



ADMINISTRATIVE GUIDELINES

MISSION STATEMENT: The purpose of The Symphony Guild, Inc. is to create, develop and promote an interest in symphonic music in the community of Charlotte and the surrounding metropolitan area and to provide financial and volunteer support to the Charlotte Symphony Orchestra Society, Inc., the Charlotte youth orchestras and symphonic educational activities.

The Symphony Guild of Charlotte, Inc. is the official name of our organization. **Please note that “The” is a part of our name and must be used at all times.** The Symphony Guild is a non-profit 501(c)(3) organization, Federal Tax ID #58-1998344.

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OFFICE INFORMATION:

The Guild maintains a virtual office with a part time (8 hours per week) Office Administrator. The Office Administrator checks email and telephone each business day.

Web Site: www.symphonymusicguildcharlotte.org

Email Address: office@symphonyguildcharlotte.org

Telephone Number: 704-525-0522

Address: The Symphony Guild of Charlotte, Inc.

338 S. Sharon Amity Road

PMB 308

Charlotte, NC 28211

The Guild maintains a storage unit at A Self Storage Center #3 on South Boulevard for record storage and supplies. In The Guild storage unit are any hard copy records The Guild must maintain according to our Retention Schedule, as well as other supply items. The inventory of supply items is maintained by the Office Administrator and posted on our web site under the "Our Story" heading and the "Resources" tab. Contact the Office Administrator to obtain any items on the Inventory list. Keys to the Storage Unit are held by the Office Administrator, President, President-Elect, Vice President of Management and Planning and the Office Manager.

Electronic files are maintained on The Guild computer which is backed up so that all records to be kept according to our retention policy are safe. The Guild scrapbooks are housed in the UNCC Special Collections and can be accessed at UNCC.

The Office Administrator reports under Management and Planning. Contact the Office Administrator directly for any assistance with Guild work. If you have a need that will require a large amount of time, contact the Vice President of Management and Planning so that this can be put on the Office Administrator's schedule. If there is an overload of work, the Office Administrator will contact the Vice President of Management and Planning or Office Manager to prioritize the work.

All members are asked to email or call The Guild Office to report any changes of name, address, or telephone numbers.

CALENDAR:

The Guild Master Calendar is posted on the website. Changes must be submitted to the Web Master.

DONATIONS:

All Guild members must keep The Guild informed about donations - individual and corporate, cash and gifts-in-kind. This must be done to comply with IRS regulations. The Donation Form can be found on The Guild web site under "Our Story" and then click the "Resources" tab. Follow the directions for completing and distributing.

MAIL AND BULK MAIL:

All Committee Chairmen must:

- 1) Have all invitations, programs, etc. approved by the appropriate Vice President and the President prior to printing anything that will be mailed.
- 2) Contact the Vice President of Management and Planning or the Guild Office Manager before printing anything that needs to be mailed to ensure that the printed material complies with Post Office regulations.

To mail items via Bulk Mail, The Guild must pay an annual Bulk Mail Fee and then a lesser per item fee and all envelopes must be in zip code order. The Guild Budget and Finance Committee has suggested that all Guild mailings be sent by bulk mail if cost justified. Each year, Management and Planning, with the help of the other Vice Presidents, will assess whether it is cost justified to use Bulk Mail.

The Post Office regulations may change so it is imperative that the current regulations are followed.

Bulk mailings can be made of at least 200 pieces in envelopes or post cards. They must be printed with The Symphony Guild return address and permit number (available via the Office Administrator), and the directions from the Post Office must be followed accurately. The Symphony Guild Office Manager is knowledgeable about bulk mail procedure, has all necessary forms and equipment and **must be consulted at least 2 weeks prior to the expected mailing date. TO ENSURE DELIVERY ALL DIRECTIONS MUST BE FOLLOWED EXACTLY. PLEASE REFER TO THE BULK MAIL INSTRUCTION SHEET.** Most important: any mailings of less than 200 pieces must have first class postage - even when the bulk mail envelopes are used. If the number of pieces to be mailed is slightly under 200, additional pieces may be addressed to the office to obtain the bulk mail rate.

