

American Guild of Organists



CHAPTER MANAGEMENT HANDBOOK

Eighth Edition
October, 2017

Committee on Membership Development and Chapter Support

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Approved by AGO National Council January 23, 2018

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Overview of the American Guild of Organists

The American Guild of Organists (AGO) is the national professional association serving the organ and choral music fields. The Guild serves approximately 16,000 members in 300 chapters throughout the United States, as well as in many countries of the world.

Founded in 1896 as both an educational and service organization, the Guild sets and maintains high musical standards and promotes understanding and appreciation of all aspects of organ and choral music.

Under the leadership of the National Council, a network of volunteer committees and officials at the regional, district, and local levels directs the activities of the Guild. The AGO National Headquarters is in New York City where a full-time staff supports and coordinates publication, administration, development, competition and certification activities of the organization. For purposes of administration and representation, the Guild is divided into seven geographical regions, and each chapter is assigned to one of them.

Mission, Vision, and Value Proposition

The mission of the American Guild of Organists is to foster a thriving community of musicians who share their knowledge and inspire passion for the organ.

The vision of the American Guild of Organists is to engage, support, and uplift every organist.

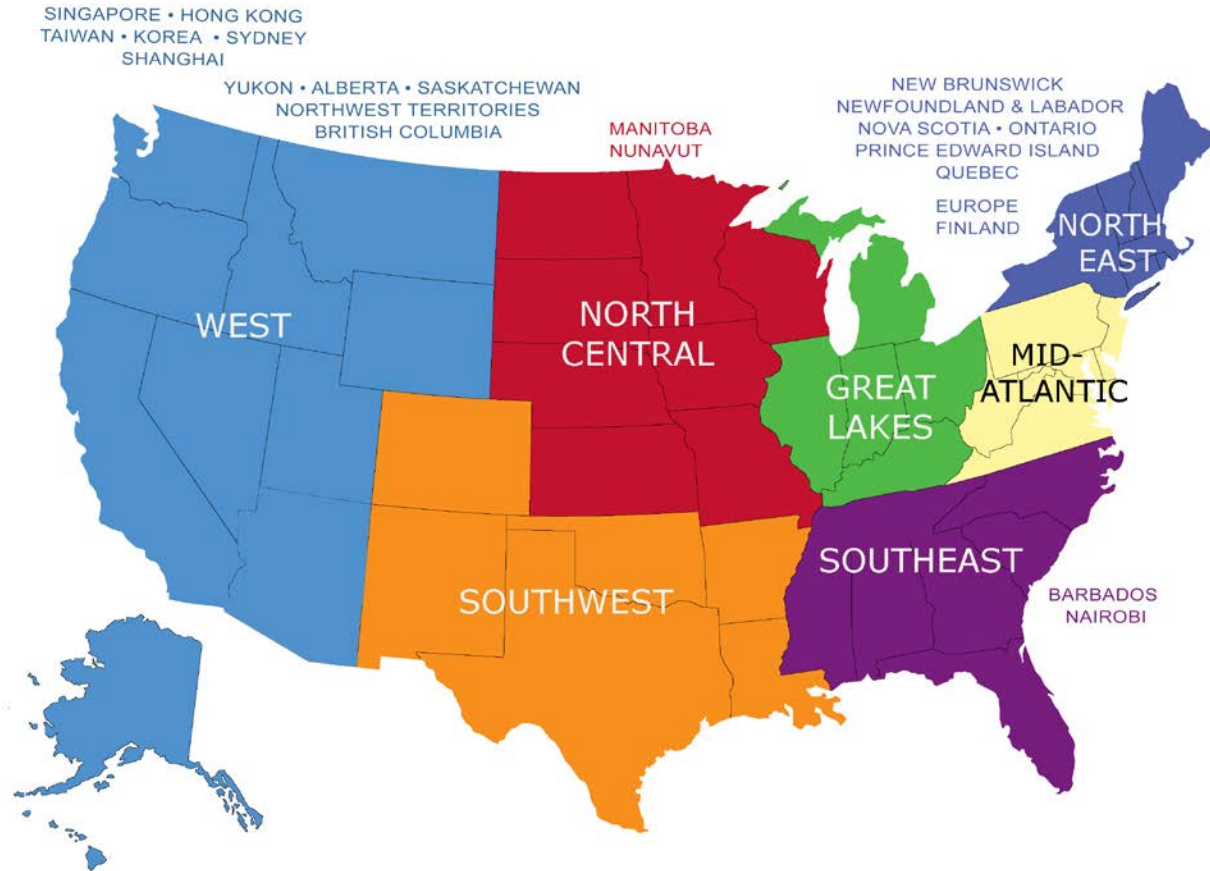
Value Proposition (A Value Proposition is simply a promise of value to be delivered—a statement of the specific benefits you can expect through AGO membership.)

As a member of the American Guild of Organists you can

- connect with other organists
- enhance your skills as an organist and choral conductor
- celebrate the organ in historic and evolving contexts
- discover news of the organ and choral world online and in *The American Organist*
- nurture new organists of all ages
- share knowledge and expertise
- enjoy camaraderie at chapter events and conventions
- find inspiration and challenge
- receive encouragement from colleagues
- experience great organs and organists
- access career opportunities and job listings
- earn professional credentials through AGO certification

Approved by National Council May 9, 2016; revised by National Council June 7, 2016.

Map of Regions and Chapters



A Regional Councillor is elected by the members of the Guild within each of the seven regions. The Regional Councillor is responsible for supervision and coordination of the work of the Guild in the Councillor's Region and reports to the National Councillor for Membership.

Appointed District Conveners are responsible for assisting the Regional Councillor in the work of the Region. In addition to District Conveners the National Council may appoint Regional Coordinators to assist the Regional Councillor in specific areas of the Guild's work, such as education and professional development.

Members who have a dual Royal Canadian College of Organists/AGO membership have full membership benefits in the AGO. They receive TAO, have full access to the website, including the job board, they can vote for National Council and the appropriate Regional Councillor. There are however, no Canadian chapters, so all Canadian members are either independent members of the AGO only or have the dual RCCO/AGO membership.

Overseas Chapters and Canadian Provinces in the Assigned Regions

Northeast

Canada:

New Brunswick
 Newfoundland and
 Labrador
 Nova Scotia
 Ontario
 Prince Edward Island
 Quebec

Europe Chapter

Finland Chapter

Southeast

Barbados Chapter

Nairobi Chapter

North Central

Canada:

Manitoba
 Nunavut

West

Canada:

Alberta
 British Columbia
 Northwest Territories
 Saskatchewan
 Yukon

Hong Kong Chapter

Shanghai Chapter

Singapore Chapter

Sydney Chapter

Taiwan Chapter

National Headquarters

The most direct method for accessing information regarding the AGO and its resources is to consult the [AGO website](http://www.agohq.org) at www.agohq.org, which is maintained and updated by the National Headquarters staff. You can find their names and individual contact information on the website. Contact and mailing information for the National Headquarters is below.

Address:

American Guild of Organists
The American Organist Magazine
475 Riverside Drive, Suite 1260
New York, NY 10115

Telephone: 212-870-2310
Fax: 212-870-2163
Email: info@agohq.org

Business Hours:

9:00 AM to 5:00 PM Eastern Time, Monday
through Friday

National Bylaws of the AGO

The National Bylaws of the AGO as most recently amended are found online. From the AGO website, go to About>Guild Documents>National Bylaws. Or, begin your search here on the [Official Guild Documents](#) page and click on “National Bylaws”. Chapter leaders should familiarize themselves with the information found in the bylaws, particularly ARTICLE III “Classes of Membership”, ARTICLE VII “Chapters” and ARTICLE VIII “Elections”.

Code of Ethics

Approved by the AGO National Council January 27, 2017

Preamble/Preface

The American Guild of Organists encourages its members to embrace and practice the following values as core ideals that Guild members aspire to cultivate in their ethical and professional conduct.

Value 1. Responsible Conduct toward Those Whom We Serve (including but not limited to clergy, supervisors, congregants, choir members, students, children, et al.). Members shall:

- Treat those whom they serve in a professional manner, with dignity, compassion, civility, and respect.
- Show respect to those whom they serve, regardless of race, ethnicity, religion, age, gender, gender identity, sexual orientation, marital status, socio-economic status, disability, or medical condition.
- Avoid any sort of abusive behavior, whether verbal, physical, sexual, psychological, emotional, or other.

- Refrain from disclosing confidential or sensitive information about others obtained in the course of professional service, unless disclosure serves a compelling professional purpose or is required by law.

Value 2. Respect for Our Professional Colleagues. Members shall:

- Maintain a professional attitude and act with integrity in relationships with colleagues, regardless of race, ethnicity, religion, age, gender, gender identity, sexual orientation, marital status, socio-economic status, disability, or medical condition.
- Respect the reputation and diversity of colleagues.

Value 3. Integrity in Our Professional Work. Members shall:

- Honor and abide by the conditions and requirements of the job descriptions and work agreements to which they have knowingly agreed, so long as those provisions are in accord with all applicable federal, state and local laws..
- Follow, as applicable, the principles of professional conduct that are expressed in the AGO Code of Professional Standards.
- For the benefit of future generations of musicians and to preserve the instruments of our profession, use care to ensure that when playing an instrument, the institution's expected practices and requirements for the care of the instrument and its venue are met.

Code of Professional Standards

Approved by the AGO National Council January 27, 2017

Members of the American Guild of Organists are bound by the Code of Ethics and guided by the Code of Professional Standards. Members of the American Guild of Organists dedicate themselves to the highest standard of professionalism, integrity and competence. The following principles are guidelines for the conduct of members in fulfilling their obligations as professional musicians.

Skills:

- I. Members develop and maintain skills in performance, improvisation, service playing, conducting, arranging, and composing commensurate with their duties.
- II. Members stay abreast of current developments in liturgy, hymnody, performance practice, and musicology through continuing education.
- III. Members become knowledgeable in the liturgy and worship traditions of the institutions they serve.
- IV. Members acquire business, administrative and interpersonal skills to perform their duties.

Employment Matters:

- I. Members agree to employment only after reaching a clear understanding of the position, the employer's expectations, and the lines of accountability.
- II. Members request written contracts that protect employee and employer.
- III. Members maintain courteous and respectful relationships with other staff members and members of their congregations, making an effort to resolve potential conflicts as soon as they become evident.

- IV. Members address differences with employing institutions through appropriate channels, including, but not limited to, their contract and the institution's personnel policies manual.

Respect for Colleagues:

- i. Members supervise other musicians in a professional and courteous manner.
- ii. Members respect the intellectual property rights of composers, authors and publishers by complying with the Copyright Law and licensing requirements regarding reproduction, recording, distribution, broadcasting and performing rights.
- iii. Members address differences with other members of the American Guild of Organists by following the procedures outlined in the Discipline.
- iv. Members do not discriminate against others on the basis of race, ethnicity, religion, age, gender, gender identity, sexual orientation, marital status, socio-economic status, disability, or medical condition.
- v. Members do not use AGO affiliation or membership information publicly (except for biographical purposes) to endorse, for commercial advantage, the financial and business goals or the products and services of others or to further any political goals.

The [Code of Professional Standards](#) is also found online. (Go to About>Guild Documents>Code of Professional Standards.)

On Being Dean: Key Elements of Chapter Leadership

By Carolyn Albaugh, AAGO

(Revised 2014)

1. Team Playing

A wise leader is a facilitator. Good ideas will come not only from your own experiences and from executive people but also from unexpected sources. Watch and listen for these. Give credit and appreciation as often as you can. Your chapter is one of many teams. What are other groups doing? Read all the AGO Chapter News reports found in TAO - not just the ones in your own region - and don't forget to send in your own report each month.

2. Problem Solving

Remember that you have a battery of experts available who will be glad to help you work through any problems that arise. Start with your colleagues. Other officers who will be valuable to you in many ways are: your District Convener, Regional Councillor, National Councillors, and AGO headquarters. Asking for help when you need it is a sign of strength.

3. Running Effective Meetings

A written agenda is a basic necessity. Leave room between topics for note taking. Sometimes ideas will be in conflict. Remember to stick to the issues, not to the personalities or the attitudes. Stay on track - socialize after the adjournment. Copies of "The ABC's of Parliamentary Procedure" are available from National AGO. You can also find help with Parliamentary procedure at websites such as www.robertsrules.com. You may wish to consider the "consensus model" of procedure such as those found at consensusdecisionmaking.org.

4. Visibility

Promote your chapter through announcements on your own Website and Facebook page (there must be several 'techies' in your chapter who can design one) as well as in newspapers, church bulletins, on radio and by posters. Sometimes it is helpful to schedule programs in conjunction with other community groups: high school band musicians for a brass and organ festival; string players for chamber music using an organ continuo. Above all, involve young people - they will be our future. We are the ones to take responsibility for getting them hooked on our unique instrument.

5. Chapter Communication

Keep in touch with your members via email. Announcements will keep them current on not only what is happening in your own chapter, but in your region and nationally as well.

6. Above all, HAVE FUN!

Your term is comparatively short. A successful Dean works very hard. Remember that smiles and thanks and enthusiasm go a long way to attract and hold both old and new members.

Key Dates for AGO Chapters

A Recommended Timeline for Chapter Leaders

JULY

July 1: Beginning of fiscal year for all chapters. Newly elected officers officially begin terms. Treasurer gives accounting records to auditors and prepares annual financial statement for chapter. Continue to remind members to renew using the ONCARD system.

AUGUST

Send reminders to all members who have not yet renewed.

Prepare membership directory/yearbook for fall distribution or publication on the chapter website. Announce fall program schedule to members (through newsletter, website, and/or other means). Publicity (member and community) for early fall events should be under way. Remember to have website updated to reflect the fall programming.

SEPTEMBER

Consider providing computer(s) and support to assist members to renew their membership at chapter meeting(s).

Contact all potential new members in area, and invite to chapter meeting.

Program year begins.

New member campaign should precede first fall event, with active members serving as hosts/hostesses for guest prospective members.

OCTOBER

October 1: Chapter yearbook should be made available to chapter members via website, print or other method.

October 1 through April 30: Service Playing Tests may be administered at any chapter.

October (even-numbered years): Deadline for chapter to submit application to National Headquarters to sponsor a chapter-level Regional Competition for Young Organists (RCYO).

NOVEMBER

November 15 deadline - If your chapter's fiscal year runs from July 1 to June 30, this is the due date to file Form 990-N with the IRS, by using the Annual Electronic Filing Requirement for Small Exempt Organizations — Form 990-N (e-Postcard) found here, [Annual Electronic Filing Requirement for Small Exempt Organizations — Form 990-N \(e-Postcard\)](#) See additional information elsewhere in the Chapter Management Handbook.

(Even-numbered years): Promote chapter-level RCYO competition.

DECEMBER

December 31: Deadline for executive committee to appoint nominating committee for chapter election. If chapter is on two-year election cycle, nominating committee is appointed in odd-numbered years.

FEBRUARY

Chapter-level RCYO held. See official rules for complete dates and guidelines.

Chapter nominating committee meets to select candidates for chapter election. If chapter is on two-year election cycle, committee must select candidates in even-numbered years.

MARCH

March 1: Deadline for nominating committee to deliver slate to executive committee, record slate in minutes, and announce candidates to membership in writing (done in even-numbered years by chapters on a two-year election cycle).

March 31 (odd-numbered years): Deadline for completion of chapter-level RCYO.

APRIL

Additional nominations to chapter election slate may be made by written petition signed by at least five voting members and sent to the chapter secretary by April 1, or within 30 days of the announcement of the nominating committee's slate (whichever is later). Following the above, the final ballot for chapter election may be prepared, and the election may proceed (to be concluded by May 31).

April 30: Service Playing Tests must be completed.

MAY

May 31: Chapter elections must be concluded.

Mid-May: CAGO examinations.

JUNE

Remind chapter members to renew their membership using the ONCARD system. Most members will need to renew their annual membership at this time.

Newly elected executive committee (and dean) appoints committee directors (and chaplain, if desired) and approves programs and budget for the new year.

Update officers for the upcoming chapter year in the Officer Roster in the Chapter Administration section of [ONCARD](https://www.agohq.org/oncard-login/). (Go to <https://www.agohq.org/oncard-login/>.) Remember that the dean's contact information will be made public on the AGOhq website. For assistance with updating the officer roster, contact Leah Semiken, Manager of Membership and Chapter Relations at 212-870-2311, ext. 7512 (email: leah.semiken@agohq.org)

June 30: End of fiscal year for all chapters.

June 30: End of term for chapter officers. If chapter follows two-year election cycle, terms end in even-numbered years.

A smooth transition to new officers of important documents, passwords and materials should take place.

Chapter website should be updated to reflect new officers and end of the program year.

Professional Certification examinations for FAGO, AAGO, and ChM held at approved examination centers (see January TAO for list). Recorded portions may be held at any chapter.

Installation of chapter officers held at any time following election.

Chapter Election Procedures

The AGO National Bylaws state the following regarding chapter elections:

1. Chapters may hold elections annually or biennially in even-numbered years.
2. By December 31 of an election year, the chapter executive committee must appoint a chapter nominating committee consisting of at least three members, a majority of whom are not on the executive committee. If a chapter operates on a biennial election cycle, the nominating committee must be appointed in odd-numbered years.
3. The nominating committee must nominate at least one person for each office. Each chapter must elect a dean, secretary, and treasurer; other officers are at the discretion of the chapter. Incumbent officers may be nominated for re-election, unless restricted by chapter operating procedures.
4. The nominating committee is strongly encouraged to nominate a number of persons in excess of those needed to fill the place of members-at-large of the executive committee who are resigning or whose terms expire in the current year, unless restricted by chapter operating procedures.
5. Chapter officers' terms are for one year in the case of chapters with annual elections, or for two years in the case of chapters with biennial elections. As noted in the National Bylaws, Article VII, Section 4: Members at large of the Executive Committee of a Chapter shall hold office for three (3) years (in the case of chapters with annual elections) or four (4) years (in the case of chapters with biennial elections) or until their successors have been duly elected, with one third of the members of the Executive Committee being elected at each election, or in cases of biennial elections one-half of the officers at each election.
6. The slate of nominees submitted by the nominating committee must be delivered to the executive committee, recorded in the minutes, and announced in writing to the membership by March 1. If a chapter operates on a two-year election cycle, the announcement to the membership must be by March 1 of even-numbered years.
7. Additional nominations may be made by petition of at least five voting members in good standing and should be received by the secretary no later than April 1 (or within 30 days after the members have been given the nominating committee's slate, whichever is later).
8. The election must be concluded by May 31. See "Balloting Procedures" in this section for procedures. A plurality (more votes than for any other candidate) of votes cast is sufficient for election.

It is imperative for the dean to inform the nominating committee members of their duties and timeline. A solid, well-run organization relies on committed, trustworthy officers. It is important that the committee nominate candidates who understand the duties of their office and assist the chapter and the Guild.

Given the above, when a prospective nominee is being contacted by a member of the committee the following information should be transmitted to the nominee:

1. We wish to nominate you for the following position in the chapter.
2. The duties you must perform in a timely fashion are set forth in the chapter's operating procedures.

3. You are expected to attend and participate in board meetings.
4. If you cannot attend a board meeting your input is expected via email or telephone call to the dean.
5. We hope you can attend chapter meetings.
6. Can you do all or most of the above?

If the potential nominee cannot or will not do the above it might be wise to consider another colleague for the position.

In seeking a nominee for a position, attempt to match work experience with the office. For example, if a member has a job that demands clerical skills, that member would have the experience for the position of chapter secretary, or if a member works in the financial industry, that member would have the experience for the position of chapter treasurer.

Election Timetable

If your chapter operates on a two-year election cycle, voting **must** be held in even-numbered years.

December 31 Deadline for chapter executive committee to appoint nominating committee.

March 1 Nominating committee's slate must be given to the executive committee, recorded in the minutes, and announced to the membership (in writing).

April 1 Additional nominations made by petition (see National Bylaws, Article VIII. Section 3. Chapter Office.) are due to the chapter secretary by this date, or within 30 days of the announcement of the nominating committee slate (whichever is later).

May 31 Elections must be held by this date. Once elected, new officers should immediately begin to attend executive committee meetings, with voice but no vote, until their official terms begin.

June 30 End of term for chapter officers and executive committee members whose terms have expired.

June 30 Officer Roster updates are due at National Headquarters through ONCARD.

July 1 New officers begin their terms.

Balloting Procedures

There are four methods of conducting a chapter election:

1. by mail
2. in person at a general chapter meeting
3. by a combination of the two above methods
4. online.

By Mail

Voting is conducted entirely by mail. Ballots are sent to all voting members two to three weeks in advance of the election deadline. The members return ballots by mail by a specified date to the chapter secretary. Ballots should be opened by two auditors who are not candidates. Mailed ballots are not to be signed nor is a proxy statement included. Rather, the envelope is marked "BALLOT" and must have the name of the voting member handwritten on it.

At a Chapter Meeting

It is important to announce well in advance that the election will be held at a particular chapter meeting. Provisions should be made for absentee voting. Eligible voting members should mark their ballots and cast them in such a way that their selections remain confidential. A written ballot is recommended.

Combination Method

This procedure was developed by the Richmond (Virginia) Chapter, and was approved by a registered parliamentarian. It is recommended to all chapters that utilize the combination method.

1. Ballots for enclosure in chapter newsletters and those for in-person balloting should be prepared on different colors of paper.
2. Mailed ballots are not to be signed nor is a proxy statement included. Rather, the envelope is marked "BALLOT" and must have the name of the voting member hand-written on it. The mailed ballots are opened only by the auditors at the time all the ballots are counted. No late ballots should be permitted.
3. Upon receipt, names of ballot-by-mail voters are checked off the voter roster.
4. These are double checked at the time of the in-person balloting.
5. For the in-person election, ballots of the second color are distributed to eligible members who have not mailed in their ballots.

Precautions:

1. ***The deadline for receipt of all mailed ballots must be prior to the meeting at which votes will be cast in person.***
2. ***All mailed ballots should be removed from their envelopes and placed with the in-person ballots prior to counting, in an endeavor to preserve the anonymity of the voters.***

Email and Online Voting

The National by-laws of the AGO do allow electronic balloting. Ballots including the Chapter Nominating Committee slate and candidates nominated by qualified petition shall be prepared by

the Secretary and distributed either by email or by using an online voting service. The following reminders and recommendations are offered:

1. Sufficient care must be taken to ensure that ballots reach every eligible Voting Member. Some members who do not have email service may need to receive their ballot by the postal service.
2. Any form of online voting should be completed before any in person voting takes place.
3. It is recommended that voting by email not be used as it does not provide adequate security or anonymity in most situations. Instead, options are available for free voting online through websites such as www.ballotbin.com which can provide secure and fair election results.

Installation of Officers

Guidelines for the Installation of Officers

Chapter installation events are intended to affirm the willingness of those elected to serve the Guild in the presence of the general membership. The American Guild of Organists is an educational organization whose members represent a variety of religious beliefs. While there is no official program for the installation of chapter officers, it is inappropriate to use an order of installation that excludes any chapter members. There is no requirement that any item/language be used in a chapter installation event. We submit here examples of the central act of installing officers. They may be modified to meet the needs of individual chapters and may take place during the regular meeting/activity of a chapter.

Suggestions

1. Verify the presence of officers to be installed prior to introducing them.
2. Naming and thanking outgoing officers would be appropriate at the time of the installation.
3. Prepare early by inviting your District Convener, Regional Councillor or other national officer to attend and lead the installation service.

Installation of Officers #1

The presiding/installing official should be one of the following: District Convener, Regional Councillor, National Councillor, retiring Dean, Sub-Dean, Chaplain, or if necessary, any designated chapter officer. She/he will read the service as follows:

Installing Official:

The (name) Chapter of the American Guild of Organists presents for installation the following duly elected officers.

(Call names and respective offices; ask them to come forward.)

You have been chosen by your colleagues to guide this Chapter during the coming year. This selection shows confidence in your wisdom, character, creativity, and leadership.

Installing Official addresses the officers:

Will you severally promise to uphold the National By-Laws of the American Guild of Organists and honor their enactment? If so, respond, "I will."

Will you unite in your common charge as officers to foster a thriving community of musicians who share their knowledge and inspire passion for the organ? If so, respond, "I will."

Will you endeavor to engage, support, and uplift every organist, encourage continued education, and strive for the enlightenment of the community in which you serve? If so, respond, "I will."

Will you faithfully fulfill the duties of your individual office to the best of your ability? If so, respond, "I will."

Installing Official addresses the general membership:

Fellow members, will you support these officers in their service to the Guild? If so, respond, “We will.”

Now that our elected representatives have pledged to serve the purposes of the Guild, and we the membership have endorsed their leadership, let us welcome our new Chapter officers.

Congratulations. *(Applause is appropriate.)*

Installation of Officers #2

The presiding/installing official should be one of the following: District Convener, Regional Councillor, National Councillor, retiring Dean, Sub-Dean, Chaplain, or if necessary, any designated chapter officer. She/he will read the service as follows:

Installing Official:

The (name) Chapter of the American Guild of Organists presents for installation the following duly elected officers:

(Call names and respective offices; ask them to come forward.)

