, short-term investments may not be purchased at a premium.

Long-Term Funds

- Long-term funds may be invested in instruments as defined in the first four items under Operating and Short Term Funds;
- Investments may be purchased at a premium if anticipated net yields compensate for premium costs;
- To maximize total return on long-term funds, a portion of these funds may be used to purchase corporate bonds; the amount allocated to purchase corporate bonds will be reviewed annually by the Finance Coordinator;
- The guidelines for purchasing corporate bonds are:
 - High-grade corporate bonds (rated AAA, AA, or A by Standard & Poor's or Moody's rating services)
 - Each corporate bond may not represent more than five percent of total funds allocated for these investments;
- The maximum maturity of corporate bonds may not be more than 10 years;
- The Regional Management Team may restrict investments based on social and ethical criteria (These restrictions may be specifically identified if preferred.).

Restrictions

No investments other than those defined in policy may be made without approval of the Regional Management Team. These restrictions include, but are not limited to:

- Foreign securities are prohibited.
- No private placements or mortgages may be purchased.
- Only dollar-denominated securities may be purchased.

Reporting Procedures

- The Regional Management Team will receive an investment report monthly (or quarterly, as deemed necessary).

- Annually (or more often, if deemed necessary), the Finance Coordinator will review performance and portfolio content of all investments and recommend to the Regional Management Team any changes in strategy.

Changes to Policy

Investment policy and guidelines will be reviewed annually by the Finance Coordinator and any recommendations for revision will be presented to the Regional Management Team for approval.

Expenses

This section identifies expenses that are internationally funded and the procedures for receiving or requesting funding.

Internationally Funded Chapter/Prospective Chapter Visits

The Education Coordinator, in conjunction with the Membership Coordinator, is responsible for scheduling the internationally funded visits. Funded visits are allocated as follows:

- A total of 18 internationally funded education visits to chartered chapters is allocated. The focus of internationally funded visits is for the purpose of in-Region personnel providing education in both the musical and administrative areas, membership development, assessment of the health and needs of the chorus, building relationships, and for discovering potential leaders.

As each member of the Regional Management Team has separate areas of expertise, the region will determine which of the coordinators or her designee will make each visit.

The region is able to download reimbursement request forms from the Sweet Adelines International Website for use in internationally funded visits. These forms are located in the “Regional” section of the Document Center and are entitled “Reimbursement Request form for Internationally Funded Visits.” Worldwide regions may be issued reimbursement in their country’s currency if they choose that option.

The Regional Management Team should determine which chapters can most benefit from internationally funded visits. Scheduling these visits as early in the fiscal year as possible gives the visitor time to plan for her trip and chapters time to confirm a date convenient for their members.

- Prospective chapters require two musical visits and two administrative visits in order to fulfill their chartering requirements. Typically, one visit occurs when the chapter is in *Step One* and one occurs when the chapter is in *Step Two*. (If determined necessary, a third musical visit may be granted with permission from International headquarters.) The musical visits should be made by the Education Coordinator or her designee. The administrative visits are made by the Membership Coordinator or her designee.
- Two internationally funded visits are available per year (maximum two years) for

chapters in revitalization. The Regional Management Team chooses the in-Region visitor based on chorus need.

Of course, the region may plan visits funded by the region in addition to those funded by international. Although it is not mandatory that international receive a report of visits funded by the region, regions are encouraged to do so.

To receive prompt reimbursement for internationally funded visits, please comply with the following:

- Always use the appropriate funded-visit form, which can be downloaded off the Sweet Adelines International Website. These forms are located in the “Regional” section of the Document Center and are entitled “Reimbursement Request form for Internationally Funded Visits.”
- If an in-Region designee is assigned to make the visit, the form must be signed (approved) by the appropriate coordinator (Education Coordinator or Membership Coordinator) before being forwarded to international.
- Round-trip ground transportation is reimbursed at the mileage rate approved by the International Board of Directors for the current fiscal year. Ground transportation reported in kilometers will be converted to miles.
- When considering funded visits, please note that hotel nights and food are not included as part of reimbursable expenses.

Any chapter visit requiring ground transportation or airfare in excess of \$600 must be pre-approved by the Chief Operating Officer or the Corporate Secretary. Airline tickets should be purchased well in advance to obtain the lowest possible fare. Travelers are expected to book the most reasonable fare available and realize that it may not always be possible to use their preferred airline or take direct flights. A short lay over or change of planes is not a valid reason to book a more expensive flight. First class airfare will not be reimbursed. Traveling RMT members may retain for personal use any frequent flyer miles or rewards points earned for travel that is reimbursed.

Regions must use Journey House Travel Service to purchase tickets for internationally funded visits. Journey House Travel Service charges are billed directly to the Sweet Adelines International master account. Following is information on Journey House Travel:

- Call Journey House Travel Service at 800-251-6559 (or outside the United States call 1-918-524-5249) Monday-Friday 8:30 a.m. – 5:00 p.m. Central Time.
- Identify yourself as a Sweet Adeline.
- Tell the agent handling your call that you are booking an internationally funded visit and give the applicable code:
 - Code # 7660 – Visits to prospective chapters
 - Code # 7670 – Visits to chartered chapters
 - Code # 7675 – Visits to revitalizing chapters
- Make the visit and complete the appropriate funded-visit form. Attach proof of purchase for the airline ticket to the form and submit it to international headquarters.

Tax considerations and information related to the organization are documented in detail in the *Chapter Guide*. The following provides an overview of taxes and IRS forms:

United States Federal Tax Exemption Status

A ruling issued on October 27, 1955, by the U.S. Treasury Department, Office of the Commissioner of Internal Revenue, Washington, D.C., granted Sweet Adelines International, and all affiliated regions and chapters certain federal tax exemptions as a 501(c)(3). This ruling affects all regions and chapters located within the United States. The exemption letter serves as that official ruling and is reproduced in its entirety in the *Chapter Guide*.

It is vitally important that each region and chapter 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 before filing any federal tax forms.

All regions and chapters are identical in their purpose, method of operation, and activities, as was stated in our request for a group ruling from the Commissioner of Internal Revenue. Please review the *Regional Bylaws*, *Chapter Bylaws*, and the *Corporate Bylaws* of Sweet Adelines International. 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.

Required Federal Filing of Form 990

All United States regions and chapters in existence during the period beginning May 1 to the following April 30 are required to file Form 990 annually with the IRS. It is the responsibility of the outgoing Finance Coordinator to complete all Form 990 reports.

Listed below is a short description of the necessary tax forms the region or chapter may be required to file:

- **Form 990-N (e-Postcard)**—Regions or chapters with gross receipts that are normally \$50,000 or less (\$25,000 for tax years ending on or after December 31, 2007, and before December 31, 2010) must file the *e-Postcard*. The deadline for filing these forms for regions and chapters is September 15. If the due date falls on a Saturday, Sunday, or legal holiday, the due date is the next business day. The *e-Postcard* cannot be filed until after the tax year ends.
- **Form 990EZ**—The 990EZ may be used if gross receipts during the year were less than \$200,000 AND total assets at the end of the year were less than \$500,000. Schedule A must be filed with the 990EZ.
- **Form 990**—If gross receipts are greater than \$200,000 and/or ending assets are greater than \$500,000, then Form 990 must be completed along with Schedule A.

- **Schedule A**—This schedule provides additional information and must be filed with the 990EZ or 990 as previously defined.
- **Form 990-T**—A Form 990-T is filed only if gross receipts from unrelated trade or business are \$1,000 or more. Gross income is gross receipts minus the cost of goods sold.
- **Form 1099-MISC**—Form 1099-MISC should be filed when payments of \$600 or more are made by the region or chapter to any person, other than a corporation, in one calendar year. This rule applies to director fees. An IRS penalty of \$50 is charged for each failure to file an information return unless the failure is due to reasonable cause. For more specific information about filing the Form 1099-MISC, refer to the *Chapter Guide*.
- **Form 941 and W-2**—If a U.S. region or chapter has employees, it must satisfy the federal and state reporting requirements for taxes, withholding, and quarterly reports. Please refer to 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.

Unrelated business income is revenue from a trade or business activity that an exempt organization regularly carries on, the conduct of which is not substantially related aside from the need for money to support the organization's exempt function or purpose.

However, if an activity is regularly carried on by volunteer members, without compensation, the revenue generated is usually not considered unrelated business income.

In April of each year International will electronically send tax information along with the verification of audit form to each United States region and chapter. The outgoing Finance Coordinator is responsible for seeing that the forms are completed and distributed as soon as possible following the audit of the region's books.

Verification of Audit

All U.S., Canadian, and prospective chapters are required to submit a verification of audit for the fiscal year ending April 30. The Finance Coordinator will receive information and a verification of audit form sent electronically in April of each year. **It is mandatory that this form be completed and returned to international headquarters by July 15.**

State Filing Requirements

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

Sales Tax Exemption

As a 501(c)(3) organization, Sweet Adelines International and all United States affiliates (regions and chapters) are exempt from federal income tax and, in most 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 compliance. This information is not available through international headquarters.

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 the state grants sales tax exemptions to 501(c)(3) organizations, please contact the state agency that administers sales tax collections.

Personal Tax Deductions for 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. The international organization, in conjunction with their outside accounting firm, has formulated some guidelines regarding the deductibility of members' expenses.

An annually updated *Memorandum of Charitable Contributions and Unreimbursed Expenses* is available on the SA website in the Document Center.

Fundraising

Generally, most fundraising activities are appropriate if the funds raised are used to perpetuate the activities of the regions and chapters as defined in the 501(c)(3) exemption status granted to Sweet Adelines International. Funds raised may never be used to benefit an individual. There are strict guidelines concerning whether funds raised may benefit another 501 (c)(3) organization. The primary requirement is that 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. State and federal postal laws may also restrict certain fundraising activities.

Raffles

According to the Internal Revenue Service it is legal for Sweet Adelines International regions and chapters to conduct drawings, lotteries, or raffles if they comply with state laws and U.S. Postal Service regulations. All funds generated from the drawings, lotteries, or raffles must be used to further the activities of the chapter or region as specified in the 501(c)(3) Internal Revenue Service exemption code. In some states, however, raffles are illegal, or have strict rules governing raffles or other similar fund-raising activities. Before conducting a drawing, lottery or raffle, contact the state attorney general or appropriate governing agency to obtain information regarding drawings, lotteries, or raffle laws. If

drawings, lotteries or raffles are legal in the state, it is suggested that the local postmaster also be contacted regarding postal regulations.

The following U.S. Postal Service regulations apply:

- A not-for-profit organization (one that would qualify as tax exempt under 501 of the Internal Revenue Code of 1986) may advertise a drawing, lottery, or raffle through the U.S. Postal mail service, but may not provide tickets or entry material through the mail. This applies only within states that allow drawings, lotteries, or raffles. Advertisements or promotions may not be conducted within states that do not allow drawings, lotteries, or raffles.
- Any form of payment for a drawing, lottery, or raffle ticket may not be sent through the U.S. Postal mail service.
- Violation of these U.S. Postal Service regulations can result in fines and/or other penalties. Before conducting a drawing, lottery, or raffle, contact the state attorney general or appropriate governing agency to obtain information regarding drawings, lotteries, or raffle laws. If drawings, lotteries, or raffles are legal in the state, it is suggested that the local postmaster also be contacted regarding postal regulations.

Questions regarding drawings, lotteries, or raffles should be directed to international headquarters.

Disaster Relief Fundraisers

Frequently, inquiries are made about raising funds to assist members or other individuals because of natural disasters such as floods or hurricanes, or because of a serious illness or accident. It is not legal to raise funds in the name of the organization on behalf of an individual nor can these funds be deposited in the region's or chapter's bank accounts. Doing so jeopardizes the tax exempt status of the region or chapter. Sweet Adelines International members may participate in performances or activities as individuals, but not as representatives of Sweet Adelines International. Please contact international headquarters for additional information.

Grants and Matching Funds

Numerous organizations and corporations provide grants or matching funds to nonprofit organizations. To identify these sources:

- Most libraries maintain a reference file of funding sources and often have reference specialists to assist in the search.
- The Foundation Center is an independent, national service organization established by foundations. Information may be obtained by calling 800-424-9836, or by accessing the organization website at www.foundationcenter.org.
- State arts councils provide grants through state and local agencies. Contact the state capitol.

Please refer to the *Guide for Grant Proposals* for detailed information on:

- Identifying and approaching the funding source
- Writing grant applications
- Soliciting corporate sponsorships

Financial Reporting

The Finance Coordinator reports on the region's financial condition at meetings of the Regional Management Team and prepares annual financial reports as described below for international headquarters. Financial reporting integrates financial planning and budgeting in a manner to allow the Regional Management Team to evaluate actual operating results against operating plans (budget).

Chart of Accounts/Bookkeeping

A chart of accounts is the organized structure for the region accounting records. An accounting system accumulates financial information in a variety of accounts. Each of these accounts is assigned a number and the overall numbering system is the chart of accounts. This numbering system allows financial information to be classified and sorted for reporting purposes and is essential for computerized accounting.

Accounting Records

Financial data must be maintained and reported in a timely and consistent manner. This provides the basis for effectively analyzing and projecting the financial status of the region, including budgeting and cash flow needs. All financial records should be audited on an annual basis to ensure that proper accounting principles are followed.

Financial Reports

Because accounting records are maintained in order to produce financial reports, the accounting records should be organized in such a way that facilitates report preparation. The accounting records usually provide more detail than is necessary for financial reports, but a well-designed chart of accounts allows flexibility in the amount of detail that ultimately is reported. Transactions to an account may be summarized or reported in detail, as needed, on the financial report. Thus, the place to start in preparing a chart of accounts is to design the region's financial reports before designing the chart of accounts. All financial reports should include:

- Statement of activity (revenue and expense)
- Monthly activity
- Year-to-date activity
- Comparison between budget and actual
- Statement of financial condition (balance sheet)
- Assets by category (cash, equipment, etc.)
- Liabilities (accounts payable, deferred income, etc.)
- Net equity (difference between assets and liabilities)

Chart of Accounts

There are broad guidelines that can be followed in designing a chart of accounts. The same number of digits is generally used in every account even though many of the digits may be zero, which generally indicates that the digit has no particular significance (does not relate to a specific function/program).

The chart of accounts facilitates accumulation of financial information in various ways, such as with expenses, by object or function/program. For example, all postage costs may be reported as a total cost (object) or allocated to a specific function/program.

A chart of accounts may be as small as four digits or as large as 11 digits, depending on how detailed the information needs to be for reporting and analysis purposes. Usually, the expanded numbering system is used for expense accounts. The first four digits usually identify the object, while sub-accounts identify the allocation of the expense to a specific function/program or area of responsibility. Most computer software packages include a chart of accounts that can be customized to specific needs.

Additional information regarding setting up bookkeeping and structuring a chart of accounts may be found in the *Chapter Guide*.

Record Retention

Various financial, insurance, and legal records should be retained by the region. Listed are items that would apply to Regions 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)	10 years

The Internal Revenue Service of the United States requires tax exempt organizations to keep 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.

Risk Management

The goal of risk management is to identify, prevent, and prepare for potential accidents, injuries, legal violations, financial losses, and lawsuits relating to activities of the region.

Risk management is more than purchasing insurance; it is defining policies and procedures to ensure that the region’s activities not only comply with civil laws, but also those that govern nonprofit organizations and volunteers. Sweet Adelines International provides governance and legal guidelines regarding:

- *Standard Form Bylaws*
- Guidelines for standing rules
- Tax laws and Form 990 filings
- Lobbying and political activities (not allowed)
- Fundraising regulations
- Copyright and publishing laws
- Regional Management Team job descriptions and scope of responsibilities
- Fiduciary responsibilities
- Use of organizational logos and trademarks

This information is routinely updated and provided to regions and chapters. Additional information or guidance may be obtained by contacting international headquarters.

Contract Terms

All agreements with vendors, hotels, exhibitors, facilities, etc. should be in writing. Key contract elements should include:

- Parties to the agreement. Specify the parties bound to the agreement.
- Scope of event or work. Specify what is to be done, where, who is responsible, etc.
- Deadlines and duration. Specify beginning and ending dates.
- Financial. Define costs and penalty clauses for cancellations or under-bookings.
- Liability. Define who is liable for property damage or bodily injury.
- Dispute resolution. Define which state’s laws will govern disputes, where the dispute is required to be resolved (jurisdiction), and if arbitration is a required means to settle a dispute; determine if the contract can be immediately suspended for good cause.
- Hold harmless agreements. A hold harmless agreement should be combined with a certificate of insurance coverage applicable to the region’s risk.
- Indemnification agreements. Carefully review any provision requiring indemnification.

More detailed information regarding contracts may be found in the *Contracts* section of this handbook.

Liability Insurance

Member Volunteers

The federal Volunteer Protection Act of 1997 grants immunity from personal liability to those who volunteer for nonprofit organizations. The law is intended to reduce the legal liability risks to individuals. The law is complex, but generally preempts state laws to provide that volunteers will not be liable for harm if:

volunteers are acting in the scope of the volunteer activity; the harm was not caused by willful or criminal misconduct, gross negligence, reckless misconduct, or a conscious, flagrant indifference to the rights or safety of the claimant; and the harm was not caused by the volunteer operating a vehicle.

Additional information regarding the Volunteer Protection Act of 1997 may be obtained by contacting international headquarters.

The Act does not provide immunity to the organization itself, therefore, the Volunteer Protection Act does not eliminate the need for liability insurance. For this reason, Sweet Adelines International provides liability coverage to regions and chapters for a nominal fee. The region should review carefully the terms of the provided policy to ensure that it covers the activities planned by the region. Certain activities may negate coverage (i.e. alcohol sales at events) such that additional coverage may need to be obtained.

Third Parties

Third-party liability coverage includes protection for claims brought by third parties who may have been injured or sustained property damage by activities of the members. This coverage is for legal liability, which means the claimant must show that the member, region, or chapter was negligent in causing the damage. The insurance does not cover injuries to members who may be injured in performing or participating in regional or chapter activities.

What Type of Claim Is Covered?

- Claims for bodily injury or property damage caused to nonmembers which result or occur in connection with regional activities.
- Claims for personal injury, including libel, slander and false arrest.
- Claims for liability arising out of the sale of products, including the serving of food and beverage.
- Primary liquor liability coverage for chapters and regions applies regardless of any licensing requirement and whether or not there is a charge for the beverage served.

What Type of Claim Is Not Covered?

- It is not intended to cover unusual events such as fireworks, rock concerts, carnival and amusement rides, racing events, or sporting events.

If the region is considering being involved in an event that is out of the ordinary, contact the organization's insurance agent to be sure coverage is in place. The policy includes certain standard exclusions, such as war, nuclear, aircraft, water craft, and professional liability.

Hold Harmless Agreements or Indemnification Provisions

If the region is entering into a written or verbal contract which involves a hold harmless clause or indemnification provision, contact international headquarters prior to finalizing the contract.

Certificates of Insurance

Certificates of insurance required by owners of rented facilities or for primary liquor coverage may be obtained by contacting the organization's insurance agent.

Bond Insurance

Bond or crime insurance for theft, fraud, or poor accounting procedures is not provided through the international liability insurance policy. Fortunately, financial risks are among the most controllable with proper internal control procedures which include:

- Division of tasks and responsibilities
- Proper use of funds; ensuring that laws governing how 501(c)(3) organizations may use their funds are followed
- Systematic recording and reporting of financial activities
- Annual audit or review of regional financial records by an outside party

If a region still desires bond or crime insurance, it must be obtained by the region through a local insurance agent.

Directors and Officers Insurance

This coverage, commonly called professional liability insurance (or errors and omissions), is not provided through the international liability insurance policy. This coverage is designed for a variety of claims alleging harm caused by the governance or management of an organization. Generally, risk is minimized if the organization follows the governance and legal guidelines identified at the beginning of this section.

Computerized Bookkeeping

The easiest and least time-consuming way to maintain the region's financial records is on a computer. If the Finance Coordinator is experienced with spreadsheet programs such as Excel, she may set up and customize the applications to suit the region's needs. However, this requires a thorough understanding of accounting principles.

Several accounting software packages on the market are designed for individuals not familiar with the debit and credits of double-entry bookkeeping and accounting procedures. The most widely used software is QuickBooks Pro. The QuickBooks Premier Edition offers software designed for nonprofits. Features include fully integrated cash receipts and check writing applications, a member database which is fully integrated with all financial transactions, budget development, and export capabilities. The Premier Nonprofit Edition also tracks information for the 990 form. Although all of the accounting packages help you track incoming and outgoing monies, they differ in their range of features and depth of financial management. When choosing a software package, analyze the financial recordkeeping and reporting needs. Compare the region's needs with features of the software packages. Particularly important are the ease of use of the package and the

report writing capability. It is best to choose a software package whose features will work hand-in-hand with the others, eliminating the need to copy data from one section to another.

Several regions and chapters already use some form of accounting software. You may want to talk with other Financial Coordinators or chapter treasurers about the software they are using before making a final decision on a package.

Regional Chart of Accounts

Over the years, Regional Finance Coordinators have inquired about having a standard chart of accounts for them to use to record and report financial transactions. Based on an analysis of various regional accounting systems and financial statements, the following prototype standardized chart of accounts was developed.

Using the standardized chart of accounts is optional and can be adapted for any accounting system. For United States regions that are required to file an annual 990 Form, the description line and tax line columns identify how to report the accounts on the 990 Form. The description column also indicates if an account is a HEADER ACCOUNT. Non-US regions should disregard the 990 information.

Chart of Accounts

The chart of accounts is the foundation of the accounting system. Consider a chart of accounts as a filing cabinet that tracks and files financial transactions by category. By grouping and categorizing financial transactions, it is easy to retrieve and report information. Within each group or category, sub-accounts (files) can be set up to provide more detail. A chart of accounts is usually set up with a special numbering system relating to the specific category.

A chart of accounts typically groups financial transactions like this:

Assets are items owned by the region such as computers, risers, video equipment, cash accounts, investments, etc. Generally, there are two categories for assets, current and fixed. Current assets include checking accounts, investments, inventory, and accounts receivable. Current assets also include prepaid expenses for the next fiscal year such as deposits on facilities for competition or workshops. Fixed assets are items that usually cost at least \$500 and have a life span of three or more years. Assets are reported as the first item on the balance sheet. Also, referred to as the *statement of financial position*.

Liabilities include amounts owed to vendors at the end of a reporting period, deferred income (amounts collected for workshops, competition or other monies relating to the next fiscal year). These transactions are current liabilities. Long-term liabilities include loans for equipment or real estate. Liabilities are reported as the second item on the *statement of financial position*.

Revenue includes regional assessments, registration fees, product sales, advertising,

etc. At the beginning of each fiscal year, deferred income at April 30 is transferred from a liability account to the appropriate revenue account. Revenue is reported on the profit or loss statement. Also, referred to as the *statement of activities*.

Expenses are self-explanatory and are categorized or grouped by activity, event, or administrative cost. Activity or event expenses usually have multiple sub-accounts. At the beginning of each fiscal year, prepaid expenses at April 30 are transferred from an asset account to the appropriate expense account. Expenses are reported on the profit or loss statement, also referred to as the *statement of activities*.

Equity represents the net worth of the region and is the difference between total assets and total liabilities. Equity is reported on the *statement of financial position* after liabilities.

State of the Region Financial Reporting

State of the Region (SOR) Reports must be submitted annually by June 30 to International Headquarters. The Finance Coordinator is responsible for completing the financial portion of the SOR. This report is used in part to help the international organization ascertain the financial health of each region.

One measure of financial health is when a region's cash and cash equivalents is equal to or greater than one year's worth of expenses. By dividing *cash and cash equivalents* by *total annual expenses*, the ratio in a financially healthy region will equal 100% or greater. This calculation is significantly impacted if the financial data includes other than a single regional contest in a fiscal year. It is possible for zero, one, or two contests to be conducted within any given twelve-month fiscal year. For example, last year's regional contest was in May and this year's regional contest is in April. In this case, two regional contests are reflected in the financial reports. Another example would be when last year's regional contest is in April and this year's regional contest is in May. In this example, there are zero regional contest during the fiscal year. The financial data must be modified for purposes of this calculation to reflect only the revenues and expenditures for one contest.

The SOR reporting instructions are designed to assist Finance Coordinators in making modifications to reflect only one regional contest. In order for these modifications to be valid, it is essential that *deferred income* (as described in the Revenue section above) and the *prepaid expenses* (as described in the Expense section above) are treated correctly in the initial financial statements. Contact the international finance staff for assistance in making these modifications if necessary.

