

Policies and Guidelines **The Symphony Guild of Charlotte, Inc.**

Introduction:

The Policies and Guidelines are to assist members in performing required volunteer tasks efficiently, keeping in mind The Guild's relationship with The Charlotte Symphony Orchestra Board, staff, musicians, and the public-at-large.

It is imperative to establish unity in order to achieve the heights anticipated for The Symphony Guild of Charlotte, Inc. in the next decade.

These Policies and Guidelines will also enable the volunteers of The Guild to reach goals by saving time and effort.

It is the responsibility of members to support the work of The Guild by active participation in its projects, special events, and community outreach for the benefit of the CSO, Youth Orchestras, and youth music education.

The President of The Symphony Guild of Charlotte is the official spokesperson for The Guild. All invitations and other publicity must include this statement: **Proceeds allow The Symphony Guild to support its enrichment projects, the Charlotte Symphony and youth music education.** Prior to typesetting, all printed materials must be approved by the appropriate Vice President and the President.

The membership list shall not be used for any purpose outside a Guild activity without Board approval. The Symphony Guild of Charlotte is financially committed to the continued growth of the Charlotte Symphony Youth Orchestras. There will be no refund of dues or monies received in payment for The Symphony Guild of Charlotte activities. Guild projects administrative expenses shall be covered by fundraising income. Dues shall be used to defray operating expenses.

All officers and members of the Board of Directors must be members in good standing of the organization. All officers, Board members and committee chairs are responsible for training the immediate successors to their positions. The immediate Past President shall serve as a member of the executive committee. All Board and committee chairs are expected to invite the President, President Elect and appropriate Vice President to all meetings. All major decisions must be scrutinized for long-term consequences approved by the Board. Each committee chair is responsible for contacting all members who have expressed interest in working on the respective committee's project. The Standing Committee Chairs will be selected from the elected directors by the Vice President Elect of Management and Planning after consultation with the President Elect. The Designer House Chair shall serve a two-year term on the Board of Directors beginning June 1 of the chairmanship year.

The Nominating Committee will consist of the three (3) most immediate Past Presidents, the President Elect, and two members at large selected by the Nominating Committee and approved by the Board. The Past President serving her last year on the Nominating Committee shall serve as Chair of the Nominating Committee and be a non-voting member of the Board of Directors for that year. The President Elect is a non-voting member of the Nominating Committee. This Committee is to present the proposed slate of officers no later than December. The Committee will solicit the membership for nominations to the slate. The Committee shall choose two non-voting Advisors to the Board to serve staggered two-year terms and one voting member, the Past Presidents' representative. The President Elect nominee will choose The Symphony Designer House Chair as soon as possible after consulting with the chair of the Nominating Committee. No member of the Nominating Committee may be proposed for a voting position on the slate. The Nominating Committee consists of the three immediate past presidents and two at-large members elected for one year. The at-large members of the Nominating Committee cannot serve two consecutive terms.

All contracts pertaining to The Symphony Guild of Charlotte activities must be signed by the President or President Elect.

Membership in The Guild is open to anyone interested in supporting The Guild and its projects in the community. New members are proposed by existing members or may apply personally to the New Member Chair. The Guild will accept new members throughout the fiscal year. After December 1, dues paid will be credited for the following year. New members will attend a new member orientation.

All **Active Members** shall be financially responsible for a ticket(s) for a fundraising project or event chosen by the Board; volunteer for one (1) Enrichment project; and volunteer for one (1) additional committee project. An associate member must have been an active member in good standing for two years. **Associate members** shall have financial responsibility for fewer tickets than active members.

Members who have not satisfied their ticket purchase responsibility by November 1st of each year shall have all benefits of Guild membership suspended until payment for those tickets has been received by The Guild Treasurer. Such benefits include mailing of *Noteables* and invitations. The President and Vice President of Membership shall evaluate each case and the reasons for non-payment, and they, in agreement, may decline to suspend any member whose situation includes good reasons for non-compliance with Guild membership policies.

All Past Presidents shall have life membership status and will have no dues or other membership requirements. They will receive all mailings. A person who joins The Guild is considered a new member for a period of one (1) year. A former member rejoining after an absence of three (3) or more years will be considered a new member.

Section 1. The President shall:

- a. Preside at all meetings of The Guild, the Board of Directors and Executive committee.
- b. Supervise the work of The Guild and coordinate the General Meetings and Board Meetings.
- c. Appoint special committees, as deemed necessary.
- d. Sign checks at the request of the Treasurer.
- e. Be an ex-officio member of all committees except the Nominating Committee.
- f. (May) appoint additional members to the Board.
- g. Serve on the Board of Directors of the CSO, the CSO Budget and Finance Committee, and the CSO Nominating Committee.
- h. Update and inform the CSO Board of The Guild's activities at the CSO Board's regularly scheduled meetings; and inform The Guild Board of CSO activities at regularly scheduled meetings.
- i. Be the liaison between The Guild and the Executive Director of the CSO and meet regularly with the Executive Director.