You have been chosen by your colleagues to guide this Chapter during the coming year. This selection shows confidence in your wisdom, character, creativity, and leadership.

At the heart of the formation and continuing life of the American Guild of Organists is its mission and vision statements:

To foster a thriving community of musicians who share their knowledge and inspire passion for the organ.

And,

To engage, support, and uplift every organist.

Installing Official addresses the officers:

As elected officials of the (name) Chapter, I ask you to keep the Mission and Vision statements of the American Guild of Organists in mind as you carry out the functions of your offices.

Officers, do you accept the challenges and responsibilities of the office to which you have been elected and agree to work with your fellow officers and members in an atmosphere of mutual respect, toward the common goals and continued health and growth of the (name) Chapter and the American Guild of Organists? If so, please respond, “I do.”

Installing Official addresses the general membership:

Members, do you accept the responsibility to support these officers whom you have elected in the work they are about to undertake on your behalf? If so, please respond, “We do.”

With these expressions of mutual respect and support, it is now my privilege to install you as the officers (and Board members) of the (name) Chapter.

Congratulations to you all. *(Applause is appropriate)*

Installation of Officers #3

The presiding/installing official should be one of the following: District Convener, Regional Councillor, National Councillor, retiring Dean, Sub-Dean, Chaplain, or if necessary, any designated chapter officer. She/he will read the service as follows:

Installing Official:

The (name) Chapter of the American Guild of Organists presents for installation the following duly elected officers:

(Call names and respective offices; ask them to come forward.)

You have been chosen by your colleagues to guide this Chapter during the coming year. This selection shows confidence in your wisdom, character, creativity, and leadership.

As members of the American Guild of Organists we are bound by the Code of Ethics and guided by the Code of Professional Standards. We are reminded therefore at this time of what our Code of Ethics asks of us:

• **Value 1. Responsible Conduct toward Those Whom We Serve. Members shall:**

- Treat those whom they serve in a professional manner, with dignity, compassion, civility, and respect.
- Show respect to those whom they serve, regardless of race, ethnicity, religion, age, gender, gender identity, sexual orientation, marital status, socio-economic status, disability, or medical condition.
- Avoid any sort of abusive behavior, whether verbal, physical, sexual, psychological, emotional, or other.
- Refrain from disclosing confidential or sensitive information about others obtained in the course of professional service, unless disclosure serves a compelling professional purpose or is required by law.

• **Value 2. Respect for Our Professional Colleagues. Members shall:**

- Maintain a professional attitude and act with integrity in relationships with colleagues, regardless of race, ethnicity, religion, age, gender, gender identity, sexual orientation, marital status, socio-economic status, disability, or medical condition.
- Respect the reputation and diversity of colleagues.

• **Value 3. Integrity in Our Professional Work. Members shall:**

- Honor and abide by the conditions and requirements of the job descriptions and work agreements to which they have knowingly agreed, so long as those provisions are in accord with all applicable federal, state and local laws.
- Follow, as applicable, the principles of professional conduct that are expressed in the AGO Code of Professional Standards.
- For the benefit of future generations of musicians and to preserve the instruments of our profession, use care to ensure that when playing an instrument, the institution's expected practices and requirements for the care of the instrument and its venue are met.

As (District Convener, Chaplain, Dean, etc.), I charge you to execute the responsibilities of the office you are about to undertake prudently and faithfully. Please join me in the installation responses as you are addressed.

Installing Official addresses the officers:

Elected officers, you have been reminded of the Code of Ethics for all members of the American Guild of Organists. If you accept the office and responsibilities to which you have been nominated and elected, and if you intend to support the standards and purposes of the American Guild of Organists as an officer, please answer, "I do."

Installing Official addresses the general membership:

Fellow members, if you endorse these elected officers before you, please respond, "I do."

Installing Official addresses both officers and members:

Officers and members, do you this day mutually agree to encourage, support, and cooperate with one another in the work of this Chapter? Please respond, "We do."

Installing Official addresses the officers:

The charge to you becomes a charge to all of us, for we are all members one of another. In common vocation with you, we pledge to you our support that you might freely exercise the leadership committed to you. Congratulations. *(Applause is appropriate.)*

The ONCARD System and Renewal of Membership

By AGO National Staff

July, 2014

ONCARD stands for **Online National Collection and Remittal of Dues**. As mandated by the AGO National Council the method of collecting dues is now a service provided to chapters by AGO National Headquarters, The national office is responsible for invoicing and collecting dues from all members and returning to the chapters their portion of the dues as well as any other chapter-specific funds collected during dues renewal.

The Invoicing Process

AGO Headquarters will email invoices to members with valid email addresses in our system. The email will contain a link to ONCARD, where members can login and securely renew their membership and make contributions to national and local funds.

We will send paper invoices by U.S. mail to members who do not have a valid email address in our system. The invoice, along with a check, should be returned to the National office. Some members will continue to send checks to the local chapter. In this case the chapter should follow tradition and send a dues report to the National office with that member's national portion of the dues. However, to avoid confusion, AGO Headquarters hopes that chapters will strongly encourage members who want to pay by check to send them to the National office.

Payment by an Employer

In order to have an employer, such as a church, pay a member's dues, a printed copy of the invoice should be given to the responsible person at the place of employment. That person must include the invoice when the check is mailed so AGO HQ can properly credit the member's account. This invoice can be printed at the conclusion of the online renewal process

Chapter Administration

During the renewal process in ONCARD, members will be able to update personal data in the AGO national database such as mailing address, or date of birth, and to make contributions to chapter and national funds. Chapter officers can also use ONCARD to update the personal data of their members, arrange payment of chapter-sponsored members, print rosters, export member data to a csv file, and review reports to track funds that have been returned to the chapter.

Chapters have the ability to set up 10 chapter-specific data fields. These fields could be used to collect data from members such as substitute availability, types of organs played, and interest in chapter events, etc. Chapters can also create up to 5 contribution funds that members can contribute to during the renewal process.

Chapter Portion of Dues & Contributions

Members will pay their dues and make contributions to national and local funds either by credit card through ONCARD or by a check to the National AGO. The national office will remit the chapter portion of

dues and any contributions to local funds to the chapter bank account via ACH transfer or check. A detailed accounting of each transfer will be available via the Remit Reports feature of the Chapter Administration subsection of the ONCARD menu.

Processing Paper Invoices & Data Collection Forms

The paper invoice mailed from AGO HQ will have space for members to update their address and other basic contact information and to make contributions to local chapter funds. National will process this information when the form is returned to our office.

The Print Chapter Data Collection Form contains the chapter-specific data fields a chapter has set up. This form may be printed in chapter newsletters, mailed to members, or handed out at meetings. Members who do not want to use ONCARD may fill out the form and return it to the chapter for input into ONCARD.

Recommended Chapter Operating Procedures

(Approved by the National Council as amended March 3, 2006)

Each Chapter may establish its own operating procedures, provided, however, that such operating procedures do not conflict with the Charter or Bylaws of the Guild. The operating procedures must be approved by the Chapter, the Regional Councillor, and the Vice President. (AGO National Bylaws)

Effective administration of a Chapter proceeds from first defining the tasks to be done and then seeing that authority is delegated to persons willing and able to accomplish the tasks. Chapter Operating Procedures help to clarify those tasks by providing job descriptions for the various positions and committees appointed by the Chapter. Chapter Operating Procedures also facilitate smooth Chapter operation by providing an enduring source documenting procedures and policies of the Chapter. AGO National Bylaws are a sufficient basis for most normal Chapter operations, though some Chapters find that adoption of a set of Operating Procedures eases management of affairs unique to a particular Chapter. While no Chapter is required to adopt its own Operating Procedures, formulation of appropriate Chapter Operating Procedures will take into account local needs and traditions that will vary from one community to another.

The Officers of the Chapter, beginning with the Dean, are the persons charged with seeing that Chapter business is properly and efficiently carried out. The Dean must be not only a person committed to the Mission Statement of the American Guild of Organists but also an individual with a keen awareness for and strong commitment to the members of the Chapter and the local community. Most important among the Dean's duties are assuring that volunteers are matched with tasks appropriate to their personal availability, interests and skills, delegating authority that enables them to accomplish assigned jobs, and encouraging their work with supportive oversight. Other Chapter Officers required by the National Bylaws are those of Secretary and Treasurer. Sample job descriptions for these positions are given in the Sample Chapter Operating Procedures in this Handbook.

Of the various optional offices the position of Sub-Dean may be most useful to a Chapter. Typically the Sub-Dean is the Director of the Program Committee, an assignment offering excellent training in the development of organizational skills. This office can provide experience in the Chapter that may prepare future Deans. While there is no formal expectation that a sitting Sub-Dean will be nominated for the office of Dean in a future election, such is the practice in many Chapters.

Standing committees can facilitate the smooth operation of the Chapter. Chapters may choose among the examples of Standing Committees given here or create others as needed to accomplish special program needs or administrative purposes. Some additional possibilities might include: a Substitute Organist Referral Committee, providing pertinent information to churches as needed; as well as standing committees for hospitality, placement, publicity and education all of which can include members with interest or special skills in these areas.

All elected officers and board members, chairpersons and members of standing or ad hoc committees of any chapter should be voting General Members of that chapter of the AGO as defined by the by-laws (see the National By-Laws, Article VII, Section 3 for additional clarification).

Sample Operating Procedures

Below is a complete set of operating procedures meant to serve as a guide for the creation of such procedures for a chapter. Standing Committees and duties may be altered to fit the particular chapter. Please review the preceding page for clarification. The italicized comments in the text are for clarification, and are not to be included in actual operating procedures. [NOTE: A Word version of this file is available on the AGO website [here](#); from the AGO website homepage, go to About>Guild Documents>Chapter Documents.]

OPERATING PROCEDURES TO GOVERN THE _____ CHAPTER American Guild of Organists

On this (Date), the undersigned members of the Executive Committee of the (Chapter name) Chapter of the American Guild of Organists do adopt the following as OPERATING PROCEDURES, which are in accordance and agreement with the National Bylaws of the American Guild of Organists, as adopted April 13, 1896 and amended through July 2, 2012.

(NOTE: the latest version of the Bylaws is available on the AGO website, go to About>Guild Documents>National Bylaws. Or, begin your search here on the [Official Guild Documents](#) page and click on "National Bylaws".

(NOTE: The paragraph headings are for convenience of organizing material and for ease of locating subjects and specifics in the document. Chapters will adjust these and the content of the paragraphs as appropriate.)

SECTION 1. NAME. The name of this organization shall be the (Chapter name) of the American Guild of Organists (hereinafter, "Chapter"), a subordinate unit of the national organization known as the American Guild of Organists.

SECTION 2. MISSION STATEMENT Article II, Section 1 of the National Bylaws is incorporated by reference, as if fully set out herein. Nothing in these Operating Procedures shall be read, and none of the Chapter's activities pursuant to these OPERATING PROCEDURES shall be undertaken or executed, in a manner inconsistent with the fundamental purposes of the Guild.

SECTION 3. CLASSES OF MEMBERSHIP. Article III, Sections 1-3 and Article VII, Section 3 of the National Bylaws of the American Guild of Organists are incorporated by reference, as if fully set out herein.

(NOTE: Chapters may elect to include here the complete text of the Bylaws excerpt.)

Section 4. CHAPTER GOVERNANCE.

1. OFFICERS. The officers of the Chapter shall be the Dean, Secretary and Treasurer.

(NOTE: National Bylaws requires these three Officers, but many chapters choose to include additional Officers. Most common are Sub-Dean, Membership Officer, Newsletter Editor, Publicity Officer, Professional Development Officer, Education Officer, and Development Officer.

Some of the most common assignments for these optional positions are described below, but a Chapter will include them in its governance structure only if the scope of Chapter activities warrants the positions.)

2. DUTIES OF THE DEAN. The Dean shall be the chief executive officer of the Chapter, and as such shall have the following duties and responsibilities:

- a. Preside at all meetings of the Chapter and Executive Committee when present.
- b. Nominate the directors of all standing committees for appointment by the Executive Committee.
- c. Nominate, for appointment by the Executive Committee, a person or persons to fill vacancies that may occur as the result of death, resignation, incapacity, removal or disqualification of any officer or duly elected member of the Executive Committee.
- d. Create, with the approval of the Executive Committee, committees and correlate the work of the officers and standing committees.

(NOTE: Though some chapters grant to the Dean sole authority to appoint committees, it is preferable that the Executive Committee ratifies all nominations for committees and for Directors of committees.)

- e. Serve as ex officio member of all committees, excluding the Nominating Committee. (NOTE: "Ex officio" means "by virtue of office held," and carries no implication that the ex officio member has no vote.)
- f. Submit reports at the general meetings of the Chapter, including issues and recommendations the Dean considers appropriate for consideration by the members of the Chapter.
- g. Carry into effect all directions and resolutions of the Chapter and Executive Committee and make such other reports to the Chapter and Executive Committee that the Dean shall deem necessary, or that policies of the Chapter or Executive Committee may require.
- h. Sign and countersign all contracts and other instruments for and on behalf of the Chapter pertaining to usual, regular and ordinary affairs of the Chapter, as may be authorized by the Executive Committee.
- i. Serve as primary Chapter liaison with the District Convener, Regional Coordinator for Professional Development, Regional Coordinator for Education, Regional Councillor and Executive Director of the Guild.
- j. Remain in office for a term of one (1) year, with the possibility of nomination for re-election.

(NOTE: Please reference details on terms of office in the note to Section VI paragraph 3 of this sample document.)

- k. Perform such other duties as are incidental to the execution of this office or that may be required of the Dean by the Executive Committee.

3. DUTIES OF THE SUB-DEAN. The Sub-Dean, in the absence of the Dean of the Chapter, shall exercise all the powers and perform all the duties of the Dean of the Chapter. The Sub-Dean will

serve as Director of the Program Committee (ref. Section VIII, paragraph 10 below and as such be responsible for planning the annual program of activities for the Chapter.

The Sub-Dean shall remain in office for a term of one (1) year, with the possibility of nomination for re-election. The Sub-Dean shall perform such other duties as are incidental to the execution of this office or that may be required of him/her by the Executive Committee. In case of the Dean's death, resignation or removal, the Sub-Dean will succeed to the office of Dean for the remainder of the Dean's elected term.

4. DUTIES OF THE SECRETARY. The Secretary shall keep records belonging to the Chapter and have custody of the minutes of the meetings of the Executive Committee and of general meetings of the Chapter. Such minutes of the Executive Committee shall include the names of those members who are present and absent as well as copies of the reports from all committees. The Secretary shall issue notices for all meetings of the Executive Committee. The Secretary shall make such reports and perform such other duties as are incidental to the execution of this office or that may be required by the Executive Committee.

(NOTE: Though not obligatory, the Secretary may also be the recorder of minutes of meetings. In some Chapters the Secretary may also perform duties of an Historian, Publicity Officer or other responsibilities. In drawing up these Procedures care should always be taken to balance the distribution of duties among members of the Executive Committee.)

5. DUTIES OF THE TREASURER. The Treasurer shall be custodian of all financial records of the Chapter, and as such, shall have the following duties and responsibilities:

- a. Supervise and have custody of all financial records of the Chapter and keep full and accurate accounts of the receipts and disbursements of the Chapter. These shall include
 - (1) Assets, liabilities and fund balances.
 - (2) Revenue and operating expenses.
 - (3) All other financial records and documents deemed necessary by the Executive Committee.

(NOTE: Some chapters may wish to add to this list specific accounts for ongoing activities, such as Chapter concert series income and expenses; income from gifts, grants and contributions; endowment funds, etc.)
- b. Cause all monies and credits to be deposited in the name of and to the credit of the Chapter in such accounts and depositories as may be designated by the Executive Committee.
- c. Disburse, or supervise the disbursement of, all other funds of the Chapter, in accordance with the authority granted by the Executive Committee, utilizing proper vouchers to correspond to the disbursements and keeping accurate records thereof.
- d. Prepare and submit such reports or statements of the Chapter's finances and accounts as may be requested by the Executive Committee.
- e. Sign and/or countersign such instruments requiring his/her signature.
- f. Serve as a member of the Finance Committee.

(NOTE: This last statement (e) only applies if the Chapter elects to establish a Finance Committee. In the absence of a Finance Committee a further paragraph could be added to the above list of duties for the Treasurer: "Make periodic recommendations to the Executive

Committee on determining an annual budget for the Chapter and on management of the Chapter's assets.")

- g. Perform such other duties incidental to the execution of this office that may be required by the Executive Committee

(NOTE: In some Chapters, in the absence of a separate Membership Coordinator, the Treasurer may assume the duties of keeping dues records by serving as chapter liaison between the chapter and the ONCARD system.)

(NOTE: Items 6-11 below are provided only in the cases where Chapters are of appropriate size and have a scope of activity that warrants the positions. A Chapter may use these descriptions or create other descriptions of positions, as appropriate to the Chapter membership and the community.)

6. DUTIES OF THE REGISTRAR. The Registrar shall be custodian of the membership records of the Chapter and, as such, shall have the following duties and responsibilities:

(NOTE: In many Chapters the following duties are included with those of the Treasurer and of the Secretary.)

- a. Assist members in gaining access to the AGO ONCARD system for renewal.
- b. Provide opportunities for chapter members to renew using ONCARD at chapter meetings.
- c. Distribute the AGO Membership Brochure to those interested.
- d. Understand and be able to retrieve records of the chapter membership from the AGO's Membership data base through the ONCARD system.
- e. Maintain appropriate and necessary contact with the ONCARD system as to support the chapter leadership.
- f. Perform such other duties as are incidental to the execution of this office or task that the Executive Committee may direct.

7. DUTIES OF THE MEMBERSHIP COORDINATOR. The Membership Coordinator shall be responsible for activities focused on recruiting and retaining chapter membership. These activities will include, but are not limited to the following:

- a. Develop and administer a process for identifying and recruiting new members and ensuring that they are registered in a timely fashion.
- b. Analyze the demographics of the current membership and recommend and implement steps to maximize retention of those members.
- c. Serve as key contact person for members and prospects seeking information about membership categories, benefits, dues, etc.
- d. Help ensure that current members participate in the chapter's social, musical, and professional development programs.
- e. Take an active role in ensuring that all chapter members are welcomed cordially at meetings and integrated seamlessly into the fabric of the chapter.
- f. Set the standards for hospitality and teach them to others.
- g. Send National and Chapter membership applications to prospective members, as determined by the Executive Committee.

- h. Serve as Director of the Membership Committee (Section VIII, Paragraph 7, below).
- i. Perform such other duties as are incidental to the execution of this office or tasks that the Executive Committee may direct.

8. DUTIES OF THE CHAPTER HISTORIAN. The Chapter Historian shall keep a copy of all Chapter programs, any published article concerning the Chapter appearing in a newspaper or magazine, any Chapter publication, and any book, score or concert program submitted by a member of the Chapter.

9. DUTIES OF THE NEWSLETTER EDITOR. The Editor of the Chapter Newsletter, *(Title may be included here)* shall have responsibility for gathering and publishing all necessary items and information for the benefit of the members of the Chapter. Such items and information shall include, but not be limited to, the following: announcements of forthcoming meetings of the Chapter; notices of upcoming Chapter program events; a calendar of future programs or events in the community; a list of positions available for church and synagogue musicians; a letter from the Chapter Dean; and any other item deemed appropriate by the Executive Committee. The Editor should work closely with the chapter webmaster to insure publication of the newsletter content properly and in a timely manner on the chapter website.

(NOTE: In Chapters with a large membership, acquisition of a postal permit for bulk mailing is strongly suggested. Publication times and dates as well as deadlines are to be established by the Executive Committee. If paid advertisements are to be solicited the description of duties for the Editor should clarify which individual is responsible for collection of payments from advertisers.)

10. DUTIES OF THE PUBLICITY OFFICER. The Publicity Officer shall have responsibility for all publicity concerning Chapter meetings, public programs, recitals and any other activities of the Chapter, as the Executive Committee deems necessary. The logo of the American Guild of Organists should be included on all printed publicity materials. *(NOTE: Camera-ready copies of the AGO logo can be obtained from the AGO website. The Chapter may wish to develop and use its own logo in addition to the AGO image, without supplanting it.)*

11. DUTIES OF THE WEBMASTER. The Chapter Webmaster shall have responsibility for maintaining the Chapter Website with the most current information possible. The Website shall include, but not be limited to, the following: a full listing of chapter events for the current year; contact information for Chapter leaders as determined by the Executive Committee; a link to the National AGO Website <http://www.agohq.org>; and any other information useful to individuals interested in contacting the Chapter through the Internet. The Chapter Webmaster shall forward the Chapter's Web address to National Headquarters to enable interested parties to reach the Chapter from a link on the National AGO Website.

(NOTE: If a chapter chooses to have an outside party (individual who is NOT a chapter member of the AGO) maintain their website, this person may not serve as a chapter officer. In such a case, the chapter may choose to divide any duties not covered by the contracted individual to other chapter officers. Should the Chapter elect to sell classified or subscription advertising for the Website the Webmaster shall work closely with the Treasurer to clarify the responsibilities and procedures for solicitation and for collection of payments. Chapters may contact National Headquarters for the most recent organizational details relevant to setting up a Chapter

Website. Setup, design and maintenance of a Chapter Website, including any costs incurred, is the sole responsibility of the Chapter.)

12. DUTIES OF THE CHAPLAIN. The Chaplain shall be nominated by the Dean and appointed by the Executive Committee and shall serve a term of one (1) year, with eligibility for appointment to successive terms. The Chaplain shall perform those duties deemed appropriate to the office.

(NOTE: Since AGO is a non-sectarian organization unaffiliated with any specific religious tradition the appointment of a Chaplain is not obligatory. The Chaplain typically serves 1) as advisor the Executive Committee on appropriate issues, 2) as "on-call" advisor to Chapter members seeking support or 3) as leader or host of Chapter events involving clergy or comprising worship events. The Chapter should not expect the Chaplain to be an advocate for Chapter members involved in disputes or as a spokesperson for the Chapter on spiritual matters.)

13. EXECUTIVE COMMITTEE. The Executive Committee is the representative governing body of the Chapter. The Executive Committee conducts the business of the Chapter when the full membership is not present. The Committee shall consist of all elected officers of the Chapter and all duly elected members of the Executive Committee. All Directors of standing committees and all District, Regional, and National Officers who are members of the Chapter may attend Chapter Executive Committee meetings with voice, but no vote.

14. EXECUTIVE COMMITTEE MEETINGS. The Executive Committee shall meet preceding the regularly scheduled general meetings of the Chapter in the months of October, January, March and May. Meetings may also be scheduled for other times as shall be deemed necessary by the Dean. The Dean shall provide no less than a fourteen (14) day notice of any meeting of the Executive Committee. Attendance by Executive Committee members is expected at all meetings. *(NOTE: Many Chapters find the need to hold monthly Executive Committee meetings in order to conduct the business of the Chapter. If so Item 14 should be altered to read accordingly. In no case should Executive Committee meetings be called with less than A fourteen- (14) day notice.)*

15. GENERAL MEETINGS OF THE CHAPTER. General meetings of the Chapter shall be held (time and date) from (month) to (month) inclusive. A general meeting may take place at such other time as deemed necessary, with approval of the Executive Committee. (Number) members shall be necessary and sufficient to constitute a quorum for the transaction of the business of the Chapter.

(NOTE: To encourage broad participation in Chapter affairs fifty percent of the membership of the Chapter is recommended as constituting a quorum, but in no case shall a quorum be declared with less than ten percent of the membership in attendance. For its Operating Procedures a Chapter may elect to express the minimum for a quorum as a percentage of membership rather than as a number as above.)

SECTION 5. DUES OF THE CHAPTER

The AGO National Council determines annual dues for membership in the American Guild of Organists.

SECTION 6. ELECTION PROCEDURES

1. NOMINATING COMMITTEE

The Nominating Committee shall consist of five (5) persons who are voting members of the Chapter in good standing. Not more than two (2) may be members of the Executive Committee. The Nominating Committee is appointed by vote of the Executive Committee upon the recommendation of the Dean (see Section I.2.c). The Nominating Committee shall nominate one (1) or more candidates for each office and an excess of candidates for membership at-large on the Executive Committee in place of those whose terms of office are about to expire. The Nominating Committee shall present the slate to the Executive Committee. The slate of candidates shall be recorded in the minutes, published to all chapter members and announced to the general membership according to the schedule required in the National Bylaws. Additional nominations may be made by petition if each petition is signed by five (5) voting members of the Chapter in good standing and submitted to the Chapter Secretary within thirty (30) days of the announcement of the slate to the Chapter membership. The slate of candidates prepared by the Nominating Committee and the names of any candidate duly submitted by petition are not subject to discussion or approval by the Executive Committee and may not be vetoed by the Executive Committee or any member thereof, including the Dean.