Accounting Software/Standardized Chart of Accounts

Most regions have a complete general ledger system and use a chart of accounts. To conform with generally accepted accounting principles (GAAP) a general ledger system is preferred. Most regions use software programs ranging from Excel spreadsheets to accounting programs such as QuickBooks. QuickBooks, Premier Nonprofit Edition, offers the most flexibility, is user-friendly, and will assist United States regions with preparing the annual 990 Form. QuickBooks software was used to develop the standardized chart of accounts. QuickBooks provides step-by-step

instructions on how to set up the accounting system. To learn more about QuickBooks Pro Premier Nonprofit Edition please go to:

<http://quickbooks.intuit.com/premier/?industry=nonprofit>.

Features of QuickBooks Premier Nonprofit Edition:

- Fully integrated cash receipts and check writing applications
- Member (customer) data base, which is fully integrated to all financial transactions relating to the individual member or chapters within the region
- Multiple tracking options including class assignments
- Budget development
- Ability to customize financial and program reports
- Generates membership letters/templates and labels
- Export capabilities

If another program is preferred, this standardized chart of accounts can be adapted to use with any system.

The following chart of accounts is a composite of existing charts of accounts used by the regions. The standardized chart of accounts offers flexibility within each category to add or track financial transactions specific to the region.

The chart of accounts is designed as follows:

- **HEADER ACCOUNT**-This identifies the main category or event.
- **SUB-HEADER ACCOUNT**-This identifies an event, activity or function under the main category specific to the region.
- **SUB-ACCOUNTS**-These are the specific revenue or expense items for the Sub-Header Account.

HEADER accounts establish standardized accounts and reporting formats. The numbering system allows for new accounts to be added based on specific activities within the region. Examples of all the sub-accounts within each category are not illustrated. For example, under the header **REGIONAL EDUCATION EXPENSE**, is the sub-header account **Summer Meeting/Workshop**, which includes sub-accounts for various expenses. The numbering series for the Summer Meeting/Workshop is 6500-6549, which allows for other accounts to be added if needed. These accounts may be duplicated under the **Fall Meeting/Workshop**, **Quartet Workshop**, or other events with similar expenses. Activities and events under each main header can be renamed to fit the region's needs.

QuickBooks software allows tracking of expenses by assigning classes to selected expenses or RMT positions. For example, rather than set up separate accounts for postage, telephone, or supplies expense for each RMT member, assign a class, which designates the RMT position. These expenses will be reported under **ADMINISTRATIVE/GENERAL EXPENSE** but a supplemental report can be generated for each RMT position. This concept can apply to all functional expenses. Detailed instructions are provided in the QuickBooks software.

8:30 AM
05/15/13Sweet Adelines International Region
Account Listing
May 15, 2013

Account	Type
1010 · Cash in bank-operating account	Bank
1020 · Cash in bank - special funds	Bank
1040 · Petty cash	Bank
1070 · Money market accounts	Bank
1075 · Certificate of Deposit	Bank
1080 · Corporate Bond	Bank
1110 · Accounts receivable	Accounts Receivable
1410 · Inventories for sale	Other Current Asset
1420 · Inventories for use	Other Current Asset
1450 · Prepaid expenses	Other Current Asset
1460 · Deposits	Other Current Asset
1510 · Marketable securities	Other Current Asset
1640 · Furniture, fixtures, & equip	Fixed Asset
1745 · Accum deprec- furn, fix, equip	Fixed Asset
2140 · Accrued sales taxes	Other Current Liability
2160 · Accounts payable	Other Current Liability
2350 · DEFERRED REVENUE	Other Current Liability
2352 · Registrations-Summer Mtg/Wkshop	Other Current Liability
2354 · Reg'l Competition Registrations	Other Current Liability
2356 · Registrations-Fall Mtg/Workshop	Other Current Liability
2358 · Quartet Workshop	Other Current Liability
2570 · Short-term liabilities – other	Other Current Liability
2910 · Custodial funds	Long Term Liability
3000 · UNRESTRICTED NET ASSETS	Equity
3009 · Transfers to/from unrestricted	Equity
3020 · Board-designated net assets	Equity
3030 · Board-desig - quasi-endowment	Equity
3001 · Opening Bal Equity	Equity
3010 · Unrestricted (retained earnings)	Equity
3100 · TEMPORARILY RESTRICT NET ASS...	Equity
3110 · Use restricted net assets	Equity
3120 · Time restricted net assets	Equity
3200 · PERMANENTLY RESTRICT NET A...	Equity
3210 · Endowment net assets	Equity
4 · CONTRIBUTED REVENUE	Income
4070 · Contributions	Income
4075 · Education stipend (int'l)	Income
4080 · Corporate/business sponsorships	Income
4085 · Grants	Income
5 · EARNED REVENUE	Income
5010 · Publication sales - program-	Income
5015 · Program-related sales - other	Income
5020 · Regional Competition	Income
5025 · Quartet Workshop	Income
5030 · Summer Meeting/Workshop	Income
5040 · Fall Meeting/Workshop	Income
5050 · Regional Assessments-members	Income
5055 · Regional Assessments-CAL	Income
5080 · Miscellaneous revenue	Income
5200 · INVESTMENT INCOME	Income
5205 · Interest-savings/money mkt.	Income
5210 · Dividends & interest-securities	Income
5230 · Security sales - gross	Income
5235 · Security sales cost	Income
5240 · Other asset sales - gross	Income
5245 · Other asset sales cost	Income
5300 · Gross inventory sales-related	Income
5320 · Cost of inventory sales	Income
5450 · Advertising revenues	Income
5460 · Rebates/commission	Income
5470 · Miscellaneous income	Income
6 · REGIONAL EDUCATION EXPENSE	Expense
6500 · SUMMER MEETING/WORKSHOP	Expense
6510 · Facilities	Expense
6515 · Faculty	Expense
6520 · Housing	Expense
6525 · Travel (non-member)	Expense
6530 · AV/Equipment rental	Expense

8:30 AM
05/15/13Sweet Adelines International Region
Account Listing
May 15, 2013

Account	Type
6535 - Miscellaneous	Expense
6550 - FALL MEETING/WORKSHOP	Expense
6600 - QUARTET WORKSHOP	Expense
6800 - CHAPTER EDUCATION/VISITS	Expense
6810 - Prospective chapter visits	Expense
6820 - Chartered chapt education/visit	Expense
6830 - Revitalization/misc.	Expense
7000 - REGIONAL COMPETITION	Expense
7005 - ASCAP/BMI	Expense
7010 - Sound & lighting	Expense
7015 - Photography	Expense
7020 - Risers	Expense
7025 - Judging Panel	Expense
7030 - Facility rental	Expense
7035 - Awards	Expense
7040 - Videographer	Expense
7045 - Printing/postage/supplies	Expense
7050 - Miscellaneous	Expense
7055 - Competition Coordinator Expense	Expense
7300 - Contributions	Expense
7310 - Scholarships	Expense
8 - ADMINISTRATIVE/GENERAL EXPENSE	Expense
8010 - Supplies	Expense
8020 - Telephone & telecommunications	Expense
8030 - Postage, shipping, delivery	Expense
8040 - Mailing services	Expense
8050 - Equip rental & maintenance	Expense
8060 - Printing & copying	Expense
8070 - Books, subscriptions, reference	Expense
8080 - Newsletters/publications	Expense
8300 - RMT TRAVEL/MEETINGS EXPENSE	Expense
8310 - Travel	Expense
8320 - Per Diem	Expense
8330 - Housing	Expense
8340 - Other	Expense
8400 - Depreciation & amortization exp	Expense
8450 - Depreciation	Expense
8500 - MISC. EXPENSES	Expense
8520 - Insurance	Expense
8535 - Bank charges	Expense
8550 - List rental	Expense
8570 - Advertising expenses	Expense
8590 - Other expenses	Expense
8800 - UNREALIZED GAIN(LOSS)	Other Income
8810 - Unrealized gain(loss) - other	Other Income
8820 - Unrealized gain(loss) - investments	Other Income

Marketing Coordinator

Job Description

- 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 and retention plans.
- Works in coordination with the Events and Education Coordinators on marketing events.
- Maintain the region's social media presence — Facebook, Twitter, etc., to keep your members informed and to attract new members.
- Works in coordination with the Communications Coordinator on 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.
- Initiates media opportunities including on-air interviews and feature stories.
- Maintains database of advertising contacts.
- Designs, negotiates, and buys advertising in local media.
- Sell advertisements in regional publications.
- Collaborates with other members of the team to encourage and support membership growth and retention.
- Maintains contact with appropriate staff members at international headquarters.
- Maintains comprehensive records and forwards materials to successors
- Trains her successor.
- Appoints staff to assist in the implementation of her responsibilities.
- Provides advice and training to chapter Marketing/PR Chairs and serves as a resource to chapters with marketing questions.

A vodcast outlining each RMT Coordinator's duties has been created and can be found in the Leadership section of the Members Only portion of the Sweet Adelines website.

The Role of the Marketing Coordinator

As the Marketing Coordinator, you are seen by members as the authority in the area of marketing and public relations. The *Real Guide to Growth*, *Chapter Guide*, *Policy Book*, the public relations and marketing kit, and the *RMT Handbook* provide valuable information for your success in your role.

The Marketing Coordinator's Staff

Find and train a staff that will share your expertise, your enthusiasm, your goals, and the work! Delegation is one key to implementing and running successful, varied regional

marketing programs. The size of your staff largely depends on the region's marketing activity, its geographic size, complexity and budget.

Determine Your Focus

Since the job description provides a standard against which your activities will be measured, review the task descriptors to begin planning your year. Although you (or your designee) are responsible for the items listed, you may see a regional need to emphasize one area of involvement over another, at least for a particular year. Identify areas to focus on, build the appropriate program(s), plan the budget and implement. Don't forget to delegate to others tasks that need to be implemented, monitored, and evaluated for their effectiveness.

Request Regional Funding

To ensure that vital marketing programs receive adequate funding, it is up to you, in conjunction with the Membership Coordinator, the Finance Coordinator and others on your staff, to develop clearly defined, goal-oriented programs which can be sold to the regional team.

Membership Growth and Retention

An important component of the Marketing Coordinator's job is working with the Membership Coordinator to promote membership growth and retention. The possibilities are endless! The *Real Guide to Growth* is a valuable companion and guide to membership recruitment and retention. Becoming familiar with this resource will allow your team to successfully assist and implement processes to assist with membership issues.

Public Relations and Marketing

PR vs. Marketing: The Distinction

The terms public relations and marketing are often used interchangeably. However, they refer to different but similar activities. Professionals recognize the distinctions, although grassroots practitioners may not. Textbook definitions may appear confusing; therefore, practical differences are cited here.

Marketing is selling, whether it be a tangible product such as a ticket to your regional convention or a service such as membership in Sweet Adelines. The end result of the marketing process is a transaction, e.g., money for a ticket, money for dues, etc. The marketing process always involves a transaction. Marketing communication, briefly, is a one-way communication such as broadcasting ticket price and availability via a variety of media. When a prospective buyer hears your marketing message she decides whether or not she will buy.

The public relations process prepares target audiences to be receptive to marketing messages. Awareness of the quality of your product is built through public relations, e.g., an appearance on a local early morning television news broadcast may attract the attention of potential ticket buyers and potential members. Public relations is a two-way

communications process. You may broadcast a message and wait for a response. If the response is favorable, you may decide to keep broadcasting the same message. If the response is unfavorable, you have the opportunity to change your message to one that may be more positively received.

In the Sweet Adelines context, public relations is a process of developing relationships among your region, its choruses, and the public. Your job, as Marketing Coordinator, is to identify publics, establish mutually-beneficial relationships, and maintain those relationships in order to earn their goodwill leading to further successes. An important part of your job is to pass your marketing and public relations skills on to those at the chorus level.

Marketing

As Marketing Coordinator, you will be working with the Education Coordinator to market regional programs, as well as training those at the chorus level to develop their own public relations and marketing plans. Some activities that a chorus might market are membership recruitment campaigns, opportunities for paid performances, its annual show, or other types of fundraising events.

The Members Only Marketing Center provides valuable how to for Marketing Coordinators. The center gives examples of marketing plans, creating materials, developing relationships with the media, and much more. Professionally produced public service announcements, press releases, media alerts and social media posts are also part of the marketing center.

Creation of a marketing plan should begin early in the development of a project or event, with open communication and action between the coordinators, if at the regional level, or with a marketing team in charge of the project at the chorus level.

To build a successful marketing plan ask:

- What needs to be achieved as a result of this project/event?
- What needs to be achieved as a result of the marketing campaign for this project/event?
- What product or service will be provided in this project/event?
- Are we capable of providing this product or service? (Promises must be delivered.)
- What are our strengths and limitations?
- Who is our target audience for this campaign?
- How will we attract the attention of the target audience and give a favorable impression of the project/event?
- What resources, including money, will be needed for the project/event and for the marketing campaign? No matter how ambitious, creative, or awe-inspiring the plan, don't forget to ask, "Is it in the budget?" One reality of marketing is that funds are usually limited and must be allocated efficiently and effectively. This is another important reason for advance planning.

Once the above questions have been answered and put into writing, you will be able to plan the marketing campaign and decide who will do what and when. A planning calendar will help plot strategies, clarify activities and establish timelines. The calendar should be distributed to everyone involved or who has an interest in the project. With your calendar and a budget estimate, your next task is to determine where the funds can best be used to produce the necessary results.

Public Relations

As stated previously, public relations is any activity that promotes a positive image, fosters goodwill, or increases membership. Publicity results when an article you write is published or when information you give to an editor convinces her/him to publish a feature story. Over time, an on-going public relations program benefits your region and its choruses by creating a favorable impression. For example, good public relations can create an atmosphere that increases public awareness of the musical excellence of your region. This can lead to new members and more frequent performance opportunities for choruses in your region.

You may be called to interact with:

- Current and potential members
- Chorus leaders/directors
- Reporters and editors
- Clubs and organizations
- Community leaders
- The performing arts community
- Potential purchasers of tickets to your regional competitions
- Vendors who exhibit at your convention or other regional events

You will develop relationships by communicating honestly and clearly and maintaining the relationships you establish on behalf of your region and its choruses. Establishing on-going relationships with the public helps them have a better understanding of the messages you send.

In public relations, the quickest route to success is:

**Do good things in the region;
tell your selected publics about
it...and do it over and over and
over again.**

The relationships you establish with the public should be truthful and mutually beneficial, those win-win situations. For example, you appear as a guest on a television talk show and invite listeners to attend Sweet Adelines' upcoming regional competition. This may lead to an increase in ticket sales for the region, and a highly enjoyable experience for the public who attend.

Be realistic in your expectation of results from public relations activities. Perpetuating the barbershop art form is what's known as a special interest activity. Even the most carefully targeted public will decide for itself if it should join, support, endorse, or believe in barbershop singing and in Sweet Adelines International. Not everyone will be interested. By truthfully sharing the principles, values and beliefs of your region, people will respect your region and your personal integrity.

Media Relations

As Marketing Coordinator, you serve as the primary media contact for your region. Those on the chapter level who have responsibilities for public relations and marketing will also look to you for training and information.

Prepare for success in using the media by adhering to these general guidelines:

- Know the media in your area.
- Read the area publications.
- Watch local stations and listen to content.
- Follow local media on Twitter.
- Establish yourself as a reliable and valuable news source.
- Approach an editor or reporter with a positive attitude.
- Introduce yourself by email or phone first before preparing the fact sheet or news release.
- Keep in touch with your media contacts but don't be a pest.
- Know their deadlines.
- Follow up in a professional manner to all media inquiries.

Getting your story told

Most journalists are competent and fair-minded within the limitations of space or time allotted to them. Their deadlines are very important. They are always looking for a story that will catch people's imagination or have wide appeal.

The city desks of your local newspapers, the assignment editors at your local television stations and the news directors of your local radio stations are inundated with requests for coverage of news and events. One solution to cutting through the clutter that rains down daily on each newsroom is personal contact, far more effective than a news release, even than a fact sheet.

If you choose to send a news release or fact sheet, it must be prepared in a professional manner. Handwritten notes won't do the job. When you write a news release, prepare it with the reporter in mind, not your region; the release must be timely and have news value. A tight, one-page release that captures the most newsworthy information about your region can persuade key media contacts to mention your region favorably in either print or broadcast.

Never approach an editor or reporter with the attitude that they have to do your story. The truth is that they are under no obligation to do so. You must use your skills to convince them that your story is terrific and that readers will want to hear about it.

Using the Internet to Gain Publicity

Distributing your press information via the Internet provides an immediate and cost-effective way to reach key journalists. Begin cultivating online relationships with those key reporters by calling targeted journalists in the morning (deadline pressure tends to increase by the afternoon) and confirm that they welcome e-releases. If e-releases are accepted, obtain their direct email addresses. Don't send your messages to general email boxes that go to an entire newsroom. Ask whether the contact would prefer the release, photographs and graphics as an email message or email attachment. Most journalists do not open attachments, so avoid sending them unless requested.

E-release Format

Adjust the format of your e-release using guidelines similar to a traditional press release, but with the following additions:

Direct Email address

Send the e-release directly to the journalist's email address.

Subject Line

In 50 characters or less, enter the headline of the press release. Remember always to include Sweet Adelines International in the subject line.

Message

Enter your e-release into the message of the email using the following format:

- Begin with the words For Immediate Release
- Double space and include the dateline by entering the city name and state abbreviation where the news originates, followed by the date of the e-release.
- Place a dash after the dateline and follow the dash with the body of the e-release.
- Single-space the text and double space between paragraphs.
- Limit the e-release length to 250-500 words.
- End the e-release with a boiler plate – a standard descriptive paragraph about Sweet Adelines International and your chorus/region.

- Follow the e-release with instructions for obtaining additional information, beginning with a phrase such as “For More Information,” To schedule interviews,” or “To obtain photos and artwork,”
- Close with contact information in this order:
 - Contact person’s name
 - Chorus/Region name
 - Contact person’s phone number including area code
 - Contact person’s email address
 - Chorus/Region website address

Online Pressroom

Increasingly, journalists interested in finding out more about your chorus/region will turn to online pressrooms for information, including current and past press releases, designated public relations contacts, downloadable images, special announcements and organizational background.

The online pressroom is an integrated section within your already existing chorus/regional website. Provide a direct link to the online pressroom from the website’s home page, and include the link within the sub-navigation menu as well.

To keep your pressroom a useful tool to journalists, make the section easy to navigate and quick to access. Include the following contents:

- Post current press releases immediately upon distribution.
- Post a searchable archive of past press releases in chronological sequence with short summaries of content for quick scanning.
- Post a calendar of upcoming events.
- Post reprints, clips or links to recent media coverage. This is an important section for building credibility. It shows that your subject is newsworthy and of public interest.
- Include the names and contact information for chorus/region-approved media spokespersons.
- Summarize background information about your chorus/region with links to expanded information.
- Provide downloadable photos and artwork authorized for media use. This section is valuable for those media contacts that do not want to accept attachments. You can embed a link to this downloadable graphic area in the e-release and direct the journalist to this link.
- Prepare your downloadable graphics with appropriate digital resolution. In general your image will need a resolution of 250-300 DPI (dots per inch) for print, and 72 DPI for digital use. JPEG files are universally accepted.
- Label the graphics/photos in your downloadable section with captions and cutlines. The caption is the title of the photo. The cutline is the photo description that is required by nearly all media outlets.
- Make it easy for journalists to find a graphic file by referencing the e-release that the artwork accompanies.

- Provide references to other resources that you feel are pertinent, such as barbershop history, barbershop style, membership information, etc.
- Maintain your online pressroom to serve as an up-to-date, 24-hour media resource that provides an informative overview of your chorus/region.
- Keep your mailing list up-to-date and send your information to the right person. Be aware of staffing changes. Today's education writer may become the entertainment writer tomorrow.

What is News?

One of the following news pegs must be present. If this isn't the case, you may want to rethink approaching the media. Though the story may be important to you, without one of these pegs, it won't be important to the media.

Audience- To whom is this story important? Too small an audience may prevent the story from being reported.

Impact- How many people are affected by this story and to what extent?

Proximity- The closer to the news room/station your story takes place, the more likely it is to get covered.

Timeliness- Experience with your own local media will provide you with insight on timeliness. In the beginning of your relationship with a reporter or editor, ask about timing when you call to pitch your story. Too early or too late is usually unsuccessful.

Prominence- The audience likes big names in the news. Who is the biggest name you can use in conjunction with your story?

Unusualness- The first time an event happens, it's news. The last time an event happens, it's news. In between is tough. If you can't use this peg, look for another one.

Drama- This is a reference to conflict. Media consumers are accustomed to stories that explain the creation/resolution of conflict situations in less than a minute and a half.

Making Contact With Print Media

Print remains an important medium although subscription totals are on the decline. In deciding which publications you should develop relationships with, analyze the ones in your area. Ask these questions:

- What publications can benefit your region the most?
- What publications would most easily give coverage to your region?
- Does the publication appear to print articles of the type you plan to submit?
- Who are the editors of those publications?
- What "Calendar of Events" or "Community Update" opportunities have you overlooked?

News not tied to a date can be submitted at any time being mindful of the publication's deadlines. News that is tied to a date such as an announcement of an upcoming event or performance, should be delivered no more than 10 days prior to the event. If you are

inquiring about a feature story, suggest your idea three weeks prior to when you hope the story will run. Submit recaps of news events, such as results from regional competition, no more than 24 hours after the event.

Suburban newspapers generally publish pictures. Be sure to get some good color or black and white photos to accompany your story. When you submit photos, send 4x6's. Put your name, address, phone number, and the name of your region on a label on the back of the photo. Include a date. Also, for publishing purposes, include a short caption describing the picture. You should also consider sending a digital image along with your press release. Make it low resolution so the email will go through easily. Have a high resolution image available upon request (preferably a download from your website).

Making Contact With Radio News Rooms

Radio is an effective tool for accurately targeting the public you want to reach. Generally, each station has a primary target audience. If you want to reach a younger audience, look for stations that play top-40 music. If you want to reach an older audience, look at the all-news format stations or those that play music from their generation.

Radio is a primary source for local news and information in the morning. Get to know news directors and producers at those stations in your area that broadcast live interviews during morning drive time.

Your radio contacts for news are called news directors. Talk shows have producers. When you call a station, ask the receptionist to tell you to whom you should talk. Other radio personnel you may work with are community services directors and promotions directors. Ask the station if they have a community affairs program or community calendar segment.

You can increase awareness of your upcoming event (such as your regional competition) by offering free tickets to stations to give away as contest prizes. These live promotional announcements are valuable components of your media mix because they build a buzz.

Making Contact With Television Stations

Increasingly, the public depends on television for the credibility of its news. Another benefit of television news is that it reaches a broad market segment.

You will want to talk either to the news director or assignment editor when you call a television newsroom to talk about coverage of your story. Many tips that apply to print and radio also apply to television.

When you contact a news director, the story should be newsworthy. For an upcoming event, inquire about coverage no sooner than 10 days before the event and no later than four days prior to the event. Because broadcast news is more immediate than print, immediate contact is required for events that have concluded, such as providing regional competition results. Forewarn the news director of the event (such as your regional

competition in another city) then fax or call her (long-distance if necessary) with the results.

If you are inquiring about being a guest on a local interview show, your contact will be the show's producer. The producer has the final say about the content of each show. Contact her with a cover letter and information about your event or project. Call for an appointment and take a Sweet Adelines brochure with you to the appointment. If you are booked to appear, send the show producer a complete bio on the featured speakers, information on the event being promoted, and information on Sweet Adelines International.

When you appear on any television show other than as the subject of news coverage, follow these suggestions:

- Be careful what you wear. Because television adds 15 pounds to everyone, stay with darker colors. Don't wear bold prints or wide stripes. Don't wear bright jewelry.
- Keep eye makeup light but wear a darker base makeup than usual because television tends to wash out a person's complexion.
- Go light on blush. Heavy blush does not make up for using the wrong base. It will make you look clown-like.
- Use loose powder on your face because studio lights can be very warm.
- Be mindful of hairstyles. Because the television camera makes facial features appear to recede, women should push their hair (especially bangs) back from their faces.
- Viewers expect to be able to look into the eyes of individuals as they are being interviewed. Take off your glasses, if possible. If viewers can't see your eyes, they may not believe or trust your story.

Integrating Social Media Sites

Making Contact with Media

Using social media sites is an easy and inexpensive way to generate information quickly. Post/tweet links to news stories, updates about upcoming events or ongoing rehearsals. Many news reporters in every genre are available via social media sites and encourage communication this way. Twitter is an especially resourceful way to disseminate information to reporters. Reporters' twitter handles or Facebook addresses are found on the news station's websites along with their other contact information. Tweets need to be under 140 characters but you may include a link to your press room so they can find more information easily. Here is an example tweet to a reporter:

@kfmuradio Spine-tingling a cappella performances at the Pepsi Center on Thursday. More than 30 choruses compete for gold. Visit www.sweetadelines.com.

