

**Rocky Mountain District  
Association of Chapters  
of SPEBSQSA, Inc.**

***Statements of Policy  
&  
Operations Manual***



**Updates and Revisions  
Executed Periodically  
by the RMD Secretary**

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# 1 OVERVIEW

## 1.1 General

In 2019, the Barbershop Harmony Society implemented a comprehensive remaking of the organization to include the Society’s vision of “Everyone in Harmony.” Consistent with this new vision, headquarters staff and volunteer organization structures were also implemented with updated responsibilities charters, all operating in support of a more succinct Society Vision and more clearly defined Mission Statement. Simultaneously, the Society authored new standardized bylaws for districts and chapters, and a new Society Operations Manual that embodies all the associated and revised procedural documentation required to carry forward the strategies and activities required to accomplish the goals and objectives represented by the Vision and Mission Statements.

The Society Operations Manual presents detailed descriptions of all positions and their responsibilities across all organization levels from the Chapter through the District and Society levels. It defines the administrative procedures and managerial methodologies by which the Society is to be governed by its membership volunteers who are supported by a headquarters professional staff.

The Society Rules & Regulations handbook is affixed to the Society Operations Manual. In it appearing among many Appendices are: (1) Society Governance Documents, which include the Society Bylaws, District Bylaws and Standard Chapter Bylaws, and (2) Society Contest and Judging Handbook.

As a point of historical clarification, use of the term “International” has been discontinued in favor of the term “Society” when referring to the headquarters staff or location and to the Board of Directors. It is still correct in the context of certain competitions, such as the “International Quartet Competition” for instance. Use of the term “Constitution” also has been eliminated from governance documents throughout the Society, District and Chapter levels.

The Rocky Mountain District Statements of Policy and Operations Manual are designed to bridge the operational gap between the Society and District, and to ensure that our District operating procedures are in consonance with Society procedures, with principal linkage through the District Bylaws. The RMD Statement of Policy and Operations Manual include statements of policy, as well as statements defining operating guidance and describing operating procedures and practices.

***This RMD Statements of Policy and Operations Manual is to be maintained and located on the web site by the District, together with a copy of the District Bylaws, and used together, along with such other materials as the user may find necessary.*** It is advised that the District Conventions Manual also be included as a frequent adjunct reference to the RMD Statements of Policy and Operations Manual, because many topics may be inter-related.

## 1.2 Manual Database

The District Secretary is responsible for maintenance of this Manual. A current copy is available on the District website ([www.rmhsing.org](http://www.rmhsing.org)).

### 1.3 Acronyms

ACDA	American Choral Directors Association
AHSOW	Ancient Harmonious Society of Woodshedders (Society subsidiary)
AIC	Association of International Quartet Champions (Society subsidiary)
AISQC	Association of International Senior Quartet Champions (Society subsidiary)
ASCAP	American Society of Composers, Authors and Publishers
ABP	Annual Business Plan
BETY	Bulletin Editor of the Year
BMI	Broadcast Music, Inc.
BOD	Board of Directors
BOTY	Barbershopper of the Year
BQPA	Barbershop Quartet Preservation Association (Society subsidiary)
CA	Contest Administrator
CARA	Chapter Activity Recognition Award
CDWI	Chorus Directors Workshop Intensive
C&J	Contest and Judging
CSLT	Chapter Support and Leadership Training
COTS	Chapter Operations Training Seminar
DP	District President
DVP-CDD	District Vice President – Chorus Director Development
DVP-C&J	District Vice President – Contest & Judging
DVP-CLST	District Vice President – Chapter Support & Leadership Training
DVP-EV	District Vice President – Events
DVP-M&PR	District Vice President – Marketing and Public Relations
DVP-M&P	District Vice President – Music & Performance
DVP-MS	District Vice President – Member Services
DVP-FD	District Vice President – Financial Development
DVP-YIH	District Vice President – Youth in Harmony
EIH	Everyone In Harmony
EVP	Executive Vice President
HOD	House of Delegates

HOF	Hall of Fame
IBC	International Bulletin Contest
IPP	Immediate Past President
L&R	Laws and Regulations
LA	Leadership Academy
LOPT	Leadership Operations Project Team
LRP	Long-Range Plan
NAfME	National Association for Music Education
MOU	Memorandum of Understanding
OIF	Outstanding in Front Program
PROBE	Public Relations Officers and Bulletin Editors (Society subsidiary)
PROTY	Public Relations Officer of the Year
RMD	Rocky Mountain District
RMHC	Rocky Mountain Harmony College
SBM	Society Board Member
VLQ	Very Large Quartet
Y&E	Youth and Education

## **2 DISTRICT GOVERNING DOCUMENTS**

### **2.1 Background**

The Rocky Mountain District Association of Chapters was formed in 1977 in Colorado Springs, Colorado, and was incorporated on March 24, 1986, in the State of Colorado. The District, as well as each chapter and its members, are subject to the provisions of the Society Bylaws, Society Statements of Policy, the District Bylaws, these District Statements of Policy, and Standard Chapter Bylaws.

From time to time, the District House of Delegates or the District Board of Directors has established policy for the conduct of District affairs, which is not appropriate for inclusion in the District Bylaws. It is important that these policies be readily available to all RMD officers and others with District or Chapter administrative responsibilities. To fulfill this need, the House of Delegates and Board of Directors have adopted this manual, which becomes the current adopted Statements of Policy. Henceforth, all policy established by either the House of Delegates and/or the Board of Directors, not requiring inclusion in the Bylaws, will be incorporated herein.

This manual also includes operating procedures to facilitate administration of District affairs. These procedures are not "governing" in the sense of a policy statement formally approved by the District's Board of Directors or the House of Delegates. Their observance is discretionary and may be modified by the Board of Directors as warranted. These operating procedures are for administrative guidance only.

Updates to these Statements of Policy shall be provided to District officers, committee chairpersons, other District officials, and each Chapter by the District Secretary. It is intended that the Standard District Bylaws and District Statements of Policy be available to all Rocky Mountain District members for information and guidance. They shall be maintained in an orderly fashion by each Chapter, District officer and committee chair people, as prescribed.

### **2.2 List of Documents**

The governing documents of the Rocky Mountain District shall consist of:

- Society Operations Manual, which includes:
  - Society Bylaws, Statements of Policy, Code of Ethics,
  - Standard District Bylaws,
- Society Contest and Judging Rules
- RMD District Bylaws
- District Statements of Policy and Operations Manual
- District Conventions Manual
- District Resolutions

Current printed, or electronic, documents shall be maintained by both the secretary and the president.

### **2.3 Distribution and Maintenance**

All District officers should have a copy of the above documents for reference purposes. These documents should be maintained in a loose-leaf notebook, and electronically, and passed along to

the officer's successor in office. The District President and District Secretary shall periodically review these documents to determine that they are current. It will be particularly important to review the minutes of each BOD and HOD meeting to identify those actions, which affect District policy and ensure that necessary revisions are made to the Statements of Policy.

## **2.4 Amendments to Governing Documents**

Amendments to the District Bylaws may be made only with the approval of the Society's Board of Directors. Proposed changes to the District Bylaws must be in accordance with Article IV of the District Bylaws. District Policies consistent with the Society Bylaws and the District Bylaws, may be adopted rescinded, or amended by the District's Board of Directors and ratified by the District House of Delegates. District Policies which do not require revision of the Bylaws are adopted or revised through "resolutions."

## **2.5 District Conventions Manual**

The District Conventions Manual shall be kept with and used as a frequent adjunct reference to the District Statements of Policy and Operations Manual. The Conventions Manual contains specific administrative guidance statements as well as applied administrative restatements of district policy for the management of District conventions, and also for staging of contests in accordance with Society Contest and Judging rules.

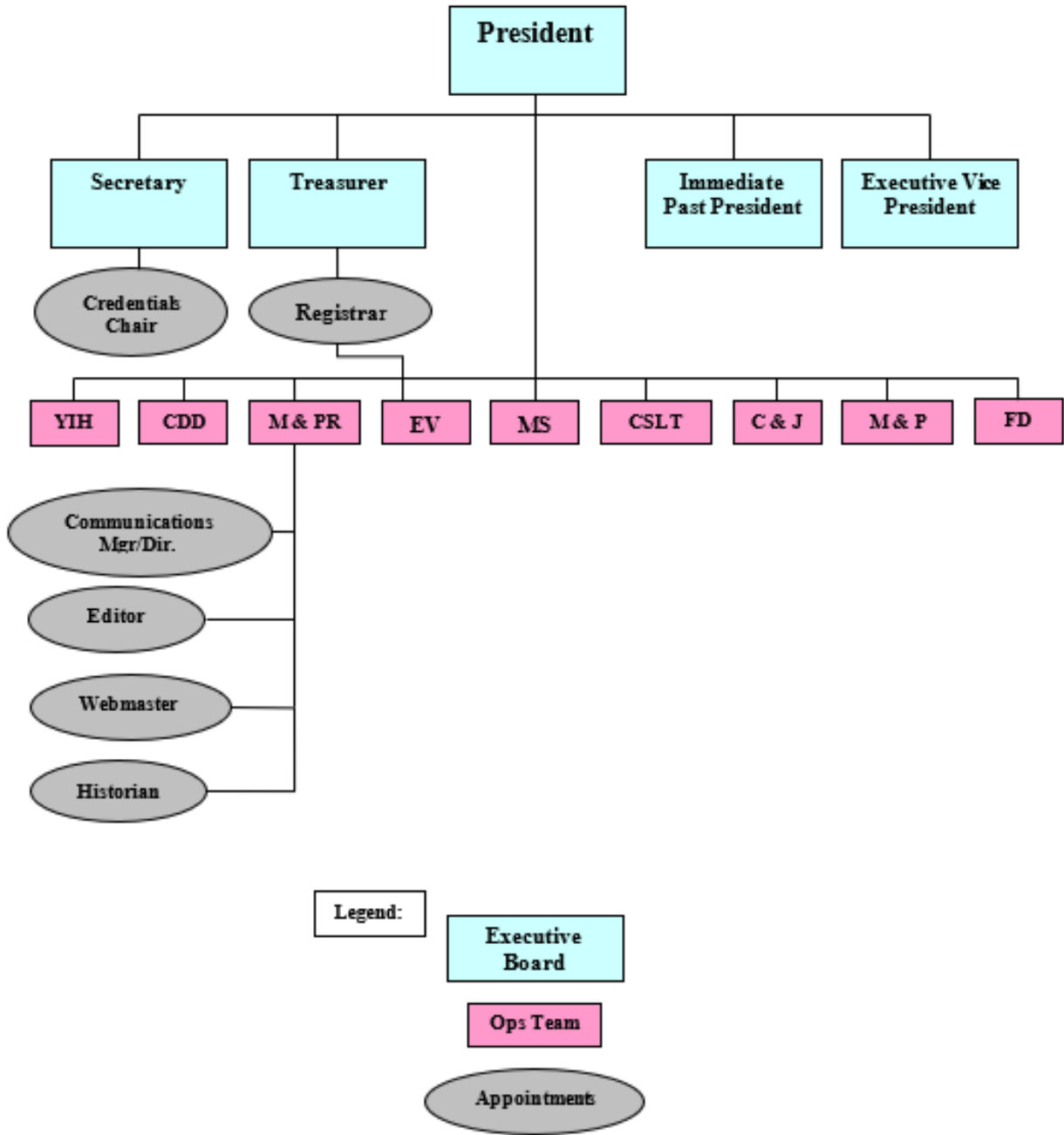


### 3 DISTRICT ORGANIZATION

#### 3.1 General

As set forth in Article IV of the District Bylaws, the House of Delegates (HOD) shall be the supreme legislative and governing body of the District. The composition of the HOD is established by Article IV of the District Bylaws. The administrative body of the District is the Board of Directors (BOD), which is explained in Article III of the District Bylaws.

#### 3.2 Organization Chart



### **3.3 Functions**

The principal function of the District organization is to discharge administrative responsibilities in the following program areas:

- Awards
- Communications and Public Relations
- Chapter Services
- Conventions and Competitions
- Financial Management
- Identification and Training of District Officers
- Membership Development
- Music Education
- Planning
- Policy Development
- Recognition and Philanthropic Programs
- Records Management
- Community Outreach
- Youth and Education

### **3.4 District Geographic Boundaries**

In accordance with District Bylaws Article IX, 9.02, the Rocky Mountain District's geographic boundaries were defined at the district's chartering. (RMD Constitution and Bylaws 9/29/89; Updated 4/20/90.)

Eastern: New Mexico's eastern state border from Interstate 40 northward to Colorado; Colorado and Kansas southern state borders eastward to route U.S. 83; and U.S. 83 northward through Kansas, Nebraska and South Dakota to the northern border of South Dakota (excluding McCook and North Platte, NE).

Northern: South Dakota's northern state border westward from U.S. 83 to Montana; Montana's eastern state border northward to interstate 94; Interstate 94, U.S. route 10 and Interstate 90 westward from the North Dakota's border to U.S. 89; U.S. 89 southward to the Wyoming state border; Wyoming's and Idaho's northern state borders westward to U.S. 93.

Western: U.S. 93 from Idaho's northern state border to Idaho's southern state border; Idaho's southern state border eastward to the Utah state border; and Utah's western state border south to the Arizona state border.

Southern: Utah's southern state border eastward to the New Mexico state border (excluding St. George); New Mexico's western state border southward to Interstate 40; and Interstate 40 and U.S. 66 eastward to New Mexico's eastern border.

### **3.5 Organization**

The entire Rocky Mountain District has been designated as a single geographic entity entitled with full operating responsibilities, functions and entitlements as a district.

## **3.6 Management**

To facilitate the discharge of District management responsibilities and the implementation of program requirements, several standing committees and appointive positions have been established. Ad-hoc committees will be established as required.

Under Article V, 5.05 and Article VII of the District Bylaws, it is the responsibility of the District President to appoint all committee chairs and, with consideration of the recommendations of the chair, all members of committees. As chief executive officer, the President is responsible to exercise general supervision over all activities of the District.

To ensure proper and complete oversight, assigned Board members may review staff functions performed by committee chair people. Those Board members will then be accountable to the President and the BOD for the work of such appointive District officials.

It shall be the duty of each Board member to charge each appointive District official under his/her supervision with his/her responsibilities at the beginning of that official's term of service. Thereafter, the Board member shall monitor the performance of all such appointive officials by maintaining contact in person, by phone or by e-mail; and he shall ensure that all assigned duties are performed in accordance with District and Board policy.

The Board member shall be prepared at all times to provide the President or Board with a progress report on functions or activities for which he is responsible. At regular meetings of the Board or House of Delegates, the Board member shall report for the appointive officials when such officials are not available to present their own report.

Responsibility for District programs will be reviewed, updated annually and communicated to members.

Each Board member shall be responsible for the expenditure of funds by the appointive officials for which he/she has oversight responsibilities.

Every effort should be made to ensure the continuity of expertise within each committee by having members serve two (or three year) terms and replacing only a portion of the committee each year.

## **3.7 Meetings: House of Delegates and Board of Directors**

### **3.7.1 House of Delegates**

The House of Delegates (HOD) will meet at least two times a year in accordance with District Bylaws, Article IV. Meetings will follow the BOD meeting, and be conducted in accordance with procedures prescribed in District Bylaws, Article III, and will address topics which have been included in the agenda developed by the District President and forwarded by the Secretary. A typical Order of Business is defined in Article IV, Section 4.03. Minutes of the HOD meeting will be recorded by the Secretary. Delegate voting representation is described in Article IV. The RMD House of Delegates shall also include the three most recent past district presidents who are registered and active members of an RMD chapter.

### **3.7.2 Board of Directors**

The District Board of Directors is required, under District Bylaws, Article III, 3.03, to hold a minimum of two meetings per year. The Secretary shall issue a CALL to each meeting. The CALL

by electronic notification shall be sent to Board members, all committee chair people, all Chapter delegates, and all past District Presidents. The CALL shall include, at the discretion of the President, a consent calendar, the meeting agenda, and such supplementary materials as may be appropriate. These materials should be e-mailed so as to be delivered at least 30 days in advance of the meeting.

Board members are expected to attend all meetings of the BOD. Appointed officials and special guests may be invited to attend at the discretion of the President. All meetings of the Board are open to any District member in good standing.

The spring meeting of the Board may be held the weekend of the Rocky Mountain District Harmony College (RMHC); the spring District event. The fall meeting of the Board will be held the weekend of the Rocky Mountain District Fall Convention. Additional Board meetings will be held as required by the District President.

The BOD shall meet prior to the HOD meeting to conduct such business as has been identified on the agenda developed by the District President and forwarded by the Secretary. Minutes of the meeting shall be recorded by the Secretary when the BOD is in formal session.

Special Meetings of the Board: May be held on call of the District President.

Mid-summer: A mid-summer planning session is recommended (but not required) to update the long-range plan and develop the preliminary program and budget for the coming year, including the proposed schedule for Society staff visits and other program activities.

Fall Convention: The BOD meeting shall be held at the Fall Convention to review the Annual Business Plan (ABP) and the budget, and to develop, clarify and/or assign responsibilities for program management to implement the ABP.

### **3.8 All BOD and HOD Meetings**

All formal sessions of the HOD and the BOD will be conducted similar to Robert's Rules of Order for Small Boards. The District President will ensure that a Parliamentarian is in attendance for all meetings of the HOD and BOD.

Due to the nature of the Rocky Mountain District spread across nine states, the BOD/Operations Team may conduct business via teleconference calls. In the spirit of being efficient in the conduct of the District's business, voting may be done in person, via teleconference call, or via e-mail.

In accordance with Section 4.4b of this manual, the Treasurer will provide year-to-date financial reports as part of the distributed CALL packet preparatory to the two mandatory BOD and HOD meetings.

