13 ADMINISTRATIVE ESSENTIALS FOR COMMUNITY CHOIRS

Dr. Brendan Lord, presenter

INTRODUCTION

A strong administrative infrastructure is the backbone of any community-based choir organization: it lays the groundwork for achievement while ensuring organizational health.

These 13 administrative essentials are about making the most of an organization's resources while avoiding frustration.

THE THIRTEEN

1. Keep a master admin calendar
2. Build the dream team
3. Make it a policy to have good policy
4. Be clear about roles & responsibilities
5. Have a plan (even when you don't plan on needing one)
6. Live your mission & values
7. Leverage tech (but recognize that it's not for everyone)
8. Fund development (the most dreaded thing on the list)
9. Reporting & record keeping (it's boring but essential)
10. Communication is the key to everything
11. Marketing & audience development (because people deserve to know what you do!)
12. ADEI – A choir for every voice
13. Manage and appreciate your volunteers

ONE—
BUILD YOUR DREAM TEAM

Because you shouldn’t have to do it alone (and there are people who want to help you)!

BUILDING YOUR BOARD/LEADERSHIP TEAM

- The Nominating Committee should be active all year long, not just in the period leading up to the AGM.
- Board and committee members need not be choir members.
- Diversity of skills, perspectives, and experience is key. Understand what you need and how team members can fill those needs.
- Create safe meeting spaces.
- Prioritize making team members feel appreciated.

TWO—
KEEP A MASTER ADMIN CALENDAR

Give your memory (and your stress levels) a break!

- Make it a sharable calendar. Digital works best, but it can be on paper too!
- Usually, the calendar is maintained by the choir's administrator or the secretary of the Board.

WHAT TO INCLUDE IN THE CALENDAR

- Grant application deadlines
- Board meetings
- Annual General Meeting
- Fiscal year end
- Renewal of the insurance policy
- Concerts, rehearsals, tours, retreats, etc.
- Policy review dates
- Fundraising events/campaigns
- Important dates in the community (major events, milestones, etc.)

THREE—
MAKE IT A POLICY TO KEEP GOOD POLICY

Many organizations are driven by the passion and values of their founders, but as Hadfield says, “at a certain point they need to write down their values and ways of operating so these are not lost.” She notes when this is not done, it can bring down an entire organization. “You have to start – and get it done.”

