

# Columbia Bands

## Operating Procedures

### Introduction

The Operating Procedures contain information about the bands, including policies and guidelines created by the Board of Directors regarding such topics as Member responsibilities, music, concert dress, formation of new affiliated ensembles and anything else that may be necessary. The Columbia Bands (CBI) Operating Procedures are not meant to contradict the band Constitution or By-Laws, and may be changed at any time by the Board.

Except where noted, the Operating Procedures apply to all affiliated ensembles (the Columbia Concert Band, the Columbia Jazz Band, Flute Cocktail, and others as formed.)

### Fiscal Year

The fiscal year shall be July 1 to June 30.

### Dues

The Board has set annual dues at:

- Columbia Concert Band - \$70 per person, or \$100 for a family.
- Columbia Jazz Band - Donation
- Flute Cocktail - \$60 per person

Members joining during the year will pay prorated dues according to the following schedule:

July 1 to December 31: Full Dues

January 1 to June 30: Half Dues

No dues for summer only participation, but ineligible to vote at the May meeting.

### Membership Eligibility

General Membership requirements are defined in the By-Laws. The By-Laws state that Members under the age of 18 may be admitted with permission of the Board. The Board has agreed that the ensemble Directors may admit younger Members according to the following policy:

It is suggested that Members shall have reached at least tenth grade, although the Director may choose to make exceptions in cases such as a child whose parent or private instructor plays in the Band. Public school students are strongly encouraged to be active in their school Band programs. If they are not, the school's Band Director may be contacted to ensure that Columbia Band ensembles are not *competing* with the school music program.

New Members are accepted into a performing ensemble with the Director's approval. The Music Director of each ensemble determines the music requirements and Membership of their performing ensemble and may adjust and change Membership at

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their discretion. The Music Director is responsible for ensuring that the new Member receives information on the location of and their responsibility to the By-Laws, Members Code of Conduct, and Grievance Policy. Members are responsible for following the Code of Conduct and abiding by all policies approved by the Board of Directors. The Grievance Policy will be utilized to address all issues Members cannot resolve on their own including breaches of the Code of Conduct.

### **Release of Photographic, Audio, and Visual media**

By participating in CBI ensembles, you grant permission for CBI, concert event personnel and the media to use any photographs, audio or video recordings from rehearsals and performances for promotional material, organizational documentation, advertising and publicity. You waive any right to inspect or approve the finished product, including written copy that may be created in connection with such images. You hereby release CBI and its legal representatives from any and all claims and liability in regard to said photographs, audio and video recordings and associated written copy.

### **Attendance**

The musical success of the Band is dependent upon weekly rehearsals with all Members who will perform at the concert. Therefore, the ensembles shall not exist as “drop-in” organizations. All Members are expected to consistently attend rehearsals except in the event of travel, illness, or other emergency. Attendance guidelines are as follows:

1. In the case of travel, illness, or other emergency, the section leader and director should be contacted. Section leaders shall follow up on all unexplained absences with a telephone call or email.
2. If a Member is frequently absent or expects to miss several upcoming rehearsals, he/she should meet with the Director to decide what is most beneficial for the Band in terms of a leave-of-absence, etc. The Director may request a consultation with any Member to discuss participation at upcoming performances if there is a concern about attendance.
3. Members who are not able to perform on a concert should consult with the Director regarding appropriateness of attendance at the corresponding dress rehearsal.

### **Marking Music**

All Members are asked to mark their music as frequently as necessary to ensure that individual mistakes are not repeated and that all ensemble interpretations, as stated by the Director, are noted. Upon return after an absence, markings from the previous rehearsal should be obtained from a section Member.

### **Section Leaders**

The By-Laws Article VI Section 2 allows the Board of Directors and the Music Director to select a section leader for each section.

For the Concert Band, the following section leader positions shall be filled:

- Flute
- Double reeds
- Clarinet/low clarinet

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- Saxophones
- Trumpet
- Horn
- Trombone
- Euphonium
- Tuba
- Percussion

The Concert Band section leaders' responsibilities shall include:

- Ensuring that all parts are covered. If there are not enough players to cover all parts or if parts appear to be too difficult, the Director shall be notified.
- Insuring that each Member of the section has a part to every piece in the current repertoire.
- Assigning solos to section Members who can comfortably play the excerpts and who have excellent attendance records.
- The physical setup of the section within the ensemble. Although rotation of parts is encouraged where appropriate, every effort should be made to organize the section in a manner that is logical for both players and the Director (i.e.: Members playing the same part should sit together) and that promotes good musical balance.
- Maintaining an ongoing attendance record for the section. Any unexplained absence shall be followed up with a phone call or email to pass on pertinent information and to verify that the section Member is intending to continue rehearsing with the Band.
- Keeping the Director informed about attendance concerns within his/her section.
- Disseminating pertinent information to the section.

## **Organizational Management**

The month to month management of the organization is handled by the Board of Directors. Generally, the Board of Directors meets monthly. Meeting dates and times should be publicly announced and open to Membership. Whenever possible, dates and times for the meetings should be included in the calendar distributed to Members quarterly. The Board of Directors operates according to the Board Code of Ethics (Appendix A). To ensure smooth transitions between Boards, a master calendar has been created to specify all management deadlines (Appendix B). The master calendar should be reviewed and updated with the election of each new Board. A task list by fiscal year has been created to assist in ensuring the timely completion of all Board management tasks (Appendix C). This also must be maintained and updated by the incoming Board each year. Individual tasks in the organization are often handled by at-large volunteers not included on the Board of Directors. To ensure smooth transitions between volunteers in set positions, the volunteer job descriptions (Appendix D) must be provided to new volunteers and should be updated annually by the Board. A current volunteer list should also be available (Appendix E).