## 4. DISTRICT OFFICERS

### 4.1 Elected Officers (The District Board of Directors)

The officers elected by the House of Delegates are as follows:

- President
- Executive Vice President
- Secretary
- Treasurer

These are the fiduciary officers that make all of the day-to-day decisions on behalf of the District. They are responsible for all decisions concerning the operation and conduct of the District's business, and they are the voting members with regard to all decisions that are not "policy" in nature. Policy is the exclusive domain of the House of Delegates.

**NOTE:** Immediate Past President (IPP) is automatically a fiduciary member of the Board

The Executive Operations Team is appointed by the District President:

- Vice President – Member Services (MS)
- Vice President – Marketing & Public Relations (M&PR)
- Vice President – Events (EV)
- Vice President – Music & Performance (M&P)
- Vice President – Chorus Director Development (CDD)
- Vice President – Contest & Judging (C&J)
- Vice President – Chapter Support & Leadership Training (CSLT)
- Vice President – Youth in Harmony (YIH)
- Vice President – Financial Development (FD)

The Executive Operations Team does not have a vote on the conduct of day-to-day business, rather they serve in an advisory role for the fiduciary Board of Directors.

### 4.2 Duties

The principal duties of the District officers are explained in the Society Operations Manual updated annually by the Society office, distributed at the annual Leadership Summit or RMD Leadership Academies, and published on the Society Website at [www.barbershop.org](http://www.barbershop.org). In this RMD Manual, the descriptions are briefly summarized, and modified as necessary to reflect RMD requirements, in Sections 6 through 18.

### 4.3 Calendar of Duties

The calendar of duties for the District President is shown in the Exhibits. Similar calendars for the other officer assignments may be developed and included as appendices if deemed helpful.

## **4.4 Reporting Requirements**

### **4.4.1 President**

The outgoing President will submit to the Society office each year, a business plan (which in recent years the Society calls a “Memorandum of Understanding”) for the coming year, by a date prescribed by the Society Board Operations Group.

### **4.4.2 Treasurer**

The individuals authorized by the President to have budgetary responsibilities will submit to the President and Treasurer the reports as follows:

- At the end of each calendar quarter, a report of anticipated changes from the previously completed quarter. This report will be the basis for the general budget compiled and submitted to the BOD, then the HOD for approval. This report is possible to be completed within the first month of the current quarter, but must be submitted not later than 45 days from the last day of the previous quarter.
- Each person delegated to authorize payment of expenses by the President must submit invoices, complete documentation and approval to pay to the Treasurer with copies to the President. Any expenditure that causes the total expense authorized for any given office to exceed the HOD approved budget for that area must be specifically approved by the President and BOD by a majority vote.
- A current financial statement, including a statement of income and expenses for the report period and the year-to-date, will be prepared by the Treasurer and submitted to the Secretary 45 days in advance of the BOD and HOD semi-annual meetings (see Section 2.1 of the BHS Treasurer’s Manual). The Treasurer will comply with Society prescribed reporting requirements, including Internal Revenue Service (IRS) tax statements, as described in the BHS Treasurer’s Manual. For more information, see 6.14 and 6.15.

### **4.4.3 Secretary**

The Secretary will prepare the minutes of all meetings of the HOD and formal meetings of the BOD. These minutes, together with the reports of District officers, Treasurer’s financial reports, will be forwarded to all District officers, officials, chapter delegates and three immediate past district presidents with the CALL at least 30 days in advance of the next meeting of the BOD and HOD. In the first calendar quarter the Secretary should also issue update pages (if any) for the District Operations Manual as required by Section 2.1 of this manual. Other reporting requirements of the Secretary are included in the BHS Secretary’s Manual. For more information, see Section 4.

### **4.4.4 Vice Presidents**

All Vice Presidents shall prepare, and submit to the Secretary 15 days in advance of the BOD and 45 days in advance of HOD meetings any agenda items on the activities for which they are responsible (or a written report for the consent calendar), for inclusion in the materials for the meetings. The Vice Presidents are also required to submit to the President, and other District officers and the Society as deemed appropriate, Quarterly Reports, Activity Reports, and periodic reports on the activities for which they are responsible. For more information, see Sections 7 through 14.

## **5 COMMITTEES AND SPECIAL APPOINTMENTS**

### **5.1 General**

The District Bylaws (Article VII) provides for the establishment of committees and task forces to discharge appropriate District functions. In recent years, District committees have been designated for such as the following:

- AHSOW
- Awards
- Chapter Activities Recognition Awards
- Communications Manager/Director
- Contest and Judging
- Conventions
- LA/COTS
- Credentials Chair
- Directory
- Ethics
- Events
- Festivals
- Finance
- Harmony Foundation Coordinator
- Historian
- District Website/Social Media
- Laws, Regulations & Parliamentarian
- Long Range Planning
- Publication: *Vocal Expressions*
- Music Education
- Nominations
- Policy & Operations Manuals
- Registrar
- Standing Ovation Program
- Webmaster

### **5.2 Appointments**

The District President appoints all committee chairs and, with the recommendation of the specific chair, all committee members. The District Bylaws require that committees be appointed prior to January 1. In practice, committees should be appointed as quickly as possible after the officers are elected so the persons named can be reported to the Society office and included in pertinent mailings.

### **5.3 Duties**

The duties of the specific committees are set forth in other sections of this manual. Refer to the Table of Contents.

## **6 DISTRICT PRESIDENT**

### **6.1 General**

The District President shall ensure that all District responsibilities, programs and functions are competently discharged. These include policy development, program planning, music education, conventions and competitions, membership development, communications, chapter services, financial management, records management, identification and appointment of District administrators, training of District and chapter administrators and other related functions. He/she is a member of the District Presidents' Council, and as such shall attend District Presidents' Council meetings held at the Society Convention in June/July, and the Midwinter Convention held in January/February. He/she shall participate in monthly Presidents' Council conference calls.

### **6.2 Duties**

Duties of the District President shall include the following:

1. Become knowledgeable of past District operations and policies as well as current approved practices. Develop a sense of District and chapter needs, preferences and capabilities.
2. Be able to attend meetings with the Society Board as scheduled to provide feedback on the district experiences.
3. Be able to participate in conference calls with the District Executive/Operations Team.
4. Be able to participate in monthly conference calls with the District Presidents' Council.
5. Develop an effective communications network with Society officials through liaison with the elected Society Board Member, staff at the Society office, contact with other District presidents and key Society committee people.
6. Develop and maintain effective communication channels with other District officers and chapters using the District bulletin and other communication vehicles.
7. Develop an effective administrative team that works together to carry out the Society's and the District's programs. Encourage officers and committee people to coordinate and communicate with each other in areas where they possess mutual interests or responsibilities.
8. Process all correspondence, expense vouchers, reports and other administrative documents timely. Acquire program data to ensure the timeliness and accuracy of required reports. Maintain administrative records in accordance with a structured records management system.
9. Review chapter bulletins, achievement reports and other materials to keep informed of chapter activities.
10. Require officers to submit periodic activity reports so as to keep informed of local or chapter concerns and to identify opportunities to provide assistance. Identify and take appropriate response action to meet chapter needs.
11. Monitor the performance of elected and appointed officials taking such action as may be appropriate to ensure the competent discharge of District responsibilities. Monitor program progress and adherence to the approved budget.
12. When leaving office, transmit to the incoming president all necessary administrative records, having purged the files of extraneous material. Transmit to the historian those records and other materials that may have historical value.



### **6.3 Appointments and Committee Assignments**

The District President shall have the authority to make appointments and committee assignments as necessary to meet the goals and objectives of the Society, the District and of the Annual Business Plan. See Section 5 of this Manual for a partial list of committees and further information.

### **6.4 Reports**

The President shall report on the “State of the District” at each HOD meeting. This report shall be included as an agenda item. The President shall submit an Annual Business Plan (business plan or MOU) and periodic progress reports and a year-end report to the Society in accordance with dates and formats prescribed annually by the Society Board Operations Group.

Submit timely and informative articles for each issue of *Vocal Expressions*, concentrating on district leadership issues, district current events topics, news related to upcoming and past district activities and Society developments that directly impact district members.

### **6.5 Staff Visits to RMD**

In coordination with other District and Chapter officers, lead coordination to schedule Society membership staff visits, ensuring that effective arrangements are prepared, that opportunities to develop extension or licensee sites are well planned, and that appropriate assistance is directed to those areas and Chapters in greatest need.

## **7 EXECUTIVE VICE PRESIDENT**

### **7.1 General**

The Executive Vice President shall function as the District President in his/her absence, or in the President's stead upon request of the President. He/she is a member of the District Presidents' Council and as such shall attend District Presidents' Council meetings held at the Society Convention in June/July, and the Midwinter Convention held in January/February. He/she shall participate in monthly Presidents' Council conference calls.

### **7.2 Desired background/capability**

1. Become knowledgeable of past District operations and policies as well as current approved practices. Develop a sense of District and chapter needs, preferences and capabilities.
2. Be able to attend meetings with the Society Board as scheduled to provide feedback on the district experiences.
3. Be able to participate in conference calls with the District Executive/Operations Team.
4. Be able to participate in monthly conference calls with the District Presidents' Council.

### **7.3 Duties**

1. Preside at meetings in the absence or request of the District president.
2. Maintain knowledge of all governing documents.
3. Act as the direct liaison between the District and the Chapters in the event of failure to report financial and incorporation filings as required by the BHS following the guidelines of the IRS.
4. The District Secretary shall make delinquent chapters known to the EVP.
5. Perform such duties as may be assigned him by the District president.
6. Do everything in his/her power to assist the president and the Board in carrying out the policies and objectives of the Board.
7. Directly communicate with: District President, District board.

## **8 DISTRICT VICE PRESIDENT – MEMBER SERVICES**

### **8.1 General**

The position of District Vice President - Member Services (DVP-MS) demands a high degree of visibility, which supports the high priority the District attaches to membership issues. The DVP-MS may have the opportunity to meet with the Society staff at the fall Leadership Academies together with presidents and other vice presidents from all districts. The DVP-MS shall attend all Executive Operations Team meetings and shall report directly to the President.

### **8.2 Duties**

The duties of the DVP-MS will include the following:

1. The DVP-MS should develop a close working relationship with the DVP-CSLT, to identify and actively assist those locations that have the interest and/or potential to establish and sustain a new Chapter.
2. The DVP-MS should provide resources and advice for chapter growth and retention.
3. Welcome new members to the RMD.
4. Monitor trends or declines in chapter growth, and report to the Board and HOD on chapter membership statistics. He/she should publicly acknowledge chapters that are showing substantial growth.
5. Serve as a resource to chapter VP's of Chapter Development or Membership to provide new member orientations and sustaining member retention.

### **8.3 Budget**

The DVP-MS shall prepare a budget for all proposed membership-related activities and present same at the fall meeting of the District Board of Directors. The budget shall include travel expenses for travel within the district commensurate with membership duties, as well as any special Marketing and Public Relations related expenses. Budget review shall be accomplished and submitted to the Treasurer on a quarterly basis.

### **8.4 Reports**

The DVP-MS shall prepare reports as the District President may require in order to track and evaluate membership and outreach programs.

Submit timely and informative articles for each issue of *Vocal Expressions* (as determined by the District Editor), concentrating on news related to upcoming and past events and activities.

## **9 DISTRICT VICE-PRESIDENT – CHAPTER SUPPORT & LEADERSHIP TRAINING**

### **9.1 General**

The District Vice President - Chapter Support & Leadership Training (DVP-CSLT), appointed by, and reporting directly to, the District President, is responsible for providing District level counsel, service and assistance to the District Chapters, for managing coordination of the District Leadership Academies, and the Chapter Activities Recognition Award (CARA) programs.

### **9.2 Duties**

The duties of the DVP-CSLT will include the following:

1. To organize and supervise the District Leadership Academies and administer the District CARA program.
2. Provide guidance to the coordinators for District Leadership Academies and the CARA administrator in the conduct of their activities.
3. Communicate and cooperate with the BHS LOPT (Leadership Operations Project Team) and the BHS Healthy Chapter Initiative Coordinators to fulfill the expectations for District Leadership Training activities in RMD, in order to help assure consistency throughout the Society.
4. Coordinate Chapter Counselor attendance at the spring meetings of the RMD Board, HOD, Chapter Counselor orientation, and any in-service training meetings.

### **9.3 Budget**

The DVP-CSLT will develop a budget for the activities in his/her area of responsibility for inclusion in the general District budget. The budget shall include travel expenses for travel within the District commensurate with membership duties, as well as any special Marketing and Public Relations related expenses. Budget review shall be accomplished and submitted to the Treasurer on a quarterly basis.

### **9.4 Reports**

The DVP-CSLT will complete evaluations, activity reports and other such reports as the District President, Society LOPT, and Healthy Chapter Initiative personnel may require.

Submit timely and informative articles for each issue of *Vocal Expressions*, concentrating on news related to upcoming and past events and activities.

# 10 DISTRICT VICE-PRESIDENT – MARKETING & PUBLIC RELATIONS

## 10.1 General

The District Vice-President – Marketing & Public Relations (DVP-M&PR), appointed by the District President to the Executive Operations Team, shall report directly to the District President. He/she is responsible for specialized capabilities and services to support internal communications and program promotion, and external publicity and public relations for District activities, and to provide guidance to Chapters for their similar needs.

## 10.2 Duties

1. The DVP-M&PR has responsibility and oversight in the following areas:
  - a. District public relations.
  - b. Encouragement of District and Chapter bulletins.
  - c. District Historian, Webmaster and the Communications Manager/Director.
  - d. Internet Website and Social Media.
  - e. Community & charitable services.
  - f. District publication: *Vocal Expressions*.
2. Provide counsel and guidance to chapters in the same areas of expertise as he manages and practices at the District level.
  1. Implement and maintain liaison with media sources and provide them with information about District activities. He/she should prepare news releases about District personnel and performing groups for distribution to newspapers, magazines, radio, and television, as well as to *The Harmonizer*, chapter bulletins and other publications.
  2. Publicize and market District competitions and events, in cooperation with the DVP-EV and various events' chair people, District magazine and Chapter bulletin editors, and Chapter public relations personnel.
    - a. Public Relations coordination from the District VP-M&PR consists of providing guidance and direction in the following six areas:
      - 1) Decide why you want the coverage.
      - 2) Know what is newsworthy.
      - 3) Develop a "hook".
      - 4) Define your approach.
      - 5) Determine your targets.
      - 6) Be prepared for the coverage and the possible consequences.
    - b. Additional public relations responsibilities include:
      - 1) Provide programs and materials to enhance public perception of the Barbershop art form, and the value of music education for personal enrichment.
      - 2) Support and promote public relations leadership development training and activities within the District.
      - 3) Responsible for effective communication and promotion of District activities through regularly distributed forms of in-District communication and dissemination to local newspapers throughout the District.
      - 4) Make sure that Rocky Mountain District and Barbershop Harmony Society events are before the public eye on a continuing basis – through whatever means is available.

- c. Marketing coordination from the District VP-M&PR consists of helping the chapters identify a message that encompasses these three questions about both the membership of the chapter and assessing member potential:
  - 1) What does the person care about?
  - 2) What are his/her problems, concerns or interests?
  - 3) Why should this member or prospective member invest three or more hours per week to membership and participation in our chapter?
- d. Additional marketing duties include:
  - 1) Support and develop marketing leadership and training activities within the District.
  - 2) Provide chapters with guidelines for improving public awareness and appreciation of RMD and BHS.
  - 3) Market RMD events to the membership in such a way that they will want to attend said events.
5. Encourage all Chapters to appoint public relations officers and provide guidance and assistance to those individuals.
6. Establish ongoing liaison with all District personnel who serve a public relations function. Plan and conduct, or arrange for the conduct of, training sessions for both Chapter public relations personnel and bulletin editors at LA, conventions or other venues, as appropriate.
7. Assist in planning and implementing District promotions and hospitality at District and Society conventions.
8. Ensure appropriate recognition of Chapter bulletin editors (IBC), public relations officers (PROTY) and Website of the Year for exceptional performance or accomplishments.
9. Endeavor to improve, through counseling and education, the quality of Chapter public relations activities within the Chapters and their communities.
10. Encourage pride through the creation and use of Chapter and District logos and banners. He should be responsible for maintaining the District banner and ensure its display at District and Collect information from Chapters, through their publications and by direct contact, and distribute that material to Chapter bulletin editors and public relations officers and to the District Bulletin Editor.
11. Ensure the design, acquisition and widespread display of District historical photographs and other paraphernalia that will help educate and develop member pride in District history. Such displays should appear at conventions, LA/COTS, RMHC, etc. and historical information could be highlighted in special articles for various district and chapter publications.
12. Collect information from Chapters, through their publications and by direct contact, and distribute that material to Chapter bulletin editors and public relations officers and to the District Bulletin Editor.
13. Ensure the design, acquisition and widespread display of District historical photographs and other paraphernalia that will help educate and develop member pride in District history. Such displays should appear at conventions, LA/COTS, RMHC, etc. and historical information could be highlighted in special articles for various district and chapter publications.
14. Develop and implement a marketing and promotional plan for sales items offered by the district (e.g. pins, CD's, barbershop shop inventory, etc.) and consult to the designated project managers to support successful sales results.

### **10.3 Budget**

The DVP-M&PR shall prepare an updated budget for his/her activities for submittal at the Fall District Board meeting. The budget shall include travel expenses for webpage maintenance / development, convention advertising and travel within the district commensurate with membership duties. Budget review shall be accomplished and submitted to the Treasurer on a quarterly basis.

### **10.4 Reports**

The DVP-M&PR shall prepare activity and financial reports and other such reports as the District President may require monitoring and evaluating the District public relations efforts. **He/she** shall also maintain close liaison and cooperation with, and submit reports as requested, to the Society Committee Chair - M&PR.

Submit timely and informative articles for each issue of *Vocal Expressions*, concentrating on news related to upcoming and past events and activities.