Tips for Being a Spokesman

Be enthusiastic and sincere. When you respond to questions, strive for over-enthusiasm and it will come off naturally to the television camera. Enunciate! Have authority in your voice. Conviction and confidence will help you sell your story to the reporter and the audience at home.

If you start off an answer in a bad direction, stop and start over again. More often than not, the reporter won't use the ragged beginning because she is looking for a clean, concise, sensible answer to the question.

If you give a good answer, stop. Don't be afraid of silence. The reporter has been trained to keep the microphone in your face but that doesn't mean you have to keep talking. The reporter uses the silence as a means of control. You may be so uncomfortable with silence that you will blurt out something you wish later you hadn't said.

Even complex, important thoughts can be condensed. Before the reporter arrives, think about the possible questions you might be asked and think of seven- to 10-second answers (sound bites).

Look at the reporter. She will be standing very close to you because of camera requirements. Try to forget the camera is there. Square up with the reporter rather than standing at an angle. If you are unable to adjust comfortably to standing so close, ask to sit down. Regardless of the proximity, don't start backing away from her because the reporter will just follow you.

Often, the first question the reporter will ask will be the best question that you can answer concisely and get your point across. If you've prepared in advance, the answer to that first question can establish your complete agenda.

Even in "soft" news stories, the reporter may try to find something negative. For example, "Doesn't all this effort take time away from your jobs and your families?" If you are prepared, once again, you can respond, "The self-confidence we develop through competition carries over into everyday situations with family and friends. I've heard members say they are better wives, mothers and daughters thanks to the skills they have developed through Sweet Adelines."

If you are involved in a "hard" news story (crisis, conflict, controversy or drama) where there is a negative reason for the interview, make your point first before the negative question is even asked. This puts the reporter in a position of not being able to follow up with more negative questions. You can learn to control the interview. It takes practice and experience. Stay focused.

Help Is At Hand

The Communications Department at international is available to answer your public relations and marketing questions. Your region may have the *Public Relations Handbook*, currently out of print, in its library. The book is worth reading for its wealth of basic information.

For more information, visit the members only marketing center of the Sweet Adelines International website. You will find press release, fact sheet, and public service announcement templates. Also, general information about Sweet Adelines International will assist you in developing press kits.

Remember you are not alone – there are other Marketing Coordinators out there who can be of assistance. Be sure to use networking opportunities to learn of your peers' plans and accomplishments in the area of marketing and public relations.

Membership Coordinator

Job Description

- 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 her 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. Assists these chapters with growth and retention programs.
- Plans and implements programs in the areas of membership growth and retention.
- Works in coordination with Marketing Coordinator on membership growth and retention plans.
- Visits and maintains regular contact with chartered and prospective chapters to promote membership growth and retention programs.
- Provides advice and assistance to chapter Membership Chairs and serves as a resource to chapters with membership questions.
- Guides prospective chapters through the *Steps To Chartering* program.
- Develops support staff to assist in planning and implementing programs such as:
 - Steps To 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, as well as any administrative or financial matters that affect them.
- Maintains contact with appropriate staff at international headquarters.
- Maintains comprehensive records and forwards materials to successor.
- Trains her successor.
- Appoints staff to assist with the implementation of responsibilities.

A vodcast outlining each RMT Coordinator's duties has been created and can be found in the Leadership section of the Members Only portion of the Sweet Adelines website.

The Role of the Membership Coordinator

As the Membership Coordinator for your region, you are seen by members as the authority in the area of membership growth and retention, and chapter administration.

If you are new to this role, there is no better way to boost your confidence than to become thoroughly familiar with the contents of the contents of the Members Only Marketing Center on the website, the *Real Guide to Growth handbook*, the *Chapter Guide*, the *Policy Book*, archived webinars in the Marketing Center and this handbook. These resources provide a sturdy foundation on which to build and maintain your region's membership programs.

The Membership Coordinator's Team

Find and train a team that will share your expertise, your enthusiasm, your goals, and the work! Delegation is one key to implementing and running successful, varied regional programs. The size of your team largely depends on the region's membership activity, its geographic size, complexity, and budget. If you and the region feel it is important to keep in close contact with choruses and Chapter-at-Large members, develop classes to take on the road, create educational events for members and/or membership chairs at regional meetings, and take full advantage of the Internationally Funded Visit program. This contact program takes time to build and implement and a minimum of several individuals to assist you. It also requires commitment on the part of the region to provide funding.

Determine Your Focus

Since the job description provides a standard against which your activities will be measured, review the task descriptors to begin planning your year. Although you (or your designee) are responsible for the items listed, you may see a regional need to emphasize one area of involvement over another, at least for a specific year. Perhaps you have expertise in membership retention or hold a special interest in working with prospective choruses. Maybe developing scripts and teaching classes in communication skills is an activity you find rewarding. Decide where you want to go, get the project funded, and take off! Don't forget to delegate tasks that need to be implemented, monitored, and evaluated for their effectiveness.

Request Regional Funding

To ensure that vital membership programs receive their share of funding, it is up to you, in conjunction with the Education Coordinator, the Finance Coordinator and others on your team, to develop clearly defined, goal-oriented programs which can be supported by the regional team.

Membership Growth and Retention

An important component of the Membership Coordinator's job is promoting membership growth and retention within the chapters and the region. The possibilities are endless! *The Real Guide to Growth* handbook is a valuable companion and guide to membership recruitment and retention.

Prospective Chapters and Steps To Chartering

A group of women who want to form a new chapter of Sweet Adelines does so through the Steps To Chartering process. The women may or may not have been affiliated with

Sweet Adelines in the past. The following is an overview of your role in the prospective chapter process.

Steps Toward Chartering

A person or group contacts international headquarters requesting information about affiliating with Sweet Adelines International. Communications Department personnel at international headquarters mail or email a letter and a packet of information entitled “Steps To Chartering” to the requestor. Steps To Chartering includes information on the history and structure of Sweet Adelines, the support provided at the regional and international level, how to request prospective status and what to expect in Step One, Step Two and when applying for charter. You are encouraged to build a healthy relationship with prospective chapters to instill confidence and a strong connection to our worldwide organization.

Granting Prospective Status

The philosophy of the International Board of Directors is to automatically grant prospective status to groups that seek affiliation with Sweet Adelines International—with rare exceptions. The board holds the philosophy that every woman should have a choice about where she sings.

Step One

Once the group applies for and is granted prospective status, Step One is mailed to the group. During Step One the prospective chapter learns about barbershop technique and basic criteria for public performance. It chooses and receives approval of its chapter name, begins developing its financial structure and administration and continues to rehearse. Along with the Step One booklet, the prospective chapter receives sheet music and learning tracks, various brochures, and other information on how to form a prospective chapter.

Administrative Visits

Each prospective chapter is required to receive two visits (funded by international) from the Membership Coordinator or her designee. The timing of the visits is coordinated by the Regional Management Team and the prospective chapter. See the section entitled Internationally Funded Visits for more information.

Step Two

When the prospective chorus is ready, it may apply to advance to Step Two. Step Two further guides the prospective chapter in membership marketing, administration, sharing responsibilities through the appointment of standing committees, completion of the chapter standing rules, the basics of barbershop and ultimately to charter as a Sweet Adelines International chapter. You continue to be a source of information and support to the prospective chapter during Step Two and beyond.

Approval to Charter

Considerable paperwork is involved in the final stages of the chartering process. You may be called upon to assist if unexpected problems arise. Four visit reports, two from the Membership Coordinator and two from the Education Coordinator, are required before a prospective chapter’s application for charter is considered complete. Once the application

is complete, the International Board of Directors is asked to vote whether or not to approve the group's application for charter.

Regional Competition

Some prospective choruses are especially anxious to compete regionally once they charter. One of the duties of the Membership Coordinator is to explain competition procedures, the deadlines involved, and music copyright requirements.

Membership Growth & Retention

Membership growth and retention are topics that, along with our music, are the lifeblood of the organization's future.

It takes an organized membership program and strong leadership to create programs that encourage growth and retention. The Regional Management Team, with the Membership Coordinator in the lead, can foster an attitude of encouraging and welcoming new members to your region as well as retaining current members.

As with any membership program, planning is vital. Vision and commitment must be well defined. You need to recruit and train a membership team to assist you, as one look at your job description will confirm. Ideally, your team should find time to meet as early in the fiscal year as possible. Define who has special interests and abilities to accomplish the many tasks that must take place throughout the year. Be realistic in your planning—consult the regional budget to see what is financially possible.

It is important that you become familiar with the resources available to you. Read the *Real Guide to Growth* handbook and review the resources in the online Marketing Center. Then, review pertinent sections of the *Chapter Guide* and the *Policy Book*. People will look to you for answers to many questions pertaining to membership and the more answers you have at your fingertips, the more comfortable and confident you will become. The Communications Department at headquarters is available to assist you and answer questions.

It is especially important that you become familiar with the membership tactics outlined in the *Real Guide to Growth* handbook because they are known to work! The membership planning exercises, samples, templates and the Vocal Lesson Plan have been used by many choruses and customized to fit many situations. This handbook offers four sections covering Vision and Value, Membership Recruitment, Preparing the Chorus and Membership Retention, plus the Vocal Lesson Plan. Each section identifies and explains effective processes for developing membership plans that generate real results.

When you plan membership programs for chorus membership leaders, stress the importance of retention. Often choruses become so caught up in recruitment campaigns that retention efforts fall by the wayside—a big mistake! When a member leaves, not only does it reduce the size of the chorus, she may take with her years of musical experience and knowledge. Choruses reach their musical potential by retaining present members as

a solid core, then steadily and slowly adding new members. A chorus that constantly churns members is typically a chorus of unresolved conflict.

As your membership team considers ways to reach individual members and enrich the membership programs of choruses within your region, consider the following ideas:

- Publish a periodic regional membership newsletter and/or electronic newsletter. This is a great way to publicize a membership class at an upcoming regional event, welcome a newly chartered chorus, or list the names and contact information of the chorus membership chairs within your region.
- Use the newsletter to highlight a chorus' successful recruitment drive, pass along retention suggestions, present regional membership statistics, suggest a new member orientation, pass on membership information from international, or share chorus membership chair job descriptions. A membership newsletter gives importance to the chorus' membership chair position, promotes sharing among the choruses, and provides general, useful information.
- Plan a membership luncheon at a regional event. Instead of a structured class, consider a luncheon for chorus membership chairs (or their designees). An effective method of gaining knowledge is to learn from one another, so allow plenty of time for interaction. Assign each table a topic to discuss over lunch, then ask each table to present an oral summary of the discussion.
- Develop a model "rookie" program for new chorus members. It is known that most members who leave the organization do so within the first three years. Many leave because they feel ignored or unable to grasp the sound of barbershop harmony. Granted, some choruses carefully plan for integrating and educating new members, while other choruses are less sophisticated in understanding newer members' needs.

A good deal of information is presented to members within the first several months of joining—and there is much to be absorbed! When the member seeks additional information, often it is not provided.

New members benefit from periodically receiving information throughout their first year and beyond, as opposed to dumping vast quantities on the member within weeks of joining. While it is natural that a new member's interest would originate at the chorus level, information regarding regional and international structure and activities should also be introduced.

Establish a membership awards program. If your region already has an awards program, think of new ways to make it more exciting and member inclusive. See if your region can use an international membership program or contest as a springboard to magnify the effect of your region's own awards program.

Plan a program with your Directors' Coordinator. One of the primary reasons members join and stay in a chorus is because of the director. The director's people skills are often as important as her/his music skills. Make sure the directors in your region understand the significant role they play in membership recruitment and retention. Ask them to watch the Director's Role webinar in the Marketing Center.

Encourage interaction between choruses. Keep the musical rivalry in your region friendly! Suggest choruses within the same geographic region get together for an evening of song and fun. This can add variety to the weekly rehearsal. Or, encourage choruses to plan a trip or community performance together. Do what it takes to promote a spirit of camaraderie within the region.

These are a few ideas for promoting growth and retention within your region. A brainstorming session will provide you with many more.

Membership Options

Chapter-at-Large Membership

Chapter-at-Large (CAL) membership provides regional and international affiliation for nonmembers or former or current members of Sweet Adelines International who cannot or prefer not to affiliate with a local chapter.

“Going CAL” is useful when a member leaves a chartered chorus to join a prospective chorus. By joining CAL, she maintains an unbroken membership in Sweet Adelines International. When her prospective chorus charts, she then transfers her membership to the new chorus.

It is important that you keep a supply of CAL membership applications on file. When you hear of a chorus split or a chorus that is losing members over some controversy, contact the chorus leadership to make certain that their members understand their option to go CAL to keep their membership continuous. A member leaving a chorus should transfer to CAL (or to another chorus) before resigning her current chorus. She may lose her membership in Sweet Adelines if she resigns without first transferring her membership. (Members also have the option of a 60-day transition period without losing their membership. To take advantage of this option, members complete a “Request for Transition Membership Status” form, available from international. For more information, see the Policy Book, Section III, Div. C, 6.)

You should appoint a CAL liaison whose job is to keep track of CAL membership records and communicate with regional CAL members, keeping them informed and responding to their inquiries so they feel integrated into the region.

The Education Coordinator is responsible for CAL quartet quality control and education for CAL members. Many CAL members actively participate in regional and international activities. CAL members often hold positions and offices at the regional or international level or perform and compete with quartets.

CAL members are eligible to vote for the regional board of directors in the region with which they are affiliated. They are also encouraged to vote in the annual election for members of the International Board of Directors. All CAL members belong to a CAL Chapter. When CAL members' votes are totaled, the results are counted as one chapter's vote.

The current per capita fee for CAL members covers a membership card, a subscription to *The Pitch Pipe*, mailings from international, member rates for international convention registration and educational events, and sales items including music.

If a CAL member finds that she desires to join a chorus, she is eligible to transfer her 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.)

Other membership options include:

Associate Membership

Associate membership was created primarily for members with physical disabilities or time constraints who find it difficult to meet rehearsal requirements and the rigors of performing and/or competing. Except for being prohibited from competing or performing in a Sweet Adelines chorus, an associate member holds all other privileges of active membership.

Dual Membership

Dual membership allows members to join more than one chorus in the same region, or different regions. This allows members the flexibility to continue year-round Sweet Adelines activities, even if they move seasonally to different locations. Dual members are counted members of all choruses to which they are paying dues for chartering and rechartering purposes. Dual members may compete with all choruses of which they are a member.

Youth Membership

Individuals 25 years of age or younger as of their membership application date or annual renewal date can qualify for youth membership. Youth members receive full membership privileges, but are required to pay only half of the regular international per capita fee. Many chapters also offer their youth members discounted chapter dues.

Although most chapters welcome young women, some specify in their standing rules a minimum age for being eligible for youth membership.

Member-at-Large Membership

Member-at-Large (MAL) members are affiliated with, and pay dues to, the international organization. MAL members are not affiliated with a chapter or region and are not required to pay regional assessments. They may not compete or perform. MAL members receive a membership card, a subscription to the *The Pitch Pipe*, mailings from

international headquarters, and member rates for international convention registration, educational events and purchases from International Sales.

Lifetime Membership

Effective January 1, 2018, 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.

Lifetime Discounted 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.

Complete criteria for all membership options in Sweet Adelines International can be found in the *Policy Book*, Section III, Division C and in the *Chapter Guide*, Section VI: Membership.

Consolidation

A consolidation occurs when two or more chapters each discontinue their independent existence (dissolve) and a new chapter is formed. The new chapter includes the memberships of the consolidating chapters, and assumes their assets and liabilities.

Chapters wishing to consolidate must notify the membership department of their intent to initiate the consolidation procedure. A joint letter, signed by the president and secretary of all chapters involved, serves as official notification. This letter must be accompanied by a consolidation fee from each chapter to help defray the cost of paperwork required to process the consolidation.

If the consolidation is taking place before regional competition, policy states the new chorus must be approved 60 days prior to competition in order to compete. If a regional championship chorus decides to consolidate it loses its status as an international competitor.

A counselor may be appointed by the International Board of Directors to assist and advise the chapters during the consolidation process. The region should maintain contact with the consolidating groups and assist them as needed.

Consolidating chapters are not considered prospective chapters. They are not required to have two administrative and musical visits.

Once the application for consolidation is complete, the International Board of Directors is asked to vote to approve the application.

For more information on consolidations, see the *Policy Book* and *Chapter Guide*.

Dissolution

Dissolution occurs when a chorus either votes to dissolve or loses its charter. There will be a time when a chorus in your region dissolves.

The Membership Coordinator should take this opportunity to comfort the chorus members, reminding them that they may continue their affiliation with Sweet Adelines International through Chapter-at-Large (CAL), Member-at-Large (MAL) or by joining another chorus.

Members of dissolving chapters may also apply for prospective chapter status. (Dissolving choruses that enter prospective chapter status go through the procedure beginning with Step Two.)

The chapter officers of a dissolving chorus and/or the regional leaders must inform International staff of the decision to dissolve. The chapter must work with regional leaders on dispersing assets and completing the final U.S. tax reports, which will then need to be reported to International headquarters. For more information on chapter dissolution see the *Policy Book* and the *Chapter Guide*.

Revitalization

This option is typically used by a chorus that has lost a director, has recently undergone a split, or has other reasons to take time out to reflect, plan new goals, and be relieved of any pressure to compete. The *Policy Book* contains information about revitalization.

Revitalization should not be considered as an easy way out of the challenge of recruiting and keeping the minimum number of members necessary to maintain a healthy chorus. Members must be willing to develop a plan to rebuild and strengthen their chorus; however, most regions have developed a written plan that outlines the purposes and responsibilities of both region and chorus during the revitalization process. The regional revitalization plan gives direction and serves to determine the chorus' progress. A revitalization template is included in this chapter to assist the region in creating a plan.

Two internationally funded visits are available for chapters in revitalization. The Regional Management Team chooses the in-Region visitor based on chorus need. Report/reimbursement forms are available from international headquarters. See the section entitled Internationally Funded Visits for more information.

Although the typical time period for a chorus to remain in revitalization is May to May, some choruses rebound quickly and ask for permission to leave revitalization within the first year. This permission is usually given; regional personnel are responsible for making this determination. A second year in revitalization may be granted at the discretion of the Regional Management Team. Anything beyond the second year must be approved by the International Board of Directors.

If a chorus is not able to attract the minimum number of members by the end of its

revitalization period, it may become a prospective chapter, beginning with Step Two. The chorus may also dissolve.

CAL: Chapter-at-Large, Not “at Loose”

Chapter-at-Large members are those who are unable or have chosen not to belong to an established chapter of Sweet Adelines International, but want to belong to the larger organization. A myriad of reasons exist for their decisions; as regional leaders you have the responsibility of communicating with these valued members. Furthermore, you have the opportunity to draw upon their talents, nurture their friendships, and include them among your regional assets. Here are some ideas for reaping those rewards:

Define a process for CAL communications. The membership Coordinator should be checking membership reports in the online Members Only section regularly for new members, including CAL. After a CAL application is processed her membership record will appear in these membership reports and international headquarters then sends her a welcome letter and membership card. What happens next? Who sends her a letter of welcome from the region? Who is responsible for adding the new CAL member to the regional mailing list? Will she receive any mailings in the transition period? Who is her regional contact if she has questions? If she plans to sing in a registered quartet, will she be auditioned?

Assign a CAL Coordinator. Once the initial communication procedures have been completed, CAL personnel often appreciate periodic contact. Assigning a regional CAL Coordinator to keep in touch and to remind them of upcoming events is effective. This person need not deal with the procedural things; perhaps she calls, emails, or sends a special note before regional events. Maybe she contacts them for input before a Regional Management Team meeting. She keeps in touch.

Organize a time and place for CAL members to get together once or twice a year. Meeting for lunch at a regional seminar, or arranging for a table together at the regional installation event helps CAL members feel included.

Provide a roster of CAL members to other CAL members in the region. Helping people make connections with others is a valuable retention tool in any chapter, including Chapter-at-Large.

Welcome CAL members moving from another region into yours. Often we're more aware of individual members deciding to drop a chapter affiliation and "go CAL" than we are of newly arriving CAL members. Take note of new arrivals.

When a chorus dissolves, provide information. Send a letter to each individual, including contact numbers for neighboring chapters and information about CAL membership. Keep a supply of CAL applications in your files, and make them available. Letting them know that you value them and want them to continue enjoying the organization is an important courtesy.

A Chapter-at-Large member can benefit your region. If the atmosphere is supportive and friendly, she will be one of our best ambassadors to the public; she will speak warmly of the organization which continues to make her proud. She may be eager to help at a regional event, or willing to contribute skills to a regional committee. Maybe she'll sing in a quartet, spreading our harmony to new audiences. If a member joins CAL because she has relocated to an area where no chapter exists, she may even feel compelled to form a prospective chorus!

Remember...she has joined CAL because she wants to remain a part of us. Communicate with her as a “keeper.”

Revitalization Program Template

Instructions: The following is a template for use in developing your region's revitalization program, agreement and time line.

Purpose

The purpose of this revitalization program is to provide information and assistance in the areas of membership growth and retention, as well as musical and administrative team-building to choruses whose membership has dropped below the 15-member chapter rechartering requirement.

Primary Goal

The primary goal is to assist the chorus as it develops an organized plan to rebuild its membership so it can recharter at or above the 15-member requirement.

Entering Revitalization Program

The Regional Management Team or the chorus may initiate this revitalization process if it is unable to recharter with at least 15 members. A chorus may request revitalization status for the next fiscal year by notifying the Membership Coordinator of its intent before May 1. The Membership Coordinator will send the chorus a copy of the region's revitalization program. After reading the program material and discussing it with the chorus director and the chorus membership, the president/team coordinator will confirm with the Membership Coordinator the chorus' intent.

A chorus that has been granted revitalizing status is not eligible for this status again for three years from the end of the revitalization period, as stated in the Sweet Adelines International *Policy Book*.

International headquarters must be notified of choruses obtaining this status. The Membership Coordinator submits an “Approval of Revitalization Status” form to the Communications Department in May for each chorus granted entry to the revitalization program for that fiscal year.

The region works with each chorus on an individual basis to help the chorus determine its specific needs, and to help the chorus develop a plan for growth. The region offers guidance and assistance so a chorus may achieve its goal of rechartering. However, the responsibility for the success (or failure) of the revitalizing program lies with the chorus.

While the primary duties associated with revitalization choruses are the responsibility of the Membership Coordinator and the Education Coordinator, all communication regarding choruses in revitalization will be shared among the Regional Management Team members so they may coordinate efforts to assist the chorus based on the following criteria:

- Musical experience, expertise and progress shown
- Administrative experience, expertise and progress shown
- Commitment to an organized membership growth plan
- Regular communication skills demonstrated within the chorus and between the chorus and Regional Management Team

Charter and Good Standing:

The chorus retains its charter and is considered in good standing while in the revitalization program.

Performance Privilege:

The revitalizing chorus will NOT accept performances until it receives written permission from the Education Coordinator. Performing without permission may void the revitalization agreement between the region and the chorus, and may jeopardize its continuation in the program, and ultimately, its charter.

Program Duration:

Revitalization status is for a 12-month period beginning with a new fiscal year. This time frame allows a chorus an opportunity to rebuild its membership. A chorus may be permitted to leave the revitalization program before the end of the fiscal year if it accomplishes the objectives of its specific plan as agreed upon by the chorus and the Regional Management Team AND the chorus has 15 or more members in good standing.

If a chorus leaves the revitalization program before the end of the fiscal year, the Membership Coordinator notifies headquarters promptly of this change.

The Regional Management Team may offer a chorus a second year in revitalization “for good cause.” As long as the chorus continues to meet the objectives set forth in the plan in a timely manner, the region will continue to offer its support through written and verbal guidance, resource materials, and visits by appropriate regional personnel.

According to the Sweet Adelines International *Policy Book*, Section III, Div. A, 4, “At the end of the revitalization period, should the revitalizing chapter be unable to fulfill the rechartering requirements, it may request dissolution or prospective status.”

Revitalization Agreement

The _____ Chorus has read the description of the region's revitalization program and policy as set forth by Sweet Adelines International *Policy Book* (Sec. III, Div. A, 4), has discussed the program with its chorus director and membership and hereby requests revitalization status, beginning May 1, _____. The chorus understands that the request must be approved by the Regional Management Team which will notify the director and president/team coordinator of the chorus' acceptance into the revitalization program.