## **Ensemble Scheduling Conflicts**

The directors and managers of the CBI ensembles are responsible for minimizing potential scheduling conflicts within the organization. However, musicians participating in multiple ensembles within the organization will occasionally experience scheduling conflicts. When this happens, it will be the responsibility of each musician participating in multiple ensembles to determine a course of action and to clearly communicate it with the necessary directors. If the conflict is of an extended duration, the directors may, at their discretion, ask the musician to take a leave of absence until the scheduling conflict ends. This policy must be clearly communicated to the musicians when they choose to join multiple ensembles.

## **Privacy Policy**

All information on Band Members and supporters shall be used solely for the accomplishment of the CBI's mission. Such information shall not be sold or provided to other organizations, whether profit or non-profit, without the express consent of the CBI Board with the Membership fully informed of such action.

## **Conflict of Interest**

The Board Members and general Membership shall be free of conflicts of interest with respect to CBI assets and resources. The Board shall have the responsibility to determine whether such a conflict exists and to take appropriate action. Membership data shall be used only for CBI purposes and not for any type of advertising or solicitation by other organizations. Informal contact for social purposes by mutual consent may be considered within the limits of the CBI mission. Publicity lists, whether through regular or electronic mail, shall be maintained by persons with no private commercial or financial interest in these data. Such data shall be kept under the oversight of the CBI Board.

## **Concert Dress**

For the Concert Band, dress for formal concerts will consist of:

Men: dark suits, white shirts

Women: black bottoms, black tops

Dress for summer concerts will be khaki pants and blue "Columbia Concert Band" polo shirts.

For the Jazz Band and Flute Cocktail, concert dress will be dependent on the particular concert.

## **Formation of New Affiliated Ensembles**

Proposals for the formation of new affiliated ensembles can be submitted for the review and approval of the Board. In reviewing proposals the Board will consider the consistency of the new ensemble relative to the Columbia Bands' Constitution, By-Laws and Operating Procedures as well as the needs (financial, equipment, music, etc.) of the

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new ensemble and the impact on the overall Columbia Bands, Inc. organization. All ensembles must have a designated leader or director and specifics of Membership responsibilities, concert dress, etc. will be detailed in the proposal for formation. Ensemble budgets (dues, revenue, expenses, prorated general costs and requested financial support) will be considered with the intent that new ensembles are income neutral to the Columbia Bands organization on a fiscal year basis either initially (preferred) or within 1 year. Performance fees earned by the ensemble should be used to pay off any outstanding expenses owed to CBI and the rest remains within the ensemble. Approval will be granted on a case by case basis. The Board will identify and track the budget, insurance, rehearsal space, performance space, publicity, and other impacts of any new ensembles and coordinate between ensembles.

### **Temporary Ensembles and Special Projects**

Proposals for the formation of a special ensemble (such as the All State Community Band or the European Touring Jazz Band) and special projects (such as hosting Community Band Day) must be submitted to the Board of Directors for approval. A comprehensive project plan (Appendix F) must be submitted that includes all information for the project including budget, timeline, committee chair and Member's roles and responsibilities, project narrative, and how the special ensemble and or project will impact the organization and other ensembles. A project plan form must be complete when submitted to the Board for approval. Upon approval, monthly updates on progress should be submitted to the Board during regular meetings. Upon completion of the special ensemble/special project, a formal report must be made to the Board detailing the results.

## Appendix A

**Columbia Bands, Inc. Board of Directors Code of Ethics<sup>i</sup>**

Members of the Board (including ex officio Members of the Board) shall at all times abide by and conform to the following Code of Conduct in their capacity as Board Members:

1. Each Member of the Board of Directors will abide in all respects by the *Columbia Bands, Inc. Code of Ethics* and all other rules and regulations of the organization (including but not limited to the organization's By-Laws and operating procedures) and will ensure that their Membership in the Columbia Bands, Inc. (CBI) remains in good standing at all times. Furthermore, each Member of the Board of Directors will at all times obey all applicable federal, state and local laws and regulations and will provide or cause to provide the full cooperation of the CBI when requested to do so by those institutions and their persons set in authority as are required to uphold the law.
2. Members of the Board of Directors will conduct the business affairs of the organization in good faith and with honesty, integrity, due diligence, and reasonable competence.
3. Except as the By-Laws and Board of Directors may otherwise require or as otherwise required by law, no Board Member shall share, copy, reproduce, transmit, divulge or otherwise disclose any confidential information as determined by the Board related to the affairs of the organization and each Member of the Board will uphold the strict confidentiality of all meetings and other deliberations and communications of the Board of Directors.
4. Members of the Board of Directors will exercise proper authority and good judgment in their dealings with CBI contractors, suppliers, and the general public and will respond to the needs of the organization's Members in a responsible, respectful, and professional manner.
5. No Member of the Board of Directors will use any information provided by the organization or acquired as a consequence of the Board Member's service to the organization in any manner other than in furtherance of his or her Board duties. Further, no Member of the Board of Directors will misuse organization property or resources and will at all times keep the organization's property secure and not allow any person not authorized by the Board of Directors to have or use such property.
6. The Board of Directors must act at all times in the best interests of the organization and not for personal or third-party gain or financial enrichment. When encountering potential conflicts of interest, Board Members will identify the conflict and, as required, remove themselves from all discussion and voting on the matter. Specifically, Board Members shall follow these guidelines:

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- Avoid placing (and avoid the appearance of placing) one's own self-interest or any third-party interest above that of the organization; while the receipt of incidental personal or third-party benefit may necessarily flow from certain organization activities, such benefit must be merely incidental to the primary benefit to the organization and its purposes;
- Do not engage in any outside business, professional or other activities that would directly or indirectly materially adversely affect the organization;
- Do not engage in or facilitate any discriminatory or harassing behavior directed toward organization contractors, Members, officers, or others in the context of activities relating to the organization;
- Provide goods or services to the organization as a paid vendor to the organization only after full disclosure to, and advance approval by, the Board, and pursuant to any related procedures adopted by the Board.