(NOTE: In Chapters of limited size a Nominating Committee of three members may be necessary, and this should be reflected in the Chapter Operating Procedures. In this case no more than one member of the Nominating Committee of three may be a member of the Executive Committee and the Dean may not be a member of the Nominating Committee of three. In Chapters holding first, second or third election cycles, the slate of nominees prepared by the Nominating Committee shall specify a class for each candidate. See Paragraph 3 below.)

2. ELECTION AND INSTALLATION OF CHAPTER LEADERS

The annual election of Chapter leaders, both Officers and members at-large of the Executive Committee, shall take place by May 31 of each year. Ballots including the Chapter Nominating Committee slate and candidates nominated by qualified petition shall be prepared by the Secretary and distributed either by mail or electronically (in the form of proxies) or at a general Chapter meeting. Sufficient care must be taken to ensure that either the mailed/electronic ballot or notification of the meeting at which voting is to take place reaches every eligible Voting Member. The ballots are to be opened and counted only in the presence of at least two Chapter members in good standing including one member who is not currently serving on the Executive Committee. A plurality of votes cast shall be sufficient for election. Newly elected Chapter leaders shall be installed at the next general meeting of the Chapter. Terms of office begin on July 1.

NOTE: Please see the Chapter Management Handbook Section on Balloting to be sure the chapter's election is properly conducted. Questions can always be referred to your Regional Councillor or the AGO office.

3. ELECTION OF EXECUTIVE COMMITTEE MEMBERS AT-LARGE.

For Chapters holding the first election cycle and holding elections annually:

The duly elected members at large of the Executive Committee shall be divided into three (3) classes, each class having equal numbers of members numbering not less than one (1) and not more than three (3). Those in Class I shall be nominated for and elected to hold office for a term of one (1) year; those in Class II shall be nominated for and elected to hold office for a term of

two (2) years; those in Class III shall be nominated for and elected to hold office for a term of three (3) years. Elected members at-large of the Executive Committee shall hold office only for the term in which they are elected and shall serve until their successors are duly elected and officially installed.

For Chapters holding the first election cycle and holding elections biennially:

The duly elected members at large of the Executive Committee shall be divided into two (2) classes, each class having equal numbers of members numbering not less than one (1) and not more than three (3). Those in Class I shall be nominated for and elected to hold office for a term of two (2) years; those in Class II shall be nominated for and elected to hold office for a term of four (4) years. Elected members at large of the Executive Committee shall hold office only for the term in which they are elected and shall serve until their successors are duly elected and officially installed.

For Chapters already having held their third election cycle, including Chapters preparing a revision of Chapter Operating Procedures:

Elections for members at large on the Executive Committee are held [annually] [in odd numbered years] [in even-numbered years] (NOTE: Choose one of these in accordance with local Chapter needs.)

If an annual election cycle, use the following: Each member at large is elected for a term of three years, one-third of the total number of members at large being selected in each election year.

If a biennial election cycle, use the following: Each member at large is elected for a term of four years, one-half of the total number of members at large being selected in each election year.

4. VACANCIES ON THE EXECUTIVE COMMITTEE

Any member of the Executive Committee may resign from his/her position with such resignation submitted in writing to the Executive Committee. The resignation is effective immediately upon its acceptance by the Executive Committee. A vacancy on the Executive Committee that may result from, but not be limited to, resignation or death of a member, or removal of a member for failure to fulfill responsibilities may be filled through appointment by the Dean. Any Chapter member appointed to fill such a vacancy shall meet all qualifications to hold office and shall serve for the unexpired term of his/her predecessor or for the predetermined term length until the successor has been duly elected and officially installed.

5. REMOVAL FROM OFFICE. A duly elected Officer or duly elected member at large of the Executive Committee may be removed from office due to inability or failure to fulfill his/her responsibilities only by action of the Chapter Executive Committee as follows:

- a. By simple majority vote the Executive Committee shall authorize the Dean or other officer designated by the Executive Committee to send a formal written notice to the officer or member-at-large in question, stating that action to remove such officer from elected position is pending before the Executive Committee. In the event of such action against the Dean of the Chapter the Sub-Dean shall act as the Chapter's executive officer.
- b. The Executive Committee shall request a response from the Officer or member at large in question within two (2) weeks, or until the next meeting of the Executive Committee,

whichever is later. After such time action to remove said Officer or member at large shall require a two-thirds majority vote of the Executive Committee.

SECTION 7. PROGRAMMING POLICY

All programs sponsored by the Chapter must have the approval of the Executive Committee. The Executive Committee must also approve all calendar dates and expenses of all programs sponsored by the Chapter. Any organization wishing to co-sponsor a program with the Chapter shall submit a proposal to the Program Committee. No member of the Executive Committee or the Chapter shall give confirmation of any event prior to its approval by majority vote of the Executive Committee.

(NOTE: It is recommended that the Chapter determine written policies and procedures both for compensation of institutions for use of their facilities and for compensation of Chapter members performing for or assuming a leadership role in Chapter-sponsored programs.)

SECTION 8. STANDING COMMITTEES

The Executive Committee has the power to appoint all standing committees and committee Directors. The Dean nominates committee Directors, and each committee Director appoints the members of his/her committee. The Dean serves as an ex officio member of all committees.

(NOTE: Standing committees should be listed in the Chapter Operating Procedures, but the size and activities of the Chapter will determine the number and duties of these committees. Standing Committees are necessary only insofar as they contribute to a Chapter's efficient operation.) Specific areas of responsibility for standing Committees may include: AGO Professional Certification, Operating Procedures, Program, Membership, Education, Chapter Competition, Yearbook, Finance, Professional Development, Placement, Publicity and Website.)

1. AGO PROFESSIONAL CERTIFICATION COMMITTEE

The Chapter Education Coordinator shall be the Director of this Committee. This Committee has responsibility for devising ways to aid members of the Chapter in preparing themselves for the AGO examinations. Should the Chapter be chosen as an AGO Examination Center the Director is responsible for conducting AGO Certification Exams according to the guidelines provided from National Headquarters.

2. OPERATING PROCEDURES COMMITTEE

The Operating Procedures Committee shall be responsible for keeping the Executive Committee advised of the contents of the National Bylaws, particularly as to the effect of any changes upon the Chapter's own Operating Procedures. This Committee advises the Executive Committee on necessary revisions to Operating Procedures and keeps records of all such policies and procedures as adopted by the Executive Committee, including such amendments and additional policies created by Executive Committee action, with indication of the dates of such actions.

3. COMPETITION COMMITTEE

The Competition Committee shall be responsible for conducting the Chapter Competition in Organ Performance. Local competitions held in odd- numbered years shall be governed by the

rules of the AGO/Quimby Regional Competitions for Young Organists, such rules being published in the June issue of the previous even-numbered year in THE AMERICAN ORGANIST.

Competitions held in even-numbered years shall be sponsored by the Chapter and shall follow procedures conforming to the Chapter's own rules as adopted by the Executive Committee.

In such competitions as are governed by national rules, the Director of the Competition Committee shall keep the Executive Committee advised as to the contents of the national rules, especially the financial obligation of the Chapter to the respective Region of the AGO. The amount of prize money, if any, shall be determined by vote of the Executive Committee, based on recommendation from the Finance Committee. The Competition Committee shall inform any prospective competitors of the competition by announcing the date, location and any other pertinent information in October of each year and shall announce the competition to the general membership of the Chapter no later than November. The Competition Committee is responsible for publicizing the competition. All press releases and informational mailings or circulars shall bear the logo of the American Guild of Organists and the name of the local Chapter with clearly legible contact information.

The Competition Committee shall submit to the Executive Committee the names of four (4) or more persons to serve as judges for all competitions. The Executive Committee shall approve three (3) judges by way of majority vote. Judges may not include current or former instructors or family members of any competitors.

The Competition Committee may be also be asked to supervise the chapter's scholarship auditions, should the chapter choose to hold such an event. The Competition Committee may be organized for the sole purpose of such an event. Scholarship auditions would not need to be governed by the AGO/Quimby Regional Competitions and would not be considered part of the AGO Quimby Regional Competition selection process.

4. YEARBOOK COMMITTEE (DIRECTORY COMMITTEE)

The Yearbook Committee shall publish the annual Chapter Yearbook (or Chapter Directory). The Yearbook shall include names of all current chapter members in good standing with addresses and other contact information that individual members have authorized to be included. The Yearbook shall also include official addresses and contact information for the Chapter and for National Headquarters, for Chapter officers and committee Directors, and for Regional Councillors and District Conveners. The Yearbook shall also include the following: a schedule of Chapter programs for the year; general information about the Chapter including instructions on using the Chapter placement and substitute organist lists; a listing of names of patrons and sponsors of the Chapter and its activities; the AGO Code of Ethics and Code of Professional Standards; and any other material that the Executive Committee shall deem necessary or helpful to the membership. A chapter may choose to publish its Yearbook online. If so, the Yearbook Committee is responsible for assuring that information so published is secure and available only to chapter members. The Yearbook Committee should ensure that all chapter members have access to the Yearbook.

5. FINANCE COMMITTEE

The Finance Committee shall consist of the Treasurer, the Dean, a member of the Executive Committee, and the Sub-Dean. The Executive Committee shall appoint the Director after nomination by the Dean.

The Finance Committee shall prepare a proposed budget for each fiscal year based upon a fiscal year beginning on July 1. The Committee shall submit the proposed budget no later than the February meeting of the Executive Committee. In addition to the annual budget the Committee shall recommend to the Executive Committee policies for financial responsibility relevant to future years.

(NOTE: Chapters may require the budget to be submitted at an earlier date. The Finance Committee will need to maintain accurate membership statistics in order to project income for the upcoming year. The Finance Committee duties may be described more specifically by enumerating responsibilities for specific investment accounts or endowment funds that the Chapter may hold.)

6. HOSPITALITY COMMITTEE

The Hospitality Committee shall be responsible for all social events of the Chapter, making all provisions that the Dean shall deem necessary.

7. MEMBERSHIP COMMITTEE

The Membership Committee, of which the Membership Coordinator or Registrar is Director, shall assist the Membership Coordinator/Registrar in recruiting new members and retaining current members.

8. PROFESSIONAL DEVELOPMENT COMMITTEE

The Professional Development Committee shall be responsible for developing Chapter policy and furthering the Guild's Mission through providing information to members about job expectations, salary guidelines and any other assistance that enables members and their employers to reach agreement concerning compensation and duties. The Committee shall also develop and nurture relationships with institutions in the community especially regarding ethical and professional dealings with, and conduct of, the Chapter's members. The Committee shall also be responsible for carrying out the policies and procedures set forth in the AGO Code of Ethics, including the Discipline.

9. PLACEMENT COMMITTEE

The Placement Committee shall be responsible for maintaining a current list of positions available for church and synagogue musicians, such list to be available to all members by means of personal contact with the Director of the Committee. The Committee shall make announcements of such positions as appropriate, including publishing them in the Chapter Newsletter and Chapter Website with the institution name, contact person's name and contact information, title or position, salary and benefits, and all other pertinent information available.

10. PROGRAM COMMITTEE

The Program Committee, of which the Sub-Dean shall be the Director, shall be responsible for all programming in the Chapter, including but not limited to recitals, concerts, lectures or other special presentations. This Committee shall be responsible for proposing a program calendar and budget to the Finance Committee and Executive Committee. This Committee shall also be responsible for carrying out appropriate logistics and making all arrangements to ensure the smooth coordination of Chapter events.

11. REPORTER

The Reporter shall gather information about the Chapter and its activities and events each month and forward such information to National Headquarters for publication in THE AMERICAN ORGANIST, and such other reporting as may be deemed necessary by the Executive Committee.

12. SUBSCRIPTION SERIES COMMITTEE

The Subscription Series is an annual cycle of programs consisting of special concerts, recitals and lectures, support for which derives from Chapter solicitation of funding other than the Chapter portion of AGO dues. The Subscription Series Committee shall be responsible for soliciting and gathering in funds to underwrite the Subscription Series. All monies collected through solicitation by the Subscription Series Committee shall be turned over to the Treasurer, who will first handle all settlements for payments concerning fund-raising expenses, then record the total proceeds as a credit to the Subscription Series. The Subscription Series Committee shall be responsible for advertising the Subscription Series as prepared by the Program Committee, as well as obtaining and maintaining the contact list for the Subscription Series. The Subscription Series Committee Director shall also maintain a roster of all contributors to the Subscription Series and see that the names are published in the printed program of each event of the Series.

13. INFORMATION TECHNOLOGY COMMITTEE

The Information Technology Committee, of which the Webmaster is the Director, shall be responsible for all aspects of the Chapter's presence on the World Wide Web, especially the maintenance of the Chapter Website. The Committee shall assist members with the renewal process as offered by the AGO's ONCARD system when such assistance is required and shall assist the chapter officers in their duties as it relates to ONCARD technology.

The Committee shall also be responsible for coordination of Chapter needs for audiovisual equipment, computer hardware or software and any other equipment or technology needed by the Chapter to carry out its activities. The Information Technology Committee shall also advise the Executive Committee on matters of Information Technology, including but not limited to acquisition or lease of computer or audiovisual equipment, purchase of software, Website policy, or any other technology-related matters that may affect the Chapter.

SECTION 9. AMENDMENTS TO OPERATING PROCEDURES

Following adoption by the Executive Committee and approval by the Chapter membership, the Regional Councillor, and the national Vice President, these OPERATING PROCEDURES and any provision thereof may be amended at any time by action of the Executive Committee. A majority of votes cast shall be sufficient to amend any provision of or add to these OPERATING PROCEDURES. Any amendment or addition thereto shall be included in this document and added in numerical sequence in order of enactment, complete with the date of such enactment.

(NOTE: Amendment of policies governing Chapter elections requires a vote of the Chapter membership, Chapter procedures being parallel to and in keeping with the rules governing national elections in National Bylaws (Article VI, Section 1): "All Bylaws of the Guild shall be subject to alteration or repeal, or new bylaws adopted, by the affirmative vote of two-thirds of the National Council at any meeting of the National Council. If any Bylaw regulating the number

of members or method of electing the National Council is adopted, amended, or repealed by the National Council, such Bylaws must be approved by vote of the Members.")

WHEREFORE, we, the undersigned members of the Executive Committee of the (name of Chapter) of the American Guild of Organists, do hereby adopt the above and foregoing OPERATING PROCEDURES to govern the (name of Chapter) of the American Guild of Organists, the first day and date mentioned above.

Dean Date

Secretary Date

Treasurer Date

Marketing for AGO Chapter Leaders

Linda Everhart

Marketing: What is It?

Though people sometimes use the words marketing and publicity interchangeably, they are really quite different things. Marketing is a three-step process:

1. Get to know your customers and would-be customers and learn about their needs.
2. Adapt and develop your product to meet those needs.
3. Communicate how your product meets the customer's needs.

So wearing a marketing cap under your dean's cap, you will begin by thinking long and hard about the needs of your members and would-be members. Then you'll ask how you could do a better job of meeting those needs and adapt your activities to better meet those needs. Finally, you'd want to make sure that you communicate how what you are offering will meet those needs.

An important concept in marketing is market segment. That means that not everybody has the same needs, and different strategies will be needed to reach different market segments. When you think about this in terms of the AGO it seems obvious. Think of three different people in your chapter: a 23-year old struggling in her first position; a full-time music teacher who is also the organist at his local church; a concert organist with advanced degrees. If you are thinking like a marketer, you will be asking yourself how can I meet the needs of each of these segments.

Generally, one size will not fit all. In the commercial landscape that has led to product diversification. You'll find bubble-gum flavored toothpaste for children, sexy smile toothpaste for young adults, and anti-gingivitis toothpaste for older folks. How does your chapter differentiate its product to appeal to the different AGO member segments?

Attracting the Elusive Younger Members

By the time you are elected a Chapter Dean you are probably well aware of the graying of the AGO and the imperative to engage younger members. Yes, all members of all ages are important, but organizationally, we have no future unless we can significantly increase the involvement of young and even early-middle-aged adults.

This is a generation raised on the internet and continually connected to smartphones and hand-held electronic devices (iPad). One gifted young organist recently captured the situation, holding up his iPhone and saying, "If it doesn't come in to me on this, it pretty much doesn't exist." For that reason, I want to concentrate on electronic communications. As Marshall McLuhan quipped in 1964, "The medium is the message." If you are trying to communicate with young organists using old media (mailings, newsletters) you are indeed sending a message: that you are out-of-date and out-of-touch. And it's not only kids. Today the majority of people--60%-- who are connected to the internet at any given time are connected by smartphones or portable electronic devices.

E-BLASTS

They're absolutely free and enable you to have regular communication with your chapter members.

1. Gather and update email addresses at every opportunity. It's worth the investment of time and energy to collect and update your chapter email database.
2. Communicate electronically with members often—at least once a week. Don't wait till the end of the month to send out "all the news." By that time, it's no longer news!

3. Each communiqué should be short—no more than 150 words.
4. The email headline should telegraph the content of the message, i.e. “Smithers Elected Dean” instead of “News from Your AGO Chapter.”
5. Work with your members to assemble email addresses into a database of Organophiles. Offering a raffle at a well-attended recital or service is a good way to obtain email addresses of attendees.
6. Set a goal for your chapter’s Organophile email list. Can you reach 250, 500, 1000? Report on your progress and continue to ask for additions.
7. Use your Organophile list to send e-blasts to non-members to communicate news and recital information. (Several times a year, invite them to become members of your chapter.)

YOUR WEBSITE should be the first place members go to find out what’s happening in the organ world.

1. All of the information that appears in your print newsletter should appear first online. Begin the discussion of how much longer you will print and mail a newsletter, recognizing that that decision is just a matter of time.
2. Job availability and job security are paramount issues to young organists. Keep those items in a prominent place on your webpage.
3. Try to slant your website more toward member needs and away from chapter business and AGO boilerplate.
4. Invite a response. Ask members to vote on their favorite chapter program, recommend recordings or YouTube videos, etc. Seek engagement of web visitors.
5. Change it up. Website content should be constantly changing.
6. Does your website look tired? What message is it communicating? Someone in your chapter probably has the skills to update the site.

FACEBOOK PAGE Does your chapter have the human resources to launch a Facebook page? Facebook pages are easy to set up and free. But they are labor intensive and require daily attention. Unless someone or some group is willing and able to post to the Facebook page several times a week, you cannot expect much from Facebook. It is not just a question of setting up the page, but of continually posting timely matter to the page.

1. Photos help to draw attention to a post.
2. For \$20-30 you can promote a Facebook post to thousands of viewers.
3. Successful Facebook pages maintain a ratio of about 1 self-serving post to 3 entertaining, amusing or general interest posts. So don’t use Facebook as a bulletin board for your organization. Keep your eye out for interesting tidbits and facts that might be of interest to your Facebook followers.
4. Engage your Facebook followers by asking for feedback. Ask them questions and seek their opinions.

TWITTER offers a good way to touch base with friends in short messages of less than 120 characters. Why not ask one of your high school- or college-aged members to tweet on behalf of your chapter?

Chapter Newsletters

Most AGO chapters regularly publish a newsletter to keep members informed of upcoming events, circulate information about chapter activities and leadership, and provide job postings. Many software programs provide newsletter templates, but a basic word-processing program can also render a very effective newsletter. Many chapters develop a logo for the newsletter's front page. AGO Headquarters provides downloadable images of the AGO seal on its website, in the Guild Documents Section, <http://www.agohq.org/about-the-ago/guild-documents/>.

Many chapters now distribute their newsletters electronically by emailing the publication to members or posting the newsletter on a website and emailing members the web address to access the newsletter online. This can provide significant savings for the chapter as well as increase the effectiveness of chapter communication. Chapters may also choose to send email bulletins for events or announcements, create a “Facebook” page or find other electronic methods to keep the lines of communication open between chapter members and leadership.

A chapter's newsletter may contain any or all of the following:

- upcoming meeting announcement with detailed information follow-up reports on past meetings
- dean's column
- notes from other officers
- committee reports, project announcements, etc.
- job placement information and/or substitute referrals
- AGO national news
- messages from your regional councillor and/or district convener
- messages from your regional coordinators for education and professional concerns calendar of local performances
- "who to contact" information
- election information
- names of current officers with contact information paid advertising (to underwrite production costs) regional and national convention information
- radio and television programs of interest to members interviews with members or visiting artists "Welcome" to new members
- "Dear Abby" column for organists, choirmasters, or teachers editorials
- special monthly features (e.g., clergy section, puzzle, or contest) newsletter editor's name, deadline date, email and mailing address chapter directory corrections and additions
- membership renewal information

Be sure that each issue includes the date, your chapter's name, city, state, and the dean's name, address, email address and phone number. Put the National President, Executive Director, Regional Councillor, and Regional Coordinators for Education and Professional Development on your emailing list. This helps them keep in touch with concerns, ideas, and events at the local level. Email addresses for each of these officers may be found on the AGO website.

If you are just starting a newsletter (or need fresh ideas), invite chapters in your area to send their newsletters to you and/or visit websites of other AGO chapters.

Creating A Chapter Website

Noel Jones, AAGO

There is almost no reason for a chapter to have to pay to have a website aside from paying for a domain name and a hosting program. As of today February 2014, a domain name can be registered for about \$10 and a website hosted for about \$10 a month. A domain name like www.agochattanooga.com is your address on the web, and the website is the pages that people see when they type in the domain name. These are two separate things. Domain names are permanent as long as you pay the annual fee. The website can be “hosted”, meaning kept available for people to see when they type in the domain name, by any number of “hosting providers”, including some free ones, which I recommend.

Within every chapter there will be someone who is able to create a simple website easily for free. Find that person. A guild member will do a much better job of creating a website that serves the guild than many professional website designers whose experience may not be in the organ field.

There will be those that want to have a professionally designed, comprehensive site and that’s possible. But first, visit some chapter websites and see what you find important and necessary to have on your site. Which pages get the most traffic? Which pages are just there to satisfy a member’s own personal interests? Four basic questions are likely to be answered on any chapter’s website:

1. How do I contact someone about the Guild?
2. When and where are the meetings and programs?
3. What jobs are open?
4. Who is available to substitute?

This is what your membership and the public want to learn from your website and these are your most important pages. All the other possible pages, including lists of organs in the area and that sort of thing can be useful, but you must cover the basic four points of interest first and avoid expensive charges for the creation of databases and web pages that do not serve to directly promote the chapter. It is important to build the website so that it works to answer people’s questions about the chapter and to invite them in. The second goal of the site might be to provide information just for guild members, such as a private members directory, non-public chapter events, officer contact information, etc.

Now, how is it possible to do this without paying a lot of money? There is no way to register a domain name for free. You will find offers of free domain names, but they are linked to signing up to have your site hosted for an annual fee. So, register your domain name and pay for it. Expect to get billed every year for renewing the domain name hosting. To find reliable information do a search on “affordable domain name registration” for current information. Keep your domain name short and easy to type.

Make sure that as board members change, the board member in charge of the website transfers the contact person information as officers change. All too often a member volunteers to sign up for the domain name and then creates the site leaving the board with little or no control over the site. This can result in a website that is out of date, inaccessible or a web domain that leads nowhere. The chapter has to own and control the domain name and run the website to avoid interruption of service.

As a caution, if a domain name is not renewed that name can be very expensive to recover. Names that are orphaned like this often have to be dropped and all the prior links and advertising that the guild has done to drive people to your site is wasted.

There are very useful free website services that let you build the site without much experience and with good results. Currently Google Sites is an excellent free website service. The webpages are simple to design and are truly free without adding distracting advertising to your site pages - something that is common with other “free” website offers.

Most guild chapters do not need anything more than a free site like this and a paid domain name.

There will be those that want to go in a different direction, preferring to have a “blog” instead of a website. Blogs can be used as websites but require more time, study and energy to build and keep running. Most website design programs let you see what you are doing when you make changes and corrections - with blogs you have to build it, go out of it, view it and return to it. Blogs are very effective when being used as a sort of online diary, with postings to it every day or even more often, but organizational websites are created as advertisements, not newspapers.

Avoid having just one person running the site, at least two people should be in charge of keeping the site working. An up-to-date and changing website is a sign to all of a vital and interesting chapter!

The national AGO website (<http://www.agohq.org>) will host a chapter web page for free. It's not a full website, but you can put up as much content as you like. [Here](#) is an example of a chapter website hosted by AGO headquarters (<http://www.agohq.org/chapters/fortlauderdale>). The new national website was created using WordPress, a widely-used blogging and Content Management System (CMS). Chapter webmasters would be given a WordPress user-id and password to access their chapter page. The page would be set up with the standard chapter template, but the chapter is not required to use the template if the webmaster has enough WordPress or HTML skills to create his or her own page. A video on how to set up a chapter page in WordPress can be found [here](https://vimeo.com/84340990) (<https://vimeo.com/84340990>).

For more information about creating a chapter web page on the agohq.org domain contact Bill Valentine at bill.valentine@agohq.org



SOCIAL MEDIA: *TIPS AND TRICKS FOR YOUR CHAPTER*

By Leslie C.S. Teardo, CAGO

Social media is a powerful tool which, when well utilized, can create buzz about your chapter, publicize events, and allow potential members to learn about the best of your chapter: the people, the educational events, and the potential for musical inspiration and growth.

