

The Symphony Guild of Charlotte, Inc.

ADMINISTRATIVE GUIDELINES

MISSION STATEMENT: The purpose of The Symphony Guild of Charlotte, 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, Incorporated, 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.

ALL INVITATIONS AND OTHER PUBLICITY MUST INCLUDE THIS STATEMENT:

Proceeds allow The Symphony Guild to support its enrichment projects, the CSO and youth music education.

TABLE OF CONTENTS

	Page
Office Information	1
Bulk Mail	2
Software Usage and Guidelines	3
Calendar	3
Donations	3
Keys	3
Labels	3
Mailing Lists	4
Stationery	4
Storage	4
Records	4
Notebooks	4
Reports	5
Member Requirements and Responsibilities	5
Guild Glossary	6

OFFICE INFORMATION:

The Guild office is a permanent location for Guild administration and record storage. Guild minutes, official records, reports, scrapbooks and member information files are stored there. Guild printed material is recorded and updated on the computer in the office.

Stephanie Levin is The Guild's office employee. The office is staffed from 10AM to 2PM on Monday and Wednesday.

Address: The Symphony Guild of Charlotte, Inc.
Park Seneca Building
1515 Mockingbird Lane, Suite 406
Charlotte NC 28209-3236

Telephone: 704 525 0522
e-mail: office@symphonyguildcharlotte.org
website: www.symphonyguildcharlotte.org

All members are asked to call The Guild Office and the Member Renewals Chair to report any changes of name, address, or telephone numbers.

A Guild volunteer, The Guild Office Manager, coordinates the work of the office employee. Ellen Crowley (telephone: 704.364.8646) is The Guild Office Manager for 2009-2010. Office work includes updating member information, updating forms, updating mailing lists, printing labels, entering and sorting interest sheets and talent information,

preparing the Notables newsletter for printing, designated bulk mailings, etc. Most of this work is listed on the Timeline for Guild Office Work. Any additional requests from Committee Chairmen or other members needing assistance with Guild work (typing, clerical, etc) must be made through the Vice President of Management and Planning or Office Manager and will be granted as time permits.

All Committee Chairmen must:

- (1) Call the Guild Office Manager before printing anything that needs to be bulk mailed.**
- (2) Have all invitations, programs, etc. approved by the appropriate Vice President and the President prior to printing.**

There is a copy machine in the office for members to use for Guild work. The member's name, number of copies, and project should be recorded on the tally sheet. Past committee reports and other information must be copied rather than removed from the office.

Any Guild committee meeting may be held at the Guild office. All meetings should be scheduled on the Guild office calendar by calling the Guild Office Manager. A conference rooms are also available for The Guild's use: room 414 has a conference table and 8 - 10 chairs to sit around the table. There is no charge for this room, but it is in frequent demand and can be scheduled, at the earliest, one month in advance. It must be reserved through The Guild Office Manager or the building management.

BULK MAIL:

The Guild Budget and Finance Committee has suggested that all Guild mailings be sent by bulk mail. The Guild has a return - postage guaranteed account for bulk mail. The Bulk Mail Permit number is #1226. **THE GUILD OFFICE MANAGER MUST BE CONSULTED BEFORE ANY INVITATION OR OTHER MAILING IS PRINTED TO ENSURE THAT THE PRINTED MATERIAL COMPLIES WITH POST OFFICE REGULATIONS.**

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 in the Guild office), and 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.

The Guild Office Manager is responsible for mailing:

- "Noteables" - copies, folded for mailing, to be received from the "Noteables" Editor
- the Guild's Annual Report - copies to be received from the immediate past Guild President
- the Directory - copies to be received from the Directory Chairman
- invitations to the Fall, Winter and Spring (Annual) General Membership Meetings -
- invitations (ready for mailing)
- the Volunteer Appreciation cards - copies to be received from the Member Support/Recognition Chairman

The Guild Office Manager is responsible for advising:

- the Chairmen (or Mailings Chairmen) for the Empty House Party, the Preview Party and any other parties of the Symphony Guild Designer House
- the Chairman (or Mailings Chairman) of the Spring Fashion Show/Fundraiser
- the Social Events Chairman about invitations to the membership for the Holiday Social
- the New Members Chairman about mailing the request for new member proposals to the membership
- the Member Renewals Chairman about mailing the interest sheets, committee guides and renewal letter to the membership; as well as the renewal invoice reminders
- the Symphony Guild Youth Festival Chairman about mailing invitations to this event
- the Guild Chairman about mailing the Annual Meeting Agenda, the Slate and the Nominating Referral Form
- other chairmen as the need arises

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 VP 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 VP 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.