# **11 DISTRICT VICE-PRESIDENT – EVENTS**

## **11.1 General**

The District Vice President – Events Planning (DVP-EV) has general responsibility for oversight and coordination of Rocky Mountain District conventions, and also supports other district events with expertise in facilities negotiations and transportation. He/she may also from time to time be assigned to participate in projects or activities led by the Society Events Committee.

His/her prime involvement is arranging for and managing the Spring Event/RMHC, and the Fall Convention/Chorus and Quartet Competition. The DVP-EV may also be called on to assist with LA/COTS and music education events, which are critical to the success of the District and the Society. The DVP-EV reports to, and is appointed to the Executive Operations Team by the District President, and becomes involved with other District events as directed by the District President.

## **11.2 Duties**

The duties of the DVP-EV include the following:

1. Coordination with the Society Director of Conventions and Meetings to ensure that RMD events are held according to the Society meeting schedule, that they are administered in a manner consistent with District and Society Bylaws and guidelines, and that they meet Society and Contest and Judging Committee standards.
2. Maintain an updated RMD Conventions Manual and site/host organization selection proposal documents for District use.
3. Promote and prepare for conventions; and select sites for educational and competition events to propose for approval by the BOD/HOD as the District President may direct. Coordinate activities of the host chapter(s) or alternative host organization for conventions; using whatever talent is available to facilitate those conventions.
4. Complete a preliminary event budget, for presentation to and approval by the District Board of Directors and House of Delegates. Make recommendations for event site approval based on the needs of Society and District music programs, and an informed evaluation of the submitted proposal. (See Sections 22.5)
5. Negotiate contracts with venue sites, hotels, event centers, transportation agents, etc. Travel as needed for direct involvement in final negotiations, site selection, event budget preparation, and event committee formation.
6. Provide informational and logistic support for the host chapter(s) or organization. Serve as liaison between host Chapter(s) or organization and the Society Office, the DVP-C&J, the District President and other Society and District officials.
7. Coordinate and ensure timely cooperation of the DVP-C&J and DVP-M&PR, the District Secretary, the District Treasurer, and others to ensure smooth running and efficiently managed events.
8. Ensure submittal and review of event financial statement within 45 days following the close of each event.
9. Establish and maintain a calendar of District events, coordinated with the District Secretary. (See Section 14.4).



10. Coordinate maintenance of event equipment ('Judges Box' - including cueing system, table lights, etc.) and timely delivery of same to successive event sites.
11. Oversee and manage performance of the District Conventions Director and the District Conventions Committee to ensure successful conventions that enjoy good member participation at a fair cost and that are a productive district revenue source.
12. Continually strive to develop district events structures, and programming in conjunction with the responsible functional DVP, that will increase participation both by members and the general public.

### **11.3 Budget**

The DVP-EV will prepare a budget for approval at the fall BOD and HOD meeting. The budget shall include travel expenses for District Fall Convention and spring event, as well as any special Marketing and Public Relations related expenses. Budget review shall be accomplished and submitted to the Treasurer on a quarterly basis.

### **11.4 Reports**

Complete periodic District Board reports, conventions proposals, post-convention evaluations and other reports as required by the District President. Submit reports to the Society Events Committee Chair, as requested.

Submit timely and informative articles for each issue of *Vocal Expressions*, concentrating on news related to upcoming and past events and activities.

## **12 VICE-PRESIDENT – MUSIC & PERFORMANCE**

### **12.1 General**

The District Vice President-Music & Performance (DVP-M&P), appointed to the Executive Operations Team by, and reporting directly to, the District President, shall be responsible for all music activities within the District that will improve and expand the musical knowledge and performance abilities of the membership.

### **12.2 Duties**

The duties of the DVP-M&P include the following:

1. Establish and administer a music program consistent with the Society's and the District's Long Range and Annual Business Plans.
2. Develop and administer a budget to implement the music program.
3. Organize and administer Music & Performance events and programs, such as RMHC, quartet development schools, Top Gun, BBS Harmony Degrees, Standing Ovation, and educational outreach programs.
4. In coordination with other District and Chapter officers, coordinate scheduling Society music staff visits to ensure assistance is directed to those areas and Chapters in greatest need.
5. Develop and implement a quartet development program especially aimed at the district's many mid-level and beginner quartets.
6. Act as a liaison between chapters and the District Board, and as a conduit between the District Board and the Society staff, concerning music programs.
7. Assess and communicate to the District Board the music needs of the quartets within the District.
8. Establish a liaison with the DVP-C&J to fully utilize the judging/coaching expertise in the District and to assist him in recruiting members for the judging program.
9. Coordinate with the District AIC representative and the Chapters to assist in qualifying RMD prospects for any available music scholarship awards.
10. Coordinate with the AIC representative to identify, and arrange for AIC quartets that might be assigned to participate in RMD RMHC schools.
11. Coordinate programs and projects of mutual interest with the DVP-EV, DVP-M&PR, DVP-CSLT, and others as required.
12. Coordinate and assist with programs and music festivals around the District.

### **12.3 District Music & Performance Committee**

A music committee may be established to assist in the development and implementation of the RMD music education program. The DVP-M&P should identify members to head various activities and programs, and recommend them for appointment by the President. Committee members may be assigned primary responsibilities for specific elements of the music program, such as RMHC schools, quartet development schools, Top Gun, BBS Harmony Degrees, Standing Ovation, and other educational outreach programs.

## **12.4 District Music & Performance Programs**

The DVP-M&P bears primary responsibility to develop the District music program, which may be based upon the major elements listed below:

1. Organize and assist with District programs to include SOP and Harmony Platoon.
2. Organize and assist with RMHC Schools and Craft Sessions. Typically, one large RMHC school (“Rocky Mountain Harmony College”) has been conducted in the RMD each year. Other schools with more limited curriculum and faculty are encouraged to be held at other times and locations, to offer more focused programs such as quartet development, craft sessions, and other similar programs.
3. Assist with District music festivals by acting as a resource for chapters interested in planning such sessions as have been held in Silverton, CO, Rapid City, SD and Chautauqua State Park in Boulder, CO; in conjunction with a public performance. These are usually one-day craft sessions. These sessions have been well received and do much to stimulate local interest. More emphasis could well be placed on such multi-chapter, weekend craft sessions or music festivals.
4. Organize and assist with coaching. The DVP-M&P should develop and maintain a file on coaching resources outside the District. He/she should promote the use, and assist in the acquisition of such talent by encouraging chapters to request assistance for their chorus and quartets in order to improve their performance capability. The DVP-M&P should identify coaching resources within the District and promote their use and development.
5. Organize and assist with Audio-Visual Evaluations. The DVP-M&P should establish and supervise an audio-visual program for District choruses and quartets as an aid to education and development. He/she should encourage chapters to submit audio-video tapes for critique and should arrange for such critique by qualified evaluators. This program will be incorporated into the Directors and Coaches Guild as it develops.
6. Organize and assist with Program Development. The DVP-M&P should develop a comprehensive multi-year Music and Performance program, consistent with the District's long-range plan. By mid-summer, he/she should have developed a specific work plan for the year ahead, including a proposal for the use of International staff personnel, for presentation to the District Board.

## **12.5 Budgeting and Financial Statements**

1. The DVP-M&P should have, by mid-summer each year, developed a proposed budget to support the Music & Performance program and work plan for submission to the Board at the fall meeting for approval and incorporation into the preliminary District budget. The Music & Performance budget should include all elements of the District music program including detailed budgets for the RMHC schools and all craft sessions to be sponsored by the District.
2. The DVP-M&P is responsible for adherence to the approved Music and Performance budget and proper documentation of all receipts and expenditures in conjunction with implementation of the program. This responsibility is usually discharged with the assistance of other designated members involved in the conduct of the schools or sessions. The DVP-M&P must, however, monitor his/her efforts to ensure competent execution of assigned tasks. The DVP-M&P is responsible to ensure that all sheet music, manuals and other materials acquired and used in the schools or sessions are properly accounted for. The DVP-M&P is responsible to ensure

that a financial statement for each school or session is prepared and submitted to the District Treasurer within, but no later than, 45 days after the school or session.

3. The DVP-M&P will prepare a budget for approval at the fall BOD and HOD meeting. The budget shall include travel expenses for District Fall and Spring Conventions as well as any special Marketing and Public Relations related expenses. Budget review shall be accomplished and submitted to the Treasurer on a quarterly basis.

## **12.6 Reports**

The DVP-M&P should submit progress reports to the President, by prescribed dates, describing the activities conducted during the report period and other relevant information. Similar reports are also submitted to the M&P Society Committee Chair according to a published schedule. The report should include the dates and locations of the activities, nature or purpose of the activity or event, number of members participating, public participation if pertinent, and the financial outcome. Program shortcomings, as well as accomplishments, should be noted. Recommendations and proposed program adjustments should be described.

Submit timely and informative articles for each issue of *Vocal Expressions*, concentrating on music and performance news related to upcoming and past events and activities.

## **13 DISTRICT VICE-PRESIDENT – CHORUS DIRECTOR DEVELOPMENT**

### **13.1 General**

The District Vice President-Chorus Director Development (DVP-CDD) is responsible for encouraging and establishing district-wide activities to recruit, train and develop chorus directors in all chapters. He/she will identify, develop and provide district and chapter-supported opportunities for directors and music educators to learn about available tools for improving barbershop chorus singing in the chapters, and will coordinate Society programs delivery to accomplish similar purposes.

### **13.2 Duties**

The duties of the DVP-CDD include the following:

1. Construct and maintain records of qualified RMD and non-barbershoppers that may be able to serve as chorus directors, either permanently or temporarily, and assist chapters who are seeking a chorus director.
2. Establish regular communications methods that identify and promote chorus director training opportunities, such as Directors College /Harmony University, RMHC and LA schools, CDWIs, OIFs, etc., and encourage directors to attend and improve skills. Also actively encourage front line and/or associate/assistant directors to voluntarily participate in the annual random drawings to receive a “first-timer”, or those who have not attended in the past five years, Society/Harmony Foundation-sponsored tuition scholarship to attend Director’s College at Harmony University.
3. Establish regular communications methods that identify and promote self-study materials and opportunities for directors, such as manuals, videotapes, Society Music Staff visits/clinics, RMD directors who are willing to “mentor”, etc., and facilitate use.
4. Institutionalize, and coordinate a hosting chapter and logistics, CDWI workshops in RMD, budget permitting, and recruit at least five directors to attend each. Collaborate with the RMD Treasurer to ensure event trainer expenses are managed effectively and in accordance with prevailing Policy.
5. Institutionalize, and coordinate a hosting chapter and logistics, at least one Outstanding In Front (OIF) workshop in RMD, budget permitting. Collaborate with the RMD Treasurer to ensure event trainer expenses are managed effectively and in accordance with prevailing Policy.
6. Lead the annual process to select at least one front-line chorus director to receive the RMD-sponsored tuition scholarship to attend Director’s College, and collaborate with the director’s chapter to fund travel expenses.
7. Lead and coordinate the nomination of a music educator(s) to receive the annual RMD scholarship to attend Harmony College.
8. Actively encourage chapters to send their director and/or assistant director to Directors College and to the other formal educational opportunities when they are scheduled.
9. Ensure that the front-line director of each newly chartered chapter takes advantage of the RMD-sponsored tuition scholarship to attend Directors College within the two years following award of the chapter charter, and urge the chapter to fund travel expenses.

10. Work with the VP M&P to develop educational programs for chapter directors in conjunction with RMHC and/or Fall Conventions.

### **13.3 Budget**

The DVP-CDD will prepare and submit a budget for the CDD functional area for inclusion as part of the overall district budget, and will coordinate with the district Treasurer in this responsibility. The budget shall include travel expenses for travel within the district commensurate with membership duties, as well as any special Marketing and Public Relations related expenses. Budget review shall be accomplished and submitted to the Treasurer on a quarterly basis.

### **13.4 Reports**

The DVP-CDD will prepare and submit timely reports to the District President and to the Society CDD Committee Chair at intervals and in formats established by each. These reports will also be made available to the District Board and the House of Delegates, as appropriate, for their meetings.

Submit timely and informative articles for each issue of *Vocal Expressions*, concentrating on news related to upcoming and past CDD events and activities.

## **14 DISTRICT VICE-PRESIDENT – CONTEST & JUDGING**

### **14.1 General**

The District Vice-President – Contest and Judging (DVP-C&J) must be a Society member for five years or more and may also be a Society Certified Judge or Contest Administrator. He/she will chair a District Contest and Judging Committee, if one is formed.

If qualified individuals are available and a need exists, the DVP-C&J may appoint members to a District Contest and Judging Committee to better satisfy program requirements.

### **14.2 Duties**

He/she shall ensure that panels of certified judges are engaged to meet the requirements of all District quartet and chorus contests. He/she should consider travel costs in developing recommendations for those judges to be assigned to RMD contests.

1. He/she may arrange with the District Treasurer to acquire all necessary tickets for the judging panel's air travel with credit for the purchase to accrue to the District travel credit card account. He/she may have the tickets prepaid by RMD and sent directly to the respective judges. DVP-C&J shall inform the judges when, and through what means, to purchase airline tickets for all RMD events.
2. He/she should initiate liaison with the DVP-EV and individual Event Chair to keep them informed of the names of the judges assigned, their travel plans (arrivals and departures) and any special requirements they may have. He should coordinate with the Event Chair to ensure that the particular needs of the judging staff are met. Detailed information on these requirements and courtesies is included in the RMD Events Manual.
3. He/she should keep a current roster of all Society-certified judges and Contest Administrators, and of the RMD judge candidates and their availability to encourage practice judging.
4. He/she shall participate in meetings of Society with DVP-C&Js as required and subsequently report to the District Board on the deliberations of the Society C&J Committee; including issues under discussion or study, and any decisions reached.
5. He/she should cooperate with the DVP-M&P in arranging craft sessions, presenting C&J information that promotes the Society's judging certification program, and also using judges as faculty for various craft sessions at events.
6. He/she should coordinate with the DVP-M&PR to promote the C&J certification program and to encourage recruitment and development of judge-candidates from the Rocky Mountain District.
7. He/she shall conduct a draw for the order of appearance of both the quartets and the choruses participating in competitions. Such draws will include Senior Quartets and college quartets, if any have registered. There will be a double draw for choruses participating in the Chorus Competition.

### **14.3 Duties of the District C&J Committee**

The District C&J Committee, if activated, under the direction of the DVP-C&J, shall be responsible for performing functions set forth in the Society's C&J Handbook, in that portion currently titled "Organization and Functions of a District C&J Committee".

## **14.4 Budget**

The DVP-C&J will prepare and submit a budget for the C&J functional area for inclusion as part of the overall District budget, and will coordinate with the District Treasurer in this responsibility. The budget shall include travel expenses for travel within the district commensurate with membership duties, as well as any special Marketing and Public Relations related expenses. Budget review shall be accomplished and submitted to the Treasurer on a quarterly basis.

## **14.5 Reports**

The DVP-C&J shall complete such reports as the District President and Society C&J Committee Chair may require, monitoring and evaluating the activities of the committee or of candidates in the Society Judging program. Submit timely and informative articles for each issue of *Vocal Expressions*, concentrating on news related to upcoming and past events and activities.



# **15 DISTRICT VICE-PRESIDENT – YOUTH IN HARMONY**

## **15.1 General**

The District Vice President – Youth in Harmony (DVP-YIH) is responsible for youth outreach programs in the District. He/she will identify, develop and provide Society and district supported opportunities for students and music educators to learn about available tools for introducing, maintaining and supporting barbershop singing in their educational institutions and programs, and in the extracurricular lives of youth.

The Rocky Mountain District will continue to endorse, encourage and support the various outreach programs instituted at the District level and those operating as a result of the vision of barbershoppers within our association of chapters (that are consistent with district and Society objectives.)

A YIH grant program, through the Donor Choice program of Harmony Foundation, has been established to assist chapters who sponsor local YIH camps, and who provide other programs in the District for youth, or education concerns in RMD. The DVP-YIH will oversee the dispersal of this grant program to the chapters. (BOD 07/02)

## **15.2 Duties**

The DVP-YIH duties include, but are not necessarily limited to, the following:

1. Encourage each chapter to have an active YIH advocate in the form of a Chapter VP or non-board chair as a “point person” who will perform grassroots work with teachers and students in the general area of the chapter.
2. Equip chapter YIH “point people” to represent our Society and its YIH mission appropriately. Ensure there is training for chapter leaders through the LA/COTS and other educational events and activities.
3. Assist chapter YIH “point people”, when necessary, in reaching music educators and/or students in college, high school and junior high school levels to provide opportunities and resource ideas where needed and welcomed.
4. Work to establish and maintain summer harmony camps in the RMD, each managed by local or regional administrators, staff and faculty, if possible.
5. Assist the RMHC school coordinator with preparation by providing curriculum and staffing for an annual youth track designed for students and music educators.
6. Solicit and receive reports from barbershoppers throughout the district who hold YIH activities (e.g. Contests, festivals, workshops, etc.) and report to the Society what is being accomplished within RMD toward the Society YIH goals.
7. Promote the Next Generation Varsity Quartet Contest and offer guidance to the entering quartets to be adequately prepared to compete. Encourage and assist in obtaining performance opportunities for collegiate and capable high school quartets.
8. Function as the district and Society (within the district) liaison with NafME, ACDA and other music education associations, and provide entertainment and other resources for their conventions and activities.
9. Prepare and coordinate an annual expense plan for RMD Donor Choice funds that come back to RMD through Harmony Foundation (see 29.2.5). The RMD House of Delegates has directed

that all Donor Choice funds be utilized for youth and education programs in the District (HOD 4/18). The DVP-YIH shall solicit youth and education proposals from the District, and determine a spending plan for approval by the RMD BOD. He shall be the “point person” in recommending the expenditure of the funds, subject to the approval of the BOD, and disbursement authorization of the RMD President. The DVP-YIH is charged with doing the necessary follow-up to the RMD BOD and Operations Team as to how the funds were expended, and the relative success of the program that received the funding.