The region agrees to:

- Contact the chorus within 30 days of the time revitalization status is granted to introduce regional contact personnel, and to begin work with the chorus leadership to develop a specific plan of action for the revitalization period.
- Cover travel expenses (either with regional funding or internationally funded visits) for regional personnel required for these activities: 1) goal-setting/ implementation session by the Membership Coordinator or her designee; 2) one follow-up visit by the Membership Coordinator or her designee; 3) two visits by the Education Coordinator or her staff.
- Provide space and time at regional weekends for the chorus president/team coordinator, membership chair, and chorus director (or others as requested) to meet with the Regional Management Team.

When revitalization status is granted, the chorus agrees to:

- Work with the Membership Coordinator and Education Coordinator to develop a plan specific to the chorus' needs during this revitalization period.
- Work with the Membership Coordinator and Education Coordinator to establish realistic schedules to complete objectives in a timely manner.
- Communicate regularly with the Membership Coordinator and Education Coordinator, as detailed in the chorus' plan.
- Participate in music and administrative events held in the region during the year.
- Whenever possible, subsidize chorus leaders' attendance at regional events, and their enrollment in special regional programs to ensure their participation.
- See that activities are delegated so that requirements and deadlines are consistently met.

 Membership Coordinator

 Chorus President/Team Coordinator

 Education Coordinator

 Chorus Director

Approval of Revitalization Status

Chapter _____ Region # _____

Location of Chapter: _____

I have approved revitalizing status for the above-listed chapter.

Give a brief explanation of why the chorus needs revitalizing status and list the specific type of help you feel the chorus needs to rebuild its chapter.

Membership Coordinator on behalf of the Regional Management Team

Date

Return to:
Sweet Adelines International
9110 So. Toledo Ave.; Tulsa, OK, USA 74137
fax 918-665-0894, email: member@sweetadelines.com

Revitalization Time Line

End of Month 1 (30 days after notification of revitalization status):

1. Chorus president/team coordinator (or her designee) will send the following to the Membership Coordinator:

- A roster which includes the names and addresses of the chapter board of directors/management team with committee chairs identified.
- A copy of the current chapter standing rules.
- A copy of the director's agreement.
- A copy of the current budget.
- A copy of the minutes from the most recent chapter board/management team meeting.
- Completed Guest Program form (form enclosed).
- A copy of a current chapter newsletter.

2. Chorus director (or her designee) will send the following to the Education Coordinator:

- A roster which includes the names and addresses of the director(s) and music staff.
- A copy of the director's agreement.
- A copy of the minutes of a recent music staff meeting.
- Completed Rehearsal Outline (form enclosed).

3. Membership Coordinator and chorus president/team coordinator will:

- Confer by telephone to set the date for the goal-setting/implementation sessions and/or membership growth training session. (At least 85 percent of the chorus members, including the chorus director, must be present at this session.)
- Establish a monthly touch-base telephone schedule.

4. The chorus director and at least one assistant director will enroll in the Director Certification Program (DCP), if they are not already enrolled. The chorus will make every attempt to defray the cost, if possible.

5. The Education Coordinator and chorus director will:

- Set a time for the Education Coordinator (or her designee) to evaluate the chorus for public performance, if necessary, as determined by the Education Coordinator.
- Establish a monthly touch-base telephone schedule.

6. Other, as specified in YOUR chorus' plan.

End of Month 2

1. Chorus and Membership Coordinator (or her designee) to complete goal-setting/implementation session.

2. Chorus will have a written program for membership growth including specific dates of implementation and duties assigned to music/administrative leaders.

3. Chorus president/team coordinator or membership chair will send the written program for membership growth to the Membership Coordinator and discuss any questions or requests during their monthly call.
4. Chorus president/team coordinator and Membership Coordinator will set the date for further administrative training or follow-up visit.
5. Chorus director will send the written program for membership growth to the Education Coordinator and discuss any questions or requests during their monthly call.
6. Chorus director and Education Coordinator will set the date for the first visit by the Education Coordinator (or her designee). The objective of this visit will be established according to each chorus' specific needs.
7. Other, as specified in YOUR chorus' plan.

End of Month 6:

1. The membership program or administrative training session will be completed.
2. The first visit by the Education Coordinator or a member of her staff will be completed.
3. The second visit by the Education Coordinator or her staff will be scheduled.

End of Month 9:

1. A document will be submitted to the Education Coordinator and Membership Coordinator which includes the following:
 - Specific plans which address membership retention
 - A long-range plan for continued new member growth
 - Specific plans for training and development of assistant directors and music staff

At Regular Intervals Throughout the Rest of the Revitalization Program:

1. The chorus president/team coordinator will continue to communicate with the Membership Coordinator on a regular monthly basis.
2. The chorus president/team coordinator (or her designee) will send the chapter board/management team meeting minutes to the Membership Coordinator.
3. The chorus director will continue to communicate with the Education Coordinator (or her staff member assigned to YOUR chorus) on a regular monthly basis.
4. The chorus director (or her designee) will send music staff meeting minutes to the Education Coordinator.

Revitalization Program Guest Program Form

(To be completed by chorus president/team coordinator or membership chair)

Chorus Name: _____ Date: _____

Membership Chair Name: _____ Phone: _____

This survey will provide a profile of your guest program for the Membership Coordinator. If necessary, use a separate page to complete your answers. Clearly printed or typed responses are appreciated.

1. Who is responsible for greeting guests when they arrive at your rehearsal?

2. Describe how guests are greeted (for example: Are they met at the door? Do they sign a guest book? Do they receive a name tag, guest music, or any other material?).

3. Are guests encouraged to sing on their first visit? ____ Yes ____ No

4. Do you provide your guests with their own music for the evening? ____ Yes ____ No

5. Describe how you make sure guests know what part to sing. _____

6. Describe the kind of follow-up used after a guest visits one time (for example: Do you call them within 24 hours? Do you send a note the next day? Are they assigned a riser buddy?, etc.).

Planning a Council of Presidents/Leadership Forum

Perhaps the most visible aspect of the Membership Coordinator's position is her work with chapter presidents/team coordinators. Because all choruses have similar needs, concerns, problems, and activities, providing a scheduled time for chapter administrative leaders to come together for education and shared discussion is an important part of leadership training.

To best meet the needs of the chapter presidents/team coordinators, the Membership Coordinator should solicit input from them early in the year, and invite suggestions each time the group meets. A survey focusing on possible topics of discussion/education can provide valuable input as you plan meetings for this group.

Regional membership weekends are the ideal setting for chapter administrator gatherings. However, special leadership retreats can be planned at any time of the year. Either way, a time for chapter presidents/team coordinators to share ideas and concerns, meet members of the Regional Management Team, and socialize with each other provides a valuable networking opportunity for chapter leaders.

Procedures for setting up a meeting

- Survey chapter presidents/team coordinators on needs.
- Prepare agenda or plan for the forum.
- Communicate plans for the meeting to presidents/team coordinators, Education Coordinator and Events Coordinator.
- Determine who from the Regional Management Team should meet with the chapter leaders at the forum.
- Work with Education Coordinator to:
 - Schedule international faculty to teach, if appropriate.
 - Determine optimum time for the event.
 - Determine whether a chapter leader workshop should be scheduled every year, or on a rotating basis.
- Follow up each meeting with:
 - Thanks to personnel involved.
 - Thanks to presidents/team coordinators for attending.
 - Send copies of information to those not in attendance.

How to Solicit Information from Chapters

You may find that soliciting information from chapters is a challenging task. Chorus presidents/ team coordinators lead busy lives and may be reluctant to take time to contact you about the chorus' needs. Following are several suggestions for gathering information:

- Conduct a Council of Presidents/Leadership Forum meeting. Ask an assistant to record the meeting, describing chorus successes, challenges, and concerns.

- Orchestrate an informal meeting, perhaps over a meal, where presidents/team coordinators can network. By listening to their conversations, you can learn their concerns. Prepare some open-ended questions relating to chorus concerns in the event that conversation stalls.
- Survey chapter presidents/team coordinators via email.
- Through your regional newsletter, encourage chapter presidents/team coordinators to contact the Regional Management Team to voice their opinions on impending decisions.
- Publish an agenda for each Regional Management Team meeting well in advance of the meeting. Distribute the agenda to all presidents/team coordinators (via email or newsletter), asking for their input.
- Remind presidents/team coordinators and chorus membership chairs that you are their representative on the Regional Management Team.
- Encourage each president/team coordinator to provide an email address for the chorus so you both have a fast and inexpensive way to communicate.
- Use evaluation forms from past regional events to discover chorus needs.
- Ask chapter presidents/team coordinators to include you on their chapter newsletter mailing list. Much can be learned from reading a chapter newsletter.
- Contact chapter presidents/team coordinators in person or by phone or email.

Team Coordinator

Job Description

- 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.
- Develops a support staff to assist in the implementation of her responsibilities such as chapter standing rules review and regional calendar.
- Maintains contact with appropriate staff at international headquarters.
- Maintains comprehensive records and forwards materials to successor.
- Trains her successor.

A vodcast outlining each RMT Coordinator's duties has been created and can be found in the Leadership section of the Members Only portion of the Sweet Adelines website.

Running a Meeting

The Meeting Agenda

You are the new Team Coordinator and it's time for your first meeting. Your team members are counting on you to keep the meeting productive and on track. There are many reasons for the success of a meeting and some of them are easier to control than others. A large factor over which you have control is the agenda. Following is some information pertaining to agendas which you might find helpful.

When is an agenda necessary? Every meeting should have a clear purpose in writing so that all members of the group can be prepared. Members should have the agenda in advance of the meeting in a timeframe that is realistic. For a quarterly team meeting, a two-week to 10-day advance is acceptable.

How are agenda items obtained? During a regional team meeting (or committee meeting), it is a good idea to make notes of items that should be included in the next meeting's agenda. A list of action items and assignments should be sent out to all Regional Management Team members within a week or two of the meeting. Refer to this list when preparing your agenda. Also, you might want to email this list again prior to the next meeting as a reminder. During weeks between team meetings, stay alert to items that should be included on the next agenda. Contact individuals to gather information.

Discuss with committee chairs their activities and needs. Let everyone know that agenda items and reports are due no later than two weeks before the meeting and stick with it as much as possible. Keep in mind that situations will arise that call for flexibility or last-minute action. Providing a preliminary agenda to team members helps catch overlooked agenda items.

What should the agenda include? The agenda should have a clear heading that includes the name of the group (team or committee), and the date, time and location of the meeting. Agenda items should be numbered to help participants prepare for what is expected of them. Indicate whether each item is for discussion, information, or requires a decision. Suggested time parameters can be included to keep the meeting flowing. To achieve this, you should think carefully about each agenda item. A good leader senses when an issue will be controversial and allows ample time for a healthy discussion prior to a decision. During a typical meeting, occasional reminders about time may be helpful, but each individual report or issue usually does not need its own time limit. When a committee has no report, time does not need to be allocated for it. It is helpful to note at the end of the agenda those committees with no report at this meeting.

Who should receive the agenda? All members of the decision-making group need a copy of the agenda; also share the agenda with anyone who may be affected by the team's decisions. Confidential issues may arise during a meeting, and while team discussions are always confidential, the broad topic can be listed on the agenda. Always save a copy of the agenda for the files.

What is the official order for items of business at a team meeting? Some guidelines are suggested by *Robert's Rules of Order, Newly Revised* and by the National Association of Parliamentarians, although there is flexibility in designing the order of business. The meeting should be called to order and a review of the previous meeting's minutes should begin the meeting. The next item should be "light" because an easy discussion and decision early in the agenda gives the team a positive outlook on subsequent orders of business. By the same token, end the meeting with something light so everyone leaves the room with an upbeat feeling. Issues that require difficult discussions and decisions should be tackled early in the meeting when everyone is fresh. Saving a difficult topic for the end of the meeting may make it even more difficult for the group to agree on the decision and may impact their ability to focus while awaiting the discussion. Be aware of the need for physical movement and schedule stretch breaks. Schedule a high-interest topic after a break to keep participants alert, interested, and involved in the meeting. Realize that each meeting should be treated as a gathering that requires a unique order of business. Vary the order of the agenda, from meeting to meeting, so items receive the attention and energy they deserve. Don't allow meetings to become routine and predictable. Treat each meeting like a performance and be aware of the ebb and flow of the delivery. As Team Coordinator, remember that not all team members work in the same way. Some need to read, some need to hear, and some need to experience an issue.

What if a team member is not present for her report? Should a member have an unavoidable conflict, make an effort to tie her in by video, telephone, email, etc. Written reports are essential whether or not the member is present. An oral review of a written

report is much easier to understand than a detailed recommendation with nothing in writing. A good written report stands on its own. Distribute reports in advance to brief participants and allow them to prepare questions to discuss at the meeting. A report containing an informational update is always appreciated by the group members. A report with a recommendation should have its justification clearly outlined for decision-makers. The facilitator can present reports for which advocates are not present.

Facilitating the Meeting

To ensure that a meeting's purpose is clear, be specific about what the group will achieve, not what it will do.

Facilitation Skills for Regional Leaders

Establishing a collaborative, cooperative environment, with open communication, is important as the team's meeting facilitator. Facilitation is about process (how you do something) rather than content (what you do). A facilitator is a catalyst. You, as facilitator, are in control of a group only to the degree that you help it work together. The group actually does the work; you, as facilitator, help participants stay focused so they can do the work. Your goal as facilitator is to help the group realize its fullest potential. This is true regardless of whether the meeting is to solve a problem, set goals, or resolve conflicts.

The principle of group facilitation is that cooperation among all people is both possible and desirable. Shared decision-making, equal opportunity, power sharing, and personal responsibility are basic components of full cooperation. The skills of group facilitation are based on ensuring that participants can, if they wish, participate fully in all decisions that affect them.

As a facilitator, you help members work together successfully by your attitude and your approach. Your presence should generate enthusiasm, participation and cooperation. You must create an atmosphere conducive to creative thinking, problem solving, and a feeling of mutual assistance. In this atmosphere, the group can develop solutions and ideas.

To create the desired atmosphere, you must establish a bond among team members by creating a shared goal. Look for common ground to build unity. Be supportive, responsive, and encouraging toward all group members. Maintain a positive attitude and comfortable environment throughout. If you project the kind of attitude that you want the group members to have, they are more likely to follow suit. Show an interest in what you are doing and in the people you are working with. Treat all team members with respect. Communicate consistently, clearly, and in a timely manner.

Here are some guidelines for ensuring that the group members can focus throughout the meeting:

- Understand the process you are being asked to facilitate (for example, problem solving, goal setting, or conflict resolution). Each process requires its own form of preparation.
- Know your team. Find out all you can about members of the group, their levels of skill, personalities, known problems, etc.

- Prepare thoroughly and carefully before the meeting; practice your approach until you are comfortable, including your words, your posture, body language, and eye contact.
- Prepare visual aids in advance of the meeting. Make them as attractive and neat as possible. Leave blank pages in flip charts to create new charts during the meeting.
- Understand the kinds of behavior that are productive and non-productive in group processes; practice dealing with these different types of behavior.
- Establish the ground rules and the agenda for the session ahead of time. Consider making these into charts that can be posted at the meeting. Review the ground rules and the agenda with the group at the outset of the meeting. Make sure everyone understands and accepts them.
- Be honest, straightforward, and positive in your attitude, words and body language.
- Confront concerns in a positive way.
- Stimulate participation by everyone to develop a sense of trust and understanding within the group. If you know the group members, if you have prepared carefully, and if your own communication with the group is honest, straightforward and positive, this will happen almost automatically.

Basic Tips for Successful Facilitation

The following suggestions may help you feel more at ease and thereby increase the comfort level of everyone present:

- Be comfortable with the facilitation process and any specific material that you intend to share with the group.
- Outline what you want to do with the group. Then practice the process until it becomes relatively automatic and you can move easily from one part to the next (without referring to your notes).
- Be as natural as you can in front of the group.
- Use a presentation/facilitation style that is comfortable for you.
- Include the use of visual aids whenever possible to enable the group members to focus on important points. Note cards can be helpful in jogging your memory and giving you something to do with your hands. They also allow you to jot down your ideas and then sequence them in any way you choose without a lot of rewriting. You can also use slides and charts to keep yourself on track.
- Some people make pencil notations on their flip charts to remind them of specific points.
- Wear comfortable, business-like clothing that makes you look good and feel good. A neat, professional appearance can engender confidence and can give you a mental lift.
- Before you begin, check the audio/visual equipment, if applicable. Make sure that everything is working properly (overhead projector, microphone, flip charts, markers, etc.).
- Ensure that everyone can hear you.
- Briefly discuss housekeeping details (location of restrooms, refreshments, etc.).
- Identify any expectations regarding interaction within the group.
- Ensure that everyone understands the agenda for the meeting.

- Maintain eye contact with the group members. Remember the importance of body language and facial expressions.
- Use gestures and movement to express yourself. Holding note cards can disguise jittery hands.
- Give examples to clarify.
- Do the best you can.
- Enjoy yourself! People rarely succeed at anything unless they enjoy doing it.
- In short, develop your own style. Do not try to be someone else. Think about your style and design your presentation for it. Be yourself.

Body Language and Eye Contact

Your body language, facial expressions and intonation make a greater impression than your words. A group may remember only about seven percent of what you actually say; but they will remember what you looked like, how you presented yourself, and how you related to them.

At some point in the meeting, make eye contact with each person in the group. This is not always easy to do. While it is natural to make eye contact with those who respond warmly to you, include all the members of the group. Get nourishment from those who respond warmly, but make sure you make eye contact with each person in the group at some point. You can minimize eye contact with people who are negative or uncooperative.

Positive Involvement by Everyone

It is sometimes easy to get swept up in the energy and enthusiasm of a group and to overlook reluctant or negative participants. As the meeting evolves, encourage silent participants to share their ideas. Brainstorming sessions can be helpful in this regard. Do not be intimidated by silent or negative participants. Do not assume a person is negative just because she is silent. Sometimes your awareness is enough to bring out the reluctant participant. Do not let silence turn you off.

It can be helpful to approach a silent participant during a break and to ask her what she thinks about something that has come up in the meeting. Very often she will have ideas but is simply reluctant to speak before the group.

Do not let participants know when they have intimidated you. Smile at them occasionally; keep your cool. Do not ignore or seem to overlook them consistently.

Recognize members who are set in their ways but do not let them dampen the spirits of the group or the direction of the session. For example, you might say: "I'm so glad you reminded us of that. It's important to remember that we've always done it that way. And up until recent times, it's worked just great."

Conveying Confidence

It is important to convey confidence at all times. If you do err, be the first to acknowledge it and apologize, but then move on. Repeatedly saying you are sorry, nervous or unprepared—making excuses—makes team members uncomfortable and worried and undermines their confidence in you and, in their ability to succeed.

Hitting the Mountain

If you are getting nowhere in a facilitation session, you may have “hit the mountain.” That is, you may have tapped that sensitive or critical issue standing in the way of further progress. This usually shows up when a group is trying to reach consensus on goals, objectives, solutions, or tasks. An excellent clue that this has happened is that the group cannot move forward. As the group continues its discussion, team members keep coming back to the same issue. If this is a major issue, the group will not be able to get through it or past it.

There are several ways to handle this situation. First, point out to the group that the issue keeps coming up and, because it does, it must be important. Be frank about your view of what still needs to be done, about whether there is time to continue working on the issue. Be positive about it, not defeatist.

If you believe the issue must be set aside, you may need to be firm about doing so and continue with other aspects of the meeting. As facilitator, you must also realize that the group may not be able to continue unless and until the group addresses the critical issue.

If the group wants to pursue the issue and there is time for it, you may want to proceed in another way. Perhaps you can take a break and reconvene to work on it again. Another option is to form into small groups to work on it, assign a time limit then reconvene to discuss the small groups’ outcomes. Perhaps you can set a time limit for the large group and work on it only for that time period.

If you are out of time, the group is exhausted, or further progress appears unlikely, set the issue aside for further work at a later time. If it is impractical or ill-advised for the entire group to work on the issue, assign the topic to specific individuals and set a time frame for completion. Confer openly (in the presence of the group). Confirm all pertinent aspects with the group’s leadership. Get consensus from the group.

Let the group know you are interested in what happens. Offer to stay involved in the process if they feel your help is warranted. Let them know you are committed to seeing this through and that it can be resolved.

Dealing with Different Types of Behavior

In a group process, each member is an individual but each is at the meeting for the benefit of the group. As facilitator, you are dealing with the group as a single entity. You need to minimize individual differences and keep your sights set on the group. The group and the benefit of the group are the focus, not the individuals who make up the group. You must be aware of individual differences and individual types of behavior but stay attuned to the group as a whole.

An important objective of any group process is to encourage productive behavior within the group and to discourage or deflect nonproductive behavior. Productive behavior supports the work of the group. Nonproductive behavior gets in the way of the group process.

You want all input expressed in a way that keeps members from going home and expressing themselves “over the back fence” (calling one another to gossip about things said during the meeting). This means you will need to redirect nonproductive energy so that each person feels as though she was adequately heard and understood. In order to do this, you need to be able to distinguish productive from nonproductive behavior.

Types of Productive Behavior

Productive behavior contributes to the work of the group. Following are types of productive behavior you may encounter and should encourage.

Initiating activity: proposing solutions; suggesting tasks and goals or defining the problem; suggesting new procedures or new organization of material.

Seeking information: asking for clarification of suggestions; requesting additional information or facts; seeking suggestions and ideas.

Seeking opinion: looking for an expression of feeling about something from the members; seeking clarification of values, suggestions, or ideas.

Giving information: offering facts or generalizations; relating one’s own experience to the group problem to illustrate points.

Giving opinions: stating a belief concerning a suggestion or one of several suggestions, particularly concerning its value rather than its factual basis; stating a belief about the group or the process.

Elaborating: clarifying; giving examples or developing meanings; trying to envision how a proposal might work if adopted; stating alternatives.

Coordinating: showing relationships among various ideas or suggestions; trying to pull ideas and suggestions together; trying to draw together activities or various subgroups or members.

Summarizing: pulling together related ideas or suggestions; restating suggestions after the group has discussed them. Though a productive behavior generally, summarizing can become tedious if it is done too much. A response to the summarizer such as “I thought Carol said that very well” can often control over-summarization.

Encouraging: being friendly, warm, and responsive to others; praising others and their ideas; agreeing with and accepting contributions of others.

Gate keeping: trying to make it possible for another member to make a contribution to the group by saying, “We haven’t heard anything from Sally yet.” Suggesting limited talking time for everyone so that all will have a chance to be heard; suggesting other procedures that permit the sharing of remarks.

Standard setting and testing: expressing standards for the group to use in choosing its content or procedures or in evaluating its decisions; reminding the group to avoid decisions that conflict with group standards; testing whether the group is satisfied with its procedures.

Following: going along with decisions of the group; thoughtfully accepting the ideas of others; serving as an audience during group discussion.

Expressing group feeling: summarizing what the group feeling is sensed to be; describing reactions of the group to ideas or solutions.

Evaluating: submitting group decisions or accomplishments to comparison with group standards; measuring accomplishments against goals.

Diagnosing: determining sources of difficulties, appropriate steps to take next; analyzing the main blocks to progress.

Testing for consensus: tentatively asking for group opinions in order to find out whether the group is nearing consensus on a decision; sending up trial balloons to test group opinions.

Mediating and compromising: harmonizing, conciliating differences in points of view; making compromise solutions; admitting errors.

Relieving tension: draining off negative feeling by jesting or pouring oil on troubled waters; putting a tense situation in a wider context; clarifying seeming differences in viewpoint.

Types of Non-Productive Behavior

Non-productive behavior leads to disorganization within the group. It interferes with or prevents the group from fulfilling its task and effectively using its human resources. Those involved in non-productive behavior often do not understand or are choosing to ignore the welfare of the group; their focus is often on their own personal needs and desires rather than focusing on the good of the group. The following are types of non-productive behavior that you may encounter and should discourage.

Being aggressive: dominating or manipulating individuals or the whole group; working for status by criticizing or blaming others; disapproving the ideas or values of others; showing hostility against the group or the task; deflating the ego or status of others. Usually the group process takes care of aggressive behavior when it comes up. There are usually enough gatekeepers in the group to stop it and redirect its energy. It also helps to think about what the aggressive person is really trying to say when she says something hostile.

Blocking: interfering with the progress of the group by going off on a tangent; citing personal experiences unrelated to the problem; arguing too much on a point.

Rejecting ideas without consideration; stubbornly resisting or disagreeing with the group. For those who like to interrupt with off-the-subject ideas, acknowledge them but redirect their concern to a later time, for example, “We’ll be dealing with that later. Save that thought and we’ll get back to you in just a few minutes.”