<sup>1</sup> Modified from the Center for Association Leadership Model Policy:  
<http://www.asaecenter.org/Resources/EURelated.cfm?ItemNumber=11611> Accessed  
11/19/2014)

**Appendix B**  
**Columbia Bands Master Calendar**

## **JANUARY**

### **Request summer performance dates, late December/early January:**

After getting both directors' preferences, President does the following:

- Logs onto Columbia Lakefront Website and "reserves" summer performance dates for CCB & CJB (August preferred). Scheduling/reserving for Columbia Lakefront is done online.
- Contacts Al Lloyd to schedule performance dates for CCB (August preferred) & CJB (June preferred) at Lurman Theatre in Catonsville.

**January 1<sup>st</sup> Deadline:** President ensures the reservation of RHHS rehearsal space for April 1 – June 30. A separate application must be completed (quarterly) for each Activity Period by the submission deadline. Priority applications received after the submission deadlines will be processed on a first come first serve basis. A separate request must be completed for each school.

### **Secure performance dates for promotion, early January:**

Confirm prominent spring performance dates for both CJB & CCB. Only performances that are open to the public should be included in promotion materials.

### **Prepare CD materials for HCAC gala early January:**

Acquire 350 blank CDs, 350 jackets, and mailing labels for the jackets, titles and durations of sample pieces from CJB & CCB directors, print labels.

### **Design Posters, mid-January:**

Create posters (color and B&W) that can be sent electronically to the business handling program design for the HCAC Gala. Payment and posters are generally due in late January. CBI also delivers these posters to HCAC the 1<sup>st</sup> week of March.

### **Create CD labels, mid-January:**

Create CD labels for the disc that include

**CBI HIGHLIGHT SAMPLER (year)**  
**Columbia Concert Band Highlights Sampler, 20XX**  
**Columbia Jazz Band Highlights Sampler, 20XX**

### **Secure ad placement details, early January:**

- Board approves payment for and placement of an ad in HCAC's Gala program. HCAC Liaison contacts the official advertising publication to get details about payment, program design, and other necessary information.

### **January 31<sup>st</sup> Deadlines:**

- **Maryland State Arts Council (MSAC) Interim Report**, due at the end of January.
- **IRS Form 1099** which reports the fees paid to our conductors.

## **FEBRUARY**

**Late February Deadline:** Finish posters and CDs for early March delivery to HCAC.

HCAC requests upcoming performances for June, July & August.

**Late February/early March Deadline:** Send the latest CD sampler, programs, and posters to MSAC.

## **MARCH**

**Early March Deadline:** Send posters and labeled CD samplers to HCAC.

**Attend HCAC Gala, late March:**

The HCAC Gala Celebration usually takes place during the final week of March. The CBI HCAC Liaison should plan on attending as should as many Members of the Board who can. Our CDs and publicity posters go into 350 goodie bags that go home with patrons in our community at the end of the evening.

**Late March Deadline:** Submit the CFHoCo Report.

**Approach potential Board candidates, mid-March:**

Nomination Committee should begin thinking of, and speaking to, prospects who might potentially join the Board of Directors in May. Written notice needs to be provided to the Membership at least 10 days, but not more than 20 days, prior to the annual meeting (1<sup>st</sup> Monday in May).

## **APRIL**

**April 1<sup>st</sup> Deadline:** President ensures the reservation of RHHS rehearsal space for July 1 – August 31.

**Send photos to Community Foundation of Howard County (CFHoCo, formerly “Columbia Foundation”), late April/early May:**

Photographer can provide these directly to the CFHoCo from any photos from the current year.

**April 30<sup>th</sup> Deadline:** Submit payment to post office for our P.O. Box 2713, regardless of whether they send a reminder or not.

## **MAY**

**Early May Deadlines:**

- Submit programs to printer one week before first spring concert.  
Submit initial grant paperwork to HCAC.

**Spring Concerts**

- Prepare Summer Concert Flier (available for distribution three weeks before the first concert.)

**Elect new Board Members, early May:**

According to the By-Laws, Elections for the Board of Directors should, if at all possible,

take place the 1<sup>st</sup> Monday in May. The annual meeting MUST take place in May.

**May 15<sup>th</sup> Deadline:** Submit Maryland Personal Property Tax form.

**Draft Budgets for the next FY:**

- Prepare and review draft ensemble budgets for the next FY

**Request air conditioning for summer, late May:**

President of the Board is responsible for ensuring rehearsal and performance spaces and requesting air as needed.

**JUNE**

**June 1<sup>st</sup> Deadline:** President ensures request for RHHS rehearsal space for Sept 1 – Dec 31.

Mid-June: Grant revision request for HCAC completed by Grant Manager.

**Budget Board Meeting:** Have Board-Elect meet to determine and approve new FY budget.

**Submit Rehearsal and performance information:** Rehearsal and performance schedule for August through July for all ensembles due to insurance broker, Mayer & Steinberg, to be submitted to insurance company for annual policy renewal (August). As dates are added to the calendar, they must be reported as soon as we know. Performance information must include: date, group performing, and location (including city/state) – Insurance Liaison/ President

MSAC requests photos. Photographer can provide these directly.

**JULY**

**Sign Contracts with Music Directors;** keep original in management binder and provide copies to each of the music directors – **President of the Board**

**“Highlight” images due to MSAC, early July:**

President sends CBI's greatest moments from fiscal year: July 1 through June 30.

**Mid-July Deadline:** HCAC Grant Report Due.

Mid-July: Grant Manager and select Board Members met with the HCAC Artistic Review Panel.

Treasurer announces first reminder for CBI Members to pay dues.

**AUGUST**

MSAC Final Report due by Grant Manager

HCAC requests performances for Dec., Jan. & Feb. They send a form, electronically, to our President. Board Member in charge of the calendar fills this out and sends it back to

HCAC.

## **SEPTEMBER**

HCAC grant awards night in Ellicott City. Grant Manager and select Board Members should attend.

CFHoCo Grant is usually due first Friday in September.