LABELS:

Labels which can be run for mailings include these categories:

- Guild Members
- New Guild Members
- Past Presidents
- CSO Musicians
- CSO Staff
- CSO Board
- Oratorio Board
- Youth Orchestra Parents
- Junior Youth Orchestra Parents
- Arts and Science Council Board
- Guild Past-Attendee (Non-Member) Master Invitation List

The Guild Office Administrator must be contacted at least one week in advance for all label requests. All labels for bulk mailings will be sorted by zip codes. (See bulk mail instructions).

MAILING LISTS:

The "Noteables"/Youth Festival/Annual Report Mailing List includes the:

- Guild Members
- Youth Orchestras Parents
- CSO Board
- Arts and Science Council Board

The Mailing List for Guild parties (with the exception of the Guild Holiday Party) should always include the:

- Guild (Non-Member) Master Invitation List*
- Guild Members
- CSO Board
- Oratorio Board
- Targeted mailing lists, if the Party Chairman so requests.

The Guild Holiday Party Mailing List (at the discretion of the Guild President):

- Guild Members
- CSO Board Members

***It is MOST IMPORTANT that the Party Committee Chairmen give the Guild Office Administrator a list of attendees and addresses following any Guild party so that those who are not Guild members can be entered into the Guild (Non-Member) Past Attendee Master Invitation List, and they will be assured of receiving future Guild party invitations.**

A MAILING LIST REMINDER: Name and address updates are made periodically through the Guild Office Administrator. Every attempt is made to avoid duplications or omissions. **BEFORE PRINTING**, it is imperative that the Guild Office Administrator be contacted whenever there is a need for the mailing list. This is needed so that the request for labels can get on the Guild Office Administrator's schedule and to get a numerical count.

LANGUAGE ON INVITATIONS, DONATION REQUESTS AND OTHER PUBLICITY

- **All invitations, donation requests and other publicity must include this statement:**
 - Proceeds allow The Symphony Guild of Charlotte, Inc. to support the Charlotte Symphony Orchestras and youth music education.
- **Donation requests should also include the following statement:**
 - The Symphony Guild of Charlotte, Inc. is a 501(3)© organization and all donations are tax deductible.
- **If you sending invitations that have multiple ticket price levels, also include the following statement:**
 - Amounts over \$x are tax deductible.

STATIONERY: The Symphony Guild has letterhead stationery, bulk envelopes, Guild notepaper and postcards for members to use. **PLEASE NOTE: LETTERHEAD IS EXPENSIVE AND IS TO BE USED ONLY FOR OFFICIAL CORRESPONDENCE AND FOR ORIGINALS IF CORRESPONDENCE IS TO BE COPIED.** See storage inventory for current inventory. If additional items are needed, contact the Office Administrator.

Stamps available: Address correction requested/return postage guaranteed and the bulk mail indicia.

NOTEBOOKS:

The President prepares a list of documents that are in the virtual notebooks and where these documents can be found.

RECORDS: The Guild hard copy administrative and financial retention records are to be stored in The Guild Storage Unit. Responsibility for maintaining these records is under the Management and Planning team. Electronic records are stored on The Guild computer.

REPORTS:

All Vice Presidents and Committee Chairs must write a report at the end of the fiscal year preferably by The Guild Annual Meeting. Committee chairs should email their report to their Area Vice President for approval. The Area Vice Presidents should review and approve prior to emailing their report plus that of their committee chairs to the Office Administrator, the outgoing President and the incoming President.

REQUIREMENTS OF ALL ACTIVE AND ASSOCIATE MEMBERS:

Each year, the Board of Directors sets specific ticket purchase requirements to a Guild event or fundraiser for members. Active members are required to purchase a specific number of tickets at a set price, Associate members may be required to purchase fewer, and Patrons are usually not required to purchase any tickets.