### **15.3 Budget**

The DVP-YIH will prepare and submit a budget for the YIH functional area for inclusion as part of the overall district budget, and will coordinate with the district Treasurer in this responsibility. The budget shall include travel expenses for travel within the district commensurate with membership duties, as well as any Marketing and Public Relations related expenses. Budget review shall be accomplished and submitted to the Treasurer on a quarterly basis.

In addition, he/she will be responsible for the submission of grant proposals for the budget of the proposed year of the event.

The DVP-YIH will oversee the distribution of HF Donor Choice funds that have been directed by the donor to the RMD for District youth and education programs.

### **15.4 Reports**

The DVP-YIH will prepare and submit timely reports to the District President and to the Society YIH Committee Chair at intervals and in formats established by each. These reports will also be made available to the District Board and the House of Delegates, as appropriate, for their meetings.

Submit timely and informative articles for each issue of *Vocal Expressions*, concentrating on news related to upcoming and past events and activities.

## **16 DISTRICT VICE-PRESIDENT – FINANCIAL DEVELOPMENT**

### **16.1 General**

The District President shall appoint a District VP – Financial Development, who will serve a one-year term, renewable. The office may be an ongoing appointment and is not restricted to a specific term of service. The VP FD shall encourage and coordinate participation by individual members, quartets, chapters, and the District-at-large in support of Harmony Foundation International (HFI) and other charitable activities.

### **16.2 Duties**

The VP-FD duties include, but are not necessarily limited to, the following:

1. Administer, coordinate and cooperate in any project, which may be established and conducted in furtherance of the HFI, the Society or other charitable activities associated with the Society.
2. Assist any Chapter, individual or other District group in initiating or modifying its gifts or contributions to HFI, the Society or other Society-associated groups either on a one-time or ongoing basis.
3. Provide appropriate recognition for exceptional individual, quartet or Chapter efforts on behalf of HFI or the Society, including the presentation of awards at the spring event (RMHC), or Fall Convention. This recognition will be coordinated with the Society or HFI representative(s), as required.
4. Create awareness of HFI and other charitable programs that provide grants to organizations that launch activities to promote singing opportunities.
5. Develop articles for publication in issues of the *Vocal Expressions* magazine that enlighten members about HFI, Society and/or other charitable causes, and encourages members to contribute (subject to the publication guidelines of the District Editor).
6. Encourage chapters and quartets to create heightened awareness of charitable causes to help HFI and the Society to fulfill the HFI goal to "... share the gift of singing as a means of making lives more enjoyable, satisfying and meaningful," as well as the Society's vision for "Everyone In Harmony."

### **16.3 Budget**

The DVP-FD will prepare and submit a budget for the FD functional area for inclusion as part of the overall district budget, and will coordinate with the district Treasurer in this responsibility. The budget shall include travel expenses for travel within the district commensurate with membership duties, as well as any related expenses. Budget review shall be accomplished and submitted to the Treasurer on a quarterly basis.

### **16.4 Reports**

The DVP-FD will prepare and submit timely reports to the District President at intervals and in formats established. These reports will also be made available to the District Board and the House of Delegates, as appropriate, for their meetings. Submit timely and informative articles for issues of *Vocal Expressions*, concentrating on news related to upcoming and past events and activities.

## **17 DISTRICT SECRETARY**

### **17.1 General**

The District Secretary is responsible for many of the institutionalized administrative and reporting functions for the District. He/she is the administrative liaison with the Society office and maintains safekeeping of important District documents.

### **17.2 Duties**

The District Secretary's duties include the following:

1. Issue a 'CALL' for Board of Directors, Executive Operations Team and House of Delegates meetings. He/she shall collect pertinent reports, publish an agenda and record the proceedings of District meetings, and he/she shall distribute minutes to District officers, committee chairs, and Chapter Presidents.
2. Oversee website maintenance of the District Directory by facilitating the reporting of chapter officer information to the Society as provided by chapter officers that are authorized to access their chapter page on the Member Center – for inclusion of directory information onto the RMD website.
3. Maintain current (and active) files of Society and District events, and chapter show dates and clearances, by approved BMI license applications. The Secretary shall copy the District Webmaster on all approved BMI licenses so those shows can be added to the District calendar on the RMD website. (Section 36.3)
4. Maintain current files for Society Bylaws, the District Bylaws, Standard Chapter Bylaws, Society Operations Manual, District Statements of Policy & Operations Manual, C&J Rules, and other published governance documents.
5. Perform a periodic update of the District Statements of Policy & Operations Manual, or shall ensure and oversee such performance by a qualified designee, and shall issue updates quarterly to district officers and committee chairs, chapter presidents and secretaries, or maintain the Manual on the RMD Website.
6. Maintain a dated, chronological record of all Resolutions passed by the Board and HOD, in summary format, separate from and in addition to records of the meeting minutes.
7. To safeguard the District Documents of Incorporation and other district legal documents.
8. Attend all District Board and House of Delegate Meetings and LA training classes for Chapter Secretaries.
9. Maintain individual files for Chapter shows. The Secretary shall receive, evaluate, and respond to applications for BMI/SESAC licenses, issuing licenses as appropriate; and forwarding copies of the licenses and payments to the Society Office in Nashville. In so doing, he/she shall require that chapters be up to date at the time of application with reporting requirements, including tax submissions to the IRS (due May 15<sup>th</sup> for the preceding year), registration with the Secretary of State as a non-profit organization (due on the anniversary or bi-anniversary of date last renewed, depending upon state law), and annual review of the chapter financial status (due February 28<sup>th</sup> for the preceding year). The Secretary shall not license shows that would conflict with Society Conventions, or with established Rocky Mountain District Conventions and events. (01/01/2012)

10. Notify the Executive Vice President of chapters that are delinquent in their financial reporting and their incorporation status at the time of application for a show license; and shall notify the chapter of the delinquency. (01/01/2012)
11. File the annual reports to the Secretary of State for the District.
12. Maintain and keep the District pages on the Member Center up to-date to include the District meetings, contact address, leaders, dues and financial filings.
13. Perform other such duties as required by the District President and as outlined in the District Secretary Manual and the District Statements of Policy & Operations Manual.

### **17.3 Budget**

The budget for the District Secretary falls under that of the District President, and the Secretary is responsible to communicate his/her budgetary needs to the President.

### **17.4 Reports**

Twice each year, at the House of Delegates Meeting, the District Secretary shall report to the House of Delegates and the Board of Directors all show licenses issued or pending, including the date, chapter, and event to which the clearance applies. The report will also indicate the dates, nature, and site of all known Society and District functions.

The District Secretary shall maintain the District Calendar by submitting approved and pending show dates to the RMD Webmaster, for inclusion in the RMD Website calendar; and to the editor of the *Vocal Expressions* newsletter, for inclusion in the RMD Calendar of Events.

The Secretary shall provide activity, financial and other reports as the District President may require. (01/01/2012)

## **18 DISTRICT TREASURER**

### **18.1 General**

The District Treasurer has the responsibility for oversight in all District financial matters and for reporting to the District Board of Directors, District Operations Team and House of Delegates concerning the state of District finances.

### **18.2 Duties**

The duties of the District Treasurer include the following:

1. Attend all District Board and House of Delegate Meetings and LA training classes for Chapter Treasurers.
2. Serve as Chair of the District Finance Committee as required by the District President.
3. Keep current balances of District income and expenditures, and for specified district events as directed by the District President and Board. Make comparisons with the District annual budget, and designated events, on a quarterly basis or more frequently as directed.
4. Pay District bills in accordance with established District procedure.
5. In the event there is a District assessment, the accurate, complete and timely invoicing and collection of such assessments to chapters and members.
6. Ensure that the semi-annual Treasurer's report is included in the advance packet for each District Board of Directors and House of Delegates meeting.
7. File all financial reports due on behalf of the District including an annual financial review to the Society, and the 990-N to the IRS, by the prescribed deadlines.

### **18.3 District Budget**

1. The District Treasurer shall structure the District budget to support the District business plans.
2. The Treasurer shall prepare the District's annual budget, based on guidance from the DP and functional inputs from the DVPs, and present same to the Board of Directors and the House of Delegates.
3. The budget for the District Treasurer falls under that of the District President and the Treasurer is responsible to communicate his/her budgetary needs to the President.

### **18.4 Reports**

The District Treasurer has the responsibility to prepare the following reports:

1. Semi-annual Treasurer's report to the District Board of Directors and the House of Delegates.
2. Financial sections and other data for the DP's year-end report that is submitted to the Society.
3. Activity and financial reports to the District President and Board as required.

## **19 IMMEDIATE PAST PRESIDENT**

### **19.1 General**

The District Immediate Past President (IPP) is the primary link to the District legacy. His/her primary responsibility is to assist the District President in keeping RMD on a consistent course of action and vision. The IPP shall manage and oversee projects as assigned by the District President.

### **19.2 Duties**

The duties of the IPP include the following:

1. Assist the District President in maintaining an awareness of past District operations and policies, as well as current approved practices. In concert with the District President, the IPP shall maintain a sense of District and chapter needs, preferences, and capabilities.
2. The IPP will chair the Chapter Counselors Program.
3. At the request of the District President, the IPP shall manage and oversee projects and Operations Team functions.
4. In the event of a vacancy in the Operations Team, the IPP may be called upon to fill the vacant position until a suitable replacement can be identified and trained.

### **19.3 Budget**

The IPP will prepare and submit a budget for the Chapter Counselors Program for inclusion as part of the overall District budget, and will coordinate with the District Treasurer in this responsibility. The budget shall include travel expenses for travel within the District commensurate with membership duties, as well as those of the panel of Chapter Counselors and their related expenses. Budget review shall be accomplished and submitted to the Treasurer on a quarterly basis.

### **19.4 Reports**

He/she may be asked to submit timely and informative articles for each issue of *Vocal Expressions*, concentrating on news related to upcoming and past events and activities.

## **20 CHAPTER COUNSELOR**

### **20.1 General**

1. The current Immediate Past President will chair the Chapter Counselors Program. Chapter Counselors are drawn from the pool of past RMD Presidents to staff the program. They will serve chapters by request. They are appointed by the District IPP, in consideration of the recommendations of the DVP-CSLT, to establish and continue to serve as liaison with the assigned chapter on behalf of the District Board of Directors.
2. A Chapter will be assigned a Chapter Counselor upon request. Assignment may be based on a geographical area or with regard to particular talents of the individual Chapter Counselor (managerial, administrative, financial, public relations, etc.).
3. The Chapter Counselor functions as a consultant, facilitator and source of information and support from the District and Society. Chapter Counselors report to the IPP and may also assist other DVP's on specific assignments. Special attention may also be directed toward Chapters that can more immediately benefit from Chapter Counselor attention: "chapters of concern".
4. A Chapter Counselor is expected to exercise initiative in identifying opportunities to provide assistance to his/her assigned chapters and to share success stories with other Chapter Counselors.

### **20.2 Duties**

Duties of the Chapter Counselor include the following:

1. Become familiar with the BHS Healthy Chapter Initiative, LOPT materials and operations.
2. Establish at least monthly contact with the administrative leadership in the chapters assigned to him/her. Review and evaluate member recruitment efforts, new member orientation, conduct of chapter meetings, internal communications, chapter and social activities, etc.
3. Visit his/her assigned chapter's Board and/or Chapter meetings on at least a quarterly basis.
4. Assist chapter leadership to ensure participation in Society staff visits to RMD, other District and Society programs, and activities that will benefit the goals and needs of the chapter.
5. Encourage chapter participation in Society and District conventions and competitions.
6. Encourage utilization of District educational programs such as LA, Directors School, RMHC and others.
7. Assist the chapters in their public relations and internal communications efforts. Coordinate with the DVP-M&PR, as needed.
8. Attend the spring meetings, at the pleasure of the District President, to participate as an observer at the RMD Board and HOD meetings, and any Chapter Counselor orientation or in-service training sessions.
9. Attend the annual LA to participate in in-service training, and to interact with the leadership team of his/her assigned chapters.

### **20.3 Budget**

Assist the Immediate Past President in providing an estimate of operating expenses for inclusion in the annual District budget.



## **20.4 Reports**

Prepare and submit Chapter Contact Reports and submit them to the IPP in compliance with the due dates established for such reports.

Prepare and submit any other reports as the District President or DVP-CSLT may require.

## **21 OTHER APPOINTED POSITIONS BY THE PRESIDENT**

### **21.1 Credentials Chair**

The Credentials Chair shall be appointed by the District President with recommendations from the District Secretary. This individual will meet with all those who plan to attend the HOD meeting as visitors or participate in the meeting as official Chapter Delegates, ensuring that they possess the proper accreditation as described in the District Bylaws (Article VI, Section 6.06). The Credentials Chair performs the calculation to ensure a quorum and after the scheduled meeting start time notifies the President when a quorum for the transaction of business (30% of the total number of eligible Delegates) has been met in accordance with Article IV, Section 4.04 of the District Bylaws. The Credentials Chair's responsibilities will also include:

Provide the President with a roster of all attendees, defining each Delegate's name and chapter, and guests' names and chapters, on two separate lists.

Ensure that seating in the HOD meeting room is set up according to the following layout:

- District Board shall be seated at a head table facing the delegates, each with a title placard.
- The Parliamentarian shall be seated at a prominent position near the head table with a title placard.
- Delegates shall be seated in rows, at tables for writing and to hold chapter placards (space permitting), facing the Board head table.
- Non-Delegate visitors shall be seated in a separate gallery behind the Delegates, also facing the Board head table.

The Credentials Chair shall position himself at a table outside the door of the HOD meeting room, such that every entrant must pass by him closely for inspection and seating instructions, and to give each Delegate his/her appropriate chapter placard and any required handout documents.

Close the door after announcing that a quorum has been reached, and be seated inside at a position to monitor and control entrance and seating by any late arrivals.

### **21.2 Webmaster**

#### **21.2.1 Desired Background/Capability:**

- Technical skills to support the current platform and technologies of our District Website.
- In-depth knowledge of web servers, web programming languages, database development, Website management tools and database protocols.
- Knowledge and experience with installing, configuring, maintaining, tuning, analyzing and optimizing websites.
- Possesses an understanding of, and is committed to, the vision and mission of the Society.
- Demonstrates commitment to teamwork.
- Ability to work on multiple projects at the same time.
- Self-starter, with good oral and written communications skills.
- Responsive to all stakeholders in the website (District officers, district members, public inquiries).

### **21.2.2 Duties:**

- Establish and maintain a website that is attractive, up-to-date, secure, easily-navigated, well-tested, and responsive, for documenting and promoting the District’s achievements, history and upcoming events, also sharing articles of general interest to our members and the public.
- Make the website the primary location for district information and the “face” of the District.
- Provide frequent updates to website content, as provided by and coordinated by the District Vice President of Marketing & Public Relations (DVP-M&PR).
- Provide, and keep updated, email addresses for all District Officers and Chair People.
- Maintains an historical archive of all District Magazines in PDF form.
- Aids District Editor in producing a Web-based publication.
- Monitor website usage and trends
- Ensure that the website looks equally good and performs well on a multitude of browsers and platforms (e.g., Mac/PC and IE/Firefox/Safari/Chrome/Opera)
- Maintain version control of all website objects
- Work with DVP-M&PR to set graphical and style standards for the District website
- Works closely with the District VP-Events to insure complete and up-to-date information is available to all interested parties for each upcoming convention
- On call for emergencies which may arise for the website
- Keep current with technology releases
- Develop a path for future upgrades
- Make recommendations to the District Board for technology upgrades when needed
- Maintain the district website and all associated technologies within budget
- Document the website design and share all access paths, logins, procedures and work in progress with designated backup person(s) as appointed by the district.
- Select, establish and utilize other web services as needed for support of event registration, surveys, targeted email marketing, credit card processing, etc.

### **21.2.3 Coordination:**

The Webmaster directly communicates with: District Board, DVP-M&PR, DVP- Events, and other District VPs as needed.

## **21.3 Communications Manager/Director**

### **21.3.1 Duties:**

- Under the supervision of the VP-M&PR.
- A separate position that does not take in Marketing and PR.
- Would lead a team of 6-7 people who would be in contact with roughly five chapters monthly to find out what’s going on:
  - Would be talking to a chapter representative (editor, Webmaster, President, VP-M&PR),
  - Would read through newsletters,
  - Would check out chapter web pages,
  - Would check out chapter social media sites.

- Each team member would write a brief paragraph (not a published article) about anything of interest going on in his/her assigned chapter.
- This information would become immediately available to each chapter bulletin editor/webmaster, as well as the District bulletin editor and webmaster.
- The Communication Manager/Director is welcome to become involved with ***PROBE***, as he/she sees fit. It is not a requirement for a District Communication Manager/Director to be a member or to participate with ***PROBE***.

## **22 DISTRICT HISTORIAN**

### **22.1 Appointment and Duties**

Each year the District President shall appoint, for a term of one year, a District Historian who will be responsible for maintaining an up to-date history of the District, its Chapters and members, and a complete file of all documents of historical value. He/she shall also construct and display much of this material at conventions and various other district events, for member historical education. The office of District Historian may be an ongoing appointment, and is not restricted to a specific term of service. Contingent on satisfactory performance, the appointee should be retained if willing to serve.

### **22.2 Acquisition and Disposition of Records**

The following will be forwarded to the Historian to provide necessary material for the District history and archives:

All records in the possession of District board members, Chapter Counselors, vice presidents, committee chairs, and other District officials, which are more than one year old at the end of the District administrative year and which are not needed by those officers in conducting their assigned duties.

- Minutes of District House of Delegates and Board of Directors meetings.
- Various committees, project and other meetings proceedings.
- Reports from District officers, area counselors and committee people.
- All issues of the *Vocal Expressions* and District directories.
- Scoring summaries from competitions.
- Records of District awards and commendations by the District President.
- Chorus and quartet photos.
- All reports to the Society office.
- All official correspondence of historical significance.