CALENDAR:

In order to coordinate office use and needs, a master calendar is posted on the office bulletin board. It is the responsibility of the President, President Elect and each Committee Chairman to clear and record dates for all Guild related meetings and events by calling the Guild Office or the Guild Office Manager.

DONATIONS:

All Guild members must keep the Guild informed about donations - individual and corporate, cash and gifts-in-kind. Each Committee Chairman should have a copy of the Donation Form in the Committee notebook. If more forms are needed, the Chairman should call the office employee or the Guild Office Manager. All forms must be completed promptly and mailed to the Guild Office. A copy of each completed Donation Form should also be kept by the Committee Chairman for the committee report at the end of the year. (The Guild Treasurer will send a copy of the returned form to the Guild office employee for computer donation records.)

KEYS:

The Guild Office Manager assigns keys to the Guild office as follows:

June 1 - May 31: President, President-Elect, Secretary, Guild Treasurer, Designer House Treasurer, VP Membership, VP Management and Planning, VP Enrichment, VP Fundraising, VP Marketing, Designer House Chairman, Guild Office Manager, Guild Office Employee. Any member who would like to use the office when the office employee is not there should contact one of the above people. A security system has been installed at the Park Seneca Building. Contact the Guild Office Manager for entry on nights or weekends. The back outside door is generally open Monday to Friday until 8:00 pm and on Saturday until 6:00; it is locked on Sunday, so do not plan to go to the office on Sunday.

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 Employee or the Guild Office Manager must be contacted at least one week in advance for all label requests. All labels for bulk mailings must 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*	Oratorio Board
Guild Members	Targeted mailing lists, if the Party Chairman so requests.
CSO Board	

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 Employee a list of attendees and addresses following any Guild party so that these names can be entered into the Guild (Non-Member) Past Attendee Master Invitation List, and they will be assured of receiving future Guild party invitations.**

ALL INVITATIONS AND OTHER PUBLICITY MUST INCLUDE THIS STATEMENT:

Proceeds allow The Symphony Guild to support its enrichment projects, the CSO and youth music education.

A MAILING LIST REMINDER: Name and address updates are made periodically through the Guild Office Manager and the office employee. Every attempt is made to avoid duplications or omissions. It is imperative that the Guild Office Manager be contacted whenever there is a need for the mailing list. This should be done BEFORE PRINTING to get a numerical count and to get the request for labels on the Guild computer schedule.

STATIONERY: The Symphony Guild has letterhead stationary, bulk envelopes, Guild notepaper and postcards for members to use. There is a sign-out sheet above the stationery credenza to note the number/kind taken. The Office Manager is responsible for reordering stationery. PLEASE NOTE: LETTERHEAD IS EXPENSIVE AND IS TO BE USED ONLY FOR OFFICIAL CORRESPONDENCE AND FOR ORIGINALS IF CORRESPONDENCE IS TO BE COPIED.

Stamps available: Guild name/address, address correction requested/return postage guaranteed and the bulk indicia.

STORAGE: The Guild mini-warehouse storage is at Morning Star Mini Storage, located on Monroe Road, and includes old records, scrapbooks, party glassware, Symphony Guild Designer House supplies and various other items. Contact the Records Manager or the VP of Management and Planning for information. All items are borrowed on a first-come, first-served basis. PLEASE NOTE: NOTHING IS TO BE REMOVED OR RETURNED TO STORAGE WITHOUT CONTACTING ONE OF THE ABOVE PEOPLE; SPACE IS LIMITED!

RECORDS: Guild administrative and financial records are to be stored in the Guild Office and at Morning Star Mini Storage. The Guild Records Manager is responsible for the ongoing maintenance of these records.

NOTEBOOKS:

The President prepares board notebooks with the assistance of the Notebook Manager, the President-Elect, and the Vice Presidents.