## **OCTOBER**

**October 1<sup>st</sup> Deadline:** President ensures the reservation of RHHS rehearsal space for Jan 1 – March 31.

**October Deadline:** Major MSAC grant due.

Every third year, a major MSAC grant is due in late October. The last one was 2013 for FY2014, so the next is anticipated for 2015 for FY2016. For the years in between, a minor grant is due in December.

### **Late October:**

- Prepare Joint Winter Concert Flier (available for distribution three weeks before concert.)

## **NOVEMBER**

Corporate income tax return (Form 990) for a June tax-exempt fiscal year entity is due November 15<sup>th</sup>. This is actually a post card filing since our gross receipts are below the full filing requirements (currently \$50,000).

Mid-November: HCAC will request the CBI Performance Schedule for the months of March, April and May.

## **DECEMBER**

### **Request summer performance dates, late December/early January:**

After getting both directors' preferences, President does the following:

Contacts Jeff Good *Columbia Concert Series Committee* Phone: [410-531-5858](tel:410-531-5858) Fax: [410-531-0062](tel:410-531-0062) for Columbia Lakefront and requests summer performance dates for CCB & CJB (August preferred). Contacts Al Lloyd, 410-379-0779, jaloyd1@verizon.net. [lurmantheater@gmail.com](mailto:lurmantheater@gmail.com) to schedule performance dates for CCB & CJB (August preferred) at Lurman Theatre, in Catonsville.

**December Deadline:** Minor MSAC grant due.

“Holiday Party” of Columbia Bands is usually held the night before the Winter Concert.

**December 31 Deadline:** Submit form (listing all performed pieces during the year) to BMI/ASCAP for performance copyright purposes. All performing ensembles should include every piece publicly performed in the previous calendar year. Utilize format listed on their website: [www.acbands.org](http://www.acbands.org).

**Appendix C  
Management Tasks  
Fiscal Year Calendar**

**July:**

- 1) Music Directors contracts updated and signed – President and Music Directors
- 2) MSAC request for pictures – Volunteer photographer or Board President
- 3) HCAC grant report due – Grant Manager
- 4) HCAC grant Artistic Review Panel – Grant Manager and two Board volunteers
- 5) Posters for Concert for Young People designed – Poster Designer and Publicity Committee
- 6) Rehearsal Room reservation for HCAC for fall- President or Ensemble Manager
- 7) Ho Co Parent Pages fall calendar events listing due early July – Publicity Committee

**August**

- 1) Posters for Concert for Young People printed and distributed – Publicity Committee
- 2) MSAC final report due – Grant Manager
- 3) HCAC calendar submissions for Dec, Jan, and Feb due –President Board
- 4) Rehearsal and performance calendar September to December to ensembles and insurance company–Vice President and Insurance Liaison
- 5) Programs for Concert for Young people – Program Coordinator
- 6) Insurance payment due – Insurance Liaison and Treasurer
- 7) Financial Report to the ensembles - Treasurer

**September**

- 1) HCAC Grant Award Ceremony – President and Grant Manager and volunteers
- 2) Community Foundation of Howard County (formerly Columbia Foundation) grant due 1<sup>st</sup> Friday in September – Grant Manager
- 3) Rehearsal Space request to HCPSS for Winter (January) due October 1 - President

**October**

- 1) MSAC new grant applications are due (every three years...otherwise, continuing grant application is due in December- new grant for FY2014) – Grant Manager
- 2) Poster for Winter Concert designed – Poster Designer and Publicity Committee
- 3) Ho Co Parent Pages winter calendar events listing due early October – Publicity Committee

**November**

- 1) Posters for winter concert printed and distributed – Publicity Committee
- 2) Corporate tax form 990 due November 15 – volunteer Accountant or Treasurer
- 3) HCAC calendar submissions for March, April, and May – President
- 4) Programs for Winter Concert – Program Coordinator

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### **December**

- 1) Scheduling for summer concert for Columbia Lakefront – President
- 2) Scheduling for summer concert Lurman via Al Lloyd – President
- 3) MSAC grant renewal application due – Grant Manager
- 4) Room reservation HCPSS for Spring rehearsal space due January 1 – President
- 5) Rehearsal and performance schedule for January to May disseminated to ensembles and insurance company–Vice President and Insurance Liaison
- 6) Renewal for Association of Concert Bands due January 1 – President and Treasurer
- 7) Submit BMI/ASCAP forms to Association of Community Bands – President and Ensemble Managers

### **January**

- 1) Begin the process for highlight CD for HCAC gala in March – Board volunteers
- 2) Poster design for spring concerts (for inclusion at HCAC gala) – Poster Designer and Publicity Committee
- 3) MSAC interim report due – Grant Manager
- 4) Form 1099 due to contract employees – Treasurer and volunteer Accountant
- 5) HCAC ad purchase for gala – Board
- 6) Ho Co Parent Pages winter calendar events listing due early January – Publicity Committee

### **February**

- 1) Completion of posters and highlight CD for HCAC gala – Board volunteers
- 2) HCAC calendar submissions for June, July, and August – President

### **March**

- 1) Materials for HCAC gala delivered – Board volunteers
- 2) Rehearsal space reservation HCPSS for summer due April 1 – President
- 3) Posters for spring concerts designed-Poster Designer and Publicity Committee
- 4) Board Nominating Committee recruits for election and determines Board slate

### **April**

- 1) Posters for spring concerts printed and distributed –Publicity Committee
- 2) Board nominating committee formed for May elections – Board
- 3) Community Foundation of Howard County grant report due – Grant Manager
- 4) Community Foundation of Howard County photograph request – volunteer photographer
- 5) Spring concert programs – Program Designer
- 6) P.O. Box payment due – Mail Volunteer