In addition, the District Historian is authorized to collect information as required from Chapter Presidents and Chapter Secretaries, contact people of quartets or any member who possesses information or documents of historical value.

The Historian is authorized to purge the files of material that in his/her view has no historical value and does not warrant retention.

### **22.3 Development of Historical Data**

During the second year following the close of an administrative year, the Historian will produce, for the archives, a written chronological history of the District for that year. The history will include, but will not be restricted to:

- An account of District and International Preliminary competitions (with official results).
- A narrative summarizing Society, District, Chapter, and individual accomplishments and awards.
- District progress toward membership, finance, extension site development, and other goals.

## **22.4 Displays and Exhibits**

The Historian will develop and maintain custody of exhibits of a historical nature and arrange for their display at all major District functions. He/she will also make historical material or exhibits available to Chapters upon request if he/she is satisfied that the material will receive appropriate care, protection and timely return. Chapters requesting material or displays will be responsible for all costs of packaging and shipment.

## **23 LEADERSHIP ACADEMY (LA)**

### **23.1 Attendance**

Once each year, following election of the new Chapter officers, and prior to the beginning of their respective terms, all chapter officers-elect, and such District personnel as the President invites, are expected to attend LA. The purpose of LA is to train officers in their duties and responsibilities, and also for aspiring non-officers to attend leadership classes of interest or various other barbershop craft classes that may be scheduled.

### **23.2 Responsibilities**

1. The District President, through an appointed District LA Coordinator and the DVP-Events, will ensure coordination with the Society CSLT/LA Subcommittee and Society staff regarding facilities, additional courses which may be sponsored by the District, support to the Society faculty including local lodging arrangements, local adjunct faculty, hospitality and promotion for attendance by District Chapters. A general schedule for LA activities is included in the Society LA Coordinator's Manual.
2. The LA Coordinator, appointed by the DVP-CSLT, will establish a liaison with the Society CSLT/LA Subcommittee member responsible for LA oversight and also with the school's assigned Faculty Dean, to ensure that all faculty requirements are satisfied.

### **23.3 Site Selection**

Leadership Academy is held on two weekends in October/November. One Academy is held in the Salt Lake City area and the other is held in the Denver area.

### **23.4 Curriculum Augmentation**

1. The District has offered classes for chorus directors, show chair people, bulletin editors, Harmony Foundation and various other topics in the past, and many additional course topics have been discussed that might be offered in the future.
2. Additional district-operated classes to augment the LA core curriculum are encouraged, but the District must assume responsibility for all required curriculum development, faculty, facilities, equipment and staff associated with such offerings.
3. Class offerings augmentation must be accomplished in a manner that will not detract from effectiveness of the required LA faculty core training curriculum and presentation.

### **23.5 Cost of LA**

Responsibility for funding of LA events is borne by the District, and each Plateau CARA winner is given free registration for all of their officers.

## **24 COMPETITIONS**

### **24.1 General**

By district policy, the contest entry deadline for a competition is four weeks. This means a quartet or chorus competitor's CJ-20 entry form must be received by the RMD VP C&J on or before the Friday four weeks prior to a published contest start date.

### **24.2 Spring Event**

The RMD spring event is Rocky Mountain Harmony College (RMHC).

### **24.3 Fall Convention**

In conjunction with the RMD Fall Convention, the District conducts quartet and chorus competitions to determine the Men's, Women's and Mixed District Quartet Champion, District Senior Quartet Champion, Fall Novice Quartet Champion, and Men's, Women's, and Mixed District Chorus Champion. Quartets and Choruses regardless of ensemble classification, will also qualify to represent RMD at BHS international competition by being the highest scoring group or achieving the target qualification score per the current SCJC recommendations.

### **24.4 Other**

Other types of performance & competition events may be scheduled for quartets, choruses and ensembles in conjunction with these conventions, such as VLQ competitions, invitational competitions, etc.

### **24.5 Judging**

The assigned judging panel will judge all competitions in accordance with the Official BHS Contest Rules.

### **24.6 Competition Details**

#### **24.6.1 Next Generation Varsity Quartet Contest**

Varsity Quartets will be eligible to compete at the International Competition every year per current BHS qualification guidelines.

See section 29.12.1 for information on financial assistance for District representatives.

#### **24.6.2 Fall Quartet Competition**

The Fall Quartet Competition is open to all registered quartets regardless of ensemble classification in the District, except for previous champions as described below. The number of quartets competing in this competition shall not be limited. There shall be no previous qualifying or elimination competitions.

Quartets are judged on four different songs in two appearances unless there are more than ten contestants, in which case the first, or semi-final, appearance is an elimination round to reduce the number of quartets competing in the second, or final, appearance to ten. The District may exercise latitude in the number of finalist quartets (Articles V.C.1 & V.C.2, Official BHS Contest Rules).



**NOTE:** The traveling trophies and/or plaques will become the responsibility of the receiving quartet. It will be that quartet's duty to ensure that the trophy is properly engraved, that it is protected against damage, and that it is made available to the District Awards Chair for presentation at the next competition.

#### **24.6.2.1 District Quartet Competition**

With the exception of previous District Quartet Champions, the highest-scoring Quartet shall be declared the District Quartet Champion for the current year. A district champion will be named for a men's, women's, and mixed quartet as long as there is at least one participant in each. A district quartet champion is not eligible to compete in the district quartet contest again.

In order to register to compete as a Rocky Mountain District quartet, a quartet is required to have at least two RMD members who make their primary residence within the geographic boundary of RMD. The RMD President, who may confer with other officials, will perform adjudication of questions related to this eligibility requirement. (HOD 04/16)

#### **24.6.2.2 International Preliminary Quartet Competition**

Regardless of ensemble classification, all Society quartets adjudicated by at least a double-panel component of certified Society judges that meet or exceed the target score (Article V.D.3) shall qualify for the international contest.

If they choose, competitors will be allowed a second attempt to achieve the target score by competing in a second preliminary event. A second attempt automatically replaces the first attempt score except as noted for district representative selection in Article II.C.1.c.

In the event that no quartet from a district has attained the target score at the end of the final preliminary quartet contest in May, the district's highest scoring quartet that competed in its home district international preliminary quartet contest and met the minimum score (recommended by SCJC) shall qualify to represent that district in the international quartet contest. (Article II.C.1.a, II.C.1.b, & II.C.1.c, Official BHS Contest Rules)

See section 29.12.1 for information on financial assistance for district representatives.

#### **24.6.2.3 District Senior Quartet Competition**

With the exception of previous District Senior Quartet Champions, the highest scoring Senior Quartet regardless of ensemble classification in the first (semi-final) round is declared the District Senior Quartet Champion and will receive the traveling trophy. A district Senior quartet champion is not eligible to compete in the district Senior quartet contest again.

A senior quartet is one in which the youngest member is at least 55 years of age; and the cumulative age of the quartet is at least 240 years (based on Article I.A.2, Official BHS Contest Rules).

#### **24.6.2.4 International Preliminary Senior Quartet Competition**

The highest-scoring Senior Quartet regardless of ensemble classification in the first (semi-final) round shall be declared the District's representative to the International Senior Quartet Contest (Article II.D.1, Official BHS Contest Rules).

A Senior Quartet is one in which the youngest member is at least 55 years of age; and the cumulative age of the quartet is at least 240 years. These requirements must be met on the basis of birthdays reached on or before the day of the International Seniors Contest held in conjunction with the Midwinter Convention (Article I.A.2, Official BHS Contest Rules). (HOD 04/16)

A Senior Quartet that is unable to attend the fall convention Senior Quartet Contest may request permission to compete in another district's contest for score to qualify as RMD's representative to for the International Senior Quartet contest at the Midwinter Convention. Quartets wishing to compete out of district should inform their own DVP C&J (DRCJ) and request permission from the DRCJ of the district in which they wish to compete at least 10 days prior to the official entry deadline of the out-of-district contest for which entry is desired. (Article I.A.4, Official BHS Contest Rules). (BOD 7/98)

See section 29.12.1 for information on financial assistance for district representatives.

#### **24.6.2.5 District (Fall) Novice Quartet Competition**

The highest-scoring Novice Quartet, regardless of ensemble classification, in the first (semi-final) round is declared the District (Fall) Novice Quartet Champion.

A novice quartet shall be one in which no more than two members have ever competed in a contest sanctioned by an existing barbershop society (i.e., BHS, Harmony, Inc., SAI, BING, LABBS, etc.)

#### **24.6.3 Fall Chorus Competition**

The Fall Chorus Competition is open to all choruses in the District, except for previous International Champion Choruses regardless of ensemble classification, who are not eligible to compete for the international championships to be awarded for the two contest cycles (normally two years) following the year in which the chorus won the international championship. (Article I.B.6, Official BHS Contest Rules). The number of choruses competing in this competition shall not be limited. There shall be no previous qualifying or elimination competitions.

Choruses are judged on two different songs in one appearance.

**NOTE:** The traveling plaques and/or trophies will become the responsibility of the receiving chapter. It will be that Chapter's duty to ensure that the trophy is properly engraved, that it is protected against damage, and that it is made available to the District Awards Chair for presentation at the next chorus competition.

#### **24.6.3.1 District Chorus Competition**

The number of choruses competing in this competition is not limited. If, in the future, there is a need for limiting the number of choruses, or for the establishment of division competitions, the Board of Directors and the House of Delegates shall enact a timely change to allow proper notification of all District Chapters prior to the affected competition date.

In the event that future restrictions are set, any currently qualified International chorus representative shall be given a 'bye' unless that chorus declines to compete. Likewise, if that chorus is ineligible to compete by reason of being the current International chorus champion, it shall also be ineligible to compete in the additional District competition.

Choruses will compete by "plateau" based upon the number of chapter members as of the June 30 membership report generated by the Society office. District plateau champions will be selected regardless of ensemble classification. These plateaus have been established as follows:

- Plateau I - 76 or more members
- Plateau II - 41 to 75 members
- Plateau III - 26 to 40 members
- Plateau IV - 25 or fewer members

Riser changes will occur during the chorus contest as needed and performers will be allowed to decide ahead of time the number of risers they wish to compete on.

Traveling trophies will be presented to the winners of each plateau.

The Most Improved Chorus will receive a traveling plaque trophy.

The District Champion Chorus shall be that chorus scoring the greatest number of points in the contest regardless of the plateau in which it competed. It shall be eligible regardless of previous championships. It shall be known as the Rocky Mountain District Champion Chorus for the current year. The highest scoring men's, women's, and mixed chorus will all be named District Chorus Champion for that year.

The District Champion Chorus shall receive the Rocky Mountain District Chorus Traveling Trophy. See Section 29.12.1 for information on financial assistance for representative chorus.

The Most Improved Chorus regardless of ensemble classification, is determined by identifying that chorus which has the greatest improvement in its score (on a percentage basis) when compared to the immediately previous year's chorus competition scores. A chorus shall not be eligible for the Most Improved Chorus competition if it received a "0" (zero) total score in any category, or was disqualified, in the previous competition. The Most Improved Chorus shall receive recognition as such and shall receive the Most Improved Chorus traveling trophy. (BOD 4/98)

#### **24.6.3.2 International Preliminary Chorus Competition**

Regardless of ensemble classification, the highest-scoring chorus competing in the International Preliminary Chorus Contest shall qualify to represent the District in the International Chorus Contest. In addition, all Society choruses that meet or exceed a target score adopted by SCJC and CEO, shall qualify for the next international chorus contest. (Article II.F.1.a & II.F.1.b, Official BHS Contest Rules).

In the event that the qualifying chorus declines to compete in the International Chorus Competition, the next highest-scoring chorus that competed in the International Preliminary Chorus Contest will be invited to replace the qualifying chorus, provided it earned the minimum score. (Article II.F.2.a, Official BHS Contest Rules).

## **25 CONVENTIONS**

### **25.1 General**

The District shall hold two events each year to conduct such activities as may have been determined by the BOD. A multi-year schedule of upcoming conventions will be distributed at Board meetings as it is updated.

### **25.2 Format**

The format of each convention shall be established by the District Conventions Director, Conventions Team and the BOD.

**NOTE:** Quartet and Chorus evaluations will be held as a part of each competition and will be scheduled by the Contest Administrator and the Vice President-Contest & Judging.

### **25.3 Special Activities**

Special activities should be included to provide convention participants, particularly non-competitors, with a number of options to enhance their convention experience. Craft sessions, special music contests or activities such as comedy quartet contests, novelty quartet contests (shortest, tallest, heaviest, oldest, etc.), non-competitive chorus performances, tag singing, and wood-shedding should be considered during non-committed time periods. Special activities for families and those accompanying attendees should also be included whenever possible.

### **25.4 Policy for Conventions Planning**

Approved policy pertaining to the conduct of these conventions and competitions is contained in the District Events Manual. Conventions are the sole responsibility of district management. Overall accountability for conventions management rests with the Vice President – Events, with hands-on management responsibility through the District Conventions Director. Convention events and specific duties will be managed by a Convention Team, which includes the resources host organization, as defined in the Conventions Manual. (HOD 9/97)

Planning and budgets for both International Preliminary and District Conventions and competitions shall be prepared and submitted for BOD approval, as far in advance as is possible. A lead-time of at least two (2) years is recommended. The Vice President – Events shall maintain an active calendar of events and of the status for RMD conventions. (HOD 9/97)

Chapters or other approved organizations selected to provide host resources and services shall secure a copy of the Convention Manual, and will proceed under leadership and authority of the Vice President – Events and the District Conventions Director. Care should be taken to address all pertinent items and provide complete and accurate data for consideration by the BOD and HOD. (HOD 9/97)

1. Convention Sites and Host Resource Organization(s) Approval(s)
2. Recommendation for the site approval of a District Convention shall be made to the HOD by the District Board of Directors after review and consideration of the recommendations of the Vice President – Events. Decisions regarding the convention sites will be made by the HOD. It is the intent that convention site cities will ensure that facilities' technical performance

standards, membership travel ease and both event financial performance and conventioners' economies are emphasized. (HOD 9/97)

3. Host resource organization(s) approval for conventions will be made only to a chapter in good standing with the Society, or such other organization(s) as may be approved by action of the BOD and/or the HOD. (HOD 9/97)

## **25.5 Policy on Hosting Conventions**

The host resources organization shall study and understand the Conventions Manual, and develop checklists to ensure that all necessary items have been addressed and effective implementation ensured.

## **25.6 Policy on Administration and Management of Conventions**

Adherence to the policies and guidelines found in the District's Convention Manual will do much to ensure a successful event. Periodic review of the Manual as event arrangements are developed and implemented will minimize deficiencies in administration and management.

## **25.7 Duties of the District Conventions Director and Convention Team**

The duties of the Conventions Director and of the Convention Team committee chairs and coordinators are outlined in the Rocky Mountain District Conventions Manual. Budget, Financial Statements and Convention Checking Account

1. After the convention site has been recommended by the Vice President – Events, a preliminary operations plan and budget shall be developed. The District Conventions Director and Vice President – Events will, in conjunction with the proposed host organization, review and revise the preliminary budget for presentation to the BOD and HOD at the earliest scheduled meetings possible prior to the convention. Within 45 days following the convention, the District Conventions Director will submit a final operations report and financial statement to the District President, the Vice President – Events and the District Treasurer.
2. The District Treasurer will serve as Convention Treasurer.
3. All convention accounting will be handled through the District bank account. (BOD 11/02)

## **25.8 Special Convention Directives**

1. All net proceeds from the Barbershoppers Shop and afterglows at RMHC and the fall District conventions shall be retained by the District.
2. The Fall Convention shall be proposed, planned and organized by the RMD VP – Events Planning who will identify venues and locations that are determined to be financially viable for the District.
3. RMD will provide every new member who joins the Society and RMD with a certificate that provides him free registration to any District sponsored event, RMHC, or District convention. The certificate is valid for one year from the date of issuance, and it must be presented at the time of registration.
4. District officers, committee chairs and convention staff will have their names authorized on the headquarters hotel master billing room block which is exempt from state sales tax in most states of the district. Each person is responsible to contact the hotel and confirm and guarantee his/her own room. Lodging sales tax will not be reimbursed to people who fail to accomplish this within the announced six-week window before the deadline date. (BOD 11/99)

5. Individual registration forms and promotional materials shall be on the RMD website for the fall convention, RMHC/spring event, and to all chapter officers for LA. (BOD 7/2001)

## **26 DISTRICT AWARDS AND RECOGNITION PROGRAM**

### **26.1 General**

The District awards and recognition program coordination is the responsibility of the Chair of the Awards Committee under the general direction of the VP-M&PR. The Chair of the Awards Committee is appointed by the District President with consideration of recommendations from the VP-M&PR.

### **26.2 Duties of Chair, Awards Committee**

The Awards Committee Chair is responsible for the timely acquisition of all certificates, plaques, trophies and other mementos authorized for presentation in recognition of special achievements. He/she must ensure that "traveling" trophies are assigned with a person who is accountable to acquire and deliver it from previous recipients for presentation at the appropriate event. He/she shall purchase new plaques and trophies, as necessary, and coordinate with the Treasurer to ensure timely payment to suppliers. Plaques and trophies so acquired should be comparable in size and design for consistency with those presented in previous years for the same award. The Awards Committee Chair will ensure that candidates for the Barbershopper of the Year (BOTY) are identified in timely fashion by the BOTY committee and referred to the past BOTY's group for vote, in accordance with Paragraph 23.14 below. He/she will coordinate with the District Harmony Foundation Chair regarding awards for that program. He/she will also coordinate with the DVP-M&PR to generate appropriate recognition for chapter bulletin and public relations award recipients.

### **26.3 Awards**

The District has authorized the following awards:

#### **26.3.1 Quartet:**

District representative(s) to the International Quartet Competition

District Senior Quartet Champion

Novice Quartet Champion

District Champion and 2nd and 3rd place quartets

District Senior Quartet representative to the Midwinter Quartet Competition

District Next Generation Varsity Quartet Champion and representative to the International Next Generation Varsity Quartet Competition

#### **26.3.2 Chorus:**

District Chorus Champion

Plateau Chorus Champions

Most-Improved Chorus

District representative to the International chorus competition



### **26.3.3 Individual:**

Barbershopper of the Year (BOTY)

Hall of Fame recipients.