Suggested contents:

For Area Vice Presidents and Committee Chairmen
Directions for obtaining online information
Calendar of Events
Past reports and job description
Financial Forms

Budget and Check Request
Board and Committee Chair Address
and Phone List
Major Functions of Board Members
Primer for Committee Chairs
Website Protocol and Marketing Guidelines
Charlotte Symphony Administrative Directory
Past Minutes and Action Items
Guild Brochure
CSO Season Brochure

Additional Material for Area Vice Presidents

Job Descriptions within that Area
Lists of volunteers for the respective Area committees
Lists of talents of members
Copies of the last three years of reports within that area
(summary reports from the Chairmen)

REPORTS:

Reports are to be written and turned in not later than the April Guild Board Meeting. The Guild notebooks are to be turned in at the April Guild Board Meeting. The Vice President of Management and Planning will oversee the filing of all reports in the Guild Office.

All Vice Presidents and Committee Chairs must write a report and submit **5 copies** (Exception: Symphony Guild Designer House Chair and Committee – see below). These 5 copies should be given to the out-going President and distributed to:

- The out-going President's notebook
- The in-coming President
- The incoming Vice President in that Area
- The incoming Committee Chair
- All remaining copies should be on file in the Guild Office

SYMPHONY GUILD DESIGNER HOUSE REPORTS

All Vice Chairmen and Committee Chairmen reports are to be written and turned in not later than the Designer House wrap up meeting. They will be collected by the SGDHD Chairman or the SGDHD Secretary. The Designer House notebooks are to be turned in at the Designer House wrap up meeting.

All Vice Chairmen and Committee Chairmen will write a report and submit 5 copies to the SGDHD Chairman. The incoming SGDHD Chairman should distribute the copies to:

- The SGDHD Chairman's master notebook
- The Vice-Chairman's notebook
- The Committee Chairman's notebook

REQUIREMENTS OF ALL ACTIVE AND ASSOCIATE MEMBERS:

Each year the sitting Board of Directors sets specific requirements for members with respect to the purchase of tickets to a Guild event or fundraiser. Active members are required to purchase a specific number of tickets at a set price, Associates are 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 chairmen.

4. Complete the New Member Recommendation form or call the New Member Chairman to suggest friends for membership, and help acquaint New Member friends with the Guild. (Members may join at any time during the year.)
5. Call or write the Nominating Committee Chairman to suggest members for consideration for Board positions (including self-referrals).
6. Call the Member Support/Recognition Chairman to report news of any member's new baby or death in a member's immediate family.
7. Notify the committee chairman if you cannot fulfill your committee responsibility and try to find a substitute.
8. Call or write 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 the Interest Sheets. Mail, along with dues for the coming year, to the Member Renewals Chairman by date specified on form.
10. Write a note or call the Member Renewals Chairman if you wish to resign your membership.

GUILD GLOSSARY:

CCASID: Carolinas Chapter of the American Society of Interior Designers.

CSO: Charlotte Symphony Orchestra

<p>CSO Address: Charlotte Symphony 1300 Baxter Street, Suite 300 Charlotte, NC 28204</p>	<p>CSO Telephone: 704-972-2003 CSO Tickets: 704-972-2000</p>
--	--

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
 CSO Nominating Committee: The Guild President

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: A book, published annually, containing a wealth of information on education, service and fundraising projects from symphony support organizations around the country. Copies from several years past are on file in the Guild Office for members to use.

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.

Guild Research Library: A collection of material stored in the Guild Office for members to use including past reports, scrapbooks and ASOL Gold Books.

JYO: Junior Youth Symphony, same as CSJYO

LAO: League of American Orchestras - a national organization. An annual meeting is held in June in varying locations around the country. Several representatives from the Guild usually attend.

SGDH: Symphony Guild ASID Designer House

SGDH Officer of the Day: One person, other than the House Chairman, who is responsible for all of the operations of the House on the given day, from turning on the lights in the morning to turning off the lights at the end of the day.

SGDH Parties:

Fundraising parties traditionally planned by the House Committee include:

The Empty House Party - a casual party usually held in June after the Guild takes possession of the House but before the designers begin their work.

The Preview Party - an evening with dinner and dancing to celebrate the opening of the House.

All members are invited and encouraged to attend the parties. Other parties and events may also be held as determined by the House Committee.

SOVA: Southeastern Orchestra Volunteer Association - a regional symphony volunteer organization. An annual conference is held in varying locations throughout the southeast. The Guild encourages all members to attend.

Youth Orchestras Committee: A committee of representatives from The Guild, Youth Orchestra parents and the CSO, which oversees and promotes activities of the Youth Orchestras. Meets at one to two month intervals.

Revised 09/2009