For the purpose of this article, we are examining three of the main social media services: Facebook, Twitter and Instagram. This article approaches social media from the perspective of new users, hopefully empowering multiple people within each chapter to utilize social media for their chapter's benefit.

facebook

The basics:

Facebook ([facebook.com](https://www.facebook.com)) is an online social networking service. Its name was derived from the directory given to college students. Facebook began in 2004 and was originally only open to Harvard students. They eventually expanded to the whole Ivy League, then all colleges, and is now open to all users aged 13 and over. Facebook can be used from all computers and mobile devices.

All Facebook users create a profile page, which includes pictures, information, hobbies, etc., using their real name. From there, users can find friends, acquaintances and colleagues and send a "friend request". This, after the other party confirms, creates a link between the two profiles. When a "friend" writes a status update, posts a picture, or shares a link, it will appear on the news feed. The news feed is a rolling, continually updating homepage that is specific to each user.

Pages:

There are many overlaps in the services offered by Facebook and a website. You can plan events, communicate with members, and share pictures and video from past events, to name a few. The benefit of maintaining a social media presence in conjunction with a website is that others can be drawn to your chapter through their friends and colleagues. The actions (attending a concert, commenting on a photo, etc) are seen in the newsfeeds of potential members, thus piquing interest and creating traffic to your website, and hopefully, the chapter. Chapters are encouraged to have an up-to-date website and a Facebook page as their online presence. Happily, there are many resources for maintaining a website and you are encouraged to read the section of the Chapter Management Handbook which covers that topic. It is recommended that every chapter have a Facebook Page and include a link to the HQ national page.

Pages offer five different administrator roles: manager, content creator, moderator, advertiser and insights analyst. The number of administrators (admins) you can have is unlimited. It is recommended, however, that admins are kept to a minimum and that there is a great deal of communication between admins to avoid conflicts and repeat postings.

For events:

Facebook is an easy way to promote chapter events. Members that have “liked” your page (more on that below) will be automatically notified of the event. Also, your members can then “share” the event to their friends, spreading the word about your event and inviting others.

Because many Facebook users are interacting with the service via a mobile device (and thus with limited screen size) you should keep your event name short. Example: “*Recitalist’s name* in Concert” versus “American Guild of Organist’s Chapter Event: *Recitalist’s name* in Concert”. The details section is a great place to share with members those details. Also, when users are notified of the event, it will read as: “**Your Chapter’s Page Name** has invited you to **Name of Concert**” which means that the name of the chapter will automatically be included in the invitation. Note: the invite notification will also include the page’s profile picture; so make sure you have one!

Be “Like” able:



The “like” button, added in 2009, gets more than 1 billion clicks per day. The power of the “like” cannot be understated. An easy way of thinking about it: the “like” button is 21st century word-of-mouth. The more people are “talking about” (aka. interacting with) an event, picture, or video, the more people will be drawn to your page and therefore your chapter.

A picture is worth a thousand words. As mentioned above: *always* have a profile picture. Even better, when first starting a page, upload a number of images from previous chapter events. Every picture will give potential members a better sense of what it means to be a part of the AGO. And, for the more ambitious social users, *a video is worth a thousand pictures*. They needn’t (and often shouldn’t) be long or involved, but a short clip can give great feeling and personal touches to your page and profile. Consider a quick “Hello from POE 2015!” or a short promotional video inviting members to a concert, event, or lecture. The possibilities are truly endless.

Staying visible is very important and can be achieved with consistent, positive posting and comes down to the news feed of your members. The news feed features more heavily the people and pages that users interact with on a regular basis (through liking, sharing, and commenting on posts). This is important from a publicizing point of view because if members of your chapter page do not find posts to interact with, Facebook will automatically move them to a lower priority and possibly remove the chapter's posts from their news feed altogether.

What posts promote interaction? Consider what you interact with regularly: fun pictures, humorous status updates and interesting articles. There is no “one size fits all” approach to interacting with your members. Share the stories and people of the chapter. Show how your chapter is a place for education, camaraderie and professional support. Share the best of you.



The basics:

Twitter (twitter.com) is a microblogging service. All posts on Twitter (“tweets”), which are similar to the original Facebook status posts, are limited to 140 characters. Can be used from both computers and mobile devices.

Like the news feed on Facebook, people & companies you follow will appear on your feed when they send a tweet. These tweets can then be “favorited” (the Twitter equivalent of the Facebook “like”) or sent on to friends.

The hashtag:

The hashtag (#) is a popular way to add a topic or clever caption to a picture or tweet. This is best shown through an example tweet:

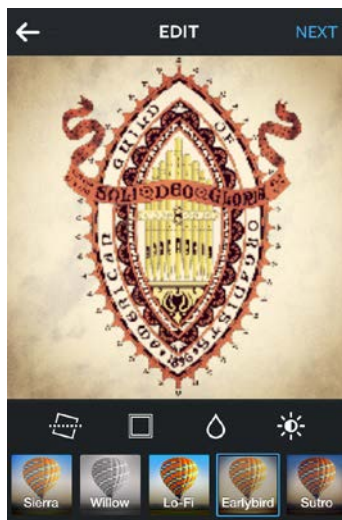


Other Twitter users can, upon reading your tweet, click on the hashtags and see other posts that have the same hashtag (think of it as giving your tweet a subject or category). Also, users can find your tweet by searching, for example, “POE” and see all the tweets that have the same hashtag.

Instagram

The basics:

Instagram: ([instagram.com](https://www.instagram.com)) originally conceived as a photo-sharing service which now includes video. It is easiest used from mobile devices. Instagram is a way to share great looking candid and posed pictures. Images on Instagram are notably square. As mentioned above, this service is most easily used from a mobile device (thus making it an “app”). Your chapter will, like the other services, need to create a username & password. The app encourages the use of photo filters, which create a desired mood or coloring.



Examples of fun photos to share: smiling faces from an chapter or executive board meeting, a great looking reception table with delicious food, a sneak peek of a guest recitalist practicing (with the recitalist’s permission, of course!), etc. With the flexibility of Instagram and its functions, you can share great behind-the-scenes images with members and friends.

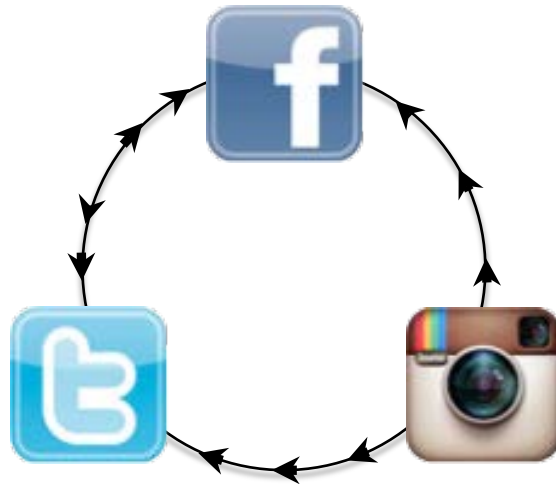
Social media etiquette:

Social media etiquette is very similar to normal business etiquette. Remember that what you post and what you type is attached to the name and the image of the AGO. As with anything you would put on the Internet, share with care. The Internet never forgets!

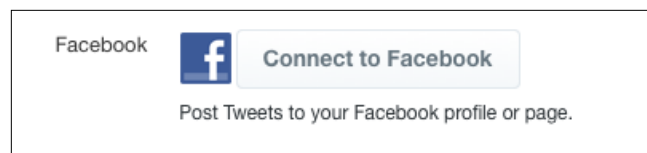
Also, this author would be remiss without mentioning that although you are able to access the photos of friends and colleagues, it is improper to use any person’s photograph without their permission, even for positive and harmless purposes. Ask first; and most likely the person will say “yes!”

Social media integration:

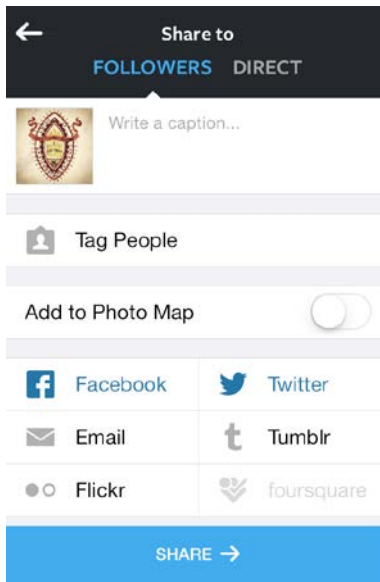
Maintaining a presence in these various services individually can be exhausting. Let them do the work for you!

**Some examples:**

- When you create a Facebook event, share it on Twitter.
- Tweets can be shared on Facebook. Go to Settings (the “gear” icon), then Profile. There you will see an option to Connect to Facebook. Follow the on screen directions to have all tweets (under the chapter’s twitter account) sent to the Chapter Facebook page.



- When publishing an image on Instagram, you can opt to share it also on Twitter and Facebook. You will find this option after the filters but before you hit “share”. The selected services will turn from black to blue:



To conclude:

There is no “one size fits all” approach to social media. The best solutions for you and your chapter are ones that are sustainable and reasonable for the size of the chapter and the resources available. Consistent postings and interactions are key to a successful social media presence. Whether you divide up the responsibilities or have a dedicated person for the task, it can be very time consuming to keep with social media. Ensure that your members are prepared for the time commitment. Social media can be a very effective tool for communicating with members and potential members; give it a try!

Mailing Lists and Mailing Permits

MAILING LISTS AND LOCAL MAILING LISTS

Every chapter should develop its own mailing list of members, individuals, and businesses interested in receiving regular and special mailings from the chapter. It is essential to computerize your list in order to make changes and additions easily, as well as to produce labels quickly. Your chapter may also wish to develop an email list to send messages quickly at no cost.

Your local mailing list might include the following:

- chapter members - membership category may be designated
- music businesses - for publicity and for soliciting contributions and/or advertisements in chapter publications
- media - for publicity about chapter programs or chapter news of public interest (see "Program Publicity" for more information)
- benefactors - contributors of financial or in-kind support
- general public - include local institutions (especially libraries and other public "bulletin board" locales) as well as interested individuals
- AGO officials - regional coordinators for education and professional development, other area chapter deans, etc.

A potential source of revenue for a chapter is rental of its mailing list. Normally, such service is provided in the form of a printout on pressure-sensitive labels, for one-time use only. The list may also be provided electronically. Each chapter is responsible for its own mailing list rental policy, including fees charged, who may rent the list, etc. So that those on your list are not bothered by inappropriate mail, the chapter may require approval of the material to be sent before renting its mailing list to others.

NATIONAL AGO MAILING LISTS

The AGO may make its mailing lists available to members and other organizations as a service to the organ/choral music community. Please use the following guidelines when requesting use of the list.

Basic Policy: AGO membership lists are available to members, chapters, other non-profit organizations, and TAO advertisers only for promotion of events and services of interest and benefit to Guild members in the organ and choral music field. Qualifying events ordinarily include concerts, recitals, lectures, workshops, courses of study, AGO conventions, and chapter events. Each request for use of Guild mailing lists must be approved by the Executive Director. Lists are released in label and electronic formats for one-time use only, and may not be reproduced or used for purposes other than those approved.

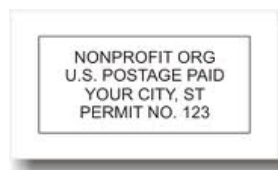
The AGO has contracted with an outside company named INFOCUS to handle all mailing list sales. The AGO sales rep for INFOCUS can be reached at 1-800-708-LIST, ext. 3250. The INFOCUS Website is <http://www.infocuslists.com/> If you have any questions not addressed on the INFOCUS Website, please contact Leah Semiken, Director of Membership and Administration at AGO National Headquarters, 212-870-2310. leah.semiken@agohq.org

MAILING PERMITS

The United States Postal Service makes available a third-class bulk mailing permit to organizations that send large quantities (over 200 copies) of uniform mailings at any one time. Sending your newsletters and other mass communications by bulk mail can save a considerable amount of money.

The following are some pertinent facts regarding bulk mailing permits for AGO chapters. For more information or any specific questions, contact your local postmaster.

1. AGO chapters are eligible to apply for a not-for-profit bulk mailing permit, as subordinate units of a national, not-for-profit organization.
2. The United States Postal Service can provide you with Publication 49, which outlines the procedures for bulk mailing.
3. The fee to own and maintain a bulk permit account is \$150 per year, with an initial application fee of \$150.
4. To qualify for use of a bulk permit account, mailings must consist of at least 200 identical pieces of mail. If your mailings are smaller, consider sending your newsletters to non-members (such as the churches and synagogues in the area). You may save money by adding names and paying the bulk rate.
5. A chapter with a bulk permit can mail from only one post office branch, designated at the time of application. That designated branch can be changed upon later application.
6. In the application process, certain documentation is required, such as chapter financial statements and proof of IRS tax exemption. National Headquarters will assist any chapter with certification of tax-exempt status, as required. The application for the permit also requires the chapter to submit some examples of pieces to be mailed in bulk.
7. A chapter may use a church's mailing permit as long as the mail piece indicates joint sponsorship of the program. This is a sensitive area in which postal requirements must be carefully observed so as not to jeopardize the church's mailing permit. Consult your local postmaster.
8. Once a bulk account is set up, it works like any other account. The chapter makes deposits to the account and the Post Office deducts the amount of postage used for each mailing. The Post Office does not extend credit, so a chapter must be sure that there is enough money in the account to cover each mailing.
9. When an application is approved, the Postal Service assigns a permit number. This number should be used to make a mailing indicia (see below) to be printed in lieu of postage stamps on all pieces that will be bulk mailed.



Chapter Yearbooks and Directories

Most chapters publish annual membership directories or yearbooks that include lists of local, state, regional, and national officers with their addresses, email addresses and phone numbers, as well as detailed member contact information (work, church, and home phone numbers). Be sure to indicate the area code of your membership so that those from other areas can use the information. Formats range from pocket size to large, bound booklets. The directory might also or perhaps only be published online on the chapter's website, if the website has a secured "members only" section that is password protected. A chapter should not publish personal contact information for its members where those outside the chapter can access it. Whatever the format, the yearbook should include a statement that identifies your chapter as part of a national organization.

To offset production costs, many chapters solicit advertisements from commercial firms, reproduce members' professional cards, or publicize concert series in their yearbook.

A yearbook might also include the following:

- a summary of the year's program events
- members' membership categories (regular, special, young organist, dual, chapter friend)
- members' position descriptions (organist, choir director)
- chapter committee personnel
- list of substitutes (and compensation guidelines)
- compensation guidelines for your area
- list of past deans
- blank space for adding new member information
- a list of local, state, and regional officials
- a list of national officers
- a description of the Guild
- Guild purposes (see Section I)
- AGO Code of Ethics and Code of Professional Standards (see Section I)

Print enough copies to distribute to your members, new members throughout the year, advertisers, District Convener, Regional Councillor, Regional Education Coordinator, Regional Professional Development Coordinator, and National Headquarters.

Keep your yearbook up to date by regularly printing new member information and corrections in your chapter newsletter.

Similar information regarding guild members of a particular chapter is available online through the ONCARD system at www.AGOhq.org

Programming Resources and Guidelines

Successful programming results from an organized and broadly focused response to the needs of the membership. The first step is to consult your members for their ideas and needs. Additional inspiration can be found in the "Chapter News" section of THE AMERICAN ORGANIST, where other chapters share what they have done. Program committees should balance the types and topics of programs, so that an interesting blend of information, education, and entertainment satisfies the needs of your members and your community. Chapters should recognize the diversity of AGO membership and the community when scheduling recitalists and designing programs.

The Internal Revenue Service classifies the AGO as a 501(c)(3) organization. This designation means more than exemption from federal income tax. It means that the Guild is recognized as an organization that provides a needed service to the community. To uphold AGO's part of the covenant, chapters should work to meet the needs of their communities.

ARRANGEMENTS

In order to execute each program thoughtfully, carefully, and graciously, attention must be paid to logistics.

1. Determine the cost to the chapter (rental of space, custodian's fees, fees of the program presenters; cost of program aids such as programs, handouts, and audiovisual equipment; postage, copying, and expenses for publicity) and budget for these expenses. A blank worksheet for planning an event budget is included in this document.
2. Finalize the time, place, and meal arrangements (including the cost to the individual members, reservation procedures and deadlines, and the number of complimentary meals, if any) well in advance of the event. Take care that the facilities are accessible to all in terms of uniform access for the disabled and that food ingredient information can be made available to those with dietary restrictions regardless of whether the chapter is holding a private function or a more publicly sponsored AGO event.
3. Arrange for the set-up of equipment, including projectors, amplification systems, and video or audio playback equipment.
4. Arrange for on-site personnel (page turners, registrars, greeters, ticket takers and sellers, audiovisual assistants and ushers).
5. Provide hospitality for guest presenters (accommodations, social involvement, transportation, adequate and comfortable practice arrangements).

PROGRAM FORMATS

There are several different types of chapter meetings, depending on the type of program and the agenda to be covered. What follows is a listing of some general types of meetings with a few of the options available for their presentation.

1. Regular Chapter Meetings

These are usually held on a regular basis from September through June. There is no national requirement that a chapter hold monthly meetings. Schedule as many meetings as your chapter needs and can afford. They should be scheduled well in advance, so that members will be able to

make other commitments without conflicts, and at times that as many people as possible may attend.

Refreshments play an important role in the social aspect of meetings. Time should be allowed before and/or after the meeting for members to socialize and talk shop. Something as simple as coffee and doughnuts will encourage them to mingle, building a sense of community within the chapter. Other ways to offer food include potluck dinners, catered parties, and the popular organist-clergy dinners.

Even in small chapters, members are not always familiar with one another. Name tags should be part of every meeting, and time should be taken to introduce new members.

The program should be the focus. Usually there is a certain amount of chapter business to be conducted (reports from the treasurer, announcements, votes on specific issues), and this may be combined with another component, such as a film, recital, speaker, workshop, or other educational forum to create interest in the event. While a business-only meeting should be a rarity, in reality most chapters separate business sessions from outreach functions.

There are a wide range of programs appropriate for a chapter meeting. Here are a few:

recital	repertoire reading session
lecture-recital	repertoire sharing session
lecture-demonstration	organ crawl
Guild service	competition
choir or hymn festival	tour of organ shop or other business
master class	recognition of group or individual
workshop	colloquium
panel discussion or debate	conference symposium handbell workshop
mock wedding	choral conducting workshop
audiovisual presentation	

2. Recital Series

Sponsoring a recital series can serve several purposes: admissions or voluntary contributions can help support the chapter or pay for the programs; individual performers of note may be showcased; the chapter can use the public forum to raise community awareness of the Guild's work and the cultural heritage of organ and choral music.

Recitals may be scheduled at regular times and places - for example, every other Thursday at noon at "ABC Unitarian Church." Depending on the recitalists available, the chapter's sponsorship may provide the continuity for the series. You can choose to feature local member artists, or you may wish to invite visiting artists to attract broader community interest.

Some chapters have found it advantageous to sponsor their series jointly with a church, a school, other chapters and/or other arts organizations to gain more publicity and to develop stronger ties with these groups.

Funding for a recital can come from a number of sources: local foundations, local or state arts councils, private patrons (who should be listed in the program), businesses that place ads in the

program, and sale of season tickets. A little research can bring results that will expand your recital possibilities enormously.

3. Educational Series

The Guild is officially recognized by the federal government as an educational organization. The goal of much chapter activity is to educate its members, that is, to develop their professional abilities and musical knowledge. In addition, each chapter should seek to educate its community regarding the professional status of organists and choral directors, as well as the musical traditions that the Guild represents. Educational programs should be one of the most important aspects of a chapter's schedule.

A number of forums are possible for an educational program. These are a few of the more common varieties:

FOR MEMBERS:

workshops
 masterclasses
 special courses
 mini-courses
 professional certification preparation
 seminars
 repertoire sharing

FOR THE PUBLIC:

children's concerts
 lectures in schools
 public demonstrations in churches
 presentations for adult groups:
 music clubs
 civic organizations
 senior citizens' groups nursing homes and hospitals
 POE and Pipeworks

These programs can be used for single events or may be offered as classes over several weeks or months, depending on the format.

As with a recital series, it is sometimes profitable to sponsor an educational series with the extension or continuing education division of a local college, possibly for credit or continuing education units (CEU's), with other music organizations, with local or regional church bodies, or with an ecumenical group.

FOLLOW-UP ACTIVITIES

1. Evaluations

It is helpful to know how useful or successful particular events have been so that past mistakes can be avoided and popular topics or speakers can be repeated. Here are some ways to collect this information:

- Discussions - the entire chapter, the executive committee, or the program committee.
- Word-of-mouth reports to members of the executive and program committees.
- Questionnaires handed out at individual programs or recitals.
- Year-end questionnaires.
- Reviewing attendance records from each event.

2. Post-Program Publicity

In conjunction with the above, always do post-program publicity by means of a review, or at least an announcement, for the chapter newsletter and national journals (especially the Chapter News of THE AMERICAN ORGANIST Magazine).

Media Relations and the Local Chapter: The Media Relations Handbook

Members of the American Guild of Organists are very much aware of the challenges facing chapters today. Your Professional Networking and Public Relations Committee wants to help you meet some of those challenges, and so has prepared a Media Relations Handbook which is available online at <http://www.agohq.org/chapter-documents/> as a Chapter Resource. This Media Relations Handbook is designed to help you better promote and publicize your chapter's events and activities. Statistics suggest that only 20 percent of the U.S. population actively participates in music. We know that fewer people than that regularly attend organ recitals. Certainly more people would be involved in music in general, and organ music, in particular, if they were aware of the joys and wonder of being involved with it. So, it's up to all of us to spread the word. The message is that organs and organ music are wonderful to see and to hear. The greatest challenge facing us today is getting our message about the organ and its music out to the general public in a simple but powerful way.

Countless books have been written about the wonder of the organ and the magic of its music, but the most powerful testimony for the organ comes from those who love the instrument and its music; therefore we encourage you and your members to be spokespersons for the AGO and your chapter activities.

- Organ music can nourish your soul.
- Attending an organ concert can introduce you to a new world of sound produced by an instrument which you may have never seen or heard.
- You can marvel at the physical coordination required of the performer.
- You can appreciate how much a pipe organ is a work of art visually as well as sonically.

What this handbook will do includes:

- It will stimulate your thinking about ways to enlighten your community about the joys and benefits of promoting the organ.
- It will provide you with a multitude of ideas for events, community relations and exposure.
- It will give you suggestions on how to launch and promote recitals.
- It will help you to build a constituency for organ music and heighten awareness of the benefits of the organ's repertoire and versatility.
- Through these efforts, it will help you and your members encourage new people to hear the instruments, resulting in more people appreciating organ music.
- It will help you and your members lay the foundation for generating an interest in organ that will benefit you for years to come.

These materials are available in hard copy from AGO Headquarters for a small charge to cover production and shipping. The online materials will be updated as new information becomes available. We wish you great success and applaud your efforts in promoting the benefits of music in your community.

Sincerely,

The Committee on Professional Networking and Public Relations

Margaret Evans, director, Barbara McKelway, Sondra Proctor, Larry Schou

15 March 2011

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Program Budget Worksheet

It is essential to know the cost of each program or event sponsored by a chapter - especially if you plan to ask for support from members, businesses, government agencies, or foundations. Listed below is the information you will need to estimate an event's cost accurately.

EXPENSES

Space rental (may include sexton's or janitor's fees) Equipment	_____
rental (risers, sound system, AV equipment, etc.)	_____
Food/refreshments	
Number of persons: _____ @ \$ _____ per person	_____
(If using caterer, add 18% gratuity for wait staff.)	
Meals for artist(s) (breakfast, lunch, dinner, etc.)	_____
Program	
Artist(s)'/presenter(s)' fee	_____
(If not an all-inclusive fee, include cabs, travel, and housing.)	
Performance rights fees (paid to ASCAP or BMI) Decorations	_____
Liability insurance ¹	<u>0.00¹</u>
Publicity	_____
Graphic design of announcements, posters	_____
Printing of announcements, posters, tickets, and programs	_____
Postage	_____
Publicity materials (press releases, photos, CDs) Photographer	_____
for event	_____
Complimentary tickets	_____
Telephone and fax Miscellaneous	_____
Contingency fund (15-20% of total)	_____
TOTAL ESTIMATED EXPENSES:	_____

¹ Provided by National AGO. See page 97.

INCOME

Ticket sales	_____
Advertising in program book	_____
Collection at event Donations and grants	_____
Indirect gifts ²	_____
TOTAL ESTIMATED INCOME:	_____

²Indirect gifts include volunteer time, donated use of instruments or concert sites (for instance, churches), refreshments, printing, graphic design - anything that is given. It is important to keep track of indirect gifts. This information can be useful in your public relations and also in securing grants and gifts from other sources.