Self-confessing: using the group as a sounding board; expressing personal, non-group-oriented feelings or points of view.

Competing: vying with others to produce the best idea, talk the most, play the most roles, gain favor with the leader.

Seeking sympathy: trying to induce other group members to be sympathetic to one’s problems or misfortunes; deploring one’s own situation; disparaging one’s own ideas to gain support.

Special pleading: introducing or supporting suggestions related to one’s own pet concerns or philosophies; lobbying.

Horsing around: clowning, joking, mimicking or disrupting the work of the group. Sometimes the most creative people in a group spend lots of time horsing around. The comfort level of the group can encourage this kind of behavior, but it can still get in the way of progress by distracting the group from its task.

Seeking recognition: attempting to call attention to one’s self by loud or excessive talking, extreme ideas, or unusual behavior.

Withdrawal: acting indifferent or passive by refusing to or ceasing to participate; resorting to excessive formality; daydreaming, doodling, whispering to others; wandering from the subject. In an energetic group with a climate of comfortableness, withdrawal behavior is usually overcome.

Playing the devil’s advocate: expressing dissatisfaction with solutions; continually offering “yes but” responses to ideas; pointing out flaws in ideas and arguments; challenging ideas and solutions. To redirect this energy, refocus on the group; for example, “I’m glad you brought that up. Do others of you feel the same? How can we use that?”

Constant contributing: contributing comments to everything; “thinking with their mouths open;” tending to speak before they think. Calling on such a person encourages the behavior by reinforcing the need to be prominent in the group. But you can acknowledge the person without calling on her; for example, “Helen, I know you’ve probably got another good idea, but we’ve got to move on right now. We’ll get back to that subject shortly,” or “Helen, let’s give someone else a chance. Your ideas are so good but we haven’t heard from Mary yet.”

Some Tips for Redirecting Non-Productive Behavior

To overcome the non-productive behavior and redirect the group in a more positive manner, consider the following suggestions:

Confront the words without attacking the person. Making one person in the group uncomfortable with your response or with how you handle a situation makes the whole group uncomfortable, even though you may have taken the brunt of aggression or hostility. Everyone gets edgy. Creativity slows down or stops.

Know what pushes your own buttons. Imagine what you would say if your buttons got pushed and how you could handle it positively.

Train yourself to be silent until your brain is engaged. Silence does not intimidate as much as saying something inappropriate does. Silence is often the best response but it must be a positive silence with an open, relaxed, pleasant demeanor and stance. It is acceptable to let people know you need a moment to think about something, and this encourages that behavior in others.

Practice standing in a relaxed, centered way with a relatively blank expression that conveys pleasantness and comfort. Be careful about smiling when responding with silence. Your smile demands a smile in return and can in itself seem aggressive.

Tips for Regaining Control in a Group

Sometimes a group “goes crazy” and you (temporarily) lose control. A group out of control is not always the result of non-productive behavior; sometimes it is the result of very high, positive energy sweeping through the group as creativity reaches a peak. A group is truly out of control when chaos reigns. No one is being heard and no one hears what is going on. The process comes to a standstill. Here are some tips for regaining control so that the process can continue:

- If ground rules are being ignored, say: “Let’s stop for a minute. I want to remind you of one of the ground rules.” Restate the ground rule that is needed to regain control. This is when having the rules posted on a chart is especially valuable.
- When the group keeps talking all at once, stand up or raise your hand high and say: “Hold it! Just one person at a time, please. Jane, you have the floor.”
- When the conversation veers down a road on which there is no pay dirt (for example, “What I don’t like about advertising is that”), stop and say: “That’s the subject of another session. Now, back to this one.” Then restate the question on the floor.
- When the members are especially non-talkative or are offering only polite replies, respond lightly (without whining) with a statement such as:
 - “Am I doing something wrong? You don’t seem to be enjoying this discussion. What is the problem?”
 - “You don’t have to be polite. My job isn’t on the line. Please help me figure out how to move us ahead on this subject.”

- “I want you to find five positive or five negative things about what we’re discussing.” Put them on a chart/board and have respondents discuss their responses.
- When nothing else has worked, stop and reorganize the room: “We’re going to take a five minute break. Feel free to use the restroom or have some refreshments. When you come back, please take a different seat.”
- Check internally to see if you are being an obstacle for communication. Your own behavior must remain productive throughout.
- If you have tried all these options and nothing works, follow your hunch. Do whatever you think will work. You have nothing to lose at this point. Trust yourself to do the right thing.

Achieving Consensus in Problem Solving

One of the most challenging parts of being a facilitator will be finding a way to help groups (your Regional Management Team, choruses, quartets, etc.) solve their problems. If the problem is very serious or sticky, you may be advised to speak with the International President or a member of the Regional Leadership Committee.

When you are called on to facilitate a problem-solving session with a chorus, you may find that you need to relate to that chorus as a mediator, a negotiator, a facilitator, or all three. Regardless of the role you play, bear in mind that in general, your attitude toward problems will be their attitude. Your positive attitude can convince them that their difficulty has been faced and solved by other chapters and that chapters grow by working together to find solutions. Do not make them feel guilty for being in such a predicament; they would probably listen to your advice but would make a note never to ask for your help again.

Help the chorus create a specific plan of action. Follow up with correspondence, offering words of encouragement. If you have to call their attention to an error, make sure you do it in such a manner that they know you have confidence in their ability to correct it.

Never discuss a chorus problem with other Sweet Adelines. Caution the Regional Management Team members to follow suit. No chorus will share its troubles with you if you broadcast them. Honor their confidence in you and share only their good points.

Six Steps in Achieving Consensus

This is a basic method that can be used in almost any problem-solving situation. It is a “win-win” method because it discourages the “win-lose” attitude of some problem-solving approaches. It attempts to establish an environment in which all participants gain. Closure and compromise play important roles in this method.

Identify and define the problem. This is the most important step in problem-solving. Be sure to include all sides of the problem or issue. Do not be in a hurry to get to the solution. Be sure that all attitudes and feelings of those involved have been expressed. If necessary, redefine the problem as you go along.

Be sure all members of the group, or those involved in the conflict, accept the definition of the problem. Define the problem in terms of the needs of each individual. You will be looking for solutions that meet the needs of all those involved. Everybody must feel that they have won or gained in some way.

Generate alternative solutions. This is the creative part of problem-solving. It is frequently hard to come up with a good solution right away. Initial solutions are seldom adequate but they may stimulate better ones.

Each person involved is to brainstorm possible solutions, no matter how wild they seem. No evaluation of these solutions is to take place at this point. If things bog down, restate the problem. Sometimes this starts the wheels turning again.

It will become apparent when to move to the next step, usually after you have come up with a number of reasonably feasible solutions or when one solution appears to be far superior to the others.

Evaluate the alternative solutions. This stage of problem-solving requires special care. Complete honesty is essential. All involved will need to think critically: Are there any flaws in any of the solutions? Are there any reasons why a solution will not work? Will it be too hard to implement the solution? Is it a fair solution for all?

Be sure to listen to others' thoughts and feelings. If you fail to test solutions at this stage, you will increase the chance of ending up with a poor solution or one that will not be carried out earnestly.

Decide on the solution acceptable to all. A mutual commitment to one solution (consensus) is essential. Usually when all the facts are exposed, one solution clearly emerges as superior to all the rest. Do not make the mistake of trying to persuade or push a particular solution on someone else. If the solution is not freely chosen and acceptable to all, chances are that it will not be carried out.

When it appears you are close to a decision, state the solution to make certain that all understand what is about to be decided.

Implement the solution. Determine who does what by when. It is necessary to talk about implementation just as soon as the decision is made. Keep the discussion positive. Each member must assume responsibility for her own behavior in implementation.

Evaluate the effectiveness of the solution. Sometimes you will discover weaknesses in the solution. In these cases, you should return to the problem for more problem-solving. All solutions should be open for revision but one individual should not be allowed to change the solution without consulting the group. Modifications have to be mutually agreed upon, as was the initial decision.

Ground Rules for Problem Solving

It is always wise to establish ground rules for the session, to post them and to go through them with the group before you begin the problem-solving process. Ground rules help set the tone for the meeting. They should clearly establish the acceptable standards for criticism and confrontation. Some typical ground rules are listed below. You may modify these to meet your needs.

- Direct everything to the facilitator. In volatile or potentially hostile environments, this keeps participants from attacking one another.
- Do not speak for others. Speak only for yourself. This discourages participants from assuming they understand what another group member believes, thinks, or feels. It also helps participants to “own” what they say.
- Exhibit unconditional, positive regard for everyone in the room. There are no bad ideas; everyone’s ideas are important. This reduces power and influence to a level of equality among participants; it encourages creative participation.
- Make every comment an “I” message. For example, “I feel good about” or “I feel frustrated when” or “I don’t enjoy.” This ensures that participants “own” what they say and gets at the feelings behind the ideas and concepts.
- Stay on the topic. This keeps participants from diverting to less volatile, less important or safer subjects during the session.

Maslow’s Hierarchy of Needs

It is sometimes helpful to examine a group’s problems from the standpoint of their level of need fulfillment. Maslow’s Hierarchy of Needs can be instrumental in helping you understand not only at what level a group is stuck but what must be done to allow the group to move to a higher level. According to Maslow, we must find fulfillment at each level of need so that we can progress to the next level. Most choruses experiencing serious problems are caught at one of the three or four most basic levels of need (items 1 through 4 below).

- 1. Basic needs:** food, water, sleep, health, physical well being. In a chorus environment, these might translate to very basic environmental needs such as a rehearsal hall, regularly scheduled rehearsals, etc.
- 2. Safety needs:** rules, routine, safety, security, stability, neatness and order. In a chorus environment, these might translate to standing rules (or unspoken rules), consistency in musical and administrative direction, etc.
- 3. Love and belonging needs:** a place in a group, group membership, affection, acceptance, participation, sharing. In a chorus environment, these might translate to unity and acceptance.
- 4. Esteem and ego needs:** recognition as a worthwhile human being, leadership, achievement, confidence, competence, success, strength, intelligence, usefulness. In a chorus environment, these might translate to placing well in competition, involvement in regional activities, etc.
- 5. Self actualization:** to reach one’s potential, to become the person one can be, doing things for the challenge, creativity, aesthetic appreciation, intellectual stimulation, acceptance of reality, quality rather than achievement, always changing, non-static.
- 6. Need to know and understand:** to learn for the sake of learning, a desire to acquire further knowledge, to organize, to analyze, look for relationships, leaving the self behind.

7. Sense of the universe: wisdom and acceptance.

Closure

Closure is the feeling of completion attained when a process ends, a goal is achieved, or a problem is resolved successfully. It is the feeling that everything has been addressed and all that could be resolved has been resolved. Once you are gone, the group must decide what to do with the results of the process they have gone through—what’s going to happen next. As part of your preparation to facilitate, you should have a plan for ensuring that the group can proceed after you leave.

Here are some ideas for ensuring this:

- If you include brainstorming in the meeting, do something with those ideas before stopping. Categorize them at least; prioritize them if possible. Make sure the group understands what the next step is. Make sure they know you are committed to seeing that they take the next step.
- Let the group know that you are committed to its success and that you will be following up (and when and how).
- Schedule a follow-up meeting with the group before you leave, if appropriate.
- Identify tasks and assign them to individuals before you leave. Get consensus on a timeline for completing those tasks.
- Include yourself on the timeline (phone calls, additional meetings, etc.).
- Get a commitment from the group that the information it has generated will be written down and distributed (within a certain time frame) to everyone, including yourself. As soon as you get home, follow up with a letter confirming your interest in the group, what they have done and what they need to do, and also confirming your continued involvement with and commitment to them. Make sure you build the group into your schedule so that you have sufficient time to follow up with them.

Monitoring Long-Range Plans

What is strategic planning? Your region probably has had several goal-setting sessions. What’s the difference between the two?

Goal-setting often bogs down. Goals were set, a “philosophy” was hammered out, and then the facilitator went home. Sometimes the team returned invigorated, ready to get going, only to find that the strategies or means to achieve goals were not in place. Also, the goals were so rigidly defined (“200 new members by April 30” for example) that discouragement sometimes sets in when the region could not meet that goal. Goal-setting can still be a valuable tool, but the process has been refined as other techniques and theories have joined the mix of current thinking on how to use the future to determine what our actions should be today.

Strategic planning will give you the tools to move forward from a shared vision. The “how-to” part of planning is built right in through the strategies that are adopted each year for implementation.

So if you have decided that not just any path will do for your region, you are ready to move into long-range strategic planning.

Not a one-time exercise

The nature of long-range strategic planning does not lend itself to a one-time rhetorical exercise. Strategic planning gives your region a plan that's alive, that helps focus programs and services to member needs. Financial stability is maintained because studies of strategies are made in an orderly way, and new and existing programs are measured against the question: does this program advance one or more of the goals of our region?

A strategic plan is constantly changing. Expect your planning document to become dog-eared from changes. While the team bears responsibility for development of a well-crafted strategic plan, you as Team Coordinator assume the primary responsibility for monitoring the plan. Monitoring includes:

- A review of the annual regional calendar to determine what changes need to be made to align the current operations with the strategic plan,
- Development of a communications plan to inform all members of the new direction, changes and the resulting benefits,
- Scheduling time at team meetings at least annually to review and update the strategic plan.

Eighty percent of the goals and strategic plans that are written are never used. Strategic plans take resources over and above the ones used for the short-term activities of the region. This is why most plans are not implemented and end up as “good intentions.” This is also why your actions are important to the success of the long-range strategic plan.

Getting started

To keep the planners on track and to allow the regional leadership to fully participate, consider bringing in an outside facilitator such as a member of the international faculty.

Be sure to give yourselves plenty of time. A one-hour shot during a regional weekend is not recommended! Your outside facilitator can talk over your needs with you and help set up a productive schedule.

Strategic Planning Process Outline

I. Pre-session work

A. Assess regional needs. Assessment tools include:

1. Member surveys
2. Membership data
3. Financial data
4. Competition scores
5. Focus groups
6. Current calendar of events

B. Complete analysis of environment

C. Choose facilitator and recorder

- II. Strategic planning session(s)
 - A. Visioning
 - B. Formulate mission statement
 - C. Identify core values
 - D. Draft goals
 - E. Develop strategies
 - F. Develop check points
 - G. Develop an implementation plan

- III. Post-session work
 - A. The written strategic plan
 - B. The communication plan
 - C. The action plan
 - D. Implementation management

Definition of Strategic Planning Terms

Mission Statement: A precise, concise and inspiring statement declaring the fundamental purpose for which the organization exists. Who we are and what is supposed to happen for whom as a result of what we do?

Goal: A timeless, unbounded statement that describes the condition or attitude that we seek to attain.

Check points: Measurable, attainable milestones to achieve by a specific point in time on the way to accomplishing the goal.

Strategies: How to organize and focus resources and actions to maximize effectiveness and efficiency in achieving goals.

Action Plan: Define how a strategy will be implemented and make progress towards the goal. Include specific actions to be taken.

Commitment: The ability to set a specific goal and follow through daily long after the inspiration of the moment is passed.

So we have a plan: what's next?

Go for a “quick win.” First, select a strategy that is a “quick win,” one that’s easy and quick to achieve and that can demonstrate that the group is on the right track and that things are happening. The strategy should also inspire, so a revision of Article II, B, 3, a, (2) of your standing rules probably should not be your “quick win.”

Promote, promote, promote

- Keep the plan in front of the team.
- Structure the agenda of each team meeting so that some of the meeting will deal with the plan.
- Encourage committee chairs and team members to report their activities showing how they relate to the strategies and goals of the plan.
- If the plan is not to molder away in a desk drawer, it needs to be present at each meeting. Also, specify one meeting of the team when the plan will be reviewed in depth.

- Make sure that regional members are involved. The management team does not have all the answers. Establish a task force or study group to take on one of the strategies and make recommendations about its implementation.
- Put the mission statement, goals, and the strategies being worked on everywhere: in your regional newsletter, on your Web page, in your roster, etc. Use catchwords and slogans that refer back to the plan. Report, no, crow about progress regularly. Blow your own horn.

Overcoming obstacles to the plan

- No plan is perfect. It's meant to be a living, breathing document. Therefore, it can be adjusted if there are parts that just aren't right for your region at the moment.
- Is the plan too ambitious? Remember this is a long-range strategic plan. The strategies for obtaining your goals are meant to be spread out along a three- to five-year time frame. Slow down. Nibble away at your plan rather than trying to digest it in big gulps.
- Your team doesn't "get it?" Educate them. Continually bring the plan to their attention. They can't support it if they don't know what it is. Your plan should be vibrant and alive; a plan that's long-range, yet filled with the passion of today.

Network

Many regions have already made long-range strategic planning an integral part of their management so that musical goals can be achieved more readily. If you have questions, use the Sweet Adelines network. Help is only a phone call or email message away.

Introduction to Contracts

Everyone who serves on a Regional Management Team should have some familiarity with contracts. Reading through the following materials will serve as a foundation for this education.

In order to present information of a legal nature accurately, John S. Foster, Esq., granted his permission for the following information to be reprinted in this *Regional Management Team Handbook*. Foster is an attorney and counsel specializing in the areas of not-for-profit organization and association management, meetings and trade shows, and travel law. The following material is reprinted with permission of the author: John S. Foster, CHSE, Esq. of Atlanta, GA.

The Contract Workshop by ©John Foster, CHSE, Esq.

Understand the legal elements of a contract. It is important to understand where you are in the discussion process. Remember this adage: If you ask the other side for something before a contract exists, it's called "negotiating;" if you ask for something after a contract exists, it's called "begging." There is a substantial difference between the two positions.

A document must have the following five elements to be a binding contract: There must be an offer, it must be accepted by both sides, consideration must be given by both sides, it must be in writing when required by law, and it must be signed by legally competent parties. Unless all five elements exist, the document is merely a proposal to do business and can be modified at will by the negotiating parties.

Understand the proper way to revise a contract or proposal. Rarely does the party receiving the other side's proposal agree with all of the terms and conditions it contains. To advance the negotiations process and to avoid a dispute over what terms are in the final contract, it is imperative that negotiating parties understand the proper way to revise or amend a proposal or existing contract. Some suggestions for doing so follow.

- a. Strike out terms in the original and write new terms in the margin. Both parties must initial and date all changes.

- b. Place new terms in an attached addendum. The addendum should be cross-referenced on the last page of the original document and on the first page of the addendum. Also, terms in the original that contradict the terms in the addendum should be crossed out, and a reference to the addendum should be made in the margin to make it easier for the reader to follow the changes. All parties must sign and date the addendum.

- c. Rewrite the original with new terms. If the crossed-out terms and addendum become lengthy and difficult to follow, the best practice is for one of the parties to prepare a new original with all of the revisions agreed to by the parties.

Understand how to sign contracts correctly. In our legal system you can sign a contract in one of two capacities: as a principal or as an agent. If you sign a contract as a principal, you are the person primarily liable for performance of the contract. If you sign as an authorized agent (or employee) of a company or association, the terms in the contract are binding on the company or association. If you do not intend to be the party primarily responsible for the contract, use your job title or the words “as agent for,” and clearly identify the parent company or association that is responsible.

Avoid “To be negotiated” clauses and always define your terms. Contracts must have specific terms in order to be enforceable. Parties should negotiate all of the key terms for price, quantity, and performance up front, specifying these terms in the contract. Don’t leave important terms, such as room rates or food and beverage prices “to be negotiated” at a later date. Use percentage caps for formulas referencing the change in the Consumer Price Index to settle how future prices will be calculated. Successful contracts avoid terms that are vague and capable of being interpreted in different ways by different parties. Vague wording, such as “a reasonable amount of meeting space is being held for your group,” is an example. What is reasonable to one side may not be reasonable to the other.

Understand how to negotiate and manage an attrition clause. Attrition clauses are becoming a fixture in hotel contracts and both sides must understand how to negotiate and manage the key variables involved. The variables include review dates, percentage of slippage allowed; and how damages due the hotel, if any, will be calculated. Professional planners should be able to establish a room block that is within the margin of error allowed by the attrition clause. For long-term meetings that are held on an annual basis, review dates can be agreed upon and formulas that will allow the meeting sponsor to raise or lower the future room block without liability – while still giving the hotel the assurance it needs – can be established.

Understand the elements of a cancellation clause and the concept of damages (vs. penalties). The law states that if one party breaches a contract, the other party is entitled to damages. Damages are defined as lost profit (or additional expenses), but not lost revenue. To determine damages, parties to a contract may agree to specific sums or to a formula. The sums or formula will be enforceable only if it is a reasonable approximation of the actual damages. Terms that attempt to penalize one or both parties are not enforceable. (A term is deemed to be a penalty if the non-breaching party would come out further ahead if the other side breaches the contract instead of performing its obligation.) Generally, the non-breaching party has a duty to mitigate its damages when a breach occurs unless the contract provides for fixed sums that are reasonable.

Spell out terms for deposits (group and individual). If deposits are required from the group or from individuals, a successful contract will specify the dates when deposits are due and under what circumstances the deposits are refundable. If these terms are missing, there is a possibility for a later dispute.

Understand option deadlines and the mailbox rule. Contract proposals will frequently specify a date by which the other side must accept the proposal in order for a contract to be formed. These are known as option deadlines and are always strictly enforced unless the party receiving a proposal with an option deadline must adhere to the deadline or get the other side to waive it in order to have a valid contract.

The mailbox rule also pertains to contract acceptance. A valid acceptance to a contract occurs when it is signed and put into the mailbox, not when the contract is received by the other party. Some contracts will change the effect of this rule by requiring that the document specifically reaches the receiver's office in order to be a valid acceptance. You must understand your responsibility when attempting to accept a contract so that you have a legally sufficient acceptance. (The mailbox rule does not preclude the use of fax machine.)

Recognize and understand indemnification and hold harmless language when you see it. If the contract contains an indemnification clause, you need to understand what risks and responsibilities you are being asked to assume. Don't agree to indemnify and hold harmless other people or entities for their negligence. Each party should be responsible for its own negligence and the contract should specify this.

Understand the merger clause. This clause states that the entire agreement of the parties has been merged into the final contract and the agreement can't be changed without each sides' write permission. The significance of this clause is that one can't later claim that the other side promised something that wasn't included in the final document. If the other side makes promises, make sure you get it in writing. Contracts that are well written and clearly specify the intent of the parties lead to successful meetings and satisfied clients. If reviewing or preparing contracts is not your strong point, get assistance from an expert, such as your in-house legal counsel or another attorney who is familiar with the meetings industry.

Election & Appointment Procedures

Election and Appointment Procedures for the Regional Management Team

The entire Regional Management Team (RMT) must be involved in the election and appointment process in order for the process to be successful. The RMT appoints the Nominating Committee, which is responsible for carrying out the processes of electing and appointing new members to the RMT.

Support Activities

There are two related activities that should be ongoing, year-round, which support the process of electing and appointing members to the RMT.

1. Developing interest in serving on the RMT is the responsibility of all members of the RMT and should happen on an ongoing basis. Not only is each RMT member responsible for identifying and developing potential successors to her job, she is also responsible for general PR and education of the region about the RMT in general.
2. Developing the regional leadership database is the responsibility of the Communications Coordinator. Through this ongoing activity, potential regional leaders may be identified and “cultivated” by inviting them to become involved in various appointed and/or committee activities prior to asking them if they might be interested in a position on the RMT

Regional Management Team Positions and Eligibility

The table on the next page summarizes the process of election or appointment for each of the eight positions on the Regional Management Team (RMT).

<i>RMT Position</i>	<i>Elected or appointed?</i>	<i>Year Start Term</i>
Communications Coordinator	Regional appointment	Even
Directors' Coordinator	Directors vote	Odd
Education Coordinator	International appointment	Even
Events Coordinator	Regional appointment	Odd
Finance Coordinator	Regional appointment	Odd
Marketing Coordinator	Regional appointment	Odd
Membership Coordinator	Regional vote	Even
Team Coordinator	Regional appointment	Even

Regional vote = Elected by members of the region by voting through their chartered chapters. Each chapter (including CAL) gets one vote. Prospective chapters are not eligible to vote as a chapter, though their CAL members vote as part of Chapter-at-Large.

Directors vote = Elected by the directors of chartered choruses in the region. Each director (whether male or female) gets one vote. An interim director is eligible to vote. Co-directors each vote separately. Directors of prospective choruses are not eligible to vote.

International appointment = Appointed by the Education Direction Committee upon the recommendation of the Regional Leadership Committee who receive recommendations from the RMT.

Regional appointment = Appointed by the continuing and incoming RMT members. Any member of the region (including a CAL member) who is in good standing with the chapter, regional and international organizations is eligible to submit an application for any position on the RMT. For candidates for the Directors' Coordinator position, experience as an associate, assistant or front-line director is recommended, but not required.