### **26.3.4 Other:**

Chapter Activities Recognition Award (CARA) (each of four Plateaus)

Special recognitions and awards as directed by the District President

<b>NOTE:</b> Typically presented at the HOD and announced at the Awards program.
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### **26.3.5 Quartet Awards**

#### **26.3.5.1 District Quartet Champion**

This award is presented annually at the Fall District Convention to that quartet accumulating the highest point total in the competition. The quartet shall receive a traveling trophy to be retained in their possession for one year, and each quartet member shall receive a lapel pin and a plaque.

The announcement of the champion quartet will be made by the Contest Administrator.

The trophy and plaques for the District Champion Quartet will be presented by the immediate past District quartet champion members, or in their absence by the District President. The District President will present the lapel pins to each member.

#### **26.3.5.2 District Second and Third Place Quartets**

Members of the quartets finishing in 2nd and 3rd place at the Fall District Convention will each receive plaques.

The announcement of the 3rd and 2nd place quartets will be made in that reverse order by the Contest Administrator.

The plaques will be presented by the District President.

#### **26.3.5.3 Senior Quartet Champion**

This award is presented annually at the Fall District Convention to that senior quartet accumulating the highest point total in the first round of the competition, who has not previously won the award.

The announcement of the champion quartet will be made by the Contest Administrator.

The Senior Quartet Champion will receive the traveling trophy to be retained in their possession for one year, and each member will also receive a plaque. (BOD 7/97) Awards will be presented by the District President.

#### **26.3.5.4 Senior Quartet representative to the Midwinter International Seniors Competition**

This award is presented annually at the Fall District Convention to that senior quartet accumulating the highest point total in the first round of the competition.

The announcement of the Senior Quartet representative to the Midwinter International Senior Quartet competition will be made by the Contest Administrator.



The plaques to each quartet member will be presented by the District President.

#### **26.3.5.5 Novice Quartet Champion**

This award shall be presented at the Fall District quartet competition. The Novice Champion quartet shall receive a plaque for each member and a traveling trophy to be retained in its custody until the next competition.

This award is presented annually at the Fall District Convention to that novice quartet accumulating the highest point total in the first round of the competition, who has not previously won the award.

The announcement of the winning quartet will be made by the Contest Administrator.

The awards will be presented by the immediate-past novice quartet champions or in its absence by the District President.

#### **26.3.5.6 International Preliminary Quartet Competition**

Members of the quartet(s) selected to represent the District at the International competition will each receive plaques.

The announcement of the quartets qualifying to participate in the International competition, either on the basis of the District's allocation or by a pre-determined qualifying score, will be made by the Contest Administrator.

The plaques to members of each qualifying quartet will be presented by the District President.

### **26.3.6 Chorus Awards**

#### **26.3.6.1 District Chorus Champion**

The chorus receiving the most points in the District competition, regardless of the plateau in which it is competing, will be declared District Chorus Champion for the current year and will represent the District at the International competition the following year.

The announcement of the winner will be made by the Contest Administrator.

The chorus champion will be presented with the traveling trophy presented by the President of the Chapter that won the trophy the preceding year. If the winning chorus is succeeding itself as champion, the trophy may be presented by the District President.

In accordance with the Society C&J Rules, a District chorus champion who chooses not to compete in the International competition, regardless of the reason for that decision, may be replaced as the District's representative by the International C&J Committee. The chorus with the next highest point total as shown by the records of the Contest Administrator will be the District's representative.

#### **26.3.6.2 District Small Chorus Champion (at this time this category is suspended).**

#### **26.3.6.3 Chorus Plateau Champions**

The chorus scoring the most points in the plateau in which it is eligible to compete will be declared the champion in that plateau. The champion chorus in each plateau will receive a traveling trophy to be retained for one year. The trophy will be returned, in person, or shipped not later than 30

days prior to the fall convention, to the District President at the end of the contest year for presentation to the next winning chorus.

The announcement of the winning choruses in each Plateau will be made in reverse order, from Plateau 4 to Plateau 1, by the Contest Administrator.

Presentation of the traveling trophies for each plateau will be made by a representative of the previous winning chorus for that Plateau, or if the winning chorus is succeeding itself or the previous year's winner is not present, by the District President.

#### **26.3.6.4 Most Improved Chorus**

The chorus that demonstrates the greatest improvement as determined by a comparison of its score with that achieved the previous year (on a percentage basis) will be declared the "most improved."

**NOTE:** A chorus shall not be eligible for the Most Improved Chorus competition if it received a "0" (zero) total score in any category, or was disqualified, in the previous competition. The Most Improved Chorus shall receive recognition as such and shall receive the Most Improved Chorus traveling trophy. (BOD 4/98)

The announcement of the Most Improved Chorus will be made by the Contest Administrator.

The traveling plaque trophy will be presented to the winner by the District President. The trophy will be returned, in person, or shipped not later than 30 days prior to the fall convention, to the Awards Chair at the end of the contest year for presentation to the next winning chorus.

#### **26.3.7 Individual Awards**

##### **26.3.7.1 Barbershopper of the Year (BOTY) Award (BOD 06/07)**

1. Any member in good standing of the RMD who has made a significant contribution primarily of the good of barbershop in the Rocky Mountain District, with secondary contributions to the Society or his/her Chapter, may be considered for the RMD BOTY AWARD. Posthumous nominations and/or selection of previously active members are permissible.
2. The award is presented at the District's spring event (RMHC) in recognition of accomplishments and overall record as a Barbershopper; principally during the previous year.
3. The award consists of a plaque and a jeweled BOTY lapel pin provided by the District and presented by the District President. If the District President is to be the recipient, the presentation may be made by an appropriate alternative or by the District's SBM.
4. The Selection Committee for the award will consist of the Awards Committee Chair and all previous BOTY recipients who are registered as a member of an RMD chapter (other than Frank Thorne). The Awards Committee Chair is responsible for administering the nomination and selection process objectively and efficiently. He/she shall inform all those participating in the selection that confidentiality of the nominees' names is to be preserved throughout the nomination and balloting process. The Awards Committee Chair shall also keep the recipient's name confidential until the award is presented.
5. The Awards Committee Chair shall, by January 10th, solicit nominations for the award from each Chapter President, each member of the District Board, and all past Barbershoppers of the Year currently registered as members of an RMD chapter (other than Frank Thorne). Each nomination shall be accompanied by a comprehensive written resume detailing the nominee's

contributions and accomplishments. The Selection Committee may request additional information as needed.

6. All nominations shall be reviewed on or about March 1 by the Selection Committee members, and they shall each submit a ballot with a first- and second-choice to the Awards Committee Chair for tabulation. Each first-choice vote will have a value of five (5) points, and each second-choice vote will have a value of three (3) points. The nominee receiving a majority of points will be declared the recipient of the Barbershopper of the Year award. In the event of a tie, the Awards Chair will cast a ballot to determine the recipient.
7. The BOTY award may be presented to any previous recipient without limitation should that person be deemed worthy of the award. (BOD 4/95)

### **26.3.8 Other Awards**

#### **26.3.8.1 Chapter Activity Recognition Awards (CARA)**

1. The Chapter Activity Recognition Award is presented to a chapter in each plateau, in recognition of that chapter's outstanding level of participation across multiple categories of activity, each quantified by points. The program is administered by the DVP-CSLT.
2. Each plateau chapter award recipient receives a certificate for four tuition scholarships for attendees in core LA classes, to be presented upon arrival for use at the next subsequent LA/COTS event.
3. Plateau award recipients are announced in reverse order from Plateau 4 through Plateau 1 by the DVP-CSLT. The District President presents each chapter recipient with a traveling plaque and its four scholarship certificates.

#### **26.3.8.2 Hall of Fame (HOF) Award (HOD 9/19)**

##### **26.3.8.2.1 Qualification and Award Purpose**

The purpose of the HOF Award is to give recognition and honor to those who have made exceptional, long-standing contributions to Barbershop singing in Rocky Mountain District.

Membership in the HOF shall be limited to persons whose contributions to Rocky Mountain District span not less than 10 years. Their contributions shall have been on various levels of the organization. These levels include Chapter, District and Society. Their contributions may be in musical activities and/or administrative activities.

##### **26.3.8.2.2 Nomination**

Nominations shall be made by any District Officer. Any member of Rocky Mountain District may prepare a nomination for submittal through a District Officer eligible to submit said nomination. All nominations shall be in writing and include detailed qualifications. Nominations shall be submitted to the RMD HOF Chair.

##### **26.3.8.2.3 Selection**

The RMD HOF Committee for the RMD HOF Award shall be a committee of past recipients of the award. The HOF Committee Chair shall be the most senior awardee, or a chair agreed upon by the committee members. In the absence of (at least) three past recipients, the HOF Committee can be made up of three RMD Immediate Past Presidents to make up the committee of 3 members, as

appointed by the RMD President. The Chair of the RMD HOF Committee shall coordinate with the RMD Awards Chair, who is appointed by the District President annually.

Nominations shall be pre-screened by the RMD HOF Chair and Committee, and the nominees shall be reduced to not more than three, or, if necessary, reduced by secret ballot. If not selected, nominees may be considered for two successive years, after which they are removed from consideration unless re-nominated.

The RMD HOF Committee will meet with the BOD at the time of the BOD meeting held at RMHC and will present up to three nominees (or one quartet), after which the BOD (fiduciaries) will go into “Executive Session” and select the HOF recipients for the designated year at the fall convention.

#### **26.3.8.2.4 Award and Recognition**

The HOF honoree(s) shall be announced and their award(s) presented as the judges tally the scores for the District Quartet Finals Contest held at the District fall convention. The RMD HOF Committee Chair makes the announcement, with appropriate remarks. The DP presents the award(s), consisting of an individual acrylic/glass award(s), a royal blue blazer(s), and a recognition HOF name badge(s). The awards, name badges, and blazers shall be ordered by the Committee Chair and are at the expense of the District.

The general appearance and design of the acrylic/glass award and blazer shall not change over the years thus preserving the special honorary significance and tradition associated with the award. Past honorees will be encouraged to wear the blazers and badges with pride during future RMD Saturday night contests/performances. Past honorees and the new recipient’s family and friends are encouraged to be onstage at the time of introduction of the new inductee to the Hall of Fame.

The RMD Awards Committee Chair shall be responsible for procuring the acrylic/glass awards, blazers and special name badges. The acrylic/glass awards are to be suitably engraved when presented to the honorees (an example as provided below). All associated expenses are to be submitted to the District President for approval and payment from the District operating budget.

### **ROCKY MOUNTAIN DISTRICT**

Proudly Designates

**JOE SMITH**

As a Member of the

Rocky Mountain District Hall of Fame

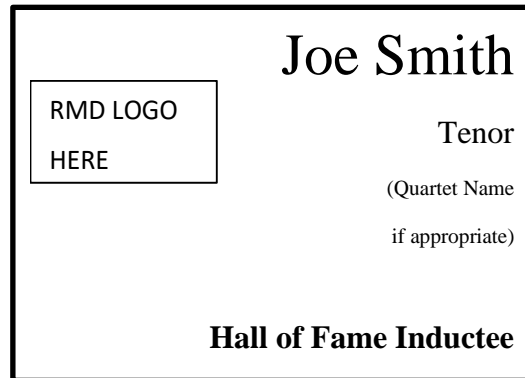
**IN RECOGNITION OF EXCEPTIONAL AND CONTINUING CONTRIBUTIONS TO  
THE ROCKY MOUNTAIN DISTRICT**

**AND FOR ENCOURAGEMENT OF BARBERSHOP HARMONY**

[Year]

The above depiction of the inscription is for general format only and is not intended to show the necessary details, such as font size or type, etc. A larger inscription could become necessary when more engraving is required, as is the case when a quartet is honored. If a quartet is honored, it would be instead of three separate individuals, in an effort to be considerate of the District's finances.

Each honoree shall also receive a special HOF plastic name badge (3-1/2 x 2 inch), to be ordered from the Society's Harmony Marketplace and to include the District's (color) logo in place of the Society logo. The badge shall be white with blue lettering and similar to Stock # 5151.



(HOD 9/19)

### **26.3.8.3 Marco Gonzalez Audience Favorite Award (Quartet – Fall Convention)**

The Marco Gonzalez Audience Favorite Award was established in January 2019 by The Summit quartet (RMD 2007 quartet champions), and is a traveling trophy fully funded by The Summit quartet in honor and memory of their bass, Marco Gonzalez. It is the trophy that The Summit received when it won Audience Favorite at the Buckeye Invitational. Since that was the last year of the Buckeye Invitational, there was no need for the traveling trophy to be returned. It will be updated for the RMD award. It will be awarded to the "audience favorite" at the end of each RMD Fall Convention final quartet contest.

Marco's life on earth ended far too early after a valiant battle with cancer. He was living in Huntsville, Alabama where he was caring for his ailing parents when he became ill, and despite his circumstances, he motivated The Summit to take one more run at qualifying for International quartet competition. They qualified and competed on the International stage in 2016, the ultimate accomplishment (of many) in the 14-year history of The Summit. Marco lived by the maxim that "singing changes lives", beginning with his own, and extending to everyone he could touch through his performances, and that legacy lives on as we annually recognize the quartet that touches the most lives through their performance at the RMD quartet contest.

The Marco Gonzalez Audience Favorite Award will be determined by one hundred random ballots which will be collected at the end of the quartet finals. The results will be tabulated and the award presented during the awards ceremony after the announcement of International qualifiers and the scoring placement awards.

## **27 DISTRICT PUBLICATION - *VOCAL EXPRESSIONS***

### **27.1 Purpose**

In an effort to provide timely news of special interest to District members, a District publication, to be known as the *Vocal Expressions*, shall be issued at least quarterly. Currently it is District policy to produce the magazine bi-monthly (6 issues per year). All issues of the *Vocal Expressions* shall be posted electronically on the RMD website.

Aside from non-recurring special mailings and The Harmonizer published by the Society office, the District publication is an additional vehicle for communicating with the general membership along with e-mail blasts and other social media such as Face book, Twitter, etc. Its regular issuance is critical for the development and maintenance of an informed membership. (BOD 10/00 and 11/04)

### **27.2 Editor**

The Editor shall be appointed by the District President, for a term of one year and may be re-appointed without limitation. The Editor may recommend, for appointment by the President, an Associate Editor.

### **27.3 Duties**

1. The District Editor serves as the communication arm of the District Board; helping to distribute information about the operation of the District to Chapter members.
2. The Editor solicits articles, edits material that has been submitted, and writes articles of general interest to District membership. He/she controls the format of the publication, with guidance from the VP-M&PR and the Board of Directors.
3. The Editor shall include in all District publications, but not be limited to, information about upcoming events and activities, such as competitions, conventions, shows, music festivals, inter-Chapter activities, or camp-outs; providing all information necessary to permit and encourage participation. He/she should publicize LA/COTS and RMHC schools well in advance of the activity and include information about costs, curriculum, faculty, travel and housing arrangements.
4. The District Editor shall work with the Secretary to publicize, in advance, the meetings of the Board and House of Delegates, including information about issues to be considered. He/she may work with the Secretary or others to prepare articles about the business conducted at the meetings and decisions reached.
5. Provide information and materials that will be helpful and of interest to Chapter Bulletin Editors.
6. Answer, or acquire the information to answer, questions posed by Chapter Bulletin Editors.
7. The District Editor is welcome to become involved with *PROBE*, as he/she sees fit. It is not a requirement for a District Editor to be a member or participate with *PROBE*.

### **27.4 Content**

The publication may contain, but not be limited to, the following material:

- Message from the District President
- Report of BOD and HOD meetings

- Report on conventions and competitions
- Report on LA/COTS
- Report on RMHC schools and similar activities
- Calendar of approved shows and other events
- Articles from District officers and committee chairs
- News stories and articles of general interest
- Notices and announcements of importance to the general membership
- News of Chapter and quartet activities
- Photos, features, etc., as the Editor deems appropriate
- Paid advertisements
- Editorial comments of appropriate tone

### **27.5 Distribution**

Notification of availability of the publication shall be e-mailed to every member of the District, International officers, and staff members, Editors of other District bulletins, and others as the Editor may deem appropriate. It shall also be posted on the District website.

## **28 ETHICS**

### **28.1 General**

The Ethics Committee is appointed by the President and is usually chaired by the incumbent Immediate Past President. The committee members are typically past District Presidents or other senior District officials. The committee receives reports regarding violations of the Code of Ethics or other misconduct on the part of Chapters or members, conducts investigations, or acquires such additional information as may be required for a proper evaluation of a given situation. It then recommends appropriate action to the District Board of Directors for disposition.



## **29 FINANCIAL MANAGEMENT**

### **29.1 General**

1. The District's mandated and discretionary programs and activities are to be administered in a fiscally responsible manner. Discretionary programs and activities will be pursued by the District only when there is a demonstrated need or benefit. The District's discretionary programs and activities are to be self-supporting to the extent practicable, with participants or beneficiaries funding operating expenses through registration fees or direct billing. Cost effective management will be a priority. Program administrators or activity leaders will be responsive to cost control opportunities.
2. The financial affairs of the District are to be managed in a manner to ensure unencumbered cash balance of not less than six months, or more than twelve months, operating expense.
3. All proposals submitted to the Board to establish, eliminate or modify a District responsibility, service, function or activity should include an estimate of the effect of such proposal on the District budget.
4. Each line item of income and expense in the District budget may be assigned to a member of the District Board for control of expenditures, consistent with his/her organizational responsibilities.
5. When an individual is responsible for two or more programs, services, or activities, the cost of, and accounting for, each function shall be maintained separately.
6. Amounts budgeted for a program, service or activity shall not be considered an absolute limitation, but it is expected that the responsible officer will not permit expenses to exceed the amount budgeted (without approval of the District President, based on the recommendation of the District Treasurer).
7. The District President and the Treasurer shall be notified immediately when the officer responsible for a function or program determines that the estimated income or expenditure budgeted for that function will be significantly changed.
8. A District Finance Committee may be appointed by the District President to provide oversight and advice to the Board and the President relative to the financial management of the District. The District Treasurer, as the principal financial officer of the District, shall chair this committee. This committee, if appointed, shall be responsible for:
  - Analysis of District expenditures and income.
  - Review of the annual preliminary budget proposal.
  - Advice to the Board and House of Delegates on fiscal policy and the financial health of the District.
  - Review of the annual audit of the financial records.