RESPONSIBILITIES OF ALL ACTIVE, ASSOCIATE AND PATRON MEMBERS:

1. Provide active support to The Guild by attending Guild events and participating in Guild activities.
2. Offer help on any committee by contacting the chairman of that committee.
3. Submit suggestions to the appropriate committee chairman.
4. Direct anyone interested in becoming a Guild member to our web site, www.symphonymusicguildcharlotte.org, click on "Membership" and then click on "Join The Guild".
5. Email or call the Nominating Committee Chairman to suggest members for consideration for Board positions.
6. Email or call the Member Support/Recognition Chairman to report member news such as hospitalization, death in family and birth of baby.
7. Notify the committee chairman if you cannot fulfill your committee responsibility and try to find a substitute.
8. Email or call the Guild Office and the Member Renewals Chairman to report name, address and telephone changes.
9. Complete and return the Member Renewal Information Form and submit dues for upcoming year by date specified.
10. Write a note or call the Member Renewals Chairman if you wish to resign your membership.

SOFTWARE USAGE AND GUIDELINES:

This policy focuses on respect for, and protection of, intellectual property, especially software. As used in this policy, "software" includes traditional program software and other electronically published works. The Vice President of Management and Planning is assigned responsibility for execution of this policy within The Symphony Guild of Charlotte, Inc. It is the policy of The Symphony Guild of Charlotte, Inc., herein after referred to as The Guild, that all computers and software are to be used in responsible, efficient, ethical, and legal manner. Members of The Guild will not, in any way, violate software licensing laws, nor will they participate in any software piracy activities. The Guild fully understands that copyright law protects software unless it has been placed in the public domain. The owner of a copyright holds exclusive right to the reproduction and distribution of his or her work. Therefore, it is illegal to duplicate or distribute software or its documentation without the permission of the copyright owner. The Guild is committed to abide by these principles and legal obligations. All software, whether purchased or donated, will be used in accordance

with its license agreement. Copies will be made only for backup and archival purposes. It is contrary to the standards of conduct of The Guild to engage in the unauthorized duplication of software. Each member of The Symphony Guild of Charlotte, Inc. will be responsible for making a good faith effort at carrying out the intent of this policy. Any member who has reason to believe there has been a violation of this policy will be expected to make that reason known to the Vice President of Management and Planning. The Guild will purchase all software using appropriate procedures and will register all purchases with the vendor in order to gain access to help desk function(s) provided.

GUILD GLOSSARY:

- CSO: Charlotte Symphony
- CSO Address:
 - Charlotte Symphony
Two Wells Fargo Center
301 South Tryon Street, Suite 1700
Charlotte, NC 28282
- CSO Telephone: 704-972-2003
- CSO Tickets: 704-972-2000
- CSO Board - Guild representatives: The Guild has 2 voting representatives:
 - The President
 - The President-Elect.
- CSO Committees - Guild representatives:
 - CSO Executive Committee: The Guild President
 - CSO Finance Committee: The Guild President-Elect
- CSJYO: Charlotte Symphony Junior Youth Orchestra for grades 5-9
- CSYO: Charlotte Symphony Youth Orchestra for grades 9-12
- CSYOPA: Charlotte Symphony Youth Orchestra Parents Association
- Gold Book: Published annually by the League of America Orchestras, contains a wealth of information on education, service and fundraising projects from symphony support organizations around the country. Available at this web site - <http://www.goldbookonline.org>
- Guild Board: President, President Elect, Secretary, Treasurer, Assistant Treasurer, Vice President of Membership, Vice President of Enrichment, Vice President of Fundraising, Vice President of Marketing and Public Relations, Vice President of Management and Planning, Board Members at large, Board Advisors. Generally meets once a month.
- JYO: Junior Youth Symphony, same as CSJYO.