CAL members in good standing are eligible to vote in Membership Coordinator elections. CAL members directing a chartered chapter are eligible to vote in Directors' Coordinator elections. It is an interesting quirk of the system that a CAL member who is directing a prospective (non-chartered) chapter, is eligible to run for the position of Directors' Coordinator, but she is not eligible to vote for that position. A male director of a chartered chapter may vote for Directors' Coordinator, but is not eligible to run for that position.

Election & Appointment Process

The process and timeline leading up to the election and appointment of RMT members is summarized in the following table:

<i>Task</i>	<i>Person Responsible</i>	<i>Time Period</i>
Appoint Nominating Committee	RMT	January
Complete peer reviews of RMT members and evaluations of appointees	All RMT members	February-March
Identify potential leaders	All RMT members & Nominating Committee	Ongoing
Maintain regional leadership database	Communications Coordinator	Ongoing
Distribute applications and publicize opportunities	Nominating Committee	February - May
Solicit applicants for RMT positions	Nominating Committee and RMT Members	February - August
Receive applications, check eligibility, and solicit confidential appraisals	Nominating Committee	June - August
Checkpoint on applications received and additional PR and solicitation of applications, if necessary	Nominating Committee and RMT members	July
Review all applications. Prepare slate for elected offices. Nominating Committee shares applications and a summary of evaluations with the RMT so international appointments can be recommended and regional appointments can be chosen.	Nominating Committee	September
Appoint Chair of Tellers Committee	Nominating Committee	No later than September 30
Review of applicants for international appointment and determine recommendations to send to international	RMT	No later than October 15
Send information to international headquarters about international appointment	Communications Coordinator	No later than October 15
Prepare election information and ballots and distribute to choruses, directors, CAL members, as appropriate	Nominating Committee	No later than November 1
Ballots received by Chair of Tellers Committee	Choruses and individuals	Prior to December 15
Tellers Committee meets	Chair of Tellers Committee	Prior to December 15
Reports results of election to chair of Nominating Committee and RMT	Chair of Tellers Committee	On or before December 15

<i>Task</i>	<i>Person Responsible</i>	<i>Time Period</i>
Election results announced to candidates	Nominating Committee	late December
Make Education Coordinator appointments and communicate to RMT	Regional Leadership Coordinators and EDC	late January (usually is late December)
Communicate international appointments to candidates	Regional Leadership Committee and RMT member on Nominating Committee	late January (usually late December)
Poll unsuccessful candidates for election and international appointment about their interest in accepting appointed positions on RMT	RMT member on Nominating Committee	January
Present candidates for regionally appointed positions to the incoming RMT (continuing members, new international appointment, and elected member)	RMT member on Nominating Committee	late January
Select regionally appointed RMT members	Continuing and incoming RMT members	late January
Appoints new Nominating Committee	RMT	late January
Announce results to region and international	Communications Coordinator	February 1

Each step in this table is described further in a later section of this chapter.

Publicity and Application Distribution

Starting in February, the Nominating Committee sends materials to each chapter, including Chapter-at-Large, to solicit applicants for RMT positions. The materials should include a cover letter describing the application and election/appointment process (Sample A), application form (Sample B), job descriptions for each RMT position (Sample C), and a list of suggested qualifications for potential nominees (Sample D). Samples of these materials may be found at the end of this chapter. The materials must make it clear that submitting an application does not guarantee a nomination to the RMT. Several packages of materials should be prepared and distributed to RMT members and to the members of the Nominating Committee (see below) to use in soliciting applications for the RMT. These materials may be supplemented by telephone calls, information on a Website and/or by personal visits of RMT members and Nominating Committee members to the chapters in the region.

Appointing the Nominating Committee

The Regional Management Team appoints a Nominating Committee in January prior to the fiscal year in which the elections/appointments will take place. The Nominating Committee will consist of one member of the RMT and two members from the membership at large. The RMT will designate one of these members as chair of the Committee.

All Nominating Committee members shall be members in good standing in chapters which are in good standing in the region and the international organization. The RMT must give careful consideration when choosing members of the Nominating Committee, which is one of the most important committees of the region. Members of the Nominating Committee must be able to keep the best interests of the region ahead of any personal interests. They often make difficult decisions, such as choosing the potential nominee who has the specific talents needed by the region over the potential nominee who is popular. Effective Nominating Committee members are discreet and inquiring, and it is helpful if they are well acquainted with the membership of the region. The strength of the region's administration depends upon responsible, capable leaders, and it is the responsibility of the Nominating Committee to find these people for the slate.

Receiving Applications, Obtaining Confidential Appraisals and Regional Evaluations

Applicants complete and return the necessary form(s) to the designated member of the Nominating Committee.

When an application is received, the Chair of the Nominating Committee or her designee first must determine whether the applicant is in good standing with the organization and whether she meets any additional eligibility requirements stated in the region's Standing Rules. Only a member in good standing in her chapter who meets the qualifications established by the International Board of Directors and the Regional Standing Rules in effect at that time shall be eligible to be appointed or elected as a member of the RMT. Determination of good standing is made by contacting the President/Team Coordinator of the member's chapter. If the applicant is a member of Chapter-at-Large, the determination of good standing is made by contacting the Membership Coordinator. If the applicant is not in good standing, the Chair of the Nominating Committee will notify her immediately and return her application without further processing.

The Chair of the Nominating Committee or her designee assigns a code number to each applicant to ensure confidentiality in the reference process. She then codes the applications (Sample B) and appraisal forms (Sample E1) and solicits appraisals from the applicant's references and from other appropriate regional and international leaders. A sample of the confidential appraisal compilation form (Sample E2) is found at the end of this chapter. If time is short, the Chair of the Nominating Committee may use the telephone to solicit an appraisal.

The Chair of the Nominating Committee or her designee receives the completed appraisal forms. When she believes that all the appraisals have been received for an applicant, she completes the appraisal compilation form (Sample E2) and destroys the signed appraisal forms.

If the applicant is a current or former member of the RMT or she has served in a regional position, the Chair of the Nominating Committee retrieves the relevant peer reviews from the regional files.

The Chair of the Nominating Committee or her designee distributes the information about each applicant (her application form, the appraisal compilation form, and any relevant regional evaluations) to the Nominating Committee and to the members of the RMT. It is not necessary to wait until all applications have been received before doing this because it is helpful to all involved in the recruiting process to know about each applicant for any RMT position.

Checkpoint on Applications Received

During the few months that applications are being received, the Chair of the Nominating Committee should stay in touch with everyone who is soliciting applicants to monitor the process and make sure that applications are actually going on. If necessary, the Chair may need to do another mailing, and those helping her with soliciting applications may make additional overtures to recruit applicants for the open positions. After reviewing the applications received, the committee may wish to solicit additional nominees.

Meeting of Nominating Committee

The Nominating Committee meets to review all applications. The primary job of the Nominating Committee is to prepare the slates for elected offices. The Nominating Committee's duty is to select applicants who are "qualified" for the position. They are not to make determinations such as "this applicant will probably win, so we won't put her on the slate and that will give others a chance to be elected." In other words, the Nominating Committee has responsibility to present those qualified, but the decision is left up to the voters.

The Nominating Committee reviews the applications, appraisal compilations, and other evaluations, using the list of suggested qualifications/skills found at the end of this chapter - Sample D). Care is taken not to place a nominee on the slate who may have to be disqualified later. Once it has been determined that a candidate will be on the slate, no further use is made of the appraisals and evaluations. All candidates go before the members as being equal.

The question has been raised about whether it is ethical or at least in good judgment, for the name of a Nominating Committee member to appear on a slate. There is no rule prohibiting this practice. In fact, it would be a waste of talent to insist that a qualified member choose between serving on the Nominating Committee and being a potential nominee for the RMT. If a member of the Nominating Committee is an applicant, the committee asks her to leave the room while her qualifications are discussed. It is appropriate to select the slate by secret ballot when a member of the committee is a potential nominee.

It is preferable to have at least a double slate (two nominees for each position to be filled); however, qualified nominees are preferable to quantity of nominees.

Once the slate is selected, the Chair of the Nominating Committee immediately notifies the selected nominees, preferably by telephone. The telephone notification is followed

by a confirmation letter from the Chair. If references other than those listed on the potential nominee's application were consulted, a statement similar to the following should be included in the letter: "In order to enlarge the comment pool, the following persons were contacted in addition to the references you listed on your application form."

The Chair of the Nominating Committee also sends a letter to the potential nominees who were not chosen for the slate, thanking them for allowing their names to be considered. The letter should include an indication of areas in which the applicant needs more experience or improvement in order to be considered for a position on the slate in the future. If references other than those listed on the potential nominee's application were consulted, a statement similar to the following should be included in the letter: "In order to enlarge the comment pool, the following persons were contacted in addition to the references you listed on your application form."

Copies of all correspondence are sent to the RMT members and retained in the Nominating Committee files.

It is not the job of the Nominating Committee to make recommendations for regional and international appointments. It may be convenient, however, for the Nominating Committee to assemble the information for the candidates for regional and international appointments. In addition, after selecting the slate(s) for the elected positions, the Nominating Committee may, at its discretion, prepare comments on any or all applicants to submit to the RMT.

Tellers Committee

After the slate(s) are selected, but before they are distributed, the Nominating Committee appoints a Chair of the Tellers Committee and submits her name to the RMT for ratification. The Chair of the Tellers Committee selects three other people who are not nominees to serve on the Tellers Committee. Members of the Tellers Committee are chosen for accuracy and dependability. They must understand the election procedures and keep the results of the voting confidential. Tellers do vote with their chapters for the nominees on the slate. Additional information about the activities of the Tellers Committee can be found later in this chapter.

International Appointments

Every other year prior to October 15, the RMT reviews all applicants for the positions of Education Coordinator. International has requested that the names of three potential appointees be submitted. While it is known it is not always possible to have three qualified candidates, this is the goal. The RMT may also submit its preferences about which of the candidates should be appointed, but this is not required.

If a current member of the RMT is an applicant, she is asked to leave the room while her qualifications are discussed. When the applicant returns to the meeting, it is appropriate to select the list of candidates and any preference order by using a secret ballot.

The Communications Coordinator sends information about the recommended applicants to international headquarters. This information includes the applications, appraisal compilations, and regional evaluations for each candidate, as well as a cover letter stating the preferences of the RMT about who should be appointed.

Staff at international headquarters gathers this information from all regions and distributes it to the Regional Leadership Committee. The RLC reviews the information and meets to recommend who should be appointed in each region. The Regional Leadership Committee are not bound by the preferences of the RMT, and may solicit additional information before making their recommendations. These recommendations are then sent to the Education Direction Committee for final decisions to be made. The final date for this decision is the third weekend in January, though it may be done earlier (during late December).

The RLC prepares notices for each Region's incoming (new and returning) and outgoing Education Coordinator and the RMT is sent a copy of the notices. The Communications Coordinator notifies those applicants who were not appointed.

Regional Elections

By November 1 (in even years only), the Nominating Committee prepares ballots and other election information and distributes it to chapter directors for the Directors' Coordinator position (to take effect on May 1 of odd year). In odd years, the Nominating Committee prepares ballots and other election information to distribute to CAL members who are in good standing with the region and to the chapter presidents for the Membership Coordinator position (to take effect on May 1 of even year). Balloting for regional elections can occur by mail or by electronic means.

The following information is sent:

- Cover letter stating the deadline for receipt of the ballots by the Chair of the Tellers Committee.
- Instructions for holding the election (Samples F and G)
- Nominee qualifications, prepared from the applications. Information presented on the ballot should be uniform for all candidates (each should contain, for example, how long each has been a member, the chapter, regional and international positions held, education, occupation, skills they bring to the position and why they are seeking the position). These usually take the form of a summary of skills and experience. In addition, photographs are recommended, but not required. A statement from each candidate (50 words or less) on "Why I am seeking a position on the RMT" is also recommended. This allows the candidates to "sell themselves." The rationale is that if the Nominating Committee approves applicants and they make it to the slate, then it's up to the candidates to give the members the right information to get themselves elected. If space permits, it is also useful to include a paragraph listing the job description for that position and the skills/experience required.
- Sample ballots
- Official ballots (Sample H)
- Official envelopes (Sample I) with the name of the chapter, director, or CAL member in the return-address portion of the outer envelope.

Preparation for the Tellers Committee Meeting

Ballots are returned to the Chair of the Tellers Committee. Those received by mail are not to be opened before the Committee Meeting. Ballots received by the Chair of the Tellers Committee after the stated deadline are to be marked “late” and not counted (though they will be reported on the tally sheet).

The Chair schedules a meeting of the Tellers Committee to be held within two days after the date the ballots are due.

Prior to the meeting, the Chair of the Nominating Committee will provide the Chair of the Tellers Committee with lists of all chapters in the region and all chorus directors in the region. Any chapter not in good standing will be noted on the list.

Either the Chair of the Nominating Committee or the Chair of the Tellers Committee will prepare the following:

- Two tally sheets listing the names of the nominees for each position in alphabetical order (Sample J).
- Large envelopes in which to seal the counted ballots and the tally sheets.
- Report form with places for the entire Tellers Committee to sign (Sample K)

Tellers Committee Meets

The Chair brings the official envelopes, unopened, and the ballots received electronically to the meeting of the Tellers Committee along with the other materials.

First the committee tallies the CAL ballots. The result is counted as one chapter. The process is as follows:

- The Chair of the Tellers Committee opens and discards the outside envelopes from CAL members. After all of the outside envelopes have been opened, the Tellers Committee will not be able to identify who has cast the ballot. Ballots received electronically are added to the ballots received by mail.
- The Chair of the Tellers Committee opens the official inside envelope and removes the ballot. If the ballot is valid, it is handed to teller #2.
- Teller #2 reads aloud the names of the nominees marked on the valid ballot. She sets the ballot aside after she has read the names so it is not mixed with the uncounted ballots.
- Tellers #3 and #4 record the votes on the tally sheets by placing a vertical line to the right of the nominee's name as it is read. The marks are made in groups of five, the fifth line being drawn diagonally across the four vertical lines. Whenever the fifth line is drawn, teller #3 calls “tally.” If teller #4 does not also record a fifth line for that vote, a recount becomes necessary.
- The nominee with the largest number of votes is declared to be the “vote” of the CAL chapter. If the vote is a tie, record all tied candidates.

Next the committee tallies the chapter (director) ballots, as follows:

- The chapter's (or director's) name, listed in the return address portion of the outside envelope, is checked against the list of chapters in good standing with the region (or list of directors in the region). If a chapter that is not in good standing returns a ballot, it is declared invalid and set aside. In like manner, ballots received electronically are also checked against the list of chapters in good standing.
- The Chair opens and discards the outside official envelopes. After all of the outside envelopes have been opened, the Tellers Committee will not be able to identify who has cast the ballot. Ballots received electronically are added to the ballots received by mail.
- The Chair of the Tellers Committee opens the official inside envelope, removes the ballot. If the ballot is valid, it is handed to teller #2.
- Teller #2 reads aloud the names of the nominees marked on the valid ballot. She sets the ballot aside after she has read the names so it is not mixed with the uncounted ballots.
- Tellers #3 and #4 record the votes on the tally sheets by placing a vertical line to the right of the nominee's name as it is read. The marks are made in groups of five, the fifth line being drawn diagonally across the four vertical lines. Whenever the fifth line is drawn, teller #3 calls "tally." If teller #4 does not also record a fifth line for that vote, a recount becomes necessary.
- If tallying for Membership Coordinator, add the CAL vote to the tally sheet.
- If the CAL vote is a tie, then the Tellers Committee determines whether that vote would make any difference to the outcome. If it would make a difference, then the election is determined to be a "tie."
- The nominee with the largest number of votes is declared to be the winner.
- If there is a tie vote, the election is resolved by consensus of the RMT. The Chair of the Tellers Committee notifies the Chair of the Nominating Committee by telephone that there is a tie. The Chair of the Nominating Committee contacts the RMT by teleconference. After consensus is reached, the Chair of the Nominating Committee telephones the results to the Chair of the Tellers Committee.

After the tally is completed, the Chair of the Tellers Committee prepares the report of the meeting. All members of the committee must agree on the report. The following information is included in the report (Sample K):

- Number of chapters/directors eligible to vote
- Number of chapters/directors voting
- Number of late ballots received
- Number of invalid ballots
- Number of valid ballots
- Names of the nominees receiving the largest number of votes
- Signatures of all members of the committee

The Tellers Committee is honor bound not to divulge any information concerning the election.

The Chair of the Tellers Committee telephones the Chair of the Nominating Committee with the results of the election. She then sends the Tellers Report to the Chair of the Nominating Committee. The Tellers Report is recorded in the official minutes of the region.

The Chair of the Tellers Committee seals all of the ballots and tally sheets in the large envelope. She retains this envelope for 90 days and then destroys it.

Announcing the Results of the Election

The Chair of the Nominating Committee announces the results of the election, first notifying all the nominees. Notification is by telephone followed by a letter of confirmation. She also sends written notification to the RMT and to the chapters in the region. The Chair of the Nominating Committee sends a letter to each nominee who was not elected, thanking her for allowing her name to be considered for election.

Regional Appointments

During January, the continuing and incoming RMT members meet to select the regional appointments. Although this could be done earlier in the process, there are several good reasons for waiting until January when the results of the regional election(s) and international appointment(s) are available. First, it is appropriate that the incoming RMT members be involved in the decision about the regional appointments, along with those who are continuing on the RMT, since together they will comprise the team. In addition, it is possible that an unsuccessful candidate for regional election or international appointment might be an excellent choice for one of the regional appointments. Regional appointments are to be completed before February 1 of each year.

If a current member of the RMT is an applicant for one of the regionally appointed positions, she is asked to leave the room while her qualifications are discussed. When the applicant returns to the meeting, it is appropriate to make the appointment by using a secret ballot.

Announcing of Results to Region and International

The names of the new members of the RMT should be announced at the regional annual membership meeting and by letter to each chapter in the region. The Communications Coordinator also sends this information to international headquarters.

Preparing for the Next Round

It is February before this process is completed. At this time, if she hasn't already done so, the Communications Coordinator should update the regional database with information about all applicants. It is then time to start the process again.

Unusual Circumstances

- *Off-cycle appointments.* If a member of the RMT resigns before the end of her term of office, another qualified member of the region is appointed to fill the remainder of her term. If the vacancy is in the Education Coordinator position, the Communications Coordinator should notify the Chair of the Regional Leadership Committee immediately about the resignation. The Communications Coordinator should act as

quickly as possible to bring names of qualified individuals to a meeting of the RMT, which shall select among these and make recommendations to international. The appointment will be made by international as quickly as possible.

- *One candidate for an election.* If the best efforts of the Nominating Committee and the RMT have produced only one qualified candidate for the election of the Directors' Coordinator or Membership Coordinator, no election is held. Instead the candidate is declared "elected by acclamation" and the region is so notified.
- *One candidate for an international appointment.* If the best efforts of the Nominating Committee and the RMT have produced only one qualified candidate for the position of Education Coordinator, that name shall be sent to international along with a cover letter explaining the situation. If there are other members of the region who were qualified but for some reason did not apply, they may be mentioned in the letter for future reference. In the event that an international appointee is not able to continue in the position, international likes to know who is out there and might be interested.

List of Sample Materials Referenced in This Chapter

- A - Sample Cover Letter for Application Packets
- B - Application for Regional Position
- C - Job Descriptions for Regional Management Team Positions
- D - Suggested Qualification/Skills for Regional Management Team Member
- E1 - Confidential Potential Nominee Appraisal Form
- E2 - Confidential Potential Nominee Appraisal Compilation Form
- F - Chapter Voting Instructions for Membership Coordinator Position
- G - Chorus Director Voting Instructions for Directors' Coordinator Position and Sample Ballot
- H - Official Ballot for Membership Coordinator
- I - Official Envelopes
- J - Sample Tally Sheet
- K - Report of Regional Tellers Committee

Sample A—Sample Cover Letter for Application Packets

Date

Name

Title

Address

City, State, Zip

Dear Name,

This is your chapter's opportunity to participate in the selection of nominees for appointment/election to the regional management team. Nominees will be selected to fill the following positions for the two-year term beginning _____, and ending _____.

(list positions to be elected/appointed)

Return completed applications to the nominating committee chair, who will request confidential appraisals from the people listed as references by the applicants. The regional nominating committee will carefully consider all the nominee applications and appraisals. After all potential nominees' qualifications have been discussed, the nominating committee will, by secret ballot, select at least two nominees for the position to be elected by the regional membership (Membership Coordinator) or the chorus directors (Directors' Coordinator).

The regional management team will review the applications and appraisals in order to appoint the (Communications Coordinator, Events Coordinator, Finance Coordinator, Marketing Coordinator and/or Team Coordinator), and to make recommendations to the Regional Leadership Committee and the Education Direction Committee for the international appointee (Education Coordinator) to the regional management team.

Do you have members in your chapter who have all, or most, of the qualifications listed below, and are interested in serving on the regional management team or as a committee member or appointee? If so, please encourage them to complete and submit the attached application.

The IDEAL potential nominee should work well on her own and as a team member to define and pursue goals, and to carry out the aims of the region and Sweet Adelines International. Her qualifications also should include the following:

- Positive, objective attitude
- Good listening skills
- Critical and analytical thinking as well as imaginative and creative thinking
- Effective verbal and written communication skills
- Knowledge and ability to use available resources
- Ability to adapt easily to different environments
- Ability to relate to a variety of personality types
- Training and experience in a field which could be of value to the regional management team
- Experience in Sweet Adelines International as a chapter, regional, or international officer, committee chair, or member

Sincerely,

Chair, Nominating Committee, Region _____

**Sample B—Application For Regional Position
Personal Data**

Information from this form will be used to create candidate biographical information.

Region # _____ ID Code # _____

Name _____ Member # _____

Chapter/Region _____

Address _____

City/State/Zip/Country _____

Preferred Phone Number _____

Email _____

Sweet Adelines International Membership Data

How long have you been a member of Sweet Adelines International? _____

Service (within the last 10 years)

- Chapter positions held: Board Member Communications Director
- Marketing Membership Music Staff PR Chair
- President/Team Leader Secretary Show Chair Treasurer

Other:

- Competition Coordinator Chapter Coordinator Class Facilitator
- Coach Comm. Coordinator Comm./Tech. Coordinator
- Chair of Regl. Convention Directors' Coordinator Education Coordinator
- Events Coordinator Facilities Coordinator Finance Coordinator
- Marketing Coordinator Membership Coordinator Mkt./Member Coordinator
- Newsletter Editor PR Chair Secretary
- Teacher Team Coordinator Treasurer

Regional positions: _____

Other: _____

Five significant leadership roles held in Sweet Adelines: _____

International positions: Arranger Committee Chair Committee Member
 Faculty Judge International Board
 Panel Secretary

Other: _____

Activity (within the last five years)

- How many international conventions have you attended? _____
- What international education events have you attended? _____
- How many regional competitions have you attended? _____
 In what capacity (competing chorus, host, audience, etc.)
- What regional educational events have you attended? _____

Education/Employment Data

List education/training _____

Employment: No Yes
 Full-time Part-time

Occupation: _____

Past occupation(s): _____

Qualifications Profile

Check skills, strengths, or experiences that would be valuable to your region:

<input type="checkbox"/> Accounting/Bookkeeping	<input type="checkbox"/> Advertising/Marketing
<input type="checkbox"/> Central Mailing	<input type="checkbox"/> Computer Skills
<input type="checkbox"/> Contract Writing	<input type="checkbox"/> Convention Planning
<input type="checkbox"/> Desktop Publishing	<input type="checkbox"/> Education
<input type="checkbox"/> Financial Management	<input type="checkbox"/> Legal/Paralegal
<input type="checkbox"/> Motivational Leader	<input type="checkbox"/> Negotiator
<input type="checkbox"/> Program Manager	<input type="checkbox"/> Public Relations
<input type="checkbox"/> Workshop Planning	<input type="checkbox"/> Writing Skills
<input type="checkbox"/> Other _____	

When asked to volunteer, do you prefer positions that are:

<input type="checkbox"/> Short-term	<input type="checkbox"/> Long-term	<input type="checkbox"/> Working on-site
<input type="checkbox"/> Working at home	<input type="checkbox"/> Well-defined	<input type="checkbox"/> Open-ended
<input type="checkbox"/> Group work	<input type="checkbox"/> Working alone	<input type="checkbox"/> Product-oriented
<input type="checkbox"/> Concept-oriented	<input type="checkbox"/> Chair	<input type="checkbox"/> Committee member

If you are not interested in a position on the regional management team, move on to Regional Committee Activity Possibilities section of this form.