**NOTE:** In practice, the District BOD has functioned as the finance committee.

### **29.2 Revenue Sources**

#### **29.2.1 Member Dues**

1. To ensure a dependable source of funds for the operation of the District and to subsidize member services, events and programs, each member of each chapter shall pay District dues in the amount established by the House of Delegates. Such dues shall be paid to the Society

Office in response to per-capita membership billings. The Society Office shall then remit the District dues, less collection fee, to the District Treasurer.

2. Only one District dues payment will be required of RMD members who belong to more than one chapter within the District. (HOD 9/90) 50-year members are waived from the obligation to pay district dues. (HOD 9/98)
3. Annual District dues are \$33 for regular members, \$28 for seniors and \$21 for students. First year membership dues are \$0, and each subsequent year are \$16.50 until age 26. (HOD 11/06)

### **29.2.2 Assessment**

The District House of Delegates, in the September 1981 session, established a policy whereby a special annual assessment may be levied upon chapters after consideration of anticipated income from regular sources and projected needs for the coming year. An assessment, not to exceed \$19.00 per member, may be imposed on all District chapters. The assessment will be based on the Society Office's membership "print-out" totals for each chapter on the final day of the preceding year. The assessment will be considered by the Board of Directors in conjunction with the review of the proposed annual budget. The Board shall submit its recommendation to the House of Delegates, which must approve any assessment levied.

<b>NOTE:</b> Effective 1/1/02 there is no current RMD assessment.
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### **29.2.3 Interest Income**

The Treasurer will ensure that District cash accounts are deposited in interest-bearing accounts to the extent possible and that District reserves are invested in such manner as to yield the most favorable rate of return with consideration for security and liquidity.

### **29.2.4 Conventions**

#### **29.2.4.1 Fall Convention**

The Fall Convention is a major source of District annual revenues and is run by the District. The host organization will receive a fixed fee of \$2000 to run the Convention. (BOD 11/03)

#### **29.2.4.2 RMHC**

RMHC will be managed and staffed by the District.

### **29.2.5 Donor Choice**

Donor Choice funds are disbursed twice per year by Harmony Foundation International; typically, in the fall and spring. It is a portion that donors can elect to have returned to their chapter and/or their District in whatever percentages they so choose. The portion of Donor Choice funds that are returned to the RMD have been earmarked as "dedicated funds" for District (or chapter) youth and education programs. Chapters can request funding through the DVP-YIH for chapter youth and education programs. Although funds are available, they cannot be committed until recommended by the DVP-YIH and approved by the RMD BOD. The proposal may receive full or partial funding depending upon the amount of funds to be disbursed and the number of applicants. All chapter and District youth and education programs are eligible for funding. The DVP-YIH will solicit proposals each year at his/her discretion and at a time he/she determines.

### **29.2.6 Miscellaneous Receipts**

There are several other sources of revenue, which provide modest returns to the District, such as advertisements in the District bulletin.

### **29.2.7 Notes**

Not affected are other net revenues (after expenses), generated during the conventions to include, but not limited to:

- Barbershop Shop, or on-line Barbershop Shop (after expenses),
- Program advertising sales (after printing costs),
- The following are possible income sources to the host chapter:
  - Golf tournaments, tours, other merchandise sales, etc., which shall accrue to the host organization(s).

Authorization for and pricing of Society items, quartet/chorus recordings, and other merchandise sold at conventions are required to comply with the provisions of RMD Policy Section 35: "Sale of Items at District and Chapter Events."

## **29.3 Budget Preparation and Adjustment**

1. The District Board of Directors will develop a standing multi-year program that is updated annually, and budget for review and HOD approval at the Fall Convention. The resulting budget will contain a progress report on the Annual Business Plan, an updated financial report for the current year, and a preliminary business plan narrative and budget for the upcoming year, plus the following year. The document will essentially bring forward the previous year's multi-year program and budget, revising it as necessary, and adding an additional year. The multi-year program and budget will be within the framework of, and be guided by, the long-range plan.
2. The preliminary multi-year program and budget, together with appropriate explanatory notes, shall be provided to the District Secretary in sufficient time to be included in the packets sent to each chapter delegate and each District officer and committee chairs in advance of the Fall Convention HOD meeting. Thus, all participants may come informed and instructed, if necessary, on program and budget positions. The District budget should be accompanied by detailed budgets of the upcoming conventions, RMHC schools, and other major programs or activities, as supplementary fiscal data.
3. The preliminary budget proposal shall be discussed in detail at the fall meeting of the Board and will be adjusted as necessary. A formal budget proposal will then be presented to the House of Delegates, which will then review, revise if warranted, and approve the budget by majority vote.

## **29.4 Control of Expenditures**

All individuals entitled to reimbursement for expenses incurred in the conduct of District business, shall submit a timely signed RMD expense voucher, with receipts attached, for approval as outlined below:

1. District officers shall submit their vouchers to the District President for approval. The President will forward vouchers approved, in whole or part, to the Treasurer for payment. At the

discretion of the District President, submissions can be made directly to the Treasurer, with the understanding that electronic approval is appropriate.

2. Individuals serving in District positions through appointment should submit their vouchers to the appropriate Vice President for approval. The Vice President will approve the voucher, in whole or part, and forward it to the President for approval and transmittal to the Treasurer for payment. The Vice President will advise the claimant and the President of the basis for rejecting any portion of a claim for expenses.
3. Members of a committee, other than the chair, should submit their vouchers to the committee chair for approval. The chair will approve the voucher, in whole or part, and forward it to the responsible Vice President or to the President for approval and transmittal to the Treasurer for payment. The committee chair will advise the claimant and the President of the basis for rejecting any portion of the claim.
4. The District President may restore any claim rejected by another District officer or committee chair on his/her own initiative. Claimants may appeal a claim rejected, in whole or part, to the District President. Decisions of the District President may be appealed to the Board. Decisions of the Board are final.
5. The Treasurer shall have the authority to deny payment on claims for expenses if the expense voucher is submitted later than 90 days after the expense is incurred.
6. The Treasurer shall have the responsibility for collection of funds due the District from chapters; including any assessments.
7. Exceptions to this expense reimbursement policy require concurrence and approval of both the District President and the Treasurer. (BOD 11/96)

## **29.5 Expenses of District Officials, Committees and Volunteers**

All reasonable and authorized expenses incurred by District officers, committee chair people, in and out of District RMHC faculty members, and other appointed officials in the discharge of their duties and assignments on behalf of the District and its members, shall be reimbursed from District funds in accordance with the policies described below (specific instructions for judges reimbursements are outlined in 14.2.1). Reimbursement is administered using the RMD Official Expense Voucher (Appendix B and on the District Website). These officials are not compensated for the time they devote to District affairs. Service to the District should not become a personal financial burden.

Those in service of RMD are entitled to reimbursement for expenses as follows:

- Basic cost of a hotel room (single rate plus tax) when an overnight stay is necessary. When more than one District representative must be housed overnight, one-half of the double occupancy cost shall be paid. (BOD 4/97) (BOD 11/99)
- Standard public transportation at the best available rate. When traveling by air, tickets are to be purchased through the Internet. Use of advance purchase and discount airfares, is required whenever possible.

District airline travel will be in accordance with Society policy. Society policy states that all those who travel for the Society (and whose travel is paid for by the Society) will book their own air tickets online (with <http://www.expedia.com/>; <http://www.priceline.com/>; <http://www.orbitz.com/>; <http://www.travelocity.com/>; <http://www.cheaptix.com/>) using their own personal travel agency; or booking directly with their airline of choice. (BOD 10/03)

- When private transportation is used, the rate will be \$.30 per mile. (BOD 10/13) Parking fees and tolls may be included. Reimbursement for rental vehicles will not exceed the lesser of equivalent public transportation or the automobile mileage amount, when rental cars are used for personal preference. (BOD 11/96) All vehicles rented for District business by any officer or designated, authorized individual must include the supplemental insurance coverage offered by the rental car company. (HOD 04/15)
- Postage, telephone, stationery (when not supplied by the District), copying services and reasonable secretarial or clerical services; to the extent such services are not available to the official at no cost.

As a general practice, meal costs are not reimbursed for RMD Board Members and appointed committee people in conjunction with attendance at district conventions, and most Board meetings that their elected capacity requires. However, unavoidable meal expenses may be reimbursed under some situations when volunteers (including District Board Members and committee people) are required to perform duties in support of district programs such as: Chapter Counselors, officers en route to chapter officers installations, officers attending some special meetings/workshops or traveling in their official capacity, music clinicians, SOP Reviewers, etc. In many situations a chapter should be expected to offset all or most of such meal expenses of volunteers; however, when a chapter is unable, district reimbursement may be authorized. Entertainment of other Barbershoppers, including Society staff whose expenses are covered by the Society, is typically not reimbursable and requires advance authorization. The intent of this provision is to cover volunteers' authorized involvement that requires meal expenditures at activities, which are separate from those that the individual would have otherwise been likely to have independently attended. (BOD 4/96) Currently, RMD pays a \$50.00 per diem to cover these expenses.

There shall be no reimbursement made for alcoholic beverages, and any such itemized expenses shall be deducted from per diem even if the total is less than the per diem amount.

District elected officials who are not performing duties as members of the Board, when attending conventions, LA/COTS, acting as Chapter Counselors, or performing other functions at the request of the District President or Board, shall be allowed reimbursement as provided above, subject to the following limitation: Transportation will not be reimbursed when such officials are reasonably able to travel by private transportation with other District Board members or other Barbershoppers.

District Board members will be reimbursed travel and lodging costs, in accordance with district expense policy, to perform installation of chapter officers, as follows:

Chapters will request assignment of a BOD member through the District Vice President-CSLT, and the DVP/CSLT will assign the closest available BOD member. (HOD 7/97)

Chapter Counselors are the only volunteers other than BOD members who will be reimbursed for expenses incurred in connection with visits to Chapters for the purpose of installing the Chapter's officers. Otherwise, such costs are to be borne by the Chapter requesting this service. District administrative officials, as distinguished from those District officials with responsibilities for the Chapter Counselor, SOP Review and appropriate music programs, will be judicious in use of District funds to attend Chapter shows.

### **29.6 Special Reimbursement: District President and Executive Vice President at Society Meetings and Society Board Members**

The District President and Executive Vice President shall be reimbursed all reasonable and actual expenses, as defined by RMD Policy limits and verified with receipts, required to attend the Midwinter and Society Conventions and Forums at which District Presidents' meetings are required. (7/01)

The Society and District share the costs for a Society Board Member to attend the two District conventions annually, as follows:

Society Board Officer or Member: Host district pays for transportation, lodging, meals and other convention-related costs such as registration, tickets, etc.

### **29.7 Society/District Cost-Sharing Methodology**

Effective 7/7/10, the cost sharing method for certain Society training events was revised, as follows:

The Society will split all training event costs (including room & board) on a per capita basis for Full Leadership Forum (only) and for tri-annual re-certification of LA faculty, contest judges and chapter counselors, plus costs for faculty travel to/from LA schools in the districts.

Each District will pay room & board for attendees at the annual Leadership Forum, for attendees at tri-annual re-certification of LA faculty, contest judges and chapter counselors, and for faculty at LA schools in the districts, and will continue to pay all other LA school costs (except faculty travel) in their district.

### **29.8 Special Guests of the District**

The District may defray the costs for selected committee chair people, staff representatives or special guests whose participation in a District meeting or function would enhance or would be beneficial to said meeting or function, in accordance with the reimbursement schedule for District officers.

### **29.9 Expense of Judges and Other Panel Members**

Judges and Contest Administrators serving on the official panel for RMD District and International Preliminary competitions shall be reimbursed in accordance with procedures set forth in the International Contest and Judging Manual. Transportation expenses for these officials may be handled directly by the District treasurer or charged to the RMD credit card (specific instructions for judge's reimbursements are outlined in 14.2.1).



It is District policy to require judges to share rooms unless the convention assigns the judge's room to be used for quartet evaluations, or the judge is accompanied by a family member or there are other mitigating circumstances requiring a single room. (HOD 9/89) (BOD 11/99)

The district will pay Society contest judges the C&J-prescribed mileage rate even if it differs from the rate reimbursed to RMD officials. (BOD 4/97)

## **29.10 Financial Statements**

A financial statement will be prepared by the District Treasurer for the period January 1 - December 31 of the previous fiscal year, for presentation to the District Board and the House of Delegates in conjunction with the spring event.

A financial statement will be prepared by the District Treasurer for the period January 1 - August 31 of the current fiscal year, for presentation to the District Board at the fall convention meeting and the House of Delegates at the fall convention.

At the fall convention meeting a preliminary annual budget prepared by the District Treasurer in support of RMD Board direction for the upcoming year January 1 through December 31 will be presented to the District Board and to the House of Delegates for review and approval.

The District Treasurer shall furnish a current statement of income and expenses, showing both the budgeted amounts and actual expenditures, and a balance sheet, as of the close of the preceding month, for those Board meetings that might be held between spring events.

## **29.11 External Review**

Consistent with Society policy, an external review of District accounts will be conducted following the close of the calendar year books on an annual basis. The President is responsible to arrange for a non-BOD member to conduct the review of all District accounts with the District Treasurer.

## **29.12 Special Financial Commitments**

### **29.12.1 Society Contests Quartet and Chorus Fund**

The District contributes to a travel fund for the District's quartet and chorus representatives for the Society's International and Midwinter Contests. This fund will be disbursed according to the following schedule that shall be included in each annual budget request:

- Chorus. RMD shall contribute \$1,000 to each chapter qualifying for International to assist with the chorus' travel funding (not to exceed a maximum of \$3,000.00 per year).
- Quartet. RMD shall contribute \$400 to quartets qualifying for the International Quartet, Senior Quartet or Next Generation Varsity Quartet Contests. To receive this stipend, a quartet is required to have at least two RMD members who make their primary residence within the geographic confines of RMD (not to exceed a maximum of \$2,000.00 per year. If the maximum is attained, the funds will be divided equally among all qualifying quartets).

It is the intent of the BOD to increase these contributions when feasible. (BOD 7/98)

### **29.12.2 Financial Assistance for District Candidates:**

- **Current RMD judges and candidate judges.** Those who reside in the district and are required to attend the tri-annual Society Judge Certification School to become certified or re-certified are funded in accordance with the Society/District Cost Sharing Formula defined in 3.7 above.
- **Candidate Judges.** To help defray a portion of those RMD candidate-judges to travel to contests for the purpose of acquiring judging experience to qualify for certification. The current practice is to reimburse up to \$100/assignment, not to exceed \$200/year, to assist candidates in defraying personal expenses. (BOD 11/91) (BOD 11/99)
- **Other Financial Assistance.** To aid candidates in specified music programs: The District may, to the extent feasible, provide financial assistance to selected participants at Society or District music training schools.

### **29.12.3 CARA winner LA scholarships**

The winning chapter in each Plateau of the Chapter Activities Recognition Award (CARA) program will receive four scholarships for attendance at the subsequent LA by officers elected into one of the five core chapter officer positions (President, VP Chapter Development, VP Music & Performance, Treasurer, Secretary). (HOD 4/97)

### **29.12.4 New chapter LA scholarships**

Each newly chartered chapter will receive up to five scholarships to fund attendees at the subsequent LA/COTS by officers elected into each of the five core chapter officer positions (President, VP Chapter Development, VP Music & Performance, Treasurer, Secretary). (HOD 7/97)

### **29.12.5 Other**

1. The District will fund a tuition scholarship (which does not include travel) to pay for annual attendance at Harmony University by a non-member Music Educator who resides in the district. Selection of the educator is coordinated by the DVP-CDD. (HOD 9/98)
2. The district will award a tuition scholarship to attend Directors College at Harmony University for the front-line chorus director of each new chapter, during one of the first two years after the chapter becomes chartered. (BOD 7/99)
3. RMD will award a tuition scholarship to Director's College at Harmony University annually to one front line chorus director who has never attended, or who has not attended in the past five years, to Directors College at Harmony University. The DVP-CDD is responsible for the selection procedure. (10/00)

## **29.13 Policy on Hospitality Rooms**

District conventions: It is current District policy not to provide a hospitality room at District conventions at the discretion of the District BOD. (9/89)

## **29.14 Policy Regarding Discretionary Funds**

The District does not provide discretionary funds for use by the District President or any other officer for hospitality, meals, gifts, or other purposes to the benefit of Society officials, District guests, or others.



## **30 LAWS, REGULATIONS & PARLIAMENTARY**

### **30.1 General**

The District Laws, Regulations & Parliamentarian Committee Chair is appointed by the President. This committee should be required to review, at least annually, the District Bylaws, Resolutions and Statements of Policy and Operating Manual to ensure that these documents are consistent with the Society's governing documents, and to ensure that policies adopted by the BOD or HOD in their most recent meetings are incorporated by the District Secretary into updates of the applicable District governing or guidance documents. The committee should be alert to needed changes in District governing or guidance documents, based on new or revised Society policies, and should exercise initiative in suggesting changes in District governing or guidance documents to the BOD for improved or more effective District administration. All proposed amendments to District documents are to be reviewed by the District LR&P Committee, and forwarded to the Society laws & regulations Committee as required by the District Bylaws (Article XI).