### **May**

- 1) Board elections – Nominating Committee
- 2) Officer elections – Board-Elect

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- 3) HCAC grant application due – Grant Manager
- 4) Rehearsal space reservation HCPSS for fall due June 1 – President
- 5) Poster design for summer events – Poster Designer and Publicity Committee
- 6) HCAC calendar submissions for September, Oct., and Nov – President
- 7) Proposed ensemble budgets submitted to Treasurer for discussion – Ensemble Managers / Directors
- 8) Draft budget submitted to the Board for discussion - Treasurer

### **June**

- 1) Grant revisions (as needed) due to HCAC – Grant Manager
- 2) Maryland Personal Property tax form submitted – Treasurer or volunteer Accountant
- 3) Approve annual budget and dues/donation structure-Board
- 4) Complete handoff to Board-Elect and officers elect – Board and Board-Elect
- 5) Review/recruit committee Membership for upcoming year – Board-Elect
- 6) Review operating procedures and make changes for upcoming year – Board-Elect
- 7) Determine Board priorities for upcoming year – Board-Elect
- 8) Storage space payment due – Treasurer
- 9) Rehearsal and performance schedule for August through July for all ensembles due to insurance broker, Mayer & Steinberg, to be submitted to insurance company for annual policy renewal (August). As dates are added to the calendar, they must be reported as soon as we know. Performance information must include: date, group performing, and location (including city/state) – Insurance Liaison/ President

**Appendix D**  
**Volunteer Job Descriptions**

**1.0 MARKETING**

- 1.1 Columbia Bands/CCB Webmaster
- 1.2 CBI Newsletter Editor
- 1.3 CJB Webmaster
- 1.4 Facebook Fan Page Moderator
- 1.5 Graphic Artists
- 1.6 Posters/Fliers for Publicity
- 1.7 Publicity Announcements for CBI Performances
- 1.8 Program Editor
- 1.9 Howard County Arts Council Liaison
- 1.10 CD Production for HCAC Goodie Bags
- 1.11 CJB Manager
- 1.12 CJB Tour Manager
- 1.13 Flute Cocktail Manager
- 1.14 Howard County Food Bank

**2.0 FINANCE**

- 2.1 Grant Manager
- 2.2 Program Ads Coordinator
- 2.3 Fundraising Chair
- 2.4 Accountant

**3.0 LOGISTICS**

- 3.0 Volunteer Coordinator
- 3.1 Insurance Liaison
- 3.2 Attendance Documentation at CCB Performances
- 3.3 Donation Baskets at CCB Performances
- 3.4 Attendance Documentation at CJB Performances
- 3.5 Donation Baskets at CJB Performances, if applicable
- 3.6 Historian
- 3.7 Librarian
- 3.8 Curator
- 3.9 CCB Personnel Manager
- 3.10 CCB Google Groups Manager
- 3.11 CCB Uniform Manager
- 3.12 CCB Equipment Manager
- 3.13 CCB Percussion Trailer Transporter
- 3.14 CJB Librarian
- 3.15 CJB Uniform Manager
- 3.16 CJB Sound System
- 3.17 CJB Stage Equipment
- 3.18 CB, Inc. Mail
- 3.19 Publicity & Grant-Related Reminders
- 3.20 CCB Set Up Crew
- 3.21 Amateur Photographer

## **MARKETING**

### **1.1 CBI/CCB WEBMASTER**

- Keeps CBI/CCB website current
  - Updates pages that include, but are not limited to, a calendar of scheduled performances.
  - Provides information about each of the performing groups.
  - Gives information about musical and administrative leadership
  - Provides links to appropriate music-related websites.
  - Includes other pages/items that Columbia Bands, Inc. believes would be of interest to the ensemble fans, ensemble Members, potential sponsors, and the general public.
- Collaborates, when necessary, with the CJB webmaster, the musical directors, or any other CBI Member with specialized knowledge to ensure a consistent, enjoyable, educational, and user-friendly web experience for visitors.

### **1.2 CBI NEWSLETTER EDITOR**

- Elicits article from CBI directors and written piece from any other CBI Member who wishes to write, for inclusion in quarterly newsletter to CBI fans and Members, using online service Constant Contact.
- Also includes calendar of future performances, plus other items of interest.
- Sends out concert reminders, also using Constant Contact, usually one week before a performance.
- Pays Constant Contact at multiple-year rate, and provides invoice to CBI Treasurer for pro-rated remuneration, based on the months that the service was used

### **1.3 CJB WEBMASTER - Keeps CJB website current.**

- Updates pages that include (but are not limited to) a calendar of scheduled performances.
- Keeps site updated with submitted information

### **1.4 FACEBOOK FAN PAGE MODERATOR**

- Keeps tabs on the Columbia Bands Facebook page.
- Updates status with upcoming concerts and other events
- Sends update messages to all subscribers about those concerts and events.
- Creates Facebook "events" for all of our concerts
- Sends "invitations" to all of our subscribers.
- Actively pursues new subscribers.

### **1.5 GRAPHIC ARTIST- Designs publication materials for concerts of the Columbia Bands ensembles as well as other events as needed.**

- Develop fliers at least 6 weeks prior to the concert date.
- Sends to the Publicity Chair and President for edits and approval.
- Develop other graphics as needed such as for the Columbia Bands website.

**1.6 POSTERS/FLIERS for PUBLICITY**- Receives draft poster in electronic form from Graphic Artist, usually 6 weeks before a performance.

- One in black and white; one in color
- Sends electronic poster file, via email, to the Columbia Bands Board and to appropriate Music Director for comment.
- Often there are minor tweaks, adding or subtracting a logo based on changing sponsorship.
- Submits final files, electronically, to the copy center at Staples through a CBI account
- Prints posters (also called fliers).
  - Tries to have posters ready three weeks in advance of the earliest event noted on the poster.
  - Sometimes there are several events to be publicized.
- Takes the posters to rehearsal
- Encourages band Members to take for distribution.
- Makes available as electronic files.
- Ensure webmasters and Facebook moderators have electronic copies.