Please rank the following regional coordinator positions you are interested in holding (1 = highest priority, 8 = lowest priority):

<input type="checkbox"/> Communications Coordinator	<input type="checkbox"/> Directors' Coordinator
<input type="checkbox"/> Education Coordinator	<input type="checkbox"/> Events Coordinator
<input type="checkbox"/> Finance Coordinator	<input type="checkbox"/> Marketing Coordinator
<input type="checkbox"/> Membership Coordinator	<input type="checkbox"/> Team Coordinator

Please complete the following questions (50 words or fewer)

Why are you seeking a position on the Regional Management Team?

How do you feel you can contribute to the Region as a member of the Regional Management Team?

What specific skills, ideas, talents, etc., would you bring to the Regional Management Team?

As a member of the Regional Management Team, what do you see as the number one priority for the position in which you are applying?

What is your vision for the Region?

What should be the priorities for the region over the next five-10 years?

References

Please select references who have seen you work in this kind of leadership capacity and know you well enough to verify your qualifications related to service within the Region. Note: international headquarters staff and family members (for example but not limited to, spouse, partner, grandmother, mother, sister, daughter, aunt, etc.) are not eligible to provide references.

Name

Phone

Address

City/State/Province/Zip/Country

Name

Phone

Address

City/State/Province/Zip/Country

Name

Phone

Address

City/State/Province/Zip/Country

Regional Committee Activity Possibilities

Below is a list of the chair, coordinator, event, resource, and committee positions currently functioning in the region. Please read the list carefully and indicate your preferences.

- | | |
|---|--|
| <input type="checkbox"/> Arrangers' Coordinator | <input type="checkbox"/> Bylaws and Rules |
| <input type="checkbox"/> CAL Liaison | <input type="checkbox"/> Central Duplicating |
| <input type="checkbox"/> Chair of Regional Convention | <input type="checkbox"/> Coaching/Faculty |
| <input type="checkbox"/> Convention Steering Committee | <input type="checkbox"/> Database Coordinator |
| <input type="checkbox"/> Director Certification Program Coordinator | <input type="checkbox"/> Education Resource/Direction Committee |
| <input type="checkbox"/> External Public Relations | <input type="checkbox"/> Faculty/Director Training Coordinator |
| <input type="checkbox"/> Fundraising Coordinator | <input type="checkbox"/> Harmony Emporium |
| <input type="checkbox"/> Historian | <input type="checkbox"/> Internal Public Relations |
| <input type="checkbox"/> Leadership Workshop | <input type="checkbox"/> Membership Resource/Direction Committee |
| <input type="checkbox"/> Newsletter Editor | <input type="checkbox"/> Outside Sales |
| <input type="checkbox"/> Pep Rally Coordinator | <input type="checkbox"/> Quartet Activities Coordinator |
| <input type="checkbox"/> Regional Directory Coordinator | <input type="checkbox"/> Regional Library Coordinator |
| <input type="checkbox"/> Regional Scheduling Coordinator | <input type="checkbox"/> Site Selection Team |
| <input type="checkbox"/> Summer Enrichment Time | <input type="checkbox"/> Treasurer |
| <input type="checkbox"/> Young Women in Harmony Coordinator | |

Workshop Steering Committees:

- Area School Coordinator
- Leadership Workshop
- Other Workshops
- Summer Enrichment Time

Applicant Photo (Please attach a recent photo)

Return to Chair, Nominating Committee, Region # ___

Sample C—Job Descriptions for Regional Management Team Positions

A vodcast outlining each RMT Coordinator's duties has been created and can be found in the Leadership section of the Members Only portion of the Sweet Adelines website.

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 of minutes 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.
- Appoints staff to assist in the implementation of responsibilities as needed.
- Trains her successor.

Directors' Coordinator

- Represents the interests of regional directors on the Regional Management Team.
- Communicates with directors in her 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 her successor.
- Appoints staff to assist in the implementation of responsibilities as needed.

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 marketing events.
- Coordinates regional faculty visits to choruses.
- Maintains five-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 for approval 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 at international headquarters.
- Maintains comprehensive records and forwards materials to her successor.
- Trains her successor.
- Appoints staff to assist with the implementation of responsibilities as needed.

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 the 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.
- Oversees registration for all regional events.
- Maintains contact with appropriate staff members at international headquarters.
- Maintains comprehensive records and forwards materials to successor.
- Trains her successor.
- Appoints staff to assist in the implementation of responsibilities as needed.

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 Regional Management Team or for examination or audit at any time as directed by the 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.
- Provides financial information necessary to complete applications for corporate gifts/grants.
- Maintains contact with appropriate staff members at international headquarters.
- Maintains comprehensive records and forwards materials to successor.
- Trains her successor.
- Appoints staff to assist in the implementation of responsibilities as needed.

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 and retention plans.
- Works in coordination with the Events and Education Coordinators on marketing events.
- Works in coordination with the Communications Coordinator on 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.
- Initiates media opportunities including on-air interviews and feature stories.
- Maintains database of advertising contacts.
- Designs, negotiates, and buys advertising in local media.
- Sell advertisements in regional publications.
- Maintains contact with appropriate staff members at international headquarters.
- Maintains comprehensive records and forwards materials to successor.
- Trains her successor.
- Appoints staff to assist in the implementation of responsibilities as needed.

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 her 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 Marketing Coordinator on membership growth and retention plans.
- Visits and maintains regular contact with chartered and prospective 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 at international headquarters.
- Maintains comprehensive records and forwards materials to successor.
- Trains her successor.
- Appoints staff to assist with the implementation of responsibilities as needed.

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.
- Develops a support staff to assist in the implementation of her responsibilities such as chapter standing rules review and regional calendar.
- Maintains contact with appropriate staff at international headquarters.
- Maintains comprehensive records and forwards materials to successor.
- Trains her successor.
- Appoints staff to assist with the implementation of responsibilities as needed.

Sample D—Suggested Qualifications/Skills for Regional Management Team Members

Qualifications/Skills for all Team Members

- Planning/organization skills
- Communication skills
- Delegation skills
- Motivational skills
- Time availability appropriate to each position
- Flexibility and open-mindedness
- Good listening skills
- Positive approach to problem-solving

Communications Coordinator

- Relevant regional service or equivalent related experience
- Computer experience (word processing, database management)
- Journalism or publications experience
- Written communication skills
- Demonstrated ability to coordinate various activities simultaneously
- Ability to record meeting minutes accurately

Directors' Coordinator

- Experience as associate, assistant, or front-line director
- Demonstrated knowledge of the barbershop style
- Demonstrated ability to communicate effectively
- Demonstrated ability to facilitate discussions/meetings
- Demonstrated ability to synthesize information and present it accurately and effectively
- Knowledge of directors' needs (information gathering)
- Knowledge of Director Certification Program (DCP)
- Negotiation skills
- Accessible and approachable

Education Coordinator

- Relevant regional service or equivalent related experience
- Supervisory/management experience
- Demonstrated knowledge of barbershop style
- Demonstrated ability to assess educational needs of targeted learners
- Experience in planning curricula for educational events
- Experience in event planning

Events Coordinator

- Demonstrated event planning and site selection experience
- Demonstrated understanding of contract negotiations
- Demonstrated understanding of audio/visual equipment

- Knowledge of basic finance concepts
- Ability to travel
- Ability to coordinate various activities simultaneously
- Ability to work proactively
- Energy (stamina)

Finance Coordinator

- Relevant regional service or equivalent related experience
- Experience as chorus treasurer
- Thorough knowledge of accounting systems
- Experience in financial management (budgeting, investing)
- Ability to communicate financial plan
- Knowledge of accounting software (spreadsheets)
- Knowledge of contracts

Marketing Coordinator

- Relevant regional service or equivalent related experience
- Demonstrated marketing/public relations experience
- Demonstrated knowledge of barbershop style in order to market the organization effectively
- Knowledge of organization structure
- Presentation skills—written and verbal
- Ability to travel

Membership Coordinator

- Relevant regional service or equivalent related experience
- Demonstrated ability to communicate effectively
- Demonstrated ability to facilitate discussions/meetings
- Demonstrated ability to synthesize information and present it accurately and effectively
- Knowledge of members' needs (information gathering)
- Negotiation skills
- Accessible and approachable

Team Coordinator

- Relevant regional service or equivalent related experience
- Demonstrated facilitation skills
- Demonstrated understanding of corporate, regional, and chapter bylaws and rules
- Ability to coordinate various activities simultaneously
- Demonstrated understanding of strategic long-range planning

Sample E1—Confidential Potential Nominee Appraisal Form

(Note: The potential nominee’s name is included only in the cover letter.)

ID # _____

The member noted in the attached cover letter is seeking a position on the Regional Management Team. Please complete this form to the best of your knowledge. Information provided will remain confidential. If it is more convenient, this form may be duplicated on your computer, or answers may be typed on a separate sheet of paper.

- Please indicate how well and in what context you know the potential nominee.

- What strengths would she bring to the organization as a member of the regional management team?

- It is important that members of the Regional Management Team possess the following attributes/characteristics. Please rate the potential nominee in each area as follows:

0=Unknown, 1=Poor, 2=Below Average, 3=Average, 4=Above Average, 5=Good

- | | |
|--------------------------|---------------------------|
| ___ Appearance | ___ Attitude |
| ___ Communication-Verbal | ___ Communication-Written |
| ___ Confidentiality | ___ Cooperation |
| ___ Copes under pressure | ___ Dependability |
| ___ Flexibility | ___ Integrity |
| ___ Intelligence | ___ Leadership |
| ___ Objectivity | ___ Patience |
| ___ Self-confidence | ___ Self motivation |
| ___ Sense of humor | ___ Social Skills |
| ___ Timeliness | ___ Vision |
| ___ Vitality | |

- What is the one most important thing that you would like known about this potential member of the Regional Management Team?

- What is the one concern you have about this potential member of the Regional Management Team?

Signature: _____ Date: _____

Address: _____ Phone: _____

Return to Regional Nominating Committee Chair by August 15.

Sample E2—Confidential Potential Nominee Appraisal Compilation Form

(Note: The potential nominee’s name is included only in the cover letter.)

ID # _____

- Please indicate how well and in what context you know the potential nominee. (List relevant comments from references; any recurring concern or comment should be listed.)

- What strengths would she bring to the organization as a member of the Regional Management Team? (List strengths stated by references.)

- It is important that members of the Regional Management Team possess the following attributes/characteristics. Please rate the potential nominee in each area as follows: 0=Unknown, 1=Poor, 2=Below Average, 3=Average, 4=Above Average, 5=Good. (Add the scores given by each reference for each category. Divide the total score for each category by the number of references received. Write the average score for each category.)

- | | |
|--------------------------|---------------------------|
| ___ Appearance | ___ Attitude |
| ___ Communication-Verbal | ___ Communication-Written |
| ___ Confidentiality | ___ Cooperation |
| ___ Copes under pressure | ___ Dependability |
| ___ Flexibility | ___ Integrity |
| ___ Intelligence | ___ Leadership |
| ___ Objectivity | ___ Patience |
| ___ Self-confidence | ___ Self-motivation |
| ___ Sense of humor | ___ Social Skills |
| ___ Timeliness | ___ Vision |
| ___ Vitality | |

- What is the one most important thing that you would like known about this potential member of the Regional Management Team? (List relevant comments and recurring criticisms or compliments.)

- What is the one concern you have about this potential member of the Regional Management Team? (List concerns noted by references.)

Sample F—Chapter Voting Instructions for Membership Coordinator Position

The following procedures for balloting for the Membership Coordinator position on the Regional Management Team should be thoroughly reviewed prior to the time of balloting.

- The chapter president/team coordinator, upon receipt of balloting material from the Chair of the Nominating Committee, schedules a meeting for the purpose of balloting.
- If a regular meeting of the chapter is not scheduled within the time frame needed to meet the deadline for returning the ballot to the Chair of the Tellers Committee, the chapter president/team coordinator calls a special meeting of the chapter for the purpose of balloting.
- Prior to the meeting, the chapter president/team coordinator arranges to have a ballot prepared for each member of the chapter. Nominee qualifications are provided to chapter members for review prior to this meeting.
- Immediately preceding the balloting, the chapter president/team coordinator reviews with the chapter the qualifications of each nominee.
- The president/team coordinator appoints a tellers committee for the purpose of counting the votes. The nominee receiving the highest number of votes for Membership Coordinator is determined to be the selection of the chapter. (If balloting results in a tie, it must be resolved before the chapter's official ballot is cast.)
- The chapter secretary indicates the selection of the chapter for position by marking an "X" opposite the name of the nominee on the official ballot, and seals the official ballot in the proper envelopes in the presence of the chapter members. Do not enclose any other items in either of the official envelopes. If electronic voting is permitted by the region, the chapter secretary follows the instructions provided by the region to submit the ballot.
- The chapter secretary mails (or sends electronically, if allowed by the Region) the official ballot to the Chair of the Tellers Committee within 24 hours after chapter balloting has taken place. Ballots must be received on or before the deadline set by the Chair of the Regional Nominating Committee.

Ballots are declared invalid if:

- The outer envelope or evote is received after the deadline.
- The official envelopes are not used in mailing the ballot.
- The selection is recorded on an instrument other than the official ballot.
- More (or fewer) than one selection for the position is marked.
- Votes (write-ins) are cast for someone not on the official ballot.
- The chapter is not in good standing with the region, as defined in the *Regional Standing Rules*.

Sample Ballot

(Instructions to the chapter secretary: Use this sample ballot in preparing sufficient ballots for the members of the chapter.)

Nominees for Membership Coordinator For Region # _____ Management Team

Voting Instructions—Read Carefully

- Read the qualifications for each nominee.
- Mark an “X” by the name of one nominee only for the position. A vote for more than one nominee for the position will void this ballot.
- After marking the ballot, fold in half and return to the chair of the chapter tellers committee.

Select One Only for Membership Coordinator

(Arrange names in alphabetical order.)

Nominee 1. _____

2. _____

Sample G—Chorus Director Voting Instructions for Directors' Coordinator Position

The following procedures for balloting for the Directors' Coordinator position on the Regional Management Team should be thoroughly reviewed prior to the time of balloting.

- The chorus director reviews the qualifications of each nominee.
- The director indicates her selection for Directors' Coordinator by marking an "X" opposite the name of a nominee on the official ballot, and seals the official ballot in the proper official envelopes. Do not enclose any other items in either of the official envelopes. If electronic voting is permitted by the region, the director follows the instructions provided by the region to submit the ballot.
- The director mails (or sends electronically, if allowed by the Region) the official ballot to the Chair of the Tellers Committee as soon as possible so that it is received on or before the deadline set by the Chair of the Nominating Committee.

Ballots are declared invalid if:

- The outer envelope or evote is received after the deadline date.
- The official envelopes are not used in mailing the ballot.
- Selection is recorded on an instrument other than the official ballot.
- More (or fewer) than one selection is marked.
- Votes (write-ins) are cast for someone not on the official ballot.

Sample Ballot

Nominees for Directors' Coordinator for Region # _____ Management Team

Voting Instructions—Read Carefully

- Read the qualifications for each nominee.
- Mark an "X" by the name of one nominee only. A vote for more than one nominee will void this ballot.
- After marking the ballot, fold in half and return to the Chair of the Tellers Committee.

Select One Only for Directors' Coordinator

(Arrange names in alphabetical order.)

Nominee 1. _____

2. _____

Sample H—Official Ballot for Membership Coordinator

Region # _____ Management Team

Instructions to chapter secretary

- Immediately following the voting, indicate the chapter’s selection by marking an “X” opposite the name of the nominee receiving the highest number of votes for the position. If there is a tie vote, resolve the tie before the ballot is marked. Do not indicate a tie vote on the official ballot. Mark the ballot and enclose it in the official envelopes in the presence of the chapter members. If electronic voting is permitted by the region, follow the instructions provided by the region to submit the ballot.
- If the ballot, inner envelope, or outer envelope is lost or accidentally mutilated, please request a duplicate from the Chair of the Nominating Committee. Allow enough time before the election meeting to secure replacements if needed. Failure to use the official ballot or official envelopes could invalidate the chapter’s ballot.
- This ballot must be returned to the Chair of the Tellers Committee by _____.

Date _____

Name _____, Chair of Tellers Committee

Address

City, State, Zip

Select One Only for Membership Coordinator

(Arrange names in alphabetical order.)

Nominee 1. _____

2. _____

Sample I—Official Envelopes**Sample Official Inside Envelope (6" x 3-1/2")**

Preprinted with the following information:

- Seal ballot in this envelope (in the presence of the chapter membership for chapter elections).
- Seal this envelope (containing the ballot) in the official ballot envelope which is preaddressed to the Chair of the Tellers Committee.
- Mail within 24 hours after the balloting takes place (applicable to chapter elections only).
- This ballot must be received by the Chair of the Tellers Committee no later than (deadline). Any ballot arriving after that time will be declared invalid.

Sample Official Envelope (9.5" x 4.125")

Preaddressed to the Chair of the Tellers Committee (Be sure the name of the chapter or director is included in the upper left-hand corner of outer envelope.)

Chapter (or Director) Name

Address

City/State/Zip

Country

Official Ballot

Chair _____, Tellers Committee

Address

City/State/Zip

Country

Sample J—Sample Tally Sheet

Membership Coordinator Names (in alphabetical order) _____

Tally

Total

Place

Nominee 1. _____

Nominee 2. _____

Directors' Coordinator Names (in alphabetical order) _____

Tally

Total

Place

Nominee 1. _____

Nominee 2. _____

Sample K—Report of Regional Tellers Committee

The Regional Tellers Committee for Region # _____ met at _____(time),
_____ (day), _____ (date), at _____ (location).

Number of chapters in region: _____

Number of chapters in good standing and eligible to vote: _____

Number of chapter ballots received: _____

Number of ballots declared invalid: _____

- a. Chapter(s) not in good standing
- b. Unofficial ballot
- c. Voted for more or less than one
- d. Received late
- e. Unofficial envelopes if mailed

Total number of valid ballots: _____

Number of chorus directors eligible to vote: _____

Number of ballots received: _____

Number of ballots declared invalid: _____

- a. Unofficial ballot
- b. Voted for more or less than one
- c. Received late
- d. Unofficial envelopes

Total number of valid ballots: _____

List names of the nominees receiving the plurality vote: _____

Membership Coordinator _____

Directors' Coordinator _____

Signed: _____ Chair of the Tellers Committee

Teller #2

Teller #3

Teller #4

Acronyms

Acronyms Used by Sweet Adelines International

ACDA	American Choral Directors' Association
ACJ	Approved Candidate Judge
AHA	Acappella Harmony Academy
AJ	Approved Judge
ASAE	American Society of Association Executives
ASCAP	American Society of Composers, Authors, and Publishers
BL&R	Bylaws and Rules
BMI	Broadcast Music, Inc.
CAL	Chapter-at-Large
CAPAC	Composers, Authors, and Publishers Association of Canada, Ltd.
CC	Competition Coordinator
CJ	Candidate Judge
COC	Communications Coordinator
CPAA	Confidential Potential Applicant Appraisal Form
CRC	Chair of the Regional Convention
DC	Directors' Coordinator
DCP	Director Certification Program
EC	Executive Committee
ED	Education Coordinator
EDC	Education Direction Committee
EVC	Events Coordinator
FC	Finance Coordinator
GKT	General Knowledge Test (judging program)
GRC	Guide to Regional Conventions
IFC	International Faculty Coordinators
IFP	International Faculty Program
IJP	International Judging Program
IMAP	International Music Arrangers' Program
IMAPC	IMAP Coordinators
JCDB	Judging Category Description Book
JPR	Judge Progress Report
JS	Judge Specialists
MAL	Member-at-Large
MEC	Membership Coordinator
MKC	Marketing Coordinator

NAfME	National Association for Music Education (formerly MENC)
NATS	National Association of Teachers of Singing
OPL	Official Panel Liaison
PR	Public Relations
RLC	Regional Leadership Committee
RTC	Team Coordinator
VP	Vice President
YSF	Young Singers Foundation (on second reference use Foundation instead of the acronym)
YWIH	Young Women in Harmony

Matrix of Responsibilities (P = primary responsibility; S = support responsibility; X = shared responsibility)

Action	Team	Coordinator							
		Membership	Communications	Directors	Education	Events	Finance	Marketing	Team
Agenda Planning		S	S	S	S	S	S	S	P
Annual Regional Budget Development		S	S	S	S	S	P	S	S
Annual Regional Budget Approval	P								
Appoints Nominating Committee									P
Assessing Regional Needs	P	X	X	X	X	X	X	X	X
CAL Quartets - Quality Control & Education					P				
Chapter-at-Large Membership		P	S			S	S	S	
Chapter Date Clearance									P
Chapter Name Change					P			P	
Chapter Evaluations of RMT			P						P
Chapter Standing Rules									P
Chapter Separations	P							S	
Chorus Visits		S		S	P		S	S	
Communications Skills and PR								P	
Conflict Management		X	X	X	X	X	X	X	X
Contracts for Service/Equipment-Negotiation							P		
Controlling Regional Finance	S						P		
Convention			S		S	P		S	
Coordinates Regional Faculty Visits		S		S	P			S	
Coordinates Ways & Means							P		
Counseling Chapters	P	S		S	S		S	S	
Curriculum for Regional Events		S		S	P			S	
Directors Forum				P					
Directors Needs				P					
Dissolution of a Chapter	P							S	
Distribution of Regional Correspondence/Publications			P						
Event Registration			S			P	S	S	
Facility Inspection						P			
Faculty Development					P				
Fiscal Audit							P		
Fiscal Report							P		
Inactive Prospective Groups		P			S				

Matrix of Responsibilities (P = primary responsibility; S = support responsibility; X = shared responsibility)

Action	Team	Coordinator							
		Membership	Communications	Directors	Education	Events	Finance	Marketing	Team
Job Descriptions (Maintaining/Updating)						P			
Liaison between Chapters and RMT		P							
Liaison between Directors and RMT				P					
Long-Range Planning - Development	P	S	S	S	S	S	S	S	S
Long-Range Plan - Monitoring	S	S	S	S	S	S	S	S	S
Marketing Tools								P	
Meeting Planning for RMT Meetings						S			P
Meeting Procedures for RMT Meetings									P
Membership Growth		P		S	S			S	
Negotiates Site Contracts						P			
Presidents Forum		P							
Primary Media Contact								P	
Prospective Chapters		X			X				
Readiness for Public Performance					P				
Records and Files		X	X	X	X	X	X	X	X
Records of Regional Meetings			P						
Regional Calendar									P
Regional Contracts - Signature							P		
Regional Correspondence	S		P						
Regional Education Program	S				P				
Regional Events Mailing			S		P			S	
Regional Leadership Database			P						
Regional Meetings - Physical Aspects						P			
Reimbursements						P			
Revitalization		X			X				
Staff Development	X	X	X	X	X	X	X	X	X
Status of the Region	P								
Steps Toward Chartering		P							
Tax Considerations							P		
							P		

**REGIONAL MANAGEMENT TEAM
PEER REVIEW EVALUATION FORM**

Instructions: Please complete this form for the regional management team member.

Name: _____ Position: _____ Region _____

1. **Job Knowledge and Confidence** Needs Improvement Satisfactory Highly Effective
Comments: 1 2 3

2. **Planning and Organization** Needs Improvement Satisfactory Highly Effective
Comments: 1 2 3

3. **Judgment (Decision Making) and Problem Solving** Needs Improvement Satisfactory Highly Effective

Comments: 1 2 3

4. **Teamwork and Interpersonal Relationships** Needs Improvement Satisfactory Highly Effective

Comments: 1 2 3

5. **Integrity and Confidentiality** Needs Improvement Satisfactory Highly Effective
Comments: 1 2 3

6. **Communication Skills** Needs Improvement Satisfactory Highly Effective
Comments: 1 2 3

7. Initiative	Needs Improvement	Satisfactory	Highly Effective
Comments:	1	2	3

8. Flexibility and Innovation	Needs Improvement	Satisfactory	Highly Effective
Comments:	1	2	3

9. Dependability	Needs Improvement	Satisfactory	Highly Effective
Comments:	1	2	3

10. Overall Effectiveness in Performance	Needs Improvement	Satisfactory	Highly Effective
Comments:	1	2	3

What kind and how much contact have you had with this person?

What do you like best about working with this person?

Comments/Suggestions for improvement (Use back of form if necessary)

REGIONAL MANAGEMENT TEAM EVALUATION
(to be completed by chapters)

Chapter _____ Region _____

Instructions: The president/team leader, in consultation with the board/management team, completes this form based on their perception of the Regional Management Team as a whole. Rate each area on a scale of 1 to 5, with 5 being the highest rating.