The Chair of the District LR&P Committee also provides counsel to the presiding officer at HOD meetings to ensure that proceedings are conducted in accordance with Robert's Rules of Order for Small Boards as required by the District Constitution (Article IV), and also at formal BOD meetings as requested.

## **31 NOMINATING COMMITTEE**

### **31.1 General**

The District Nominating Committee (as the three most recent immediate past Presidents) is appointed by the President prior to the first of the year. Members' required qualifications are described and set forth in Article V of the District Bylaws. The Committee is charged with the responsibility for seeking out, obtaining resumes from, selecting, and interviewing those District members who might be qualified and likely best serve the needs and interests of the Rocky Mountain District.

### **31.2 Duties**

The members of the Nominating Committee will contact and interview prospective officers to determine their qualifications, preparedness and willingness to serve. The Committee will also provide nominees with information about the duties of each elected position, and with the names of those who have served in the position before.

### **31.3 Reports**

The Nominating Committee will submit a slate of nominees for District elected officers to the District Secretary not later than 45 days prior to the fall convention.

The Nominating Committee will prepare and submit any such interim reports as the District President may require.

The Secretary shall submit the approved slate of officers to the Society immediately following the fall elections so that they can be included on the Leadership Summit roster to be invited to that training event.

## **32 PLANNING**

### **32.1 Five Year Planning**

The Five-Year Plan is a document which sets forth the extended goals of the District. It is defined as the Annual Business Plan (ABP) for the next budget year, plus the subsequent four years. It is to serve as a key input for the development of an Annual Business Plan designed to achieve specific objectives within annual stages of the Five-Year Plan, and thus attain the District's goals. The Five-Year Plan and the Annual Business Plan do not include the current year under execution.

**32.1.1 Maintenance:** The Five-Year Plan is to be evaluated at least semi-annually by the Planning Committee and revised as necessary. Revisions are based primarily on:

- Measured progress or deviations resulting from sequential Annual Business Plans.
- Evaluation of existing and proposed programs and activities.
- Anticipated impact of current or proposed Society programs.
- Other relevant factors.

### **32.2 Planning Committee**

The Planning Committee is comprised of the District Board and chaired by the District President or his/her delegate and develops a Five-Year Plan. This plan is iterated and updated annually in coincidence with the other fifteen districts to project collective program requirements so that trained instructors' needs can be estimated and prepared.

### **32.3 Annual Business Plan**

#### **32.3.1 Purpose**

The Annual Business Plan (ABP) is a document used for expressing the District's objectives for the next budget year and to organize work toward attainment of the goals set forth in the District Five Year Plan, which in turn integrates into, what the Society calls Memoranda of Understanding. The ABP describes, in specific terms, the proposed programs and activities that the District expects to execute or implement during the year to achieve the identified objectives.

#### **32.3.2 Scope**

The Annual Business Plan specifically focuses on programs for the upcoming year. In some instances, the ABP may involve a program or project whose development will progressively extend forward across more than just the current ABP.

#### **32.3.3 Development**

##### **32.3.3.1 Preliminary Annual Business Plan**

The ABP is developed under the direction of the President in cooperation with all Board Members and other key District officials, and reflects considerations and issues described in the Society's Planning Guidance. The ABP format is generally structured along functional lines, and a preliminary draft is usually developed in conjunction with a review of the District Five Year Plan and with the Society's Annual Business Plan. The District ABP also incorporates a Society Plan component within which the DVPs integrate their efforts with objectives of their respective Society committees. The Board typically shapes a preliminary ABP at the District Board's July weekend

work session to form a basis upon which to plan the upcoming year's budget. This preliminary plan and the related budget are progressively refined and are presented to the HOD at the fall meeting, seeking approval with delegated authority for the Board to proceed unless significant plan or budget changes become necessary.

#### **32.3.3.2 Final District Annual Business Plan**

Following the BOD meeting at the District Fall Convention, and following the Society Leadership Forum, the budget may be slightly revised and the final Annual Business Plan adopted. This is usually accomplished at the first BOD telecon meeting held following the Leadership Forum.

#### **32.3.3.3 Society's Annual Business Plan**

In addition to the District ABP process described above, the Society prepares an Annual Business Plan and Budget that are approved by the Society Board at meetings held during the first BOD meeting of the new year. The District's ABP is developed in such a way that many programs and activities will dovetail with those in the Society's ABP.

#### **32.3.3.4 Reports**

The District President is required to submit periodic status reports to the Society Board's Operations Group that states progress on various defined and measurable district goals. Functional DVPs are required to also submit periodic reports to their respective Society Committee Chairs that states progress on the various defined and measurable district goals that have been identified as integrated with Society goals.

## **33 POLICIES ON CHAPTERS**

### **33.1 Licensing Chapters**

A minimum of four (4) members of the Society is required to obtain a “license to operate as a Chapter” (referred to as a “licensee”) in the Society, and the group must observe the procedures as set forth by Society Rules and Regulations, plus any supplemental rules imposed by the District.

#### **33.1.1 A licensed Chapter may:**

- Refer to itself as a “licensee” Chapter of SPEBSQSA/BHS
- Send voting representatives to official meetings of the District and Society.
- Receive The Harmonizer, officers’ manuals and most insurance coverage.

#### **33.1.2 A licensed Chapter may not:**

- Register quartets with the Society.
- Enter competing quartets or choruses in any official Society contest, except for evaluation, and then only at the request of, and with permission from, DVP-C&J and the Contest Administrator of the event.
- Produce a show, unless it is co-produced with an active “chartered” chapter, preferably the sponsoring chapter.
- A “license” to operate as a Chapter of the Society is valid for one year. During that period, it is expected that the group will have grown in membership and experience, and will apply and qualify for approval to become a “chartered” Chapter. A three-month extension may be granted by the District Board of Directors and upon payment of an administrative fee required by Society Rules.

### **33.2 Chartering Chapters**

A minimum of twelve (12) members is required to obtain a “charter” as a chapter, 50% of whom must not previously have been members of the Society, or must be former members whose membership expired more than one year previously. The charter application package may be obtained from the Society office upon request by the District President. After completion, the application must be endorsed by the sponsoring Chapter or area and the District President. The application must be sent to the Society office, accompanied by a check paying all applicable Society dues and fees.

### **33.3 Suspending Chapters**

1. Any Chapter for which a Society billing remittance is not mailed to the Society office within 30 days from date of billing shall become a suspended Chapter, per Society Rules. If concerted efforts by the Society office, assisted by District officers, fail to rectify the situation by the end of the quarter in which suspension occurred, the charter will be automatically revoked.
2. Any Chapter failing to remit to the District Treasurer, by the end of the calendar year, any assessments or other charges due to the District which have been accrued by that Chapter, or which fails to report to the IRS on time as required by the Society shall be suspended and may be subject to charter revocation.

### **33.4 Dissolution or Merger of Chapters**

1. If a District Chapter votes to dissolve, that Chapter's Secretary shall notify the District President, in writing, of its intent to do so. Upon receipt of such notice the District President shall remind the Chapter, in writing, of its responsibility to transfer to the District within 30 days all its funds and property, pursuant to Sections 7.08 and 11.01 of the Standard Chapter Bylaws. The Chapter charter shall be forwarded to the Society office. The District President, or his/her designee, shall follow up to ensure that this requirement is fulfilled.
2. If two Chapters in RMD plan to merge, each Chapter President shall each notify the District President, in writing, of their desire to do so. Such desire shall be evidenced by a vote in favor of the proposed merger by two-thirds of the members of each of the two Chapters present at meetings which have been announced by written notice (stating the purpose of the meeting), mailed to ALL members two weeks in advance of the vote; provided that a quorum of the Chapter membership is present at the meeting during which the vote is taken. The merger cannot take place unless, and until, it is approved by the District Board of Directors and until the Society office has notified the District and the two Chapters that the records of the Society have been updated to reflect the merger. The requirement that the funds and property of a dissolving Chapter be given to the District shall not apply to either Chapter in a merger, but the funds and property of the two Chapters shall be joined together in the name of the merged Chapter.

## 34 RECORDS MANAGEMENT

### 34.1 District Files

It is recommended that a standardized file system be established and maintained by each District officer and official to enable him to receive, act upon, maintain and dispose of written materials received or generated in the normal conduct of his/her assignment. The system should be documented or set up in such a manner as to facilitate its use by each incumbent's successor in office. A system appropriate for the District President is suggested below.

GENERAL	FINANCE	SUBSIDIARIES	COMMITTEES
BY LAWS RULES & REGULATIONS POLICY STATEMENTS ASCAP/BMI ETHICS FRANK THORNE LICENSING & CHARTERING RECORDINGS BOARD MEETINGS/ FINANCIAL REPORTS	BONDING INSURANCE (Property/Liability/Safety) CREDIT CARD ENDOWMENT FUND TRAVEL CONTRACT MEMBER INSURANCE PLANS	AIC AISQC AHSOW FOREIGN (BABS, SNOBS, etc.) PROBE OTHERS	<b>STANDING</b> FINANCE HARMONY FOUNDATION L&R ETHICS NOMINATING  <b>OTHERS</b> AD HOC COMMITTEES - As may be required CONVENTIONS (by year)
<b>ROCKY MOUNTAIN DISTRICT RECORDS</b>			
RMD DISTRICT GOVERNING DOCUMENTS (May be maintained in separate notebooks for convenient reference) BYLAWS ARTICLES OF INCORPORATION STATEMENTS OF POLICY AND OPERATIONS MANUAL			
<b>CHRONOLOGICAL RECORD OF RESOLUTIONS PASSED</b>			
DISTRICT PRESIDENTS' COUNCIL (by year) LEADERSHIP SUMMITS (by year) BOARD OF DIRECTORS MEETINGS (by year) (Maintain separate notebook for complete BOD/HOD minutes by year) HOUSE OF DELEGATES MEETINGS (by year)			
<b>COMMITTEES AND APPOINTMENTS</b>			
PERMANENT COMMITTEES NOMINATING ETHICS PLANNING	LA CURRENT YEAR ARRANGEMENTS CHAPTER COUNSELOR	CONVENTIONS (excluding budget and contest data) DISTRICT (by year)	COMPETITIONS INTERNATIONAL PRELIMINARIES (by year) MID-WINTER

(Correspondence only - By assignment)	TRAINING REFERENCE MATERIALS	DISTRICT EVENTS MANUAL	SENIOR QUARTET COMPETITION
MUSIC PROGRAM WORK PLAN & COMPREHENSIVE BUDGET (by year) FINANCIAL ESTIMATES REPORTS FOR OVERALL MUSIC PROGRAM RMHC SCHOOLS	SPECIAL EVENTS SILVERTON CHAUTAUQUA FT. ROBINSON HARMONY HAPPENING IN THE HILLS OTHERS	SOCIETY STAFF VISITS HARMONY COLLEGE DIRECTORS COLLEGE YOUTH OUTREACH STANDING OVATION COACH'S GUILD AND QUARTET DEVELOPMENT DIRECTOR'S GUILD AND DIRECTOR DEVELOPMENT DISTRICT QUARTET CHAMPIONS ASSOCIATION PLANS & REPORTS (excludes reports of District officers)	LONG RANGE PLANS  ANNUAL WORK PLANS, MID-YEAR AND END OF YEAR  REPORTS (by year)
BUDGETS AND FINANCIAL REPORTS (By year, includes copy of convention & music program budgets and reports, RMHC and C&J budgets and reports, Convention financial reports, and all periodic financial statements for that year) AUDIT REPORTS (by year) CHAPTER AGING REPORT (Retention discretionary)	MEMBERSHIP STATISTICS, MISCELLANEOUS, CORRESPONDENCE EXIT QUESTIONNAIRES (retention discretionary)  MISCELLANEOUS MATERIALS	RECOGNITION PROGRAM AWARDS ACHIEVEMENT PROGRAM POLICIES STATISTICS	COMMUNICATIONS DISTRICT PUBLICATIONS: <i>Vocal Expressions</i> and OTHER DISTRICT BULLETINS (retention discretionary) HARMONIZER (retention discretionary) PROBE PUBLIC



OFFICER EXPENSE & ACTIVITY REPORTS & CALENDARS			RELATIONS OTHER EXTERNAL PUBLICATIONS
HISTORIAN/ARCHIVES RMD DISTRICT DIRECTORY (by year) ROSTER OF INTERNATIONAL OFFICERS CHAPTER ROSTERS OTHER DISTRICTS' DIRECTORIES	BARBERSHOPPER'S SHOP DISTRICT POLICY SOCIETY MARKETPLACE CATALOG		

### **34.2 Records Retention & Disposal Policy**

1. It is imperative that District records be screened from time to time to permit the disposition of those records not required for administration of the District, or transfer to the historian of those records that may have historical value. It is recommended that all officers and other officials that are being succeeded in office be responsible for screening the records in their custody before transferring them to their successor. A District officer leaving an office should:
  2. Retain those records, which might be needed for carrying out another assigned task.
  3. Transfer to his/her successor those records that should be in the custody of the incumbent of the position he/she is vacating.
  4. Transfer to the historian those records that may have historical value and that are not required for current District administration.
  5. Destruction of those records of no continuing value requires BOD notification and an approval entry into the minutes of a BOD meeting.
  6. If an officer or other official is in doubt as to the utility or value of any documents or other material, the documents should be transferred to the Historian, who will be responsible for determination as to their final disposition.

### 34.3 Records Retention Schedule

<b>TYPE OF RECORDS</b>	<b>YEARS</b>
<b><i>Annual Records-</i></b>	
Annual financial statements, journals, tax returns and worksheets, depreciation schedules, general ledgers, fixed asset purchases and financial review.	Permanent
Accounts payable/receivable.	10
Sales records, expense records, loan schedules.	7
<b><i>Bank Records</i></b>	
Bank statements and cancelled checks	7
Tax payment checks	Permanent
Loan records	7 (from last payment)
<b><i>Computer Records</i></b>	
Backups of all business records	Permanent
Board minutes, incorporation documents, by-laws, licenses, contracts, leases, mortgages, insurance policies and other legal documents	Permanent
<b><i>Personnel Records</i></b>	
Employee contracts and records, including performance reviews	7 (after termination)
<b><i>Real Property Records</i></b>	
Purchases, deeds, bill of sale, construction, appraisals, improvements, blueprints, and plans	Permanent

## **35 SALE OF ITEMS AT DISTRICT EVENTS**

### **35.1 General**

Statement of Policy provides, in part, that "sale of recordings and other items shall not be conducted at any District function without prior clearance under rules established by the District."

To better control the activities of performers who wish to sell recordings or other merchandise at District events, the policy outlined below shall be observed at all District events.

### **35.2 Policy**

1. Notification of intent to sell recordings or other items at District events will be made to the District President through the DVP-Events by the applicable representative of a quartet or chorus wishing to sell merchandise in advance of the event.
2. Approval of the management of any involved performance facility must be secured by the seller. (Some facilities prohibit outside sales or require sharing the revenue from such sales.)
3. A quartet or chorus should never let the sale of items interfere with activities the District has planned for the performers or audience members. If appropriate, the Master of Ceremonies may mention the availability of the items for sale after the show or during the Afterglow, if such sales have been authorized by the performance facility.
4. A negotiated charge, not to exceed 10% of the selling price of each item offered, shall be paid to the District in return for the privilege of promoting these items at a District event. At RMD conventions or other District functions, such commission may be waived by the District President for RMD quartets that customarily perform without charge at District functions.

### **35.3 Exception**

Items made by or sold under direct supervision of the Society or RMD, as well as those sold in support of the Harmony Foundation International charity, shall be exempt from the provisions of section 35.2.4 above. As with other merchandise sales, approval for the sale of exempted items must be obtained from the management of the performance facility.

## **36 SHOW CLEARANCES**

### **36.1 Purpose**

The purpose of obtaining District approval or clearance for Chapter-sponsored shows is to prevent conflicts in show dates between Chapters, or with District and Society events. The order of consideration for a clearance is: Society activity dates, District sponsored activities, Chapter shows. A Chapter proceeding with a show without first obtaining District clearance stands in violation of District policy and is subject to loss of its charter.

### **36.2 Procedures**

The District Secretary is responsible for administering, approving and periodically distributing calendars announcing show clearances. No show clearances will be issued for any chapter that is not up to-date with their chapter filings, as described in 17.2(9).

Clearances may be granted by the District Secretary upon the receipt of the BMI/SESAC form requesting a performance license, together with the required fee(s).

Clearances for area or regional shows shall be secured by the host chapter. Clearances for chapter shows will be obtained by the chapter secretary. Show clearances for co-produced shows for newly “chartered” or “licensed” chapters will be obtained by the sponsoring chapter.

No clearance is required for inter-chapter visits, paid public performances, or community service appearances, even though such events are being presented in the immediate or adjacent locality of another chapter that is presenting a cleared annual show. (Courtesy notification of a request for any such performance or activity should be sent to the chapter sponsoring the cleared annual show well in advance of the function so that any possible conflict may be identified and resolved.) Any infringing annual show date should be coordinated with the District Secretary before concluding arrangements.

### **36.3 Protection of Convention Dates**

No clearance will be issued for annual show dates in conflict with the Society’s International or Midwinter conventions, any District convention, or other District-wide event. District-sponsored events will have priority in a given locality and will be subject to the same review as for conflicting chapter shows in the same locality.

Failure to comply with the foregoing clearance procedures, or to honor the denial of an annual show clearance, shall be the basis for disciplinary action as determined by the District Board of Directors, up to and including loss of chapter charter. (01/01/2012)

## **37 FRANK THORNE CHAPTER MEMBERSHIP**

### **37.1 General**

An active or prospective member who does not choose to affiliate with an existing chapter is eligible to be a member of the "Frank Thorne" chapter. The Frank Thorne chapter was originally established to accommodate members, who were geographically isolated from active chapters, but the rules have been subsequently liberalized to eliminate this criterion, and now Frank Thorne members are eligible to compete in District and International quartet contests.