**1.7 PUBLICITY ANNOUNCEMENTS for CBI PERFORMANCES**

Submits concert announcements by email or in electronic form to a variety of publications

- Includes concert information for concerts to a variety of publications.
- Updates and maintain press contact sheet information

**1.8 CCB & CJB PROGRAM EDITOR** - Designs and produces all programs for formal concerts of the Columbia Bands.

- Designs layout of programs.
- Ensures that all advertising is complete and included in programs.
- Ensures that all files are delivered to the printer in a timely manner.
- Ensures that programs are delivered to the concert site on time.

**1.9 HOWARD COUNTY ARTS COUNCIL LIAISON**

- Serves on Celebration of the Arts Gala planning committee and subcommittees as requested by HCAC staff.
- Attends, if possible, the Celebration Gala that takes place in late March, as representative of Columbia Bands.

**1.10 CD PRODUCTION for HCAC GOODIE BAGS for GALA** Process should begin in early to mid- JANUARY.

- The CDs are due the 1<sup>st</sup> week of March, to HCAC.
- Order 350 - 400 CDs, envelopes and mailing label stickers- Music is assembled from all ensembles and put on a master CD. CDs are burned from the master.
- Labels go on the envelopes listing the titles and composers.
- Labels go directly on the CDs, and do not contain any track information. The labels contain the title of the CD art work
- CDs must be assembled for labeling.
- Designs and prints the labels at home.

- Labels are adhered to all CDs.
- CDs are put into their jackets.
- All 350 CDs get delivered to HCAC by the HCAC Liaison or whomever assembles the CDs
  - We make every attempt to meet HCAC's deadline given; usually 1<sup>st</sup> week in March.
  - Stuffing Gala Bags occurs the week before the Gala.

### **1.11 CJB MANAGER**

- Makes contact with potential clients.
- Upon Board approval, uses contract template to secure payment for performances with venue.
- Keeps the band informed of rehearsal and performance schedule.
- Keeps in close contact with the CJB director as well as with the Columbia Bands, Inc. Board.

### **1.12 CJB TOUR MANAGER –Manages all aspects of the Jazz Band tours**

(Approximate two year commitment)

#### **Preliminary Arrangements:**

- Establish relationship/guidelines with Columbia Bands, Inc (CBI) Board including:
  - Reporting Requirements (financial and other/TBD)
  - Signature authority for contract with a tour company and disbursements
  - CBI funding contribution to the tour
- Negotiate financial instrument(s) to be used for the tour with CBI Treasurer and establish banking mechanism

#### **Tour Preparation**

- Solicit tour ideas from band Members
- Define proposed tour (itinerary, including dates, estimated of number of participants)
- Identify potential tour companies; solicit bids from companies; select tour company; negotiate tour definition with company; communicate tour information to potential participants
- Negotiate contract including cost and all details; SIGN CONTRACT! (Potential personal risk unless specifically pre-authorized – see above)
- Maintain constant contact with the music director to assure compatibility and changes
  - Number, frequency and timing of gigs
  - Type of gigs (indoor, outdoor, festival, non-festival)
  - Band personnel
- Establish tour price including estimating costs beyond tour company charges
  - Potential price increase (fuel, exchange rates)
  - Excess baggage charges
  - Insurance, if any
  - Tips/gratuities (tour managers, drivers, guides, porters, photographer, and videographer)
  - Baggage cart rentals for band equipment/instruments; equipment rental for non-festival performance sites
- Identify tour participants
  - Band Members identified by music director

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- Establish and maintain participant record database: name, address, phone, email, roommate (facilitate sharing when needed), and payment records
- Handle itinerary deviators (alternate departure/return airports, trip extensions, etc.); cancellations; pay refunds as appropriate
- Deal with vacancies and maintain a waiting list
- Establish participant payment plan commensurate with payments due to the tour company
  - Collect payments (multiple times); issue payment reminders; expedite late payments
  - Photocopy all payments received; make deposits
  - Make multiple payments to tour company
  - Stay in communication with participants
    - Respond to questions and concerns
    - Supply passport requirements
    - Provide detailed itinerary and flight information including: departure/arrival, airport lead times and baggage allowances
  - Determine gig uniform (shirts)
    - Get pricing for and order shirts for band and non-band Members
    - Package and distribute shirts
  - Gather information on equipment-to-be-taken including: music stand fronts, banner, CDs for sale and identify volunteers who will be responsible for transporting such equipment
  - Make and distribute name tags
  - Stay in communication with the tour company
    - Tour plan changes; tour uncertainties (e. g., festival acceptances)
    - Identify performance venues and establish venue requirements including: equipment requirements; stage characteristics (size, shape); back line, electronics, especially if equipment must be rented
  - Facilitate and host tour company representative/presentations to the participants
    - Publicize representative presentation schedule and location
    - Assist company representative in ticket distribution
  - Prepare for possible change of tour organizer/music director (death, illness, etc.)
    - Prepare and update tour preparation status report and identify location of all relevant information
    - Identify backup tour organizer and brief him/her on above
    - Identify backup music director
  - Fulfill CBI reporting requirements at specified intervals
  - Consider photo/video-documenting of tour
    - Identify photographer
    - Identify videographer and video equipment
  - Solicit, accumulate and submit ‘mug shots’ as necessary
  - Identify/provide (backup) rehearsal space
  - Solicit donations; keep donation records and issue “thank you” letters to donors
  - Ensure all participants going on the trip have signed an insurance waiver for the Columbia Bands, Inc. as provided by the Board.

