



## CRITERIA FOR CHARTERING an AOSA CHAPTER

### Before Chartering:

The chapter must file a letter of intent to become a chartered chapter. This letter should include:

- a. proposed name of chapter
- b. name of potential officers
- c. plan for workshops for year in which letter is written
- d. timeline for meeting charter requirements
- e. statement of agreement to adherence to AOSA Articles of Incorporation and Code of Regulations (available in the Chapter Leadership Resource Center on the AOSA website)

- ALL local chapter members must also be national members of AOSA with a minimum of 8 members to charter.
- Each chapter may organize its own administration with a minimum of three (3) officers.

If everything is in order, the chapter will have provisional affiliation, pending the official chartering.

To obtain an official charter from the American Orff-Schulwerk Association, the local chapter must complete the following criteria. If the requirements are completed at least six months prior to the next National Conference, the chapter will receive its charter at that conference. If the local chapter is organized later in any given year to qualify for the six-month interim period, said Chapter is given provisional status and will be chartered officially at the National Conference the succeeding year.

After achieving provisional status, the provisional chapter must submit an annual report due May 15<sup>th</sup> of every year.

When the above is completed and the local organization is prepared to fulfill the needs in sharing and learning about Schulwerk, send a follow-up letter to the AOSA Chapter Liaison including:

- f. list of members with mailing and email addresses
- g. list of board members including position and term
- h. outline of the chapter's plans for the coming year
- i. copy of EIN paperwork
- j. official request for inclusion in AOSA group exemption or copy of IRS determination letter if independent 501(c)3 status sought
- k. statement confirming chapter's fiscal year coincides with AOSA, July 1-June 30.

### After Chartering:

1. Each chapter must adopt and submit a constitution within two years **after** chartering.
2. Each chapter will have the right to collect local dues to finance activities and this will in no way be the responsibility of national AOSA.
3. Each chapter must submit an annual report due June 1<sup>st</sup> of every year.
4. Local chapters shall have no direct jurisdiction over the formation or location of new chapters.
5. A chapter shall be put on probation within three months of non-receipt of the Chapter Annual Report.

## SUGGESTED CHAPTER ORGANIZATION

**\*PRESIDENT:** Responsible for the smooth running of the chapter.

**VICE PRESIDENT:** President Elect; Responsible for programs and membership.

**\*SECRETARY:** Responsible for record keeping, correspondence, hospitality, and credit management.

**\*TREASURER:** Responsible for collecting dues and fees, banking, and budget.

**PAST PRESIDENT:** Advisor.

\*Starred officers represent a minimum board. Add officers and/or board members as the work load demands.

## BOARD MEMBERS AT LARGE

**COMMITTEE CHAIRPERSONS**, elected *or* appointed, may include:

- Program Officer
- Publicity Officer
- Media Officer
- Historian
- Local Membership Officer
- Newsletter Editor
- Equipment Officer
- Hospitality Officer
- National Membership Officer
- College Credit Conference Liaison

### **Possible election procedures:**

1. Elect officers who appoint committee chairpersons as needed.
2. Elect officers and members-at-large.
3. Elect a certain number of members-at-large to serve on the chapter board. Chapter board then must meet to elect officers and delegate committee responsibilities.

## POSSIBLE DUTIES OF OFFICERS

The following outline is a compilation of possible responsibilities and suggestions as to how these duties might be distributed. The size of the chapter and the number of chapter functions and meetings determine the complexity of organization necessary.

### **I. President**

- A. Presides at all meeting.
- B. Completes, sends Annual Report to Executive Director; saves a copy in an electronic or paper folder labeled Annual Reports.
- C. Makes appointments as required by local constitution.

- D. Is responsible for the smooth operation of the chapter.
- E. Attends Advisory Board meetings at national conferences or designates a representative.
- F. Assists with national AOSA conferences held in region as requested.
- G. Assists with AOSA functions at state, regional, and national music conferences.

II. **Past President** (optional)

- A. Offers advice to the board.
- B. Ensures continuity in chapter operation.
- C. May or may not have voting privileges.
- D. May attend Advisory Board meeting at national conference.