AREA	WHAT TO CONSIDER	RATING
Communication from the region	Does the region make effective use of regional newsletters, forums, Websites, chapter visits, regional calendar, regional director? Does the chapter have advance knowledge of events?	
Planning and Organization of Events	Did the chapter receive advance description of events and faculty. Do events meet the needs of members? Are you aware of the region’s long-range plan for education?	
Effectiveness of Chapter Visits	Did the chapter receive a musical or administrative visit? Was information presented clearly? Was regional faculty effective?	
Uses Regional Resources Effectively	Did the region make efficient use of chapter visits, regional coaching? Are music schools interesting and well attended? Is the chapter aware of the regional budget; is the budget well-defined? Does the region provide educational materials, e.g., video tapes, books, guides, etc.?	
Sets and Maintains Membership Goals	Is the chapter aware of regional membership goals? Is there a forum for chapter membership coordinators? Are regional membership statistics shared with chapters? Does the region have membership retention programs in place?	

Briefly describe or identify the programs or activities the region has sponsored that are most beneficial to your chorus:

Additional comments:

EXAMPLE OF EDUCATIONAL PLAN

Who are the region’s audiences?

- Directors
 - Director’s forum
 - Mentoring Program
- Choreographers
- Musical Team
 - Assistant Directors
 - Section Leaders
- Visual Leaders
 - Costumers
 - Make Up
- Arrangers
- Administrative Leaders
 - Board of Directors
 - Management Teams
- General Members
- Quartets
- Regional Leaders
- Young Women in Harmony

Current Avenues of Education

Music Camp	Fall FEST	Specialty Training	Publications/Comm.
Directors Forum PR Society First Timers Presidents’ Forum Membership Magic Quartet corner Camp Choruses Quartet Coaching DCP Program Testing Modules PVI’s Choreography Corner REC Training	Directors Forum PR Society First timers Presidents’ Forum Membership DCP Program Testing Modules	Leadership Training Faculty Training Int’l. Training Arrangers Home Study YWIH Track Area Chorus Coaching and PVI’s Director One-on-One w/Int’l. Faculty Video Tape Coaching	Add-A-Line Website Directory Yahoo email group E-groups PR Choreography Directors Membership Quartets

New Educational Areas to Explore

- Judge Category Description Book
- Arranger Training
- Develop Positive Attitudes
- Directors as Performers
- Understanding Chorus Management by Teams
- Diversity Issues
- Quartet Coaching/Education
- How to Develop Quartets
- Small Chorus-Better Singing Quality/Business Issues
- Music Theory
- YWIH-Festivals
 - How to work with school choral directors
 - How to Work with Young Voices

No. 1 Priority for the Region: **Stronger Directors**

What skills do they need?

- **People Skills**
 - Positive Attitude
- **Teaching Skills**
 - Ear
 - Training Vocal
 - Production
 - Vowels
 - Recognition of problems
 - Music Selection
- **Ability to Assess the Needs of the Chorus**
 - On a nightly basis and set plan to address the needs
 - Understand the balance of expectations
- **Unity of Presentation**
 - Connection between music and choreography

Region XX Five-Year Plan

2013-14

Focus: Visual Presentation and Vocal Production

Audience	Music Camp, June <i>Faculty:</i> <i>The Stage Coaches</i>	Fall FEST, Nov. <i>Faculty: Karen Breidert</i> <i>plus one additional</i> <i>faculty to be named</i>	Others
Director	How to Teach Vocal Production Directors Rap	People Skills Vocal Production Follow up	
Musical Leaders			
General Membership	Small But Mighty Vocal Production Visual Presentation Resonation Music Theory PVI's First Timers	Vocal Production PVI's People Skills First Timers	
Admin Leader	Presidents' Forum - Hot Topic Long Range Planning Delegation PR Society Membership Magic	Presidents' Forum - Hot Topic Communication/ Listening Skills PR Society Membership Magic	
Choreographers	Visual Presentation Choreo <i>Jencik</i>		
Regional Faculty			May Faculty Training. <i>Faculty: Carmody</i>
Arrangers		Arrangers Track <i>Bailey</i>	
Quartets	Quartet Coaching <i>Faculty: Clipman</i>		

FACULTY VISITS

Five-Year Plan 2014-15

Audience	Music Camp Focus: Sound/ Music Categories, June <i>Faculty: Babb</i>	Fall FEST Focus: Small Choruses, November <i>Faculty: Miller</i>	Director/Music Ldr. Workshop Focus: Achieving Unit Sound, August <i>Faculty: Breidert</i>	Others
Directors	Directors Role in Membership Directors Rap			
Musical Leaders	Supporting Interp Through Vocal Prod. Techniques			
General Membership	PVIs First Timers			
Admin Leaders	President’s Forum - Hot Topic: Financials PR Society Membership Magic	Presidents’ Forum Membership Growth & Retention Team Building PR Society		
Choreographers	EXTRA DAY <i>Suggested Faculty: Marron</i>			
Regional Faculty				
Regional Leaders				May 21-23 Ear Training Analytical Listening How to Train Section Ldrs <i>Suggested Faculty: Gram</i>
Arrangers			Arrangers Training <i>Bailey</i>	
Quartet	Quartet Coaching <i>Suggested Faculty: Cleveland; Walters</i>			

FACULTY VISITS

Five-Year Plan 2015-16

Audience	Music Camp, June. Focus: Expression/Show Categories <i>Suggested Faculty: Clipman; Davis; Pinvidic; Kirkpatrick; Syverson</i>	Admin Leader Workshop August <i>Suggested Faculty: Zimmerman; Miller; Carmody</i>	CU in SC Pilot Program, Oct.	Others
Directors	EXTRA DAY Director One-on- One Directors Rap			
Musical Leaders			Section leaders	
General Membership	PVIs First Timers		PVIs Coaching Chorus	
Admin Leaders	President's Forum PR Society Membership Magic	Financials Membership Diversity Team Mgt. Positive Attitude	Membership	
Choreographers				
Regional Faculty				Faculty Training, May <i>Suggested Faculty: Louise Thompson</i> Consider doubling with Directors
Regional Leaders				
Arrangers		Arrangers Training <i>Bergman</i>		
Quartet	Quartet Coaching <i>Suggested Faculty:</i>			

FACULTY VISITS

Five-Year Plan 2016-17

Audience	Music Camp, June. Focus: Art of Barbershop <i>Suggested Faculty Hagerman; Postma; Vaughn; Lyford</i>	Director/Musical Ldr. Workshop Focus: Membership Growth August <i>Suggested Faculty:</i>	Fall FEST Focus: Quartets <i>Suggested Faculty: Wright</i>	Others
Directors	Technique & Artistry Directors Rap One-on-one with small chorus directors	Directors/Mus. Ldrs. Role in Membership	How to develop And promote Quarteting Quality Control	
Musical Leaders		Assessing Needs of Chorus and Development Plan to Address needs Ear Training Rehearsal Planning Long Range Pln.: Coaching Chorus Activities Contest		
General Membership	Vocal Production PVI's First Timers Members Role in Membership Growth Singing Part Smart		Ear Training How to Start a Quartet Mix & Match Sessions First Times	
Admin Leaders	EXTRA DAY Membership Growth & Retention President's Forum Pos. Attitude Not just the job Of the Member Chair PR Society Membership Magic	Financials Membership Diversity Team Mgt. Positive Attitude	Membership Magic PR Society President's Forum	
Choreographers	Art of Showmanship to enhance the BBSH Sound			
Regional Faculty				Faculty Training, May <i>Sug. Faculty:</i>
Regional Leaders				
Arrangers			Arrangers Training <i>Bailey</i>	
Quartet	Quartet Coaching <i>Suggested Faculty:</i>			

FACULTY VISITS

Five-Year Plan 2017-18

Audience	Music Camp, June. Focus: Get Your Act Together & Put It On Stage <i>Suggested Faculty: Lyford; Breidert, Howden</i>	Admin Leader. Workshop Focus: August <i>Suggested Faculty:</i>	Fall FEST Focus: <i>Suggested Faculty:</i>	Others
Directors	EXTRA DAY Planning Directors Rap Recognizing Members Assets Director One-on-One			
Musical Leaders, Choreographers & General Membership	Camp Choruses going through simulated year of preparation. Classes: Music Selection Interp Vocal Production Chord Design Emceeing Script Writing First Timers		Membership Retention Dealing with Stress Life after Competition	
Admin Leaders	President's Forum: Hot Topic Recognizing Members Skills PR Society Membership Magic	Financials Membership Diversity Team Mgt. Positive Attitude	Membership Magic PR Society President's Forum	
Choreographers	See above			
Regional Faculty				Faculty Training, May <i>Suggested Faculty:</i>
Regional Leaders				
Arrangers			Arrangers Training <i>Bailey</i>	
Quartet	Quartet Coaching <i>Suggested Faculty:</i>			

FACULTY VISITS

2013-2014 “Year of the Small Chorus and Quartet”

2013

RQA (Regional Quartet Association) Day – July 29 – Kathy Carmody

Fall Regional – Sept. 15-17 – Darlene Rogers

2014

Winter Regional – Jan. 19-21 – Mari Pettersson & Renée Porzel

RQA – July 28 – THE BUZZ

Side car: Spit and Polish – small chorus – judges

ROAR

2014-2015 “RMT Training and Faculty”

2014

Aug 4 – Paula Davis

Fall Regional – Sept. 14-16 – Britt-Helene Bonnedahl & Patty Cobb Baker

2015

Winter Regional – Jan. 25-27 – Cammi MacKinlay & Diane Porsch

Regional Competition – May 1-4

2015-2016 “Year of Musical Leadership”

2015

Fall Regional – Sept. 19-21 – Molly Huffman & Lynne Smith

2016

Winter Regional – Jan. 23-25 – THE BUZZ

Regional Competition – April 30 – May 3

RQA – July TBD

Side car: Directors –

ROAR

Fall Regional – Sept. 11-13 – Judy Pozsgay

Region 1 Strategic Plan 20XX 20XX

<u>GOAL</u>	<u>Strategy</u>	<u>Program/Activity</u>	<u>Action Steps</u>	<u>Time Frame</u>	<u>Status 1</u>
1. Provide quality education to enhance musical excellence	1a. Provide training and education for the Regional Faculty	Faculty Training Faculty training The Year of Musical Leadership		04 / /20XX 20XX -20XX	done ongoing
Vocal Production	1b. Provide training in vocal production	PVI class where people observe others having a PVI "How to teach PVIs" & "Rise and Shine" - Rogers "The Cornerstones of Vocal Health" - Lyford "How to do a PVI" - "Designing a PIP" - "The Mature Voice" - "Healthy Singing" – Rogers		Jan 20XX Sept. 20XX Jan. 20XX	done ongoing
	1c. Provide training in vocal production - breathing	Provide more PVIs at weekends "How to Teach VP" - " Integration of VP, Unit Sound & Expressive Singing" - "Rise & Shine"-Maybury "Getting an Upper hand on Breathing" - Lyford "Designing a PIP" – Rogers		Jan 20XX Jan. 20XX	done ongoing
	1d. Provide a way to increase the vocal production level of members	Provide an individual voice teacher to each chorus to give every member the opportunity for a minimum of two (2) PVIs. Host a PVI School "Designing a PIP" – Rogers		Jan. 20XX	done ongoing
Directors	2. Provide director education - educate to find new directors & assistants	Area school Novice Directors The year of the musical leadership		20XX -20XX Jan. 20XX 20XX -20XX	done ongoing
	2a. Provide training for directors in PVIs and how to teach them	How to do PVIs - Lyford How to do PVIs – Rogers		Jan. 20XX Jan. 20XX	done ongoing
	2b. Provide more hands-on help	Beginning Director class Area Schools "Beyond the Ictus" - Lyford "People Skills vs. Arm Waving" - "Lyford Conducting Skills" - Rogers		Jan. 20XX 20XX -20XX Sept. 20XX Jan. 20XX	done ongoing
	2c. Provide a way to have all front-line directors at the certified level or above in the DCP	Area Schools Regionals		20XX -20XX	ongoing
	2d. Provide some funding for new directors to attend Side by Side when tracks are offered for new directors				
	2e. Provide training in teaching skills	Area schools "Learning Music, Tips and Tricks" - Lyford		20XX -20XX Sept. 20XX	done ongoing HZ Reg 1

Region 1 Strategic Plan 20XX 20XX

<u>GOAL</u>	<u>Strategy</u>	<u>Program/Activity</u>	<u>Action Steps</u>	<u>Time Frame</u>	<u>Status 2</u>
	2f. Provide training in people skills	Area schools "Dealing with Difficult People" – Carmody		20XX -20XX Jan. 20XX	done ongoing
	2g. Provide training in problem solving/conflict management	Panel - feedback from successful directors Area Schools "Dealing with Difficult People" – Carmody		20XX -20XX Jan .20XX	done ongoing
	2h. Provide training in music selection	Area schools		20XX -20XX	ongoing
	2i. Provide training in rehearsal planning	Area schools		20XX -20XX	ongoing
	2j. Provide training about music staff training	Area schools		20XX -20XX	ongoing
	2k. Provide training in prioritizing	Area schools		20XX -20XX	ongoing
	2l. Provide training in performance packaging	Area schools "It's Showtime" – Pozsgay		20XX -20XX Sept. 20XX	done ongoing
	2m. Provide video critiquing	Director to direct a pre-assigned song to be critiqued (combine sing part smart, have someone direct, video them and critique it) Area schools Regionals		20XX -20XX	done ongoing
	2n. Provide a director mentor program	Area schools		20XX -20XX	in process
	2o. Provide training in riser placement				
	2p. Provide DCP training - module class - label it in the schedule	Area schools		20XX -20XX	
Coaching	. Provide training In coaching/ general education	Provide International Faculty to every chorus each year "The Art of Coaching" – Rogers		Jan. 20XX	done ongoing Reg 1

Region 1 Strategic Plan 20XX – 20XX

<u>GOAL</u>	<u>Strategy</u>	<u>Program/Activity</u>	<u>Action Steps</u>	<u>Time Frame</u>	<u>Status 3</u>
	a. Provide training on how to prioritize while coaching	Set up a 1-1 shadow coach "The Art of Coaching" – Rogers		Jan. 20XX	done ongoing
	b. Small chorus coaching	Small chorus coaching by International Faculty (Rogers "Small Chorus Coaching")			
	c. Coaching for all choruses	Provide every chorus the opportunity to be coached during class time at a Regional Weekend and to sing on the Show (cycle through choruses)			
	d. Provide training in coaching quartets	Regional weekends - RQA The year of the small chorus & quartet "The Art of Coaching" – Rogers		Jan. 20XX July 20XX 20XX -20XX Jan. 20XX	done ongoing
	e. Provide training in coaching choruses	Regional weekends Small chorus weekend with 4 judges, 2 in each room, move to be coached by the others		Jan. 20XX 20XX -20XX	done ongoing
Barbershop craft	4. Provide training about the craft Of barbershop	What makes it barbershop?			
	4a. Provide ear training	"The Art of Listening" – Rogers		Jan. 20XX	done ongoing
	4b. Provide training in harmony accuracy	"Pythagoras was Right On - The Emotional Impact of ..." Rogers		Jan. 20XX	done ongoing
	4c. Provide training in reading music	"Beginning Music Theory" - Lyford "Sight-Singing Made Easy" - Rogers		Jan. 20XX	done ongoing
	4d. Provide training in forward motion				
	4e. Provide training in unit sound - synchronization	"Unit Sound" - "Beyond the Ictus" - "Three Dimensional Sound" -Lyford "Creating Sight and Sound" - Lyford "How Movement Affects Sound" - Lyford "It Ain't All About You" – Lyford		Sept. 20XX Jan. 20XX	done ongoing HZ Reg 1

Region 1 Strategic Plan 20XX – 20XX

<u>GOAL</u>	<u>Strategy</u>	<u>Program/Activity</u>	<u>Action Steps</u>	<u>Time Frame</u>	<u>Status 1</u>
Visual Performance	. Provide training in choreo - video critiquing, advanced choreo, working with directors, getting it across the footlights	"The Year of the Performance" Program/Activity "Creating Sight and Sound" - Olson "You Want Me to do What on the Third Row?" - Lyford "How Much Movement Affects the Sound" - Lyford "Get Into the Groove" - Rogers "Physical Expression" – Rogers		20XX -20XX Sept. 20XX Jan. 20XX	done ongoing
	a. Provide training in creating choreography	The Do's and Don'ts of Teaching Choreography to the Whole Chorus "The Year of the Performance"		20XX -20XX	
	b. Provide video critiquing	Area schools Video critiquing "Score Sheet Review and Critique of Videos - Clipman		20XX -20XX Sept. 20XX Jan. 20XX	done ongoing
	c. Develop a plan to provide education to raise the performance and showmanship level of regional choruses and quartets	The Year of the Performance RQA Days		20XX -20XX	
	d. Provide training in makeup/grooming	"The Year of the Performance"		20XX -20XX	
	e. Provide training in characterization	"The Last 10 Points - Whose Song is it Anyway" -Clipman "What's the Story - The Eyes Have It" - Clipman		Sept. 20XX	done ongoing
	f. Provide training in audience rapport	"The Year of the Performance"		20XX -20XX	
Quarteting	. Provide quartet education	Regional weekends "Quartets Don't Just Sing, They Talk" - Rogers RQA Days The Year of the Small Chorus & Quartets		Jan. 20XX ----- July 20XX 20XX -20XX	done ongoing
	a. Develop a higher degree of excellence in the quartets in the region. Score at least C+ level, champions B/B+.				
	b. Provide Training In Music Selection				HZ Reg 1

Region 1 Strategic Plan 20XX – 20XX

<u>GOAL</u>	<u>Strategy</u>	<u>Program/Activity</u>	<u>Action Steps</u>	<u>Time Frame</u>	<u>Status 5</u>
YWIH	7. Provide training In YWIH promotion	Host a YWIH festival		Jan. 20XX	done ongoing
		Send a YWIH quartet to Rising Star Quartet Competition			
		Teaching and working with the YWIH age level		Jan. 20XX	done ongoing
Arranging	. Provide training in arranging	Annual Seminar - ROAR		May-0	
	a. Provide training in music theory	Meeting at events "Basic Music Theory" - Clipman "What the Average Chorus Member Needs to Know About Music Theory" – Clipman		Jan. 20XX	done ongoing
	b. Provide training in arranging at all levels	Arrangers networking "So You Want to Write a Song" – Bailey		Jan. 20XX	done ongoing
	c. Plan for future arranger education through the proposed arranging program, which will be provided by International in the future				
Section Leaders	. Provide training for section leaders	Area school "How to Develop a Physical Warm Up" - Clipman The Year of Musical Leadership		20XX -20XX Jan. 20XX 20XX -20XX	done ongoing
	a. Develop a plan to provide education for section leaders to help develop better unit singing and vocal growth within individual sections of choruses	Area school "Section Leaders Arise!" - Clipman The Year of Musical Leadership		20XX -20XX Sept. 20XX 20XX -20XX	done ongoing
Chorus Leadership	10. Provide Training In Chorus Leadership	Area schools "The Role of the Admin and Music staffs in the Life of a Chorus" - Clipman The Year of Musical Leadership		20XX -20XX Sept. 20XX 20XX -20XX	done ongoing HZ Reg 1

Region 1 Strategic Plan 20XX – 20XX

<u>GOAL</u>	<u>Strategy</u>	<u>Program/Activity</u>	<u>Action Steps</u>	<u>Time Frame</u>	<u>Status 6</u>
	10a. Provide training in people skills	Area schools			done
	10b. Provide training in image & impact				
	10c. Provide training in tools & resources				
	10d. Provide training in membership				
	10e. Provide training in marketing				
	10f. Provide training in the care of directors				
	10g. Provide training in understanding bylaws & standing rules				
	10h. Provide training in awareness of the organization's dimension				
Judging	11. Provide training in the Judging Program	"What it Takes to be a Judge" - Clipman "How to Score Big in the Sound Category - Clipman		Jan. 20XX Jan. 20XX	done ongoing
	11a. Provide training with the JCDB	"What it Takes to be a Judge" - "How to Score Big in the Sound Category" - Clipman Expression category - Clipman Score sheet review - Clipman Area Schools		Jan. 20XX Sept. 20XX Jan. 20XX	done ongoing
	11b. Provide training in level videos	"What it Takes to be a Judge" - "How to Score Big in the Sound Category – Clipman		Jan. 20XX	done ongoing done ongoing
Show Production	12. Provide training in show production	"The Year of Show....."		20XX -20XX	HZ Reg 1

Region 1 Strategic Plan 20XX – 20XX

<u>GOAL</u>	<u>Strategy</u>	<u>Program/Activity</u>	<u>Action Steps</u>	<u>Time Frame</u>	<u>Status 7</u>
	12a. Provide training in showmanship	"The Year of Show....."			
	12b. Provide training in choreo - visual plan - staging	"The Year of Show....."		20XX -20XX	done ongoing
	12c. Provide training in emcee work	"The Year of Show....."		20XX -20XX	done ongoing
	1 . Other	Develop a Star Chorus		20XX -20XX	Done
		Encourage choruses and the Region to fund directors to Side by Side and members to AHA.			
Performance	14. Provide training in performing	"Performance Level and How to Move Up" - TBD Performance Seminar		Jan. 20XX	done ongoing
	14a. Provide training in repertoire - performance packaging - balanced -selection	"Four on the Floor - Take a Break!" - TBD "Don't be Afraid to Make a Scene" - TBD "Overcoming Stage Fright" - TBD		Sept. 20XX Jan. 20XX	done ongoing
	14b. Provide training in emcee work	"Four on the Floor" - TBD		Sept. 20XX	done ongoing
Promote regional leadership excellence and develop new regional leaders	1 . Provide training in regional leadership	Training		Nov. 20XX June 200 04/20XX	Done Done
	1 a. Provide training in people skills				
	1 b. Provide training in communication	"Effective Meetings" - TBD "Using Computers to Improve Chorus Communication" – TBD		Sept. 20XX	done ongoing
	1 c. Provide training in team building				HZ Reg 1
	1 d. Provide training in unifying the team				

Region 1 Strategic Plan 20XX – 20XX

<u>GOAL</u>	<u>Strategy</u>	<u>Program/Activity</u>	<u>Action Steps</u>	<u>Time Frame</u>	<u>Status 8</u>
	1 e. Provide training in strategic planning				
	1 f. Provide training in doing your job	"Membership Retention" – TBD		Jan. 20XX	done ongoing
	1 g. Provide training in problem solving				
	1 h. Provide training in finding a successor	"So you want to be a leader?" "Meet the Regional Management Team"		Jan. 20XX Sept. 20XX	done ongoing HZ Reg 1

Information to include on a Membership Survey

Sweet Adelines Membership Information:

Name
Member Number
Address
City, State, Zip
Primary Chapter
Dual Chapter
Email
Home phone
Cell or Work phone
Fax

Chapter Positions Held

Board/Team Member
President/Team Leader
Director
Membership
Music Staff/Section Leader
Treasurer/Finance
Secretary/Communication
Show Chair
Choreographer
Marketing/PR
Other

Regional Positions Held

RMT Positions (name all)
Regional Faculty
Newsletter Editor
Webmaster
CRC
CC
Musical Coach
Other

Name the Regional and International events you have attended, when and how often

Name the International Positions you have held and International and Regional Programs to which you belong

Please check the major areas where you would like to volunteer

Communications (typing, record keeping, meeting preparations, surveys, reports, spreadsheets, history, mailings, goal setting, etc.)
Education (planning, YWIH, arranging, faculty development, instructor, DCP, choreography, emcee, public speaking, etc.)
Events (event planning, negotiations, venue selection, registration, regional calendar, etc.)
Finances (budgets, long-range planning, reporting, bank accounts, ways and means, contracts, investments, grant writing, etc.)
Marketing (communication, public relations, events marketing, media contacts, press releases, sales, etc.)
Membership (growth and retention, CAL and MAL members, bylaws and standing rules, strategic planning, etc.)

Please list your education (high school, college, advanced degrees, special training)

List your employment (full time, part time, retired) and current occupation

Members Only Education Center

Sweet Adelines International offers the most comprehensive, quality music education available anywhere in the world. To champion our dedicated singers, we have expanded our online and distance learning offerings with the online Education Center. It provides a one-stop portal for members to digitally access a vast assortment of educational materials, articles and eLearning tools. The Education Center is organized into eight areas of interest: directors/quartets, history, leadership, music, visual, voice and youth. Each section provides access to download archived newsletters and articles of interest, vodcasts and/or podcasts, webinars, handouts from previous educational seminars and much more.