### **Tour Execution/Implementation**

- Interface with Company Tour Manager(s) in country(s)

- Confirm all scheduled participants are “aBoard” at all times; confirm those ‘not going’ on side trips
- Acquire local funds for tips (debit card at ATMs) (multiple currencies) and keep records
  - Determine local currency amounts needed and deal with daily ATM withdrawal/limits
  - Manage significant cash and maintain records of all transactions
  - Pay tour guides’, bus drivers’ and company tour managers’ tips (multiple currencies)
  - Manage CD sales in multiple currencies
- Negotiate local transportation issues including: departure times; “rest stops”; equipment conveyance
- Hotel and venue logistics/issues
  - Room key distribution
  - Evaluate and manage equipment availability, suitability, operation, performance
  - Deal with consequences of participant inappropriate actions, e.g. bar and restaurant bills
- Maintain and promote participant morale and camaraderie

### **Post-Tour Activities**

- Collect receipts and make reimbursements
- Exchange any residual foreign currency(s)
- Reconcile all financial information
- Establish refund policy; determine refund amounts; disburse refunds, including snail-mailings and reconcile bank account
- Prepare and Submit Tour Summary/Report including
  - Number of participants; name and location of tour company
  - Tour activities including: dates, locations, gigs
  - Detailed financials: income by source; expense, by payee including realized exchange rates; totals
- Respond to follow-up inquiries
- Secure tax-deduction letters from the band’s CPA and distribute to band Members

### **1.13 FLUTE COCKTAIL MANAGER**

- Develop rehearsal schedule
- Reserve rehearsal space and submit contract for space to Board for approval
- Store, organize, and distribute music to the musicians
- Schedule performances
- Primary contact for performances
- Maintain music database and library
- Produce all concert programs

### **1.14 HOWARD COUNTY FOOD BANK LIASION**

- Contact the food bank prior to joint events
- Ensure donations are solicited at rehearsals, on posters, and in programs
- Ensure delivery of all donations to the food bank after events

## **FINANCE**

### **2.1 GRANT MANAGER**

- Manages all aspects of grants and grant funding for the organization
- Finds new funding sources
- Writes all grant applications
- Works with Treasurer on grant budgets
- Ensures completion of all grant deliverables
- Completes and submits all grant reports
- Maintains grant calendars
- Attends grant information sessions by different funders
- Reports all grant related information to the Board in a timely manner

### **2.3 FUNDRAISING CHAIR**

- Sets and develops fundraising strategy for Columbia Bands, Inc. and its Member ensembles for fiscal year (**starts July 1**).
- Coordinates with Board and Treasurer for fundraising goals.
- Finds and appoints volunteers for the following areas:
  - o Program Ads Coordinator
  - o Grants Manager/Writers
  - o Sponsorship
  - o Donors/Annual Giving
- Coordinates regular meetings of all fundraising volunteers.
- Reports progress on fundraising goals to Board, regularly.

### **2.4 ACCOUNTANT**

- Handles all IRS and other governmental agency compliance issues and tax filings.
- Provides tax positions regarding The Jazz Band travels as they relate to personal tax deductions.
- Advises regarding sales tax on sales of recordings that have been avoided by not "selling" the recordings, but rather providing them free of charge to those making contributions to the band.
- Handles all government correspondence that the Treasurer forwards to accountant

## **LOGISTICS**

### **3.0 VOLUNTEER COORDINATOR**

- recruits volunteers to ensure smooth delivery of programs
- updates volunteer list and job descriptions as needed
- updates volunteer policies and procedures as needed
- manages volunteer recognition programs

### **3.1 INSURANCE LIAISON**

- Coordinates communication regarding the organization's insurance needs with the insurance broker and/or insurance carrier.
- Reviews, periodically, the insurance contract, billing statement, and renewals.

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- May set up and attend meetings with the broker and representatives from the Board of Directors of the Columbia Bands organization.
- Ensures timely delivery of the ensembles rehearsal and performance schedules

### **3.2 ATTENDANCE DOCUMENTATION at CCB PERFORMANCES** - Keeps

track of concert attendance, needed especially for grants.

- The audience number is documented in an Excel spreadsheet
- Spreadsheet is sent to the Grant Manager for inclusion in grant reports

### **3.3 DONATION BASKETS AT CCB PERFORMANCES** -

- Sees that donation basket(s) are at the performance venue.

- Counts all donations and makes sure Treasurer gets the money.

### **3.4 ATTENDANCE DOCUMENTATION at CJB PERFORMANCES** - Counts

number of people in attendance for all CJB performances.

- The audience number is documented in an Excel spreadsheet
- Spreadsheet sent to Grant Manager

### **3.5 DONATION BASKETS at CJB PERFORMANCES,**

- Sees that donation basket(s) are at the performance venue.

- Counts all donations and makes sure Treasurer gets the money.

### **3.6 HISTORIAN**

- Collects and stores concert programs as well as any publicity about the organization.

### **3.7 LIBRARIAN**

- Accepts new music purchased by director.
- Applies CCB stamp to each individual piece of that music.
- Numbers each individual piece of that music.
- Identifies each numbered piece of music on form created as to instrument represented.
- Staples the form to the music jacket for future use.
- Distributes new music to section leaders.
- Collects from section leaders, band Members, and the Director, such music as band director determines should no longer be in folders.
- Collates music collected, determines what original parts are missing and attempt to locate them.
- Turns chart over to curator, when all or most of the parts are collected, for inclusion in database and storage.

### **3.8 CURATOR** - Maintains the music library.

- Ensures all music is entered into the database.
- Ensures all music is filed in a timely and accurate manner
- Pulls music and scores as requested by the music director
- Maintains the storage space of the music

CCB Music Library:  
8221 Snowden River Parkway  
Phone: 443-539-3000 Columbia, MD. 21045

### **3.9 CCB PERSONNEL MANAGER**

- Maintains and updates monthly the list of Columbia Bands, Inc personnel for all CCB.
- Provides rosters for Members and Board monthly.

### **3.10 CCB GOOGLE GROUP ADMINISTRATOR** - Adds, deletes, makes changes to Members' e-mail communication subscriptions to the groups to which they belong.

- Includes the musical group as well as their instrument section or administrative group (if applicable).

### **3.11 CCB UNIFORM MANAGER** - Provides concert shirts for both the Concert and Jazz bands. - Provides, occasionally, other "spirit-wear" to include T-shirts, hats, etc.