Program Evaluation Survey

Evaluating programs with a brief survey can help your Chapter when planning future programs. Surveys can be done with a paper form available at events (see sample below), through email, or using a free online service such as Survey Monkey, <https://www.surveymonkey.com/>

"SAMPLE CHAPTER," AMERICAN GUILD OF ORGANISTS Program Survey Example

I. Assessment of Chapter Events

Please indicate your evaluations in the three areas noted, by circling a score from the scale 1-5 (1 being unsatisfactory, 5 being excellent) or 0 (for nonattendance).

EVENT	QUALITY OF PROGRAM	CONTRIBUTION TO YOUR OWN INTERESTS	CONTRIBUTION TO COMMUNITY NEEDS	DIDN'T ATTEND
Sept.- Publicity Planning/Guest Speaker	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	0
Oct.- Recital/ Featured Artist	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	0
Nov.- Hymn Festival/ Session Leader	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	0
Jan.- Organ and Instruments/Guest Artists	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	0
Feb.- Guild Service	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	0
Mar.- Chapter Meeting	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	0
Apr.- Anthem Accompaniments	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	0
May- Recital/Guest Artists	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	0

II. Future Programs

1. Please rate the following program topics according to your own professional interests on a scale of 1-5 (5 being the most appropriate, 4 the next, etc.).

- | | |
|---|--|
| <input type="checkbox"/> recitals by guest artists | <input type="checkbox"/> organ and instruments programs |
| <input type="checkbox"/> recitals by chapter members | <input type="checkbox"/> choral music reading/workshops |
| <input type="checkbox"/> Guild service | <input type="checkbox"/> choral concerts |
| <input type="checkbox"/> organ playing/repertory workshops | <input type="checkbox"/> professional development programs |
| <input type="checkbox"/> organ building and design programs | |

2. Please rate the following program topics according to your view of the needs of the community (scale as above).

- | | |
|---|--|
| <input type="checkbox"/> recitals by guest artists | <input type="checkbox"/> organ and instruments programs |
| <input type="checkbox"/> recitals by chapter members | <input type="checkbox"/> choral music reading/workshops |
| <input type="checkbox"/> Guild service | <input type="checkbox"/> choral concerts |
| <input type="checkbox"/> organ playing/repertory workshops | <input type="checkbox"/> professional development programs |
| <input type="checkbox"/> organ building and design programs | |

3. What evening is best for you to attend Chapter events? _____

_____ What evening is worst for you to attend? _____

4. Are you currently a member of the "Sample Chapter?" _____ Yes _____ No

III. Optional

NAME: _____

EMAIL: _____

STREET: _____

CITY, STATE, ZIP: _____

Special Events

There are a number of special occasions that can be used to create a special chapter event.

Anniversaries. These can include the recognition of composers' birth or death dates, as well as those of others who have made major contributions to the profession. You may find it appropriate to present a recital featuring the composer's works, or sponsor a local festival with another community music group.

Other anniversaries to keep in mind are those of your chapter's inception (for example, a 25th or 50th year of existence), or perhaps a milestone anniversary of a particular member (again, 10, 25, or 50 years of membership in the AGO and/or the chapter). You can plan a simple party or a grand, catered dinner to celebrate. When honoring AGO anniversaries, consider inviting an AGO official to speak. Contact your District Convener, Regional Councillor, or the Executive Director to see if they are available to visit for these special events. National officers will want to mark the occasion with a letter of congratulations if they cannot attend the actual event. Please notify them at least six weeks in advance to be sure that they are able to write and send such a letter in time for your celebration.

Honors. There are many individuals and institutions deserving local recognition for their contribution to the arts. The honor need not be limited to a member or a group affiliated with the AGO. For example, your community may be home to a composer with a history of publishing nationally recognized works, or perhaps there is a member of the clergy who has made major strides to communicate the importance of the place of the professional musician among fellow clergy. If you are home to a symphony orchestra, its conductor may be someone who should be welcomed into the Guild.

An honor can be a way of officially saying "thank you" to an individual or an institution. You may have a member who has for years contributed to the success of the chapter through the donation of time, talent, and energy; the chapter might want to specially recognize him or her upon retirement. The possibilities in this area are plentiful - be sure to ask the members of your program and executive committees if they know of any special occasions that the chapter should commemorate.

American Guild of Organists Discipline

Approved by the AGO National Council January 27, 2017

The *Discipline* is to be used when an individual Member of the AGO or an AGO Chapter Executive Committee wishes to file a complaint against another Member for a violation of the *Code of Ethics*. The procedures in the AGO Discipline may not be used to address a complaint that relates to competitive matters that would be prohibited by the terms of the AGO's settlement with the Federal Trade Commission. They may be employed, however, where a member's actions may put the AGO at risk of violating the terms of the AGO's settlement with the FTC.

Neither the complainant nor the accused may participate through legal counsel. If either party insists upon involving legal counsel in the *Discipline*, the procedures shall be terminated.

Confidentiality: The proceedings relating to the *Discipline* are to be considered confidential. The final determination will be made known to both parties, but all discussions and any supporting documentation will remain confidential.

I. AT THE CHAPTER LEVEL

- A. The complaint should be filed, in writing, with the Dean of the accused Member's chapter, the District Convener, or the Regional Councillor. It should be filed within 30 days of the time the alleged violation becomes known. The complaint should outline the nature of the alleged violation, and be accompanied by any supporting documentation. The Member filing the complaint agrees to cooperate fully with this process. Independent Members shall be considered as members of the Chapter which is nearest to their primary residence. "Nearest" shall be defined as the residence of the closest Chapter Dean at the time an incident occurred which gave rise to the use of the Discipline.
- B. The officer who receives the complaint shall forward a copy of the letter and a copy of the *Discipline* to the accused Member, and request a response in writing within 15 days. The *Discipline* process will continue with or without a response from the accused Member.
- C. The officer who received the original complaint shall provide copies of both Members' letters and accompanying documentation to the following individuals, who shall together promptly decide if the complaint should be acted upon:
 - Chapter Coordinator for Professional Development (or another chapter officer if there is no Chapter Coordinator for Professional Development)
 - Regional Councillor
 - Regional Coordinator for Professional Development
 - National Councillor for Membership/Convener of the Regional Councillors

- D. If it is determined that the complaint deserves no further consideration, no other proceedings are necessary. The Regional Councillor shall notify both Members promptly, in writing, of this determination.
- E. If it is determined that the complaint deserves further consideration, the Regional Councillor shall appoint a Committee director, who shall convene the Committee and sign all correspondence. The Committee, appointed to carry out the *Discipline*, shall be made up of the following individuals:
- two members of the chapter, appointed by the Dean (the Dean may be one)
 - Councillor for the Region (or his/her representative)
 - Regional Coordinator for Professional Development (or his/her representative)
 - National Councillor for Membership/Convener of the Regional Councillors (or his/her representative)

II. AT THE COMMITTEE LEVEL

- A. Within 30 days of the decision to proceed, the Committee shall have a meeting with both the complainant and the accused Members present. At least 3 of the 5 members of the Committee must be present. Both Members should be given adequate opportunity to discuss the situation with those members of the Committee present. A written record of the meeting should be kept, and distributed to all members of the Committee as soon as possible following the conclusion of the meeting.
- B. The entire Committee shall meet within 15 days of the above meeting to discuss the case. If a majority of the Committee feels that further investigation is necessary, such investigation should be undertaken and completed within 30 days, at which time the entire Committee will reconvene. The Committee will decide on an appropriate response:
- a. Exoneration, meaning that no wrongdoing was found.
 - b. Censure, including a written reprimand from the Committee. The Committee may also determine that certain conditions should be met in order to maintain AGO membership. Those might include a letter of apology or compensation for lost income. If the censured Member fails to comply with the conditions within a reasonable length of time, the Committee may recommend expulsion.
 - c. Expulsion, an extraordinary remedy that is applied in the most extreme circumstances. If the Committee decides to recommend this response, that decision must be ratified by the National Council.
- C. The Committee shall notify both Members of their decision immediately.
- D. The Committee shall formulate a final report that includes their recommendation and the reasons for it, as well as the supporting documentation from the investigation. This report will remain in the chapter files of the accused Member's chapter.

III. AT THE NATIONAL LEVEL

- A. If the recommendation of the Committee is expulsion, the National Councillor for Membership/Convener of the Regional Councillors will forward the Committee's report to the National Council. The Council will consider the case as soon as possible. It may vote to uphold the Committee's recommendation of expulsion, or take other action as it deems appropriate. The National Council's determination is final.
- B. The decision of the National Council will be reported by the National Councillor for Membership/Convener of the Regional Councillors to the investigating Committee. The National President will inform both Members in the case of the National Council's determination.

IV. REINSTATEMENT

A person who has been expelled from membership in the AGO may seek to reapply for membership after 3 (three) years have passed. The application should include a statement from the expelled Member outlining the reasons why his/her readmission is merited. It should also include letters in support of the application from three voting Members in good standing. The application should be addressed to the National President, for consideration by the National Council at its next meeting.

NOTES

Geographical Considerations: The Regional Councillor may determine that E-mails, teleconferencing and/or video-conferencing may be used at certain points in this process if the distances involved in travel for Committee members, the complainant or the accused would constitute an unreasonable financial burden.

Overt actions designed to circumvent the *Code of Ethics* may subject a Member to disciplinary action.

Employment

The American Guild of Organists (AGO) encourages the establishment of written contractual arrangements between organists serving in any institution and their employers because employees' rights can be severely limited when they are serving purely "at will." AGO members should be aware that the nature of the musician's work usually results in musicians being classified as employees and not as independent contractors. Regardless of a written agreement to the contrary, governmental agencies are likely to find that a church or temple musician is an employee because of industry practice, facilities used, work venues, an ongoing employment relationship, and the employer's right to supervise the musician.

The tax and accounting burden is greater for independent contractors. Therefore, if the institution tends to treat the musician as an employee for purposes of supervision and control, it should make the appropriate FICA/Medicare/Unemployment/Workers Compensation contributions from which the musician may benefit as an employee.

Anti-Trust Compliance

As the result of a Settlement Agreement that the AGO entered into with the Federal Trade Commission, the AGO is no longer permitted to publish Salary Guidelines, Model Contracts, or Model Contract Provisions. Accordingly, these documents and guidelines have been removed from the AGO's website. The following information, which is in compliance with our agreement, is provided to you to assist in employment matters.

Anti-Trust Compliance Guide

Why Anti-Trust Applies to the AGO

The American Guild of Organists is committed to complying fully with all laws and regulations and to maintaining the highest ethical standards. This commitment includes strict compliance with federal and state antitrust laws. In 2017, the AGO entered into a settlement agreement with the Federal Trade Commission ("FTC"), and the FTC's Order issued in connection with the settlement requires the AGO to abide by certain practices and avoid others.

We provide the following as important information for our members, chapters and leaders to ensure that our organization as a whole abides by its legal responsibilities under the antitrust laws. Please do not hesitate to contact the Executive Director of the AGO with any questions you may have regarding your responsibilities in this regard.

To many, it may seem unusual that we raise the topic of antitrust in the context of the AGO. Antitrust is most often viewed in the context of businesses that are competing to sell products and services, and it may not seem appropriate that antitrust laws also apply to us as members of the AGO. But they do.

- Under the antitrust laws, AGO members are competitors with one another when we offer to provide our professional services as musicians to employers, whether these employers are religious organizations, concert managers, or individuals engaging us for a special event such as a wedding.
- As members of the AGO, we are not unlike doctors – who may join an association that brings together like-minded professionals for educational and other purposes but who compete as providers of medical services to patients and hospitals.
- While working together as members of the AGO and its Chapters, we must remain mindful that certain conduct -- relating to fees and terms for our services or applying for positions of employment -- are subject to antitrust laws. As discussed in more detail below, the antitrust laws specifically prohibit our collaboration on these matters.

The AGO must depend upon its members, leaders and chapters to know, understand, and strictly abide by the antitrust laws and the Federal Trade Commission's Order that requires the AGO to take certain steps and avoid others. This compliance guide provides important information for our organization.

AGO SETTLEMENT WITH THE FEDERAL TRADE COMMISSION

On May 26, 2017, the FTC issued an Order, as part of a settlement agreement with the AGO. The agency had raised concerns regarding the AGO's Code of Ethics, Professional Standards, and certain other of our practices. The AGO has responded to the FTC's concerns by making a number of changes and undertaking a number of additional obligations to ensure that our practices comply with antitrust laws. We are also implementing a careful program of antitrust compliance education to ensure the AGO does not act anticompetitively and that the organization -- and its leaders, chapters and members -- understand the breadth of our antitrust obligations.

The specific obligations to which the AGO has agreed are contained in the Order issued by the FTC on May 26, 2017. In sum, the AGO may not --

- Limit price competition for the provision of services by its members;
- Discourage members from seeking employment or accepting engagements at an institution when another organist or choral conductor is employed at that same institution, or suggest that to do so is unprofessional or unethical;
- Suggest or mandate that any member requested to play for or conduct for a wedding, funeral or other service must obtain prior approval from the organist or choral conductor currently employed in that worship location or venue;
- Issue any schedule or recommendation of compensation or model contract provisions; or
- Accept any chapter into the organization that engages in the prohibited conduct above.

In addition, to ensure that our members, leaders and chapters understand and abide by the FTC's Order and the changes it requires, the AGO must implement an antitrust compliance and education program. The articles that have already been published in *THE AMERICAN ORGANIST* and the speeches and presentations that have already been made at various gatherings, as well as this compliance guide are part of our compliance program.

The AGO's responsibilities extend throughout the AGO, to its leaders and chapters, and to individuals participating in AGO events or in a capacity on behalf of the AGO. Our Chapters are also required to certify that their practices and documents are in accordance with the Order's requirements.

Please do not hesitate to ask questions of our Executive Director, James Thomashower, whom the National Council has appointed as the AGO Antitrust Compliance Officer, or reach out to other leaders for assistance with any questions you may have. We are conducting periodic antitrust training and also have an antitrust lawyer who will provide us additional advice as well. We all stand ready to make sure everyone understands our responsibilities and is able to act accordingly.

GENERAL ANTITRUST PRINCIPLES

We all know that the mission of the AGO is to foster a thriving community of musicians who share their knowledge and inspire passion for the organ. Our organization is a national professional association which serves the organ and choral music fields and was founded as both an educational and service organization. We seek to maintain high musical standards and to promote understanding and appreciation of all aspects of organ and choral music. As a whole, our members lead worship for congregations in each of the fifty states and our presence is widespread. None of this has changed. We set out our principles proudly in our website and other public materials. The antitrust laws, and the FTC settlement, do not keep us from continuing on this pathway that the AGO established more than 120 years ago.

Like many other professional organizations, however, our members are also competitors. The antitrust laws recognize that professional organizations such as ours provide a great benefit to our members and also to others in our communities. But because professional membership organizations may also provide opportunities for competitors to engage in unlawful trade restraints and "conspire" to fix prices for services, they also draw the scrutiny of the government antitrust enforcers in the Department of Justice, the Federal Trade Commission, and State Attorneys General.

Below are descriptions of some types of activities that may raise antitrust concerns. In some situations, bright lines can be drawn between permissible and impermissible conduct. In others, whether particular conduct is lawful will be less clear. Please ask questions whenever you are unsure about any matter. Our Antitrust Compliance Officer or our legal counsel will provide guidance. We want to be sure that we take every step to abide by the antitrust laws as well as the obligations the AGO agreed to in its settlement with the FTC.

DISCUSSIONS OF BUSINESS ISSUES

In many of the AGO activities, our meetings provide opportunities for members to improve our skills, to enjoy others' musical proficiency, and to become better musicians and worship leaders. We can also assist one another in our personal and professional relationships, which may include providing information and ideas about potential jobs or networking opportunities. These activities are not prohibited by the antitrust laws or the FTC Order.

While information-sharing is the lifeblood of many associations, there are topics that may not be discussed among members. We all need to be aware that certain topics that raise significant antitrust issues because they go to the essence of the competitive sector of our professional lives. These include:

- Current fees, prices or rates we may charge for our services;
- Plans to increase or decrease our fees, prices or rates;
- Allocating customers or territories among ourselves (e.g., agreeing with one another that one will work to serve certain organizations, individuals or geographic area while another seeks to serve others);
- Collaborating with our peers to boycott or retaliate against an organization or another group of competitors (e.g., collectively deciding to boycott an organization that stated it would not increase fees or employ AGO members); and
- Engaging in any collective effort to influence an employer's salary levels or fee structure.

Please note that it is quite appropriate for AGO members to engage in discussions about fees, salaries, and the like with current employers or with those from whom you may be considering employment. You may also discuss these matters with other individuals from whom you might seek advice, either formally or informally. The limits listed above apply to discussions *during AGO or AGO Chapter meetings and between members or other organists or choral directors* -- because these are discussions between *competitors*.

While discussions between members about specific fees and salary structures are prohibited, there are business-related topics close to these that are permissible topics for Chapter meetings. The list of permissible topics may include discussions of such things as:

- How current economic trends are affecting the profession;
- What employment opportunities may be likely to become available;
- How members can become more profitable by acquiring better knowledge of their potential job opportunities or their potential students;
- What teaching methods and instruction strategies are most effective and lead to the most income potential;
- How instructors might respond to students who are deciding not to continue instruction;
- How to manage a career that involves part-time employment for a religious organization as well as employment as a teaching professional or in another occupation; or
- How to best serve an employing organization or to develop a better working relationship with an employer.

MEMBERSHIP APPLICATIONS, BENEFITS AND EXPULSION

The AGO welcomes new members, openly inviting individuals who are interested in the organ and choral music fields to join our organization. In some professions, however, membership in a particular organization may be critical or necessary for an individual to practice or advance; in these, the organization's actions regarding membership and rejection or expulsion of members may be subject to antitrust scrutiny. While AGO membership most likely is not economically significant enough to raise antitrust liability, it is nonetheless prudent that we use basic procedures so as to avoid even this slight possibility. The AGO expects that our Chapters should do so as well.

The AGO accepts members on non-discriminatory terms. Membership is open to all who are interested in the organ and choral music fields, regardless of denominational affiliation or musical ability. To join, one need only submit a completed membership form with contact information and annual dues payment. In prior years, the AGO's membership form included a request that applicants agree to abide

by the organization's Code of Ethics. The Code was last modified (in January 2017, discussed below), but older versions of this Code had included provisions that raised antitrust concerns related to suppressing competition between members. The AGO no longer expects its members to abide by the older versions of its Code of Ethics.

Actions taken to expel a member or consider doing so should also be done in a manner that is not based on discrimination. The AGO may terminate a membership for non-payment of annual dues. Or, if a member engages in conduct that is illegal or would subject the AGO to charges that it has engaged in illegal conduct or violated the antitrust laws or the FTC Order, the AGO may terminate that individual. But neither the AGO nor its chapters should consider terminating membership for any competitive reason. For example, the AGO may not expel a member who is willing to provide services at rates that others believe are unfairly low. To do so could subject the AGO to charges that it has violated the antitrust laws, and the AGO will exercise care to ensure considerations for expulsion are carried out within appropriate procedures that safeguard from this potential liability. A significant element of any expulsion proceeding will be to provide the member an appropriate opportunity to explain or refute claims made. Expulsion by the AGO is, and will remain, a highly unusual action.

CODE OF ETHICS AND PROFESSIONAL STANDARDS

The AGO has modified its Code of Ethics and Professional Standards to resolve concerns raised by the FTC. The modified documents, which bear the date January 27, 2017, appear on the AGO website, have been published in *THE AMERICAN ORGANIST*, and are found in the first section of the Chapter Management Handbook.

It is important to note that even when a code of ethics is not enforced by an organization, the organization may still run afoul of antitrust laws. The FTC has long held that voluntary standards may still be actionable if they advocate membership behavior that is anti-competitive.

FEE OR RATE SURVEYS

Surveys and compilations of fees or rates raise serious potential antitrust exposure. In some circumstances, collecting and exchanging this competitively sensitive information can even lead to criminal antitrust liability. Under carefully controlled parameters, however, a professional or trade association may hire an independent third party to collect *historical* data that then is aggregated sufficiently to mask the underlying source data, but this should only be done after obtaining antitrust advice.

To comply with the FTC's Order in connection with its investigation of the AGO, our organization no longer publishes its Salary Guidelines and Model Contract Provisions. In addition, the AGO must be certain that any chapter that desires to collect information concerning fees or salary rates does so only within permissible limits that are in keeping with the FTC's Order and applicable antitrust laws. If any chapter is interested in collecting fee or rate information from members or others, it should contact the Antitrust Compliance Officer to seek necessary guidance *prior* to taking any action. The AGO, including its chapters, must use caution in this context to protect the organization from adverse legal action.

CERTIFICATIONS

The AGO offers certifications for members and non-members of the AGO. These programs provide opportunities for professional musicians to demonstrate their capabilities and to signify to the public and to their peers that they have achieved particular levels of expertise. Because the denial of a certification can disadvantage an applicant in obtaining jobs or engagements when competing with other organists for employment or engagements, antitrust principles require that the certifications be fairly administered.

As a general rule, certification programs will be analyzed under the antitrust laws based on various factors, such as:

How subjective or objective is the certification testing? The more objective the testing, the more likely it will be immune from challenge.

Who serves as the judges in awarding these certifications? If the judges are fellow competitors, the decision-making process may draw greater scrutiny since the court may suspect that a denial of certification is motivated by anti-competitive considerations.

Is the certification testing a fair measure of the certification being awarded? Associations providing certification programs should be able to show that the testing is logically related to the designation being awarded and that the testing was developed in a methodical and competent manner that fairly tests the skills of the applicant.

Was the testing carried out in a consistent manner and without possible discrimination? In this regard, testing standards should be carefully and uniformly followed by judges. Judges should be free of any possible conflict of interest, which the AGO's blind judging procedures are designed to ensure.

As noted above, certification programs are important benefits that should be open to nonmembers. An association may charge a nonmember more than a member for the certification testing. However, nonmember fees must not be so large that they effectively compel the nonmember to join the association. In addition, testing applied to nonmembers should be identical to that applied to members.

DATABASES AND REFERRAL SERVICES

It is permissible for the AGO to maintain a database that can be used to locate organ instructors. To ensure that this database does not run afoul of antitrust requirements, the AGO maintains certain practices:

- Members who meet objective criteria may be included in the database. The criteria should be reasonably related to the teacher's ability as an instructor, such as the number of years of experience or a particular level of certification.
- All referrals should be made in an objective manner, such as a simple rotation of names, by the location of the teacher(s) closest to the consumer, or by teacher specialty.

- Associations should avoid allowing staff to suggest particular members as referrals since that may lead to claims of favoritism or the unfair exclusion of eligible teachers.

COMPETITIONS

The AGO and its chapters offer competitions, which will not run afoul of the antitrust laws so long as they are administered in an equitable manner. For instructors, the success of students in these competitions can elevate the teachers' reputations and marketability. Competitions also allow skilled students to showcase their talent and can lead to teachers soliciting other teachers' prized pupils.

When sponsoring competitions, the AGO and its chapters should comply with the following antitrust considerations.

- Neither the AGO nor any Chapter should restrict teachers from soliciting students of other teachers. Any type of solicitation restriction may violate antitrust laws.
- It is permissible to limit the number of students in a competition because of practical limitations, such as hall size or the number of judges.

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Please do not hesitate to call or write to ask for assistance if you have any questions about the application of the antitrust laws to your activities with the AGO.

Employee vs. Independent Contractor

Independent Contractor or Employee? How to Tell the Difference.

Occasionally churches or synagogues will hire musicians as independent contractors instead of employees. According to the IRS, workers are generally considered employees if they:

- Must comply with the employer's instructions about the work.
- Receive training from or at the direction of the employer.
- Provide services that are integrated into the business.
- Provide services that must be rendered personally.
- Are aided by assistants who are hired, supervised, and paid by the employer.
- Have a continuing working relationship with the employer.
- Must follow set hours of work.
- Work full-time for an employer.
- Do their work on the employer's premises.
- Must do their work in a sequence set by the employer.
- Must submit regular reports to the employer.
- Receive payments of regular amounts at set intervals.
- Receive payments for business travel expenses.
- Rely on the employer to furnish tools and materials.
- Lack a major investment in the facilities or equipment used to perform the services.
- Cannot make a profit or suffer a loss from their services.
- Work for one employer at a time.
- Do not offer their services to the general public.
- Can be fired by the employer.
- May quit work at any time without incurring liability.

According to these guidelines, the majority of church and synagogue musicians are employees.

New Music Commissions

By Philip Brunelle
revised 2014

Commissioning music is a marvelous experience - the thrill of having something written especially for you is like ordering your own tailored ensemble of clothes. In all of life's musical presentations, there is nothing that can compare with the joy of presenting a commissioned work. In the specific instance of an AGO Chapter, the "world premiere" of a piece commissioned from a local (and perhaps overlooked) composer can stir interest and provide an incomparable source of enthusiasm for both the chapter members and the community at large. Why, then, is not more music commissioned?