Section 2. The President-Elect shall:

- a. Preside at all meetings of The Guild, the Board of Directors and Executive Committee in the event of the President's absence, resignation or inability to serve and shall perform such services as may be requested by the President.
- b. Be responsible for the appointment of The Designer House Chair for the following year and for selecting the Designer House, if appropriate.
- c. Attend regularly scheduled meetings with The Guild President and CSO Executive Director.
- d. Be a non-voting member of the Nominating Committee.
- e. Be a member of the Youth Orchestra Committee.

Section 3. The Vice-Presidents of Membership, Enrichment, Fundraising, Management and Planning, Marketing and Public Relations.

Please see job descriptions filed in The Guild Office, and in each notebook provided for each Vice-President.

Section 4. The Secretary shall:

- a. Keep and distribute the minutes of all meetings of The Guild, including those of Board of Directors and the Executive Committee.
- b. E-mail copies of all minutes to The Guild office.
- c. Conduct any correspondence as may be assigned.

Section 5. The Treasurer shall:

- d. Deposit all funds and other valuable effects in the name of The Guild in such repositories as may be designated by the Board of Directors.
- e. Keep an itemized account of all receipts and disbursements in accordance with the requirements of The Guild.
- f. Disburse funds for The Guild as may be ordered by The Board of Directors.
- g. Report periodically to the President and the Board of Directors all transactions and the financial condition of The Guild.
- h. Attend (with the Assistant Treasurer) the first meeting of each major committee to review and explain financial guidelines and forms.
- i. Serve (with the Assistant Treasurer) on the Budget and Finance Committee.

GUIDELINES FOR COMMITTEES:

Chair and/or Co-chair of Committees

It is IMPERATIVE for Chairs and all committee members to follow these guidelines.

- Select an Assistant who will be willing to chair the committee the following year.
- Prepare a budget by establishing a financial goal for the function.
- Committees are encouraged to be innovative and creative; however, for smooth and efficient functioning of The Guild the following parameters must be met:
 - Must invite the President and President-elect to all meetings to be kept informed.
 - Must invite the Vice President to whom the committee reports to all meetings, so that person will be kept informed.
 - Must invite the Treasurer and Assistant Treasurer to the first committee meeting to discuss financial procedures
 - Prepare a final Committee report including an Expense and Income statement, and make five (5) copies.

Budget:

- The Guild shall sponsor the President and President-Elect or an appointed delegate to the LAO National Conference and provide expenses as decided by the Board of Directors and included as an item in the annual budget.
- Establish a ballpark budget for each committee or event, and be certain the Treasurer is included in the process.
- Be aware of the overall budgetary goals of The Guild's commitment to the CSO for the current year of the event.
- All items purchased for use by the committee must be placed in the budget.
- Try to pay for purchases with payment direct from Guild Treasurer instead of reimbursement.
- Refer to Financial Guidelines as set up in this manual.

Correspondence:

- When writing to individuals, groups, etc., use The Guild's stationary with letterhead. Write "On behalf of The Symphony Guild of Charlotte, Inc."
- Stationary is kept in The Guild Office.
- Send a copy of your correspondence to the President of The Guild and the Vice President of the appropriate committee for approval.
- **Thank you notes are essential.** Each chair is responsible for having thank you notes written for each project. You need not send copies of hand written notes – a list of thank you notes will be enough to the President or Vice President.
- Invitations to any Guild event must be sent to all Symphony Guild members.

Solicitation:

- When seeking funds/donations/prizes for any event, the committee chair must clear with the Chair or Chair elect of the Sponsorship Team.

Music:

- If music for an event is to be provided through the CSO office, take these steps:
 - Arrange through the appropriate Vice President of The Guild with the General Manager of the Staff.
 - Include in the committee's budget, if need be.

Public Relations:

- All public relations should be handled by the Vice President of Marketing and Public Relations.

Photographer:

- We wish to record all efforts and events of The Guild. Contact the Vice President of Marketing and Public Relations.

Access to the Board of The Guild:

- Advise the President of any issue you wish to place on the agenda for the upcoming Board of Directors meeting as early as possible.

Appointments with CSO Staff:

- Appointments with the Staff must be made in advance
- Be sure you know the person who can help you the most. If uncertain, contact the Vice President under which your committee reports to the Board.
- Be cognizant of performance dates – Days on which concerts are given and avoid appointments on those days.

Symphony Center – PAC:

- When holding meetings or events at the Blumenthal, arrangements should be made well in advance with the Operations Manager of the Symphony Staff to reserve the room or space needed.

General Meetings:

- The President coordinates General Meetings. The Hospitality Chair and her committee will provide for the refreshments, centerpiece and clean-up.

Confidentiality:

- If critical or controversial questions arise, please first contact the President of The Guild.
IMPERATIVE!
- Do not take your problem into the public eye (by talking outside the committee or The Guild Board).
Re: Orchestra, staff, The Guild, etc. Your comments do return to the Symphony organization members and a great deal of misunderstanding occurs.
- Image must be kept in mind at all times and we wish to portray to the public positive thoughts.
Remember our purpose – ultimately benefiting the Charlotte Symphony Orchestra Society, Inc., the Charlotte youth symphonies and symphonic educational activities.
- When voicing your concern to the President of The Guild, your President will convey fairly as much as can be revealed to help you gain a more complete picture of the situation.

Happy Volunteering for The Symphony Guild of Charlotte, Inc.