- Purchases shirts from Virginia-Ts over the Internet.
- Printing is done by Nightmare Graphics in Columbia.

### **3.12 CCB EQUIPMENT MANAGER**

- Keeps track of all CCB-owned equipment (percussion items, extra wind instruments, auxiliary items, etc.), including where each item is housed, what condition it is in, when it is being used, and by whom.
- Arranges transportation of trailer to and from local CCB summer performances. Secures volunteers to help load and unload trailer items at summer venues.
- Ensures proper form is filled out and signed when CCB loans equipment to a non-CCB musical entity, and ensures proper return of loaned item(s).

### **3.13 CCB PERCUSSION TRAILER TRANSPORTER** - Drives the concert band's percussion trailer to performance locations for summer concerts. (The trailer "resides" in the parking lot of Christ Memorial Presbyterian Church, Columbia, MD).

### **3.14 CJB LIBRARIAN**

- Collects music from the folders that have been declared excess for the time being.
- Files them in folders noting the missing parts and storing them in a file cabinet located in CJB Librarian's residence.

### **3.15 CJB UNIFORM MANAGER**

- Informs ensemble of appropriate attire for each performance.
- Orders additional uniforms, as needed.

### **3.16 CJB SOUND SYSTEM MANAGER**

- Maintains inventory and stores sound system.
- Arranges for transport of sound system to and from gigs.
- Facilitates/assists with setup, sound check, break playlist and breakdown of equipment at gigs.
- Maintains documentation on configuration and settings
- Works with CJB manager if repairs are necessary or on suggestions for potential upgrades.

### **3.17 CJB STAGE EQUIPMENT**

- Ensures that the appropriate number and size of CJB labeled music stands are taken to and from all CJB performances.

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- Requests/gets clear instructions from the director or band manager about the size and number of CJB stands that are needed for each performance. The trumpets, trombones, drummer, bass guitarist, frequently prefer to bring and use their own stands.
- Makes available, by delivery or pick-up, the number and size stands needed for the performance for any small ensemble performances (albeit infrequent) requiring the music stand volunteer.

### **3.18 CBI MAIL**

- Every Monday, picks up the CBI mail from post office box.
- Takes mail to rehearsal
- Distributes to appropriate addressees.

### **3.19 CCB SET UP CREW**

- Arrives early, approximately 7:00 P.M.
- Sets up chairs and stands in the band room for the 7:30 rehearsal.
- Situates percussion equipment in appropriate places.

### **3.20 AMATEUR PHOTOGRAPHER**

- Attends most concert band and jazz band performances.
- Photographs the performers.
- E-mails choicest images to the CCB web manager

Some images are

on FlikR <<http://www.flickr.com/photos/45541344@N07/>><http://www.flickr.com/photos/45541344@N07/> where band Members are encouraged to view.

- Receives occasional requests for a particular image in higher resolution.
- E-mails image to person

**Appendix E**  
**Volunteer List 2015-2016**

**MARKETING**

Columbia Bands/CCB Webmaster – Len Morse  
CJB Webmaster – Matt Williams  
Facebook Fan Page Moderator – Katy Clemens  
Graphic Artists – Corey Holland; Alexandra Duffy, substitute  
Posters/Fliers for Publicity – Jim Kaiser  
Publicity Announcements for Columbia Bands Performances – Kim Drake  
CCB & CJB Program Editor – Jeanette Donald  
Howard County Arts Council Liaison – Vacant  
CD Production for HCAC Goodie Bags – Ensemble Managers  
CJB Manager – Bob Frantz  
CJB Tour Manager – Randy Malm  
Flute Cocktail Manager – Jeanette Donald  
CCB Manager – Bill DeVouno  
Howard County Food Bank – Nancy Efron

**FINANCE**

Grant Manager – Jeanette Donald  
Fundraising Chair – Al Ingalls  
Accountant – David Weisenfreund, CPA

**LOGISTICS**

Insurance Liaison – Kim Drake  
Attendance Documentation at CCB Performances – Meghna Lipcon, Kathleen Shoemaker  
Donation Baskets at CCB Performances – Kathleen Shoemaker, Meghna Lipcon  
Attendance Documentation at CJB Performances – Tanya Allan, Maurice Feldman  
Donation Baskets at CJB Performances, when applicable – Tanya Allan & Maurice Historian – Melinda Frisch  
CCB Music Librarian – Karissa Strawley  
CCB Curator – Karissa Strawley  
CCB Personnel Manager – Michelle Sobel  
CCB Google Group Manager – Karen Carothers  
CCB Uniform Manager – Bill DeVouno  
CCB Equipment Manager – Len Morse  
CCB Percussion Trailer Transporter – Chris Wills  
CJB Music Librarian – Bob Frantz  
CJB Uniform Manager – Bob Frantz  
CJB Sound System – Megan Zontek, Mark Morris  
CJB Stage Equipment – Bruce Robbins  
CBI Mail – Tanya Hoegh-Allan  
CCB Set Up Crew - George Smith; Andrew W. Seacord, II; Steve Shivers  
Amateur Photographer – Graham Allan

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### Appendix F Special Ensemble/Project Plan

1. Name of the Ensemble/Project: \_\_\_\_\_
2. Date (s) of the Planning Period: \_\_\_\_\_
3. Date(s) of the Event: \_\_\_\_\_

a. Date of Rehearsals prior to event: \_\_\_\_\_

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4. Committee Chair and responsibilities: \_\_\_\_\_

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5. Committee Members and responsibilities: \_\_\_\_\_

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6. Project Narrative: \_\_\_\_\_

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7. Project Budget

Income	Estimated	Notes
Total		
Expenses	Estimated	
Total		

8. Impact (or potential) on the Organization and other ensembles: \_\_\_\_\_

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## Columbia Bands Operating Procedures

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<sup>i</sup> Modified from the Center For Association Leadership Model Policy:  
(<http://www.asaecenter.org/Resources/EURelated.cfm?ItemNumber=11611> Accessed 11/19/2014)