There are several misconceptions about commissioning new music that prevent many people from considering it as a viable option. First, there is the matter of money. Many people believe that all commissions cost tons of money, and that the small amount they have to offer would not be acceptable. **THIS IS NOT TRUE.** The range in pay scale for a commission can vary from a few dollars to many thousands. The commissions we most frequently hear about are the large symphonic and operatic commissions - works that engage a composer in months (and even years) of activity. Commissions within reach of a chapter would not normally be of such scope. Composers are anxious to write, and will welcome the opportunity to create a piece for which there is a "certain market," taking into account the needs and resources of the patron. Of course, a well-established composer will have a more settled idea about what should be charged, but generally speaking, the fee is likely to be proportionate to the composer's reputation in the music world.

Another misconception regarding commissions is that the commissioning body has no say in the matter of what will be written. **THIS IS NOT TRUE.** Once you have agreed upon a composer (this includes knowing the style of music that composer writes and having some idea of what you want the composer to create), talk with the composer about your idea. Discuss the fee you can pay (many composers use a fee scale based on each minute of music composed), and whether or not the cost of copying is the responsibility of the composer or the commissioner. In some instances the commission fee includes the copy costs, while other times this is a separate item. Explain the occasion prompting the work (the chapter's anniversary, honoring a special member, etc.), ideas on the text, the size of the performing forces (choir a cappella, or choir with instruments and which ones, etc.). This kind of information is helpful to composers and gives them the guidelines needed to think about the work. It may be that you are not sure about some of these details and will want the composer's advice - that is fine. Remember, as the commissioner, you are in the driver's seat: make sure you and the composer understand each other. This is simple communication, but immensely important. Once you have this understanding, the composer can go to work.

Be sure that the composer hears your choir or the performer(s) for which he/she is writing. This may not always be possible, and a tape may have to suffice, but it is most important. Only in this way can the composer judge the level of accomplishment of your group, hear its strengths, and capitalize on them. An overly difficult piece, or one that highlights the weakest points of its intended performers, will do nothing to advance the reputation of either the composer or the chapter.

Agree on a date for delivery. The composer may want to go over the work with you prior to submitting it in final form to get your opinion - some do, some don't. Some are very prompt with their work, some are a bit tardy, and some are horribly late. Be prepared! With the arrival of the commission, you must

determine how you are going to get copies to the performers. In some instances, you need only decide whether the manuscript is legible enough to be copied as is, while sometimes the music will have to be given to a third party for computer setting. If there is any question about its legibility (and time to rehearse is always limited), it is highly recommended that you have the work printed via a computer music notation program.

Now you are ready to rehearse the work. If at all possible, get the composer's thoughts on the work before you begin; perhaps the two of you can play it through together. If this isn't possible, communication by phone or letter is essential. Rehearsals can now begin! If your group has never been involved in a premiere before, help them to sense the uniqueness and thrill of the occasion; many volunteers have trouble seeing what the outcome will be and need your support . . . and not all of the notes may be learned at the first rehearsal! If the composer lives in town and wants to attend rehearsals, you may want to have several weeks with the new material alone before inviting your special guest - that way you can get some of the note- chasing taken care of, and the composer can listen to interpretive things rather than wayward pitches.

Finally, the premiere is here! Make it a thrilling moment - do all you can to involve the congregation or audience in the sense of the occasion. If the composer is in attendance, welcome him or her and, if you desire, have the composer say a few words. If it is an anthem for a service, let me make a suggestion: immediately after the service, have the choir return to the loft, and invite the congregation to remain for a second hearing. We all know that it takes more than one hearing for us to grasp a new thing - and how true this is for the audience. It makes for a welcome beginning in the life of a new work: you have experienced one of life's musical riches!

You may not want to coordinate a mass commissioning project like the one described here, but this story may give you ideas about how to start your own chapter commission. This is the sort of project that benefits from brainstorming with the members of the executive or program committee - once the concept takes hold, you will be surprised by the range of ideas that will be unleashed!

In 1980, when the AGO held its National Convention in Minneapolis-St. Paul, I suggested having each church in the immediate area, large and small, commission an anthem to be performed in its own service on the Sunday preceding the Convention. We decided on a fee of \$300 - a modest amount at that time which we felt each interested church could raise, one that would not be prohibitive for any church choir. It was our plan to pay each composer \$200 and use the remaining \$100 to copy each of the commissioned anthems and publish them as a bound set - each choir receiving a copy of the anthology for every choir member.

We wrote to all the composers residing in the Minneapolis-St. Paul area (the American Composers Forum helped us to compile an excellent list). The commission project was explained to them - the occasion that prompted the project, the modest amount of the commission (which would be the same for all), the printing of the anthology, and that after the premiere each composer was free to have the anthem published in octavo if a publisher could be found. The response was overwhelming - more than 40 composers expressed a desire to be included.

Twenty-nine churches ultimately participated in the project, representing small congregations as well as downtown cathedrals. The money was raised by private donations, by bake sales, by car washes . . . a host of ways that all helped the choir members become part of the commissioning process.

The American Composers Forum, based in St. Paul, Minnesota has developed a helpful commissioning guide for anyone wishing to commission a composer or initiate a composer residency. The Forum has broad experience working with composers of all musical styles and genres, and welcomes inquiries for assistance and guidance. The commissioning guide is available through their website at <www.composersforum.org>. You may also request a copy by calling them at 651-2512833, or writing to the American Composers Forum, 522 Landmark Center, 75 West 5th Street, Saint Paul, MN 55102-1439.

I hope this information will inspire and encourage you to attempt your own chapter commission. With a little care and the understanding that it need not be an overwhelming project, the rewards for your chapter (and the composer) can be tremendous.

Philip Brunelle is Founder and Artistic Director of VocalEssence in Minnesota. He is also Organist-Choirmaster at Plymouth Congregational Church, Minneapolis, and is known nationally and internationally as a conductor, choral scholar, and organist. He records for Virgin Classics, Angel/EMI, Collins Classics and VocalEssence.

Local Chapter Competitions

Your chapter may choose to hold a local competition, apart from the AGO/Quimby Regional Competitions for Young Artists, for local recognition only. Each chapter is responsible for devising rules to govern its own competition. Competitions can stimulate community interest in the organ, and also introduce students and new organists to your chapter and the Guild.

You will need to form a competition committee. Its duties include making all arrangements for the competition (practice times, page turners, selecting an appropriate instrument, appointing judges, etc.) and overseeing its execution. This committee, in conjunction with the chapter executive committee, can also determine what awards will be made to the winner(s) and how they will be awarded. Will the prize money be split if the judges recommend it? Will the chapter present the award the day of the competition, or wait to do so in front of the general membership?

The executive committee may elect to establish a scholarship fund to finance the competition. Such a fund may be used to award prizes directly to the contestants, or scholarship awards may be paid to a school, college, or private instructor to encourage students to continue their development within the profession.

MATTERS TO DECIDE FOR CHAPTER COMPETITIONS

1. Who is eligible? Eligibility may be by school grade level and/or age, for example.
2. Must the contestant be a member of your chapter, or a student of a chapter member, or will the competition be open?
3. The number and difficulty of the pieces to be played (for example, a Bach work and one work from either the 19th- or 20th-century repertoire). Maximum and minimum performance time should be determined.
4. Items on which contestants will be judged (registration, performance style, tempi, etc.) and the relative importance of each item.
5. To whom the scholarship award will be paid:
 - winning contestant
 - school
 - college
 - university
 - private instructor
6. Restrictions on previous winners entering the competition.
7. Provision of scores for the judges by the contestants in accordance with copyright laws. As noted in the AGO's "Official Rules Governing the 2013 Regional Competitions for Young Organists,

The use of photocopies of scores in public domain (copyright before 1923) is acceptable. The use of photocopied or other illegally reproduced copyrighted scores without the written permission of the copyright holder is prohibited and will disqualify a competitor from participation in the competition. Exceptions to this rule apply only to reductions for performance and to pages duplicated for the purpose of facilitating page turns.

8. Preparation of application forms. Include a statement that each contestant must return the form to the chapter competition director by (date) , accompanied by a registration fee of (amount) , with a check made payable to (your chapter name) .
9. Amount of practice time permitted on the competition instrument. Contact person for practice time and person to send organ specifications to each candidate.
10. Date and time of the competition (should be announced well in advance of the actual event). For additional guidance in setting up a local competition, refer to the rules for the Regional Competition for Young Organists and National Young Artists Competition in Organ Performance, available from National Headquarters.

AGO/Quimby Regional Competitions for Young Artists

If your chapter is interested in hosting this regional competition, contact your Regional Councillor or the National AGO Office.

Conventions

Conventions provide a forum for education, socializing, and communication within the organization. Opportunities for informal exchange of interests, ideas, and mutual support, combined with seminars on professional issues, performance, liturgics, and other topics make these gatherings an important aspect of Guild life. Sponsoring a regional convention can also prove to be an excellent way to energize a chapter.

The Guild regularly schedules two types of conventions: a large national convention, held during the summer of even-numbered years, and seven smaller regional conventions, scheduled during the summer of odd-numbered years. Both are produced with the indispensable assistance of local chapters. National conventions are run under the aegis of the National Council, while regional conventions are entrusted to a sponsoring chapter with the advice and approval of the appropriate Regional Councillor.

If you are interested in sponsoring a regional convention, contact your Regional Councillor. He or she is responsible for submitting a recommendation to the Regional Convention Committee four years prior to the convention date. Procedures for site selection vary from region to region, so it is best to contact your Regional Councillor directly for details as soon as you feel there is an interest in sponsoring a regional convention in your chapter.

If you are considering hosting a national convention, you should contact the National Convention Committee through the National Headquarters office in New York.

Official Guidelines and Procedures for hosting national and regional conventions are available on the AGO website at <https://www.agohq.org/conventions/regional-convention-planning-documents/>

In addition to these nationally recognized events, you may consider producing a "mini- convention", January Jubilee, or POE for all the chapters in your district or local area. Your Regional Councillor and District Convener will be able to help you plan such an event.

Duties of the Chapter Professional Development Committee Director

Every AGO chapter is encouraged to establish a professional development committee. The director of that committee may be an elected officer or be appointed by the dean, depending on the chapter's operating procedures. Chapter professional development directors should:

1. Encourage their chapter to be a professional development committee-of-the-whole, so that professional development work is not confined to a few.
2. Order their own copies of professional development publications from Headquarters, and make them available to members as needed.
3. Provide regional coordinators with their name, address, Guild certification, email, and phone numbers.
4. Report at every chapter meeting, and have at least one chapter meeting yearly devoted to the work of professional development.
5. Get to know and collaborate with the chapter's director for education. Such areas as certification and the Annual Fund are concerns for both.
6. Survey and publish results on topics relating to professional development.
7. Chapters may wish to hold seminars and meetings to foster goodwill and mutual support from the employing institutions in the area served by the chapter. The Committee Director should be familiar with the anti-trust policies of the guild and ensure that the chapter works within those guidelines.
8. Work with the editor of the chapter newsletter and the chapter directory to be sure that the addresses and telephone numbers and email addresses of National Headquarters, regional councillors, regional coordinators for education, professional development and competitions, and district conveners are readily available.
9. Initiate and maintain contact with local churches, schools, and seminaries to promote the development of a musically informed clergy.

NOTE: Deans should be sure to pass along to their chapter professional development committee directors any correspondence from National Headquarters or regional offices that pertains to professional development issues.

Chapter Placement Information Services

By Maureen Jais-Mick
(Revised by COMDACS 2014)

Two important ways in which chapters can interact with their communities, serve their members, and have an impact on the future of organ and choral music are through placement information and substitutes referral services. These services may be a chapter's primary contact with local congregations, and a way to influence professional compensation and working conditions. A placement information service is also a means of attracting new members.

When organizing a placement information service, decisions have to be made. Among them:

1. TO WHOM WILL JOB INFORMATION BE AVAILABLE?
Chapter members? All AGO members? Non-members?
2. WILL A FEE BE CHARGED TO EMPLOYERS FOR USE OF THE SERVICE?
Mailing, printing, maintaining and staffing a placement service requires time and money. A placement information service can pay for itself and also produce income. The fee amount should be based on how many people a potential employer will reach through the service - and the materials provided.
3. WHO WILL MANAGE THE SERVICE?
Ideally, the job of coordinator is a long-term commitment. The coordinator will often counsel employers and members regarding expectations, working conditions and compensation. From experience, I can say that you get better at this the longer you do it. It must be a person who can be reached, in person or promptly by email and it must be a person who communicates quickly.
4. HOW WILL THE SERVICE BE PUBLICIZED?
If your chapter decides to publicize to local churches and synagogues, this may be many congregations' first contact with AGO. Materials should be friendly and attractive. Including information about the National AGO adds credibility to local brochures.
5. WILL THE SERVICE SUGGEST STANDARDS AND PROVIDE EMPLOYMENT AND COMPENSATION INFORMATION TO THE USERS, OR WILL IT BE ONLY A LISTING OF JOB OPENINGS?
We strongly recommend that a chapter help employers understand fair compensation and working conditions. To achieve this, they must know what is expected of them in terms of compensation and working conditions.
6. HOW WILL VACANCIES BE ANNOUNCED TO THE CHAPTER MEMBERSHIP?
Vacant positions most likely will be posted on the chapter's website or may be delivered by email to each member as the positions become open. You may wish to list positions in the newsletter or have members contact the coordinator for updated information.
7. WILL THE SERVICE MAINTAIN A LIST OF SUBSTITUTE ORGANISTS AND DIRECTORS?
When a church or synagogue calls about listing a position, it is helpful to be able to suggest members they might call for substitute or interim work. This also provides income for members.

CHAPTER SUBSTITUTES REFERRAL SERVICES

A useful adjunct to a chapter's placement information service is a substitutes referral service. Such a service not only provides employment for chapter members but allows employers the time needed to advertise for and audition candidates for a vacant position. Some chapters test all members who wish to be included on such a list. Others simply accept the name of any member wishing to be listed.

A chapter may wish to ask substitute candidates to evaluate themselves. The chapter can then produce an annual table that includes the following information about each person listed as a substitute:

- Name
- Telephone number
- Email address
- Denominational preferences
- AGO Certification
- Education
- Availability for interim work
- Other information (minimum fees, how far they'll travel, etc.)

Each person also evaluates their skills, using the following codes:

1=strong skills 2=moderate skills 3=basic skills

- Conducting from the console
- Conducting from podium
- Directing children's choir
- Directing handbell choir
- Improvisation
- Transposition
- Play from figured bass
- Cantor for mass

Duties of the Chapter Education Coordinator

The chapter's education coordinator is normally appointed by the dean (unless other provisions exist in the chapter's operating procedures), and serves for a term of either one or two years, subject to re-appointment. Although this is an optional office, it is strongly urged that chapters appoint an education coordinator whenever possible, to promote and develop the educational purposes of the Guild.

The duties of the chapter coordinator for education include the following:

- To motivate chapter membership in continuing their education through certification, workshops, conventions, etc.
- To share AGO educational materials within the chapter.
- To help establish a chapter library of AGO materials appropriate for the particular chapter.
- To write short articles on AGO educational materials, workshops, and the AGO Professional Certification Program for chapter newsletters.
- To organize study sessions with members for continuing education.
- To speak regularly (and briefly) about educational resources and the educational progress of the chapter membership at chapter meetings.
- To work closely with the chapter's coordinator for professional development.
- To maintain contact with the regional educational coordinator for assistance and advice in carrying out the above duties.
- To form a small committee for delegation of these duties when appropriate.

Administering Professional Certification Exams

The success of the Guild's Certification Program depends on the careful organization and fair and competent supervision of the examination process. The chapter dean, and/or local examination center's designated examination coordinator, is the person responsible for making certain that these procedures are followed scrupulously, with everything being done well, promptly, and with complete integrity and fairness to the candidates.

The following is a brief survey of the duties involved in administering certification exams. The Manual of Procedure for each examination should be consulted for complete information and a timeline of duties. For more information on the certification program see *AGO Certification - A Chapter Guide to Preparation, Promotion, and Participation*, available as a pdf. From the AGO website, go to the bottom of the home page in Quick Links and choose Chapter Documents>Certification Program: A Chapter Guide for Promotion, Preparation, and Participation. Or, begin your search here on the [Chapter Documents](#) page.

Chapters designated as "Examination Centers" by National Headquarters may administer any exam or any portion of an exam. Regional Councillors recommend specific chapters for this status. If you believe there is sufficient interest in your area to serve as an Examination Center, contact your Regional Councillor directly.

Some examinations may be administered by any chapter - with certain provisions. The Service Playing Test and the Colleague (CAGO) Examination may be given at any chapter that has access to an organ adequate for the repertoire and appropriate recording equipment. Use of a pipe organ is strongly recommended, but in certain cases electronic organs, or organs which combine ranks of pipes and digital components, may be used. The paperwork sections of the Fellowship (FAGO), Associateship (AAGO), and Choir Master (ChM) exams may be administered at any chapter. Practical portions (Section I) of these exams must be taken at Examination Centers.

Dates for administering the different exams vary. The Service Playing Test, for example, may be given at any time during a certain period, while the other exams have specific dates and times. Consult the current requirements for exact dates. All expenses incurred by a chapter in administering CAGO, AAGO, FAGO, and ChM examinations are submitted for reimbursement to National Headquarters at the end of the testing period. There is a nominal reimbursement for the Service Playing Test. The chapter's examination coordinator (or Dean) must be well acquainted with the Professional Certification Requirements, as printed in the July issue of THE AMERICAN ORGANIST (and at <http://www.agohq.org/certification/> on the website), to determine specific procedures and repertoire. Responsibilities of the coordinator include:

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| <ul style="list-style-type: none"> • publicizing the exams to chapter members • securing adequate facilities • appointing competent proctors and examiners • scheduling practice time • acquiring required music for examiners, test choirs, and accompanists | <ul style="list-style-type: none"> • securing recording facilities • receiving the exams prior to the day • coding, processing, and returning exams to Headquarters using a rapid delivery agency • giving appropriate recognition to successful candidates |
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Professional Certification Requirements

The American Guild of Organists was chartered in 1896 by the Board of Regents, University of the State of New York, to administer a comprehensive series of examinations for professional certification. The Guild offers the following certifications:

Service Playing Certificate (SPC) Colleague (CAGO)

Choir Master (ChM) Associateship (AAGO) Fellowship (FAGO)

To obtain detailed requirements for each examination, contact National Headquarters or download the documents referred to at <http://www.agohq.org/certification/>.

Examination Date: see July TAO for specific dates.

SERVICE PLAYING TEST: October 1 through March 31.

COLLEAGUE EXAMINATION: Mid-November, Mid-May.

CHOIR MASTER EXAMINATION: (morning and afternoon) Late May/early June.

ASSOCIATESHIP EXAMINATION: (paperwork section both mornings; organ playing one of the afternoons) Late May/early June.

FELLOWSHIP EXAMINATION: (paperwork section both mornings; organ playing one of the afternoons) Late May/early June.

Eligibility

It is not necessary to be a member of the AGO in order to take a certification examination. The examinations may be taken in any order, except that the Associateship certificate must be acquired at least one year before the Fellowship examination may be taken.

Application Procedures

Service Playing Certificate Test

Write to National Headquarters for application forms and a manual of procedure. The completed application may be submitted between September 1 and February 1. Tests may be taken at any chapter where a suitable organ and recording equipment are available, since the test is recorded and the recording sent to National Headquarters for evaluation. Candidates desiring joint certification with the National Association of Pastoral Musicians should so indicate on their applications, and should note the specific requirements for NPM candidates in the Professional Certification Requirements. Candidates seeking joint certification must be members in good standing of NPM.

Colleague Examination

Write to National Headquarters for application forms and a manual of procedure after July 1 for the November exam, and after December 1 for the May exam. The completed application must be submitted by September 15 for the January exam, and by March 1 for the May exam. Exams may be taken where a suitable organ (not normally played by the candidate) and recording equipment are available, since the exam is recorded and the recording sent to National Headquarters for evaluation. The Colleague examination may be taken in two sections: Items C1-C4, performance of repertoire, and Items 5-8, keyboard skills. As with the higher examinations, a CAGO candidate who takes the entire examination but fails to pass one of the two sections may retake that section at a later designated examination date. Candidates desiring joint certification with the National Association of Pastoral Musicians should so indicate on their applications, and should note the specific requirements for NPM candidates in the Professional Certification Requirements. NPM also requires a written test for

Colleague candidates; instructions for this are available from NPM headquarters. Candidates for joint certification must be members in good standing of NPM.

Choir Master, Associateship, and Fellowship Examinations

Write to National Headquarters after January 1 for application forms and a manual of procedure. The completed application must be submitted by April 1. Both sections of these examinations (paperwork and tests at the organ) may be taken in the same year, or each section may be taken singly. If only the paperwork section is to be taken, the examination may take place at any chapter, since the papers are sent to National Headquarters for evaluation. But if the performance tests, or both sections, are to be taken, the examination must take place at one of the designated regional examination centers, since two examiners must be present to hear performance tests. A list of these examination centers is available on the website <http://www.agohq.org/education-certifications/certification/exam-locations/>. The candidate may choose the center that is most convenient.

Examination Fees

Fees for each of the examinations are given along with the Professional Certification Requirements each July in THE AMERICAN ORGANIST.

Certificates

Choir Master, Associateship, and Fellowship certificates will be issued to those who obtain at least 50% of the points for each item and 70% of the total maximum marks in each section (i.e., performance and paperwork). In the case of the Colleague Examination, each section, and the Service Playing Test, the entire test, must be passed by the same minimum scores. Information on the purchase of academic regalia is available from National Headquarters.

Credit

Either or both sections of the Colleague, Choir Master, Associate, or Fellow Examinations may be taken on any designated examination date. Candidates who pass one section of an examination must pass the remaining section within five succeeding years. This ruling does not apply to those who passed one section prior to 1969.

Preparation

Examinations and solution booklets from previous years the Examination Hymn Booklet , and the current editions of the Colleague Examination Study Guidelines and Service Playing Test Study Guide may be obtained from AGO National Headquarters, available online in the AGO Store [here](https://ago.networkats.com/members_online/members/createorder.asp) (https://ago.networkats.com/members_online/members/createorder.asp).

It is advisable, for practice, to work out a full set of paperwork tests within the limits specified before taking the Choir Master, Associateship, or Fellowship Examinations. For those taking the Colleague Examination and/or Service Playing Test, the respective study guidelines offer comprehensive approaches for preparation.

Examination Work Sheets

Paper will be supplied for paperwork sections. For the Choir Master, Associateship, and Fellowship Examinations no papers or books may be brought into the examination room. All candidates' answer sheets are retained at National Headquarters. Candidates will receive judges' comments as a matter of course.

Recommended Bibliography

A bibliography for examination study is available as a pdf on the website.

AGO Examination Prizes

The following prizes are awarded each year:

FAGO Prize—\$600, for highest overall score on the FAGO Exam (both sections).

AAGO Prize—\$500, for highest overall score on the AAGO Exam (both sections).

ChM Prize—\$500, for highest overall score on the ChM Exam (both sections).

S. Lewis Elmer Award-\$500, for highest overall score on any of the above three exams.

To qualify for any of these prizes, both sections of an examination must be taken in the same year, and the overall score must be at least 85%.

AGO CERTIFICATION EXAMINATION STUDY MATERIALS

National Headquarters makes available a number of publications that will help in preparing for the Guild's certification exams. These educational resources have been developed over the years by the Committee on Educational Resources and are valuable study aids. They are listed each month in TAO and are available for purchase. You may also find these materials available at the AGO store on the AGO website [here](https://ago.networkats.com/members_online/members/createorder.asp) (https://ago.networkats.com/members_online/members/createorder.asp).

Building Chapter Membership: Identifying Potential Members

By Ardyth Lohuis, Revised 2014

Recruiting new members should be an ongoing activity involving all current chapter members. Periodically a chapter should engage in special campaign activities to search out, contact, and enroll new members and to reinstate those who may have left the group. This campaign may rely on a core group for implementation, but needs the involvement of everyone for its greatest success.

Such a campaign is increasingly important for the local chapter as the ONCARD system for national renewals takes effect. Members in ever increasing numbers will no longer rely on the annual spring/summer membership campaign to enroll and the local chapter's enrollment renewals will be spread across the calendar year. This campaign may include enrollment opportunities at chapter meetings when chapter members/officers might assist those less comfortable with online renewals by providing computer access and assistance.

Since membership in the AGO is open to all, the potential for growth is vast. Lovers of the organ and its music, students, choir directors, music committee personnel, clergy, organ sales and maintenance people, music dealers, spouses and partners of church musicians - all are potential active members of your chapter. Organists of all abilities and backgrounds are welcome. No examination is required for membership. It is important to stress the openness and willingness of the AGO to serve all who are interested. Their many talents, enthusiasm, and different perspectives will enhance your chapter.

You should work on two fronts simultaneously:

- Compile a data bank of prospects
- Gather materials for your promotion - a letter of invitation that introduces the Guild and your chapter in particular, membership card, back issues of THE AMERICAN ORGANIST, and a brochure or flyer summarizing your chapter's coming events and special services (placement, substitutes register, etc.)