III. **Vice President(s)**

- A. May be considered officer-in-training for President.
- B. Presides in absence of President.
- C. May serve as program chairman, and/or membership chairman.
- D. May head committees related to workshop planning.
- E. May attend Advisory Board meetings at national conferences.

IV. **Secretary**

- A. Recordkeeping Duties
  - 1. Distributes minutes as instructed by chapter.
  - 2. Assists President in completing the Annual Report.
  - 3. Records attendance for in-service credit.
- B. Correspondence Duties
  - 1. Writes and sends letters of contract.
  - 2. Writes courtesy letters, thank you notes, invitations.
  - 3. Writes letters of chapter business.

V. **Treasurer**

- A. Collects and records all dues & financial transactions.
- B. Collects National AOSA dues and sends to Executive Headquarters within one week of collection.
- C. (See Collection of National AOSA Memberships, Chapter Finances)

VI. **Members-at-large** (previous board experience not required, term may be shorter)

- A. Gives broader representation to board business.
- B. Assists with board's responsibilities by heading a committee or project.
- C. Serves as a training position for other board members.

Additional responsibilities may be assigned to officers, members-at large, or appointed board members

I. **Membership**

- A. Keeps list of members current for fiscal year.
- B. Sends renewal forms.

- C. Prints and distributes membership cards.
- D. Keeps attendance lists as required by chapter or affiliated organizations.
- E. Prepares mailing labels.
- F. Prepares membership directory.

**II. Mailing** (may be a duty attached to Program or Membership Chairman)

- A. Labels, sorts, mails flyers and newsletters.
- B. Sends copies of newsletters to National Board of Trustees, chapter presidents in the region, and Editor of *Reverberations*

**III. Media/Publicity**

- A. Contacts local news media.
- B. Writes articles for state music education journal.  
*Consult the Chapter Publicity section in the Leadership Manual for more information.*
- C. Assists or is responsible for workshop publicity.
- D. Assists or is responsible for chapter newsletter.
- E. Keeps a file of publicity used, photos (especially action shots), hints as to what works, fails, names of contact persons for various media (newspaper, TV, radio).
- F. Makes use of AOSA publicity brochure.

**IV. Hospitality**

- A. Arranges for all refreshments at chapter/board meetings.
- B. Gathers equipment, obtains food.
- C. Arranges for any overnight accommodations required by visiting clinicians and guests.

**V. Program**

- A. Plans, and is responsible for, the calendar of the chapter's activities.
- B. Solicits program ideas from the membership, board members.
- C. Contacts publicity persons for program.
- D. Consults equipment and hospitality committees.  
*See Chapter Workshops section in the Chapter Leadership Manual for more information.*

**VI. Historian**

- A. Keeps a chapter history.
- B. Collects flyers, news items, and pictures.

**VII. Nominating Committee**

Often appointed by President, approved by the board and/or chapter (see your local constitution), usually before the first meeting after September 1 of any given year. Election of officers should take place in January, to allow for:

- A. Reporting of new year's President to Executive Headquarters by March 1.

- B. Completion of annual report by out-going president by June 1.
- C. Renewal of Chapter Board Members' national membership to accompany the Chapter Annual Report.

**VIII. Newsletter Officer**

- A. Announces items of related interest to members, such as school programs, other area workshops, profiles of members and state music education news.
- B. Writes up notes of previous workshops, as a scribe, with help of a scribe or from workshop notes by clinician.
- C. Informs members of chapter business conducted by the board.
- D. Informs members of National AOSA news from AOSA National Board of Trustees, AOSA board minutes, or Executive Director's Office.

**IX. Equipment Officer**

- A. Obtains list of needs for each workshop from clinicians.
- B. Arranges for instruments and audio-visual equipment needed (keep inventory or delegates this responsibility).
- C. Oversees setting up the teaching area.
- D. Supervises the taking down and returning of equipment.

Some local merchants will supply instruments for meetings. It is the chapter's privilege to accept, seek out, or refuse their assistance.

**X. Telephone/E-mail Officer**

Uses a phone tree or an e-mail list to publicize meetings or notify of emergency cancellations.

**XI. National Membership Officer**

Promotes interest and commitment to AOSA.

**XII. Conference Liaison**

Assists with national conference when in the same region.