On a map of your state, draw a circle with a 25-to-30 mile radius around your city or the main community in your area. If you live in a sparsely populated region, your circle should be larger. Your objective will be to identify every potential member within the circle. To make your list as inclusive as possible, use these resources for developing your list:

- ministerial associations
- diocesan, synodical, or conference offices
- councils of churches
- your local and state affiliates of the Music Teachers National Association (MTNA)
- local music clubs
- schools
- telephone company yellow pages
- AGO Headquarters
- Websites or web searches

Using websites and directories of the groups listed above, begin making a data file to include each individual's name, institutional affiliation, address, email, phone number, and role within the organization. Visit organizational websites to find contact information. If possible, email these organizations to obtain correct, electronic copies of the names of their musicians, clergy, and

chairpersons of the music and personnel committees. Since you want your mail read, avoid sending mail addressed simply to "organist" or "minister." In some instances phone calls may be necessary or even desirable.

An internet search for music and CD retailers, church music-related businesses such as denominational bookstores, and organ and piano sales and maintenance firms will help you to create another list of potential members. Some of their personnel will wish to affiliate with the AGO; all are helpful in distributing publicity for your meetings and special events. The ONCARD system and AGO website can assist you in creating a list of lapsed members.

When you have compiled the lists, send an initial mailing directly to all prospective members, followed quickly by an email to all of those addresses mentioning the coming postal delivery and briefly giving an introduction and summary of benefits of the AGO. In your postal letter, introduce the Guild and its benefits and invite Guild membership. A slightly different letter should be sent to clergy. This letter will also introduce the Guild, but will stress the ways in which a chapter can benefit both musicians and the institutions they serve. A third letter might be developed for those who are music lovers but not institutional leaders. This letter would focus on the Guild's educational and community services. All letters should include chapter name and the name, email and phone number of your dean or membership director, chapter website address, and the AGO national website address. Prospective membership cards in full color are also available through the AGO website and should be included. Be positive and enthusiastic in all communications.

As soon as a response is received, make person-to-person contact by phone, email, or visit right away, both to extend a warm welcome and to arrange an "escort-host" for the next chapter event. An escort may be someone whose residence is nearby and who will provide transportation as well as companionship. As host, the chapter member will take care to introduce the visitor to as many others as possible and make him or her feel welcome and at ease. A member of the executive or recruiting committee should do a telephone follow-up within a day or two of the event. Be sure to maintain contact with the prospect ensuring that they understand how to find and use the ONCARD system at the AGO website to join your chapter. A phone call before the next meeting will help ensure a long relationship.

After a suitable time, make phone calls to those who did not reply in order to encourage attendance at coming events and to answer any questions that might remain.

Letters alone, no matter how brilliantly written, can never replace the person-to-person approach. As part of the campaign, make an opportunity to reinforce with chapter members the positive roles they can assume in building a strong chapter.

Ardyth J. Lohuis is Professor Emerita of Music at Virginia Commonwealth University in Richmond and performs with her violinist colleague, Robert Murray, as The Murray/Lohuis Duo. She is a past dean of two different AGO chapters, a former Virginia State Chairman, and was a member of the national Committee on Chapter Development for several years. She was also the General Chairman for the Region III Convention in 1983, on the steering committee of the 1995 Region III Convention, and has been involved in several Pipe Organ Encounters.

Energizing Your Chapter: Membership Recruitment and Retention

By Marianne Webb (1936-2013)

As amended by COMDACS, January 2014

Commit to Build

A chapter is built member by member. Each prospective member needs to become a major recruitment endeavor. This type of recruiting takes a special commitment of time and energy and is almost always accomplished one-on-one. The overall chapter recruitment effort ideally should be one member's responsibility, one person's obsession. Sometimes it takes several years to bring a person into a chapter. Never give up!

Establish a Goal

Set a membership goal and reach for it. Saying, "We really need to recruit some new members this year," will not be as effective as saying, "Let's strive for ten new members this year."

Maintain a Record

Keep a list of prospective members. Invite these people to organ recitals and chapter meetings, and especially to the receptions following these events. Social interaction can be a key factor in encouraging people to join.

Expand Recruitment Sources

Read the wedding announcements in the local newspaper for names of area organists. Note the people who attend organ recitals regularly. Bear in mind that not all members must be organists or choir directors. Some of the most loyal and hard-working chapter members are people who simply love organ and choral music but are not musicians themselves. Look for these people; they are not hard to find. They add a special dimension to a chapter and a viewpoint that is important.

Utilize Local Media

Place announcements of chapter meetings, with a brief description of the evening's activities, in the local newspapers and local online news services. Television or radio may also be interested in special events, particularly those that focus on youth or children. Include in the release, "Visitors are welcome" or "Open to the public." When financially feasible, purchase newspaper ads for major events of interest to the general public.

Promote Recognition

Wear name tags at chapter meetings, particularly at the beginning of each season, that distinguish visitors from members. Be eager to extend the hand of fellowship to make each person sincerely feel special, wanted, and needed. These are the three keys to recruitment and retention.

Extend Borders

Don't limit your chapter recruiting to one geographical area. Think big and reach out as far as you can without infringing upon the territory of another chapter.

Consider Sponsoring Members

In instances of severe financial hardship, it can be very rewarding for a member of the chapter to serve as a sponsor, paying someone's dues for a year, either anonymously or with the person's knowledge. This is an effective retention tool as well as a recruitment tool.

Consider Honorary Members

In many chapters, long-time members who have served faithfully for many years are honored by the status of Honorary Life Member. Under this arrangement, the chapter pays their dues (reduced, since these folks are usually over 65 years of age) for the rest of their lives.

Another type of honorary membership is that given to an outstanding musician who is not an organist - for instance, the conductor of your local symphony orchestra. It can certainly be worth the investment for your chapter to welcome such persons into membership. You show your support of their work and also introduce them to the (perhaps unfamiliar) world of the organ through their subscription to TAO.

Welcome New Members

After successfully recruiting a new member, send a warm letter of welcome. Work to make each person feel important and essential to the chapter. The retention of members is vitally important. Quickly add new members to your chapter's mailing list and electronic communication. Send them copies of your chapter's yearbook and be sure they have been provided complete access to the chapter's website and any important information published there. Have someone in your chapter call and invite them to the next meeting. Be sure someone at that meeting is assigned to host them and introduce them to other members. Send information on each new member to your newsletter editor for inclusion in an upcoming issue. Make them welcome. They've made the decision to join your chapter. Now it's up to you to keep them.

Retention

Be sure the chapter programs meet the needs of the collective membership. Find out the needs of your chapter members and then seek to fulfill them. Programs must be interesting, appealing, organized, and exciting. Section III of this Handbook is an invaluable resource in planning your program year. USE IT!

Socializing is an integral activity of any chapter, but it cannot be the focal point. People will not drive 50-60 miles for a social gathering month after month, but they will drive that distance for a worthwhile program, and welcome the chance to stay a little while afterward to visit with each other. A time for fellowship is important, particularly in chapters where, because of geographical distance, members see each other only at meetings. Consider how to best use the various forms of electronic communication and social media to keep members connected between meetings and over distances.

Make Members Feel Special

The following are a few ideas to help you retain members:

- Have some officer or officers, if the chapter is large, go around to each member present at a meeting and extend the hand of fellowship. Make each person sincerely feel special, wanted, and needed.
- Form a special concerns committee to call on members in the hospital or on those who are grieving. Send cards and notes to members who are ill or in sorrow. Recognize members who have received honors with congratulatory notes or cards.
- Send out a monthly newsletter, electronic or printed that is more than just a listing of events. It does not need to be long, but it does need to reflect the vitality, professionalism, and positive

aspects of the chapter. Members reading a monthly newsletter need to experience the same warmth, concern, and commitment they would feel at a meeting.

- Consider using Google Groups, Facebook, or other social media to assist members in being connected socially as well as a place to offer the opportunity to ask questions and gain the assistance of other members.
- Allow no cliques to form. All members must be encouraged to share their experience with the others in the group.
- Use emails and social media to remind members of upcoming meetings, to encourage attendance, to see if anyone needs a ride, to learn of chapter member illnesses, or to call off a meeting because of inclement weather or some unforeseen circumstance.
- Before the first meeting, send out a detailed calendar of events for the coming season, outlining for each member in a handy and accessible way the year's activities.
- Offer technical support and computer access to assist members in using the ONCARD system to renew their AGO membership.
- Do not charge chapter members to attend regular meetings. If admission must be charged for a special event (a recital, for instance), offer discounted tickets to members.
- Be sure that thank-you notes go out after each meeting to 1) the person or persons who presented the program, 2) the people who provided the food, and 3) the church that hosted the meeting.
- Encourage the participation and support of members' spouses and partners. Welcome them to meetings and invite them to the Christmas party, the May banquet, and the picnic. Their support is invaluable.

Marianne Webb was the Distinguished University Organist at Southern Illinois University Carbondale and a well-known concert artist. In 1982, she founded the Southern Illinois Chapter, serving as Dean for six years and in a variety of other capacities. At the national level she was active on the Task Force on Membership Development and Chapter Support, and the Committee on Educational Resources. She performed recitals and gave workshops at numerous AGO national and regional conventions.

100 Ways to Encourage and Maintain Membership in Your AGO Chapter

1. Appoint a membership coordinator for your chapter.
2. Invite potential members to AGO concerts, programs, meetings and social events.
3. Maintain a supply of the AGO card for perspective members at each meeting.
4. Include a "Visitors" page on your chapter website with recruitment materials and a link to the ONCARD membership site.
5. Post the current chapter newsletter immediately to the website so that perspective members can view it.
6. List chapter services in recruitment publications: newsletter, placement, programs, conferences, workshops, networking, membership directory, and fellowship.
7. List AGO services in recruitment publications: THE AMERICAN ORGANIST; conventions; life, disability, and health insurance; retirement programs.
8. Prepare an attractive AGO display for membership recruitment.
9. Exhibit AGO and/or pipe organ display (including membership forms) at local libraries (public/school/college), chapter events, workshops presented by colleges and music dealers, community events and malls.
10. Open all programs to the public.
11. Open membership to all interested lovers of music.
12. Open membership to businesses especially those with connections with churches and church music including music store staff, funeral directors, religious bookstore staff, organ sales and maintenance people, and handbell salespersons.
13. Open membership to choir directors and members.
14. Open membership to handbell directors and ringers.
15. Open membership to all organists, young and old, beginning and experienced, trained and untrained, practicing and retired, amateur and professional.
16. Open membership to students at all levels.
17. Open membership to church worship/music committees.
18. Open membership to the clergy
19. Compile data bank of the names of potential members including members of music and arts clubs, school music teachers, college professors, professional musicians, MTNA (Music Teachers National Association) members, as well as all musicians and clergy at local churches.
20. Compile data bank of churches/synagogues addresses and send membership information to their musicians and clergy (Contact ministerial associations, diocesan lists, and yellow pages, for names wherever possible).
21. Invite lapsed members to renew with personal telephone calls.
22. Encourage dual memberships for members with seasonal presence.
23. Place prospective members on electronic communication lists for a season.
24. Encourage the participation of members' spouses.
25. Emphasize AGO's unique qualities: services provided nowhere else.
26. Have members make announcements about AGO membership at conferences, clinics and workshops sponsored by music dealers, colleges, the chapter, and other music organizations.
27. Extend the chapter geographical area to the boundaries of neighboring chapters.
28. Welcome new members in newsletter.
29. Welcome new members using chapter social media and include their photo.
30. Welcome new members with escort/host at first AGO event.
31. Make AGO events free of charge, wherever possible.

32. Encourage churches to pay annual AGO dues for musicians.
33. Sponsor certain memberships: financial hardship, retirees, and outstanding/visible local musicians.
34. Provide laptops and technical support to assist members in renewing their membership on the ONCARD system.
35. Make chapter programs varied and relevant and appealing to a broad range of people.
36. Make chapter programs educational.
37. Connect some social events to regular programs.
38. Establish a special concerns committee to send cards and/or to call on the hospitalized or the grieving.
39. Establish a special concerns committee to recognize members' special accomplishments with cards/notes/newsletter briefs.
40. Publish each chapter event in as many media as possible – website, Facebook, email, etc. being sure each member has access to the information.
41. Include as much chapter information as possible in the newsletter-programs, concerts, minutes, new members.
42. Include as much arts community information as possible in the chapter newsletter: concerts, public radio (Pipedreams), public television programming.
43. Invite chapter members to volunteer for next year's committees by providing easy access through email or the chapter website.
44. Invite chapter members to volunteer for next year's committees by providing a Committee Volunteer sign-up sheet at the last meeting or two of the current year.
45. Invite chapter members' input into the planning of chapter programs by soliciting input through online surveys or discussion groups.
46. Invite chapter members to volunteer to participate in the presentation of next year's programs by providing a sign-up sheet at the last meeting or two of the current year.
47. Form a telephone brigade to remind members of chapter events, encourage attendance, and share rides.
48. Offer discounted tickets to members for any AGO event for which there is a charge.
49. Discourage exclusive behaviors of all kinds within the organization.
50. Address professional concerns issues - fees, salaries, contracts, and job descriptions.
51. Survey chapter members regarding musical needs and interests.
52. Wear nametags at chapter meetings at the beginning of the season.
53. Have officers greet members at meetings and programs.
54. Say, "thank you" to everyone verbally and in print, as often as possible.
55. Report chapter events to THE AMERICAN ORGANIST, using members' names where possible and include photos.
56. Maintain up-to-date and accurate membership contact lists.
57. Contact inactive members periodically.
58. Involve members to whatever extent they are willing to be involved.
59. Recognize members who have reached milestone membership anniversaries.
60. Encourage individual members to pursue "pet projects" within the organization.
61. Encourage members to attend AGO regional and national conventions.
62. Use resources available through the AGO website to contact lapsed members and to reach out to new members or renewing members.
63. Feature a "member of the month".
64. Involve local choral ensembles and their directors in chapter programs.
65. Provide master classes by guest recitalists for young organists.

66. Encourage members to present organ demonstrations and adult education forums within their congregations.
67. Involve church choirs in the presentation of large choral works and hymn festivals.
68. Provide workshops for rural church musicians.
69. Provide choral reading clinics for regional church choir directors.
70. Provide organ-reading clinics for regional organists.
71. Establish a chapter handbell choir.
72. Establish a chapter choir.
73. Present some chapter programs in outlying communities.
74. Provide a speaker's bureau for service clubs, Chamber of Commerce.
75. Present some chapter programs in unusual venues (nursing homes, libraries).
76. Establish a presence within the community through an annual fund drive.
77. Establish a presence within the arts community by writing grant proposals.
78. Establish a presence within the arts community by maintaining membership on the local arts council.
79. Establish a presence within the community by sending announcements of all chapter events to all community calendars, arts calendars, newspaper calendars and online local arts calendars and news sites.
80. Cooperate with local colleges and schools in presenting concerts/recitals.
81. Cooperate with artist series (community, college, and church) in presenting concerts/recitals.
82. Establish rapport with local public radio and television stations.
83. Cooperate with civic choral ensembles and orchestras in the presenting of concerts/recitals.
84. Maintain a permanent chapter website.
85. Seek advertising by businesses in chapter newsletters and on the chapter website.
86. Create an annual slogan or theme.
87. Develop a chapter logo and create a chapter banner.
88. Present organ demonstrations by members for school children.
89. Sponsor pipe organ encounters (POE) and/or organ academies for new/potential organists.
90. Sponsor recitals by keyboard students of area music teachers, especially members of AGO.
91. Cooperate and exchange programs with neighboring chapters.
92. Encourage school and college choirs to use organ accompaniments and to use churches with good organs for their concerts.
93. Compile data bank of potential donors - members, arts council mailing lists, donors to other arts organizations.
94. Compile data bank of potential concert/workshop attendees for publicity purposes.
95. Compile data bank of addresses of media for publicity purposes.
96. Announce AGO events in local media (releases, interviews).
97. Use the electronic media and social media sites to announce AGO events.
98. Offer free tickets to those in financial need - members and non-members alike.
99. Establish a chapter library and a chapter archives.
100. Appoint a chapter historian and a chapter photographer.

Sample Recruitment and Retention Letter/Email

(Originally written and designed by the Southern Illinois AGO Chapter; updated by COMDACs)

This sample may be used as a postal letter or may be sent via email.

We invite you to become a member of the (Chapter Name) AGO Chapter. We are professional and amateur organists, choral directors, and other musicians and clergy involved in church music - plus members who simply enjoy choral and organ music. We would be delighted to have you join us.

AGO chapter membership has many benefits. Among them are:

- Fellowship: Each month there is a wonderful opportunity to interact with people who have concerns and interests similar to yours.
- Programs: Our chapter is known for its excellent programs and workshops - all designed to increase members' knowledge and skills. As you can see from the enclosed calendar, we have a wide range of programs, recitals and worship opportunities scheduled for each month from July through June.
- Information and Assistance: There are a variety of resources available to members: our monthly newsletter; the national publication - THE AMERICAN ORGANIST Magazine; eligibility for life, disability and health insurance plans; an AGO-sponsored credit card; certification; voting privileges; and more.
- Conventions: Regional and national conventions provide educational opportunities and the chance to enjoy memorable musical performances.

Our Chapter is unique in its programming and is eager to reach out and warmly welcome anyone interested in organ, choral activities, and related music. We focus on serving our members and would like you to become one of us.

I hope you will seriously consider joining us and invite you to contact me if you have questions.

Visit us online at www._____.com/org or visit the national AGO website at www.agohq.org where you can become a member of our chapter and learn more about AGO benefits.

Sincerely,

(Name)

Membership Coordinator (or Dean)

(Telephone) (Email)

Sample Letter/Email to a New Member

(CHAPTER LETTERHEAD – if applicable)

Dear :

Thank you for joining the (Name) Chapter of the AGO. We are delighted that you have chosen to be associated with us. Chapter communication may come to you by email from _____.

Please be sure your browser will allow these emails. If you are a national voting member - THE AMERICAN ORGANIST Magazine will begin soon. You can also check out various resources and information on our chapter website at www._____.org/com and on the national AGO website at www.agohq.org

We look forward to having you participate in our activities and to welcoming you personally at a meeting in the near future.

Sincerely,

(Name)
Membership Coordinator (or Dean)
Telephone
Email Address

Sample Letter to a Member of the Clergy

(CHAPTER LETTERHEAD)

(Date)

Dear :

This letter is to encourage you to think about the important responsibilities your organist and choir director have in worship. The Psalms and other documents of the early church tell us of the important heritage of music in worship, a heritage that finds continued expression in Christian and Jewish traditions. It would be difficult for us to imagine a service that does not express our faith through music as well as the spoken word.

Many personal and professional skills are necessary to accomplish this important part of worship. Those skills are continually addressed by the American Guild of Organists, a non-denominational organization of more than 16,000 members whose vocation is a musical ministry in churches, synagogues and educational institutions throughout the United States. The AGO, through its distinguished monthly journal, *The AMERICAN ORGANIST MAGAZINE*, and a variety of programs and professional services at the local, regional, and national levels, meets the needs of people who select music, rehearse choirs, play hymns and other service music, and practice for hours each week to improve their craft.

Because your musicians provide a ministry in music by helping to proclaim and interpret scripture through their musical selections and performance, your entire congregation will benefit from the enhancement of your musician's personal and professional skills. Providing your church musicians with membership in the American Guild of Organists is an immediate way to recognize the importance of their professional growth and foster it at a very nominal cost.

Please check out our chapter website at www._____.org/com and the national AGO website at www.agohq.org for more information and to become a member.

We encourage you to support your musicians by motivating them to pursue a course of life-long learning as active members of the American Guild of Organists. Your commitment to your organist's professional career will provide lasting benefits to your congregation and ministry.

Sincerely,

(Name)

Dean or Membership Coordinator

Telephone

Email

Chapter Financial Management

Responsible financial management of the chapter is of the utmost importance for the chapter's success in providing programs and services to its membership. Accounting for the chapter's funds need not be an onerous task, especially in a small chapter. Setting up and maintaining a sound financial system is the responsibility of the chapter officers and executive committee. Some chapters delegate this responsibility to a separate finance committee.

Some basic points of chapter financial management include:

1. **Accountability**

Chapter members have both the need and the right to be informed regularly about the financial status of the group. Chapter treasurers should report current fund balances, income, and expenditures to the membership at business meetings.

2. **Authorization**

The authority to approve an annual chapter budget and to authorize expenditures should rest with the executive committee of the chapter. Any departure from or adaptation of the chapter budget should be approved by the executive committee prior to the creation of additional financial obligations. A sample chapter budget follows.

One officer, most likely the dean or treasurer, should have authority to approve expenditures within the framework of the annual budget. He or she may do this by right of signing the checks for disbursement. Receipts should be required for all expenses, particularly those that involve reimbursement of an individual. Provision for dual signatures on checks over a certain amount (for example, \$75.00) may be made with the bank, to provide an additional measure of safety.

3. **Record Keeping**

This includes the physical custody of the books and preparing the financial reports and statements. It helps if this task is given to someone in the chapter who has experience in bookkeeping or accounting. Otherwise, the chapter should consult a qualified individual at least annually to prepare accurate statements.

4. **Reporting to National Headquarters**

When the fiscal year ends on June 30, each Treasurer should send a copy of the chapter's annual income and expense statement and balance sheet to: AGO National Headquarters, Attention: James Thomashower, Executive Director, 475 Riverside Drive, Suite 1260, New York, NY 10115 (email: jet@agohq.org). A sample income and expense statement and balance sheet follow.

The three sample forms are based, in part, on an actual AGO chapter's financial records. The budget categories are consistent throughout the samples, so you can compare the budgeted and actual figures to see how one chapter accounts for its finances throughout a given year. Following each sample form is a blank form to be copied and used by local chapters.

IRS Annual Filing Requirements

by Eric Birk, FAGO September 2017

All Chapters of the American Guild of Organists are required to file annual returns of their income and expenses with the Internal Revenue Service. AGO National Headquarters is not permitted to file a return on behalf of any chapter, nor does Headquarters have access to a chapter's income and expenses each year. The typical fiscal year for AGO Chapters, as suggested in this handbook, is July 1 to June 30. For all chapters with a fiscal year ending on June 30, their returns are due on November 15. Some chapters have used a calendar year (Jan. 1 to Dec. 31) as their fiscal year, and for those chapters, the deadline is May 15. Whatever the chapter's fiscal year, its filing is due four months and 15 days after the end of it. If the due date falls on a Saturday, Sunday, or legal holiday, the due date is extended to the next business day. Types of filing for AGO Chapters **Most chapters are required to file the form 990-N, also known as the e-Postcard.** This form is for small non-profit organizations whose gross receipts (total amounts the organization received from all sources during its annual accounting period, without subtracting any costs or expenses) are normally less than or equal to \$50,000. The form 990-N is only available as an electronic filing, described by the IRS as *Electronic Notice (e- Postcard) for Tax-Exempt Organizations not Required To File Form 990 or 990-EZ*. There is no paper form. The e-Postcard requires that a chapter representative, typically the chapter treasurer, establish a website login at <https://www.irs.gov/990n>. To do this, the reporting chapter representative will need to have these items (found with detailed support at <http://www.irs.gov/Charities-&-Non-Profits/Information-Needed-to-File-e-Postcard>):

1. Chapter's Employer identification number (EIN), on file at AGO National Headquarters
2. Tax year
3. Legal name and mailing address
4. Any other names the organization uses
5. Name and address of a principal officer (i.e., Chapter Dean*)
6. Web site address if the organization has one
7. Confirmation that the organization's annual gross receipts are \$50,000 or less
8. If applicable, a statement that the organization has terminated or is terminating (going out of business).

*Full contact information for the dean is provided to the IRS annually each April by AGO National Headquarters as the chapter's official contact.

The e-Postcard requires a login with username and password be set up to access the webpages for online reporting. For assistance in registration to file for your chapter, please consult the IRS user guide at <https://www.irs.gov/pub/irs-pdf/p5248.pdf> for use during the registration process. No login from the Urban Institute will function as of February 29, 2016.

If you do not file your e-Postcard on time, the IRS will send you a reminder notice. There is no penalty assessment for late filing the e-Postcard, but an organization that fails to file required e-Postcards (or information returns – Forms 990 or 990-EZ) for three consecutive years will automatically lose its tax-exempt status. The revocation of the organization's tax-exempt status will not take place until the filing due date of the third year. For information about filing requirements and auto-revocation of tax-exempt status, please read all of the material on the IRS website at its page entitled, "[Annual Electronic Filing Requirement for Small Exempt Organizations — Form 990-N \(e-Postcard\)](#)" or visit the URL for that page

at: <https://www.irs.gov/charities-non-profits/annual-electronic-filing-requirement-for-small-exempt-organizations-form-990-n-e-postcard>.

You cannot file the e-Postcard until after your tax year ends. When attempting to file a return at the proper time (following your chapter's end of fiscal year), if an error message appears which says that a filing has already occurred for the most recent year, it is possible that the fiscal year recorded for your chapter by the IRS is incorrect. Be sure to verify annually that your chapter's fiscal year is recorded correctly.

Some chapters will be required to file IRS Form 990 or 990-EZ. If your chapter's gross income during the tax year was more than \$50,000 and equal to or less than \$200,000 with total assets equal to a value less than \$500,000, your chapter will need to file IRS Form 990 (Return of Organization Exempt from Income Tax) or IRS Form 990-EZ (Short Form Return of Organization Exempt from Income Tax). You should consult an accountant or tax specialist to prepare this return. This report is due four months and 15 days after the end of the chapter's fiscal year (by November 15 for chapters with a June 30 date for end-of-fiscal year).

A very few chapters may be required to file the IRS Form 990 if, for example, in the process of hosting a national or regional convention, gross income (including all chapter dues, grants, donations, registrations and admissions) is equal to or greater than \$200,000 and total assets are equal to or greater than \$500,000. Consultation with an accountant or tax specialist is strongly recommended in preparing this return, also due four months and 15 days after the end of the fiscal year.

All chapters are encouraged to make use of the latest information available on the IRS website, especially the documentation at <http://www.irs.gov/Charities-&-Non-Profits/Exempt-Organizations-Required-Filings>.

Requesting a Correction to Fiscal Year

Many AGO Chapters have experienced an unauthorized change to their fiscal year on the e-Postcard website, which can seriously hamper their ability to accurately keep track of their chapter's IRS filings. If an incorrect chapter fiscal year is recorded by the IRS, a correction may be requested by sending a letter with chapter name (example: Anytown Chapter AGO), chapter number (example: C099), and chapter EIN (Employee Identification Number) signed by an authorized officer of the chapter to:

IRS Attn: EO Entity Mailstop 6273

Ogden UT 84201

or by FAX to: 801-620-7116 88

Auto-revocation of AGO Chapters

All chapters are granted tax-exempt status at the time of their formation under the AGO's group exemption number. Unfortunately, a surprising number of AGO chapters have had their tax-exempt status revoked by the IRS since 2011 for failure to file the Form 990-N (e-Postcard) for three consecutive fiscal years. This is a serious problem for a chapter because it means the chapter must pay taxes on its income like any other business. In addition, individuals and businesses are no longer able to make charitable donations to the chapter for which they can get tax deductions. Moreover, foundations will not make grants to a chapter that has lost its non-profit, tax-exempt status. IRS compliance is a challenge for everyone.

AGO National Headquarters has seen nine chapters regain their tax-exempt status. Acquired material and advice from chapters that have successfully navigated the difficult and time-consuming process of restoring their tax-exempt status after it has been revoked is available from AGO Headquarters to all chapters who have experienced auto-revocation. If your chapter's tax exemption has been automatically revoked and it has not yet re-established its 501(c)(3) status with the IRS, help is available in the form of a full tax-exempt packet with accompanying information files that include sample documents and appropriate answers to the IRS Form 1023.

Unfortunately, if a chapter's tax-exempt status is revoked, the IRS will not permit AGO National to act on behalf of that chapter for the chapter's reinstatement of its tax exemption. Chapter officers have the fiduciary responsibility for ensuring that their chapter complies with IRS regulations. Please be assured, however, that help is available if a chapter needs proof of its existence from AGO National records or examples of reinstatement filings that other chapters have completed. Please contact AGO National Headquarters to obtain assistance with this process.

Sample Chapter Budget

The individual line items included in a budget will depend on the needs of the chapter. The following sample budget lists income and expense items used by many chapters. The amounts allocated to each line should be determined in keeping with the chapter's recent financial history and also any new revenue sources or program expenses anticipated for the coming year. A blank budget worksheet appears on the next page.

CHAPTER BUDGET

2005-06 Fiscal Year

(July 1, 2005 through June 30, 2006)

REVENUE

Member Dues	\$7000.00
Newsletter Advertising	350.00
Mailing List Sales	25.00
Grants and Gifts	200.00
Ticket Sales	450.00
Savings Interest	45.00
Miscellaneous	
-0- Total Anticipated Revenue	\$8070.00

EXPENSES

National Portion of Dues	\$3750.00
Honorary Member Dues	25.00
Website and Internet	500.00
Postage	170.00
Printing	500.00
Hospitality	200.00
Programming	2000.00
Professional Concerns/Education	100.00
Chapter Library	70.00
Administrative Costs	150.00
Publicity	100.00
AGO Annual Fund Contribution	100.00
Dean's Regional/National Convention Fund	100.00
Miscellaneous	
-0- Total Expenses	\$7765.00

Expected Excess Revenue over Expenses: \$305.00

Chapter Budget Worksheet

CHAPTER AGO BUDGET FISCAL YEAR: 20 _____ -
 (July 1, 20 _____ - June 30, 20 _____)

REVENUE

Member Dues from National
 \$ _____

Grants
 \$ _____

Gifts
 \$ _____

Advertising Income
 \$ _____

Interest
 \$ _____

Miscellaneous
 \$ _____

Total Revenue
 \$ _____

EXPENSES

Honorary Member Dues Paid
 \$ _____

Newsletter
 \$ _____

Printing
 \$ _____

Hospitality
 \$ _____

Programming
 \$ _____

Publicity
 \$ _____

Education
 \$ _____

Chapter Library
 \$ _____

Annual Fund Gift
 \$ _____

Administrative Costs
 \$ _____

Dean's Convention Fund
 \$ _____

Total Expenses
 \$ _____

TOTAL EXPENSES OVER REVENUE: \$ _____

Sample Chapter Balance Sheet

A balance sheet should show, as simply as possible, the status of a chapter's financial condition at the end of the fiscal year. It may be appended to the chapter's income and expenses statement. The equation to follow in balancing this statement is:

ASSETS = LIABILITIES + FUND BALANCES

Assets consist of a chapter's liquid resources, such as bank accounts, plus the value of any property or materials owned by the chapter. Liabilities include any accounts payable or outstanding loans. Fund Balances are calculated by taking the fund balance from the previous balance sheet and adding the excess of revenue over expenses for the current year, resulting in a figure for the chapter's net worth. The total of liabilities + fund balances should match the total assets figure. A blank balance sheet is printed on the next page.

CHAPTER BALANCE SHEET As of 30 June 2006

ASSETS

Checking Account	\$348.00
Savings Account	\$500.00

Total Assets	\$848.00
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LIABILITIES

First Presbyterian Church	\$100.00
A&B Printing	\$62.50

Total Liabilities	\$165.20
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FUND BALANCES

Opening Balance (7/1/94)	\$509.56
Revenue over Expenses	\$173.24

Total Fund Balances	\$682.80
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Total Liabilities and Fund Balances	\$848.00
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Chapter Balance Worksheet

When the fiscal year ends on June 30, a completed copy of this form (or the form used by your chapter) should be sent to National Headquarters.

CHAPTER AGO BALANCE SHEET As of June 30, 20

Assets (all cash/property, etc.)		Liabilities (outstanding bills/loans, etc.)	
Checking Account	\$ _____	_____	\$ _____
Savings Account	\$ _____	_____	\$ _____
Total Assets	\$ _____	Total Liabilities	\$ _____

Fund Balances (This fund = the previous year's "Total Fund Balances" amount)	Opening Balance (7/1/ __) \$ _____
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Revenue over Expenses total (This figure comes from the current year's Revenue over Expenses income/expense statement)	\$ _____
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Total Fund Balances	\$ _____
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TOTAL ASSETS \$ _____	TOTAL LIABILITIES + FUND BALANCES \$ _____
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The above two figures should balance. Remember: ASSETS = LIABILITIES + FUND BALANCES

Financial Development and Fundraising

By Stephen Smith

Fundraising is based on the development of a relationship between a donor and a recipient. If you plan to be on the receiving end, you must accept your part of the relationship. Most donors will be easily satisfied knowing they are helping to fulfill a proven need (your first responsibility) if the activity is of high quality and they know their donation is appreciated.

1. Set your goal. Your goal will usually be the difference between the overall expenses and the income you anticipate.
2. Break down the goal into sub-goals from different activities: special events, contributions from individuals, etc.
3. Choose your fund-raising activities. Define your target groups, then get to know them (what they like, what their intentions are, what they've responded to in the past, etc.). Some suggestions:
 - a. PATRON LISTINGS. Set up a schedule of giving categories from which potential contributors can choose. Corresponding "perks" have proven to be an enticement. Perks may include:
 - i. Listing in concert programs
 - ii. Priority seating or announcements
 - iii. Social events - dinner or reception with the artists
 - iv. Musical events - invitations to a special choir caroling party, choir talent night, private chamber music concert
 - v. Free tickets to other events or services (a good way to get business people involved)
 - vi. Anything else you can think of - use your imagination!
 - b. FUNDRAISING SPECIAL EVENTS. There are limitless possibilities:
 - i. Benefit car washes, benefit dinners in private homes, bake sales, group music appreciation courses, T-shirts, carnivals, rummage sales, wine-tasting parties, etc. Your members are an excellent source of ideas for these events.

Fund-raising events not only raise money, but they generate enthusiasm, interest and exposure for your activities. Publicize the fact that the fund-raising event benefits your concert series. People want to participate in what they've given money to support. These activities also reinforce the image of a strong, healthy, lively chapter in the community (an excellent argument to win over any doubting chapter leaders).

- c. SOLICITATION OF MAJOR GIFTS FROM INDIVIDUALS. This is where to put your committee to work. Your committee director may first want to encourage gifts from committee members, as once the committee members are financially committed themselves they will be more willing to solicit other gifts. Someone who has a strong relationship with the potential contributor should do on a one-to-one basis and solicitation of major gifts always. A luncheon or personal visit is much better than a phone call. The solicitor should be prepared with all the facts (budgets, artists, future plans, etc.) and should have a specific amount in mind before approaching an individual.

Major contributors have most likely been approached by other groups in the past and have a tendency to be savvy about such matters. They also are usually more interested in what their gift will mean to the community rather than perks or personal advantages.

- d. CORPORATE/FOUNDATION SOLICITATION. This is a rather specialized field, but one that need not intimidate you. Preparation is crucial, and there are several excellent publications that can assist you. Your best resource will be the FOUNDATION CENTER. For the name and address of one of the 130 Foundation Center Cooperating Collections in your area, call 800-424-9836.

Research, preparation, and a professional presentation are essential. A written proposal should include a detailed budget, proof of not-for-profit status, a project narrative including dates and artists, and sources of earned and contributed income. Find out who makes the decision before you start the process, and enlist someone who knows that person best to make the presentation with you. Good luck!

For additional information and encouragement regarding fundraising, a good book is **Fundraising for Non-Profits** by P. Burke Keegan (New York: HarperPerennial, 1990). Ms. Keegan offers welcome assistance with the most difficult aspect of fundraising - convincing yourself and your chapter to go out and ask for support.

Stephen Smith is Music Director of the First Unitarian Church of Oakland, California, and is Managing Director of Aria Business Associates of San Francisco. In addition to having held the positions of Executive Director of the San Francisco Opera Guild and Development Director of the Chamber Music Society of Lincoln Center in New York City, his client list as a private fundraising and management consultant includes the Wolf Trap Institute of Creative Learning, University of California Health Program for Performing Artists, Merola Opera Program, and Opera Southwest. He has served on the National Development Committee of the Guild and is a former member of the Executive Committee of the New York City Chapter AGO.

AGO National Funds

Updated by AGO HQ July, 2017

In December 1982, the Guild established the **AGO Annual Fund** to generate contributions beyond dues from individual members, chapters, and businesses in fields related to organ and choral music. Moneys raised through the Annual Fund support the general operating expenses of the national organization. Thanks to the generosity of thousands of individuals, chapters, and businesses that contribute to the Annual Fund each year, the day-to-day challenges of the Guild are better met, and our financial foundations are strongly reinforced.

The American Guild of Organists' lively concern for education and outreach prompted the formation of the **AGO Endowment Fund** in 1994. The purpose of this fund is to expand programs for leadership development among AGO members, educate new organists, and cultivate new audiences for organ and choral music. Contributions to the Endowment Fund are invested in perpetuity to produce continuing income support for the Guild's educational programs and projects. As of August 31, 2017, the Endowment Fund account value was \$6,311,646.02.

The **AGO New Organist Fund** was established in 1993 to support Guild programs dedicated to developing a new generation of organists. Inaugural contributions to this fund were made in honor of three extraordinary leaders of the Guild: M. Searle Wright, FAGO; Roberta Bitgood, FAGO, CHM; and Leslie P. Spelman, FAGO. Today, the New Organist Fund shelters both permanently restricted gifts to named scholarships, and restricted gifts for the support and development of new organists. Each year, this fund provides scholarship assistance for talented POE participants. Many young, aspiring organists benefit from this fund each year, some who otherwise would be unable to attend a POE. As of August 31, 2017, the New Organist Fund account value was \$533,549.26.

As of August 31, 2017, 19 permanently endowed scholarships have been created. All named scholarships are listed below. Scholarships are awarded annually from each with a minimum total balance of \$10,000 or more.

Charlene Brice Alexander Scholarship
 Lucie Ford Anderson Scholarship
 Anthony Baglivi Scholarship
 Philip E. Baker Scholarship
 Robert S. Baker Scholarship
 Seth Bingham Scholarship
 Michael Cohen Scholarship
 Clarence Dickinson Scholarship
 Virgil Fox Scholarship
 Eileen Guenther Scholarship

Philip Hahn Scholarship
 Charles Henderson Scholarship
 The Leupold Foundation Scholarship
 Alfred E. Lunsford Scholarship
 Ruth Milliken Scholarship
 Gordon and Naomi Rowley Scholarship
 Ned Siebert Scholarship
 Morgan and Mary Simmons Scholarship
 Frederick Swann Scholarship
 Martin M. Wick Scholarship

The **Nita Akin Competition Fund** was established in 1984 to support the ongoing operations of the National Young Artists Competition in Organ Performance (NYACOP). It is a permanently restricted fund. Eighty percent of the earnings of this fund is available for use each year. The remaining 20% is reinvested. Nita Akin is remembered as a devoted teacher and one of the early American pioneers in the field of organ performance. A student of Charles Courboin, she taught hundreds of students during

her long and distinguished career as organist at the First Methodist Church in Wichita Falls, Tex., and as professor of organ at Midwestern University. Nita was a selfless, inspiring giver, never charging any student for the lessons she gave. As of August 31, 2017, the Nita Akin Competition Fund account value was \$113,897.69.

For more information on all of these funds visit www.agohq.org and click on “Contribute”.

Tax Exempt Status and Tax Filing Requirements

The AGO is a not-for-profit, educational organization, chartered by the Board of Regents of the University of the State of New York and incorporated in 1896. The AGO was granted tax-exempt status by the Internal Revenue Service in September 1955 under section 501(c)(3) of the Internal Revenue Code.

Because of its structure, the AGO has been granted a "Group Exemption." The National Headquarters is listed with the IRS as the primary exempt body, and the chapters are listed as "subordinate units" that share this tax-exempt status.

Our Group Exemption Number (GEN) is 1109. This number has been assigned to the entire AGO to identify our group of organizations. We are also classified as 509(a), "not a private foundation."

Please Note: Upon request, National Headquarters will issue a packet consisting of a letter from the Executive Director attesting to your chapter's relationship with the national organization, a copy of the AGO Bylaws and copies of the appropriate IRS exemption letters. You may be asked to provide this documentation of your chapter's 501(c)(3) tax-exempt status if your chapter is applying for a state/local tax exemption, a foundation grant, or a bulk-rate mailing permit. The Bylaws are included in Section I of this Chapter Management Handbook. Copies of the IRS exemption letters are in this section.

Some misconceptions: Our not-for-profit, tax-exempt status does not mean that a chapter cannot have excess income over expenses. Surplus funds may be held and invested, so long as the funds and the income from them are used for the educational purpose for which we have been chartered. Admission "donations" may certainly be collected at events sponsored by chapters. It is not against Guild policy. Admissions are an important part of the earned income of all major not-for-profit arts organizations.

STATE AND LOCAL TAX EXEMPTION

The above information applies only to the federal aspect of a chapter's tax-exempt status. Exemption from state and local taxes (generally income and sales taxes) must be obtained by each chapter individually. State laws vary widely as to what types of organizations are eligible for exemption. Consult your state tax department for information and an application. National Headquarters can provide the documentation you may need for these applications (see note above).

TAX RETURNS

If your chapter's gross income during the tax year (July 1 - June 30) was less than \$25,000, you do not need to file a return.

If your chapter's gross income during the tax year was more than \$25,000, you will need to file IRS Form 990 (Return of Organization Exempt from Income Tax). You should consult an accountant or tax specialist to prepare this return. This report is due three months and 15 days after the end of the fiscal year (by October 15).

FEDERAL EMPLOYER IDENTIFICATION NUMBER (EIN)

Every organization "doing business" must have a Federal identification number, called an Employer Identification Number (or EIN). AGO chapters, while not usually employers, need this number for identification in the files of the IRS. It is usually required by banks when applying for checking and savings accounts. This number is for identification purposes only. It is the corporate version of a social security number. In itself, it has nothing to do with the tax- exempt status of the Guild. Each chapter must obtain its own EIN. Chapters may not use the EIN of the AGO national organization, but only their chapter's EIN, when filing with the IRS. Please confirm your chapter's EIN any time it is needed by calling AGO National Headquarters at 212-870-2310.

Please check your records to see if they list your chapter's EIN. If you can't find such a number, contact the Membership Coordinator at National Headquarters to find out what it is. If your chapter is new, or for some other reason does not have an EIN, you will need to apply for one.

To apply for an Employer Identification Number, request a copy of IRS Form SS-4 from your IRS Service Center. A copy of this form is later in this section, filled out for a typical AGO chapter. When you receive your new EIN from the IRS, 1) inform Headquarters immediately and 2) retain the number in the chapter's permanent files, which are passed on to new officers as they are elected.

Chapter Liability Insurance

As liability insurance rates have increased dramatically in recent years, many organizations have cut their costs by not including the use of their facilities by outside groups in their liability insurance coverage. Such facilities, which your chapter may wish to use for program events (churches, school facilities, and concert halls) will require that your chapter carry its own liability policy for such events. Proof of such insurance will be required before use of space is approved.

The Guild has a group Chapter Liability Insurance Plan covering all AGO chapters. The plan is administered by ONI Risk Partners (formerly Old National Insurance). The plan covers all chapter activities, including regional conventions.

The policy provides the following comprehensive coverage:

- Claims for bodily injury or property damage
- Claims for personal injury, such as libel, slander, defamation of character, false arrest, etc.
- Claims alleging host liquor liability when alcohol is served

- Claims involving use of automobiles not owned by the chapter, but used for official chapter business on an excess basis.
- Claims alleging failure to render professional health care services by nonprofessional individuals

The Plan pays complete legal defense costs and settlement costs if a coverage charge is brought against your chapter—whether it results in a lawsuit, court judgment, or even out-of-court settlement.

Your chapter, its leaders, and any member acting on behalf of the chapter are covered under this comprehensive Chapter Liability Insurance Plan. The plan provides up to \$1,000,000 per occurrence and a \$2,000,000 annual aggregate to each chapter. There is no deductible.

If your chapter is told by a church or facility that it must provide proof of insurance before scheduling an event there, the “Chapter Request for Certificate” should be completed and sent to Jessica Callahan, the AGO representative at ONI Risk Partners (formerly Old National Insurance), by email to: jessica.callahan@onirisk.com, or by fax to 260-625-7525. If you need assistance completing the form, please call Jessica Callahan for assistance at 260-625-7216. The form is found on the next page, or by going to the AGO website>Quick Links>Chapter Documents> Chapter Liability Insurance, or begin your search here on the [AGO website](#).

ONI Risk Partners
1111 Chestnut Hills Parkway, P.O. Box 1705
Fort Wayne, IN 46801-1705
Phone: 260-625-7216
Fax: 260-625-7525

Ours has been described as a litigious age, in which everybody sues for everything. They don't always win, but it is good to know that your chapter is covered in case of accident or injury to anyone attending a chapter event. For additional information on this subject, call National Headquarters.

**CHAPTER REQUEST FOR CERTIFICATE OF INSURANCE
CHAPTER/CLUB LIABILITY PLAN**

Name of Chapter: _____

Name of Officer/Member requesting certificate: _____

Office/Member E-mail address: _____

Mailing Address: _____

Telephone number(s): _____

Name of event or function you are hosting: _____

Is the event sponsored by your chapter? YES NO

What will your chapter's function actually be for the event? _____

Location of the event or function: _____

Date of the event or function: _____

Facility that is requesting proof of chapter liability coverage: _____

Address to which certificate should be mailed: _____

Is facility requesting to be named as an additional insured? YES NO

Is this facility the property owner where event is being held? YES NO

If no, please explain: _____

Signature: _____ Date: _____

Please e-mail this completed form to Jessica Callahan at: jessica.callahan@onirisk.com
ONI Risk Partners , 1111 Chestnut Hills Parkway, P.O. Box 1705, Fort Wayne, IN 46801-1705
Phone: 260-625-7216 , Fax: 260-625-7525

IRS Determination of Tax Exempt Status

U.S. TREASURY DEPARTMENT Washington 25
Office of
COMMISSIONER OF INTERNAL REVENUE September 29, 1955

Address reply to
Commissioner of Internal Revenue
Washington 25, D.C.
and refer to T:R:PEO:SRD American Guild of Organists
630 Fifth Avenue
New York 20, New York

Gentlemen:

Consideration has been given to the evidence submitted for use in further considering your status for Federal income tax purposes. You request in effect that you and your subordinate chapters be held exempt from Federal income tax under Section 501(c)(3) of the Internal Revenue Code of 1954.

You have also submitted a list, in triplicate, showing the names and addresses of the new subordinate chapters chartered by you during the year 1954. It is not shown that any chapters have been discontinued.

Our records show that in a ruling dated January 10, 1949, which affirmed a ruling of September 20, 1937, it was held that you are not entitled to exemption from Federal income tax under section 101 (6) of the Code of 1939, but are exempt under section 101(7) of the 1939 Code. Your subordinate chapters chartered prior to 1954 were held to be exempt under section 101(7) of the 1939 Code in supplemental rulings dated January 12, 1951, April 14, 1952, March 12, 1953, and April 7, 1954.

It is our opinion, based upon the evidence now submitted, that beginning September 24, 1954, the date of the amendment to your charter, you and your subordinate chapters, including those chartered in 1954 and shown on the list submitted with the affidavit executed by your President on February 10, 1955, are entitled to exemption from Federal income tax as organizations described in Section 501(c)(3) of the 1954 Code, as it is shown that you and your subordinate local chapters are organized and operated exclusively for educational purposes. The above-mentioned rulings dated September 20, 1937, January 10, 1949, January 12, 1951, April 14, 1952, March 12, 1953, and April 7, 1954, are modified accordingly.

You and your subordinate chapters are not required to file income tax returns so long as there is no change in the character, purposes or method of operation of your organization or of such subordinate chapters. Any such changes should be reported immediately to the National Office of the Internal Revenue Service in Washington, D.C., in order that the effect of the changes upon your present exempt status or that of the chapters may be determined. However, you and your subordinate chapters are required to file annually, information returns on Form 990A, with the District Directors of Internal Revenue for the respective districts in which located so long as this exemption remains in effect. This

form may be obtained from the District Director and is required to be filed on or before the fifteenth day of the fifth month following the close of the respective annual accounting periods.

Contributions made to you and your subordinate chapters, beginning September 24, 1954, are deductible by the donors in computing their taxable income in the manner and to the extent provided by the section 170 of the 1954 Code.

Bequests, legacies, devises or transfers, to or for your use or the use of your subordinate chapters, beginning September 24, 1954, are deductible in computing the value of the estate of a decedent for estate tax purposes in the manner and to the extent provided by sections 2055(a) and 2106(a) (2) of the Code of 1954. Gifts of property to you or your subordinate chapters, beginning September 24, 1954, are deductible in computing gifts for gift tax purposes in the manner and to the extent provided in section 2522(a) and (b) of the 1954 Code.

No liability is incurred by you or your subordinate chapters for the taxes imposed under the Federal Insurance Contributions Acts (social security taxes) unless waivers of exemption have been filed in accordance with the applicable provisions of such Act. In the event social security coverage is desired for your employees or those of your subordinate chapters or you or such chapters have any questions relating to the filing of waiver of exemption certificates, the matter should be taken up with the District Directors of Internal Revenue for the respective districts.

You should continue to furnish the National Office of the Internal Revenue Service in Washington, D.C., annually, on the calendar year basis, lists, in duplicate, showing only the names and addresses of any new subordinate chapters chartered by you during the year and the names and addresses of any subordinate chapters which for any reason have ceased to exist. These lists should be accompanied by a statement sworn to by one of your principal officers as to whether the information heretofore submitted by you is applicable in all respects to the new chapters appearing on the lists, and should be forwarded so as to reach the National Office not later than February 15 of the following year.

Your request for admissions tax exemption under section 4233(a)(1)(ii) of the Code will be made the subject of a separate communication.

The District Directors of Internal Revenue for the districts in which you and your chapters are located are being advised of this action.

Very truly yours,

(Signed) P. Henry Needham

Chief, Pensions and Exemption
Organizations Branch