—charityvillage.com

POLICIES TO INCLUDE

Finance + budget

Attendance

Supervision of minors

Conflict of interest

Harassment

Protection of personal information

COVID

Social media

Policy on policy making

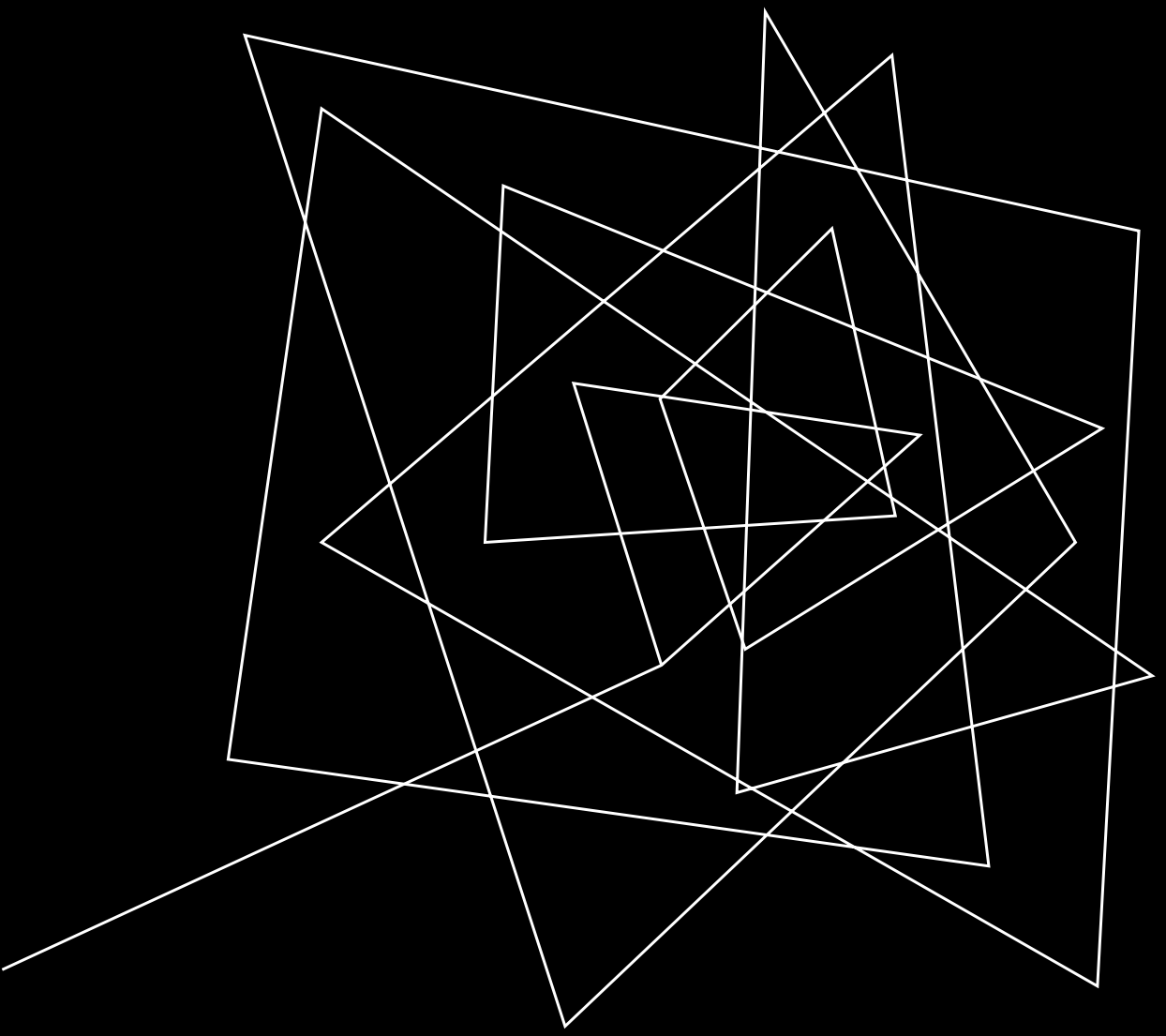
Human resource

"Policy and procedures link vision and operation."

—*Tom Bartridge, nonprofit consultant*

Policy is most often developed in the context of time, knowledge, and resources, luxuries we don't have when making most decisions. For this reason, it plays a valuable role in guiding day-to-day decisions within the organization.

Remember, policies can be changed by the Board whereas bylaws can only be changed by the membership (at an AGM or a special meeting). Therefore, it is advisable to keep bylaws general and to deal with details in the policy.



FOUR —
BE CLEAR ABOUT ROLES AND RESPONBILITIES

Your organization’s traffic is much easier to direct when everyone is driving in their lane.

A framework of roles and responsibilities is integral to an efficient and frustration free working environment for staff and volunteers.

Roles and responsibilities should be summarized in a roles and responsibilities document and shared with all members of the leadership team.

The roles and responsibilities framework can be housed as an appendix to your organization's policy manual.

Roles (or lanes) might include:

- Conductor or Artistic Director
- General Manager/Executive Director/Administrator
- Board Chair
- Treasurer
- Secretary
- Marketing & publicity coordinator
- The entire Board
- Fund development coordinator

RACI MATRIX

RACI Chart

Activity	Project Sponsor	Project Manager	Project Team	Department Manager
Prepare Bill of Materials		A	R	C
Prepare Estimate	I	A	R	I
Authorize Expenditure	R	I	I	I
Send Procurement Documents		R	C	
Evaluate Bids	A	R	C	
Perform Inspections	I	A	R	

R = Responsible A = Accountable C = Consult I = Inform

TERMINOLOGY

RESPONSIBLE
The person doing the task.

ACCOUNTABLE
The person with decision making authority.

CONSULT
Key stakeholder who should be included in the activity.

INFORM
The person/people who need to be kept in the loop.

FIVE—
HAVE A PLAN
(EVEN WHEN YOU DON'T PLAN ON NEEDING ONE)

Why?

1. It establishes your goals.
2. It sets clear priorities.
3. It aligns your team.
4. It simplifies decision making.

WHAT SHOULD YOUR PLAN INVOLVE?

It doesn’t need to be a full-fledged strategic plan or business plan.

Start by assessing where your organization is currently at with a SWOT (strengths/weaknesses/opportunities/threats) or SOAR (strengths/opportunities/aspirations/results; analysis.

Review and update your mission statement and values (and any other framework policies you have). These provide the lens through which decisions are made.

Allow space for blue sky thinking.

Using the information gathered during assessment and idea sharing, establish priorities and strategic objectives (big picture).

Develop initiatives that will advance the strategic goals. Allocate resources to each initiative.

Establish monitoring and reporting criteria (KPI’s). Consider adding a standing agenda item to provide a progress update at Board meetings.

Strengths

1. What do you excel at?
2. What are your greatest accomplishments?
3. What are you most proud of?
4. What makes you unique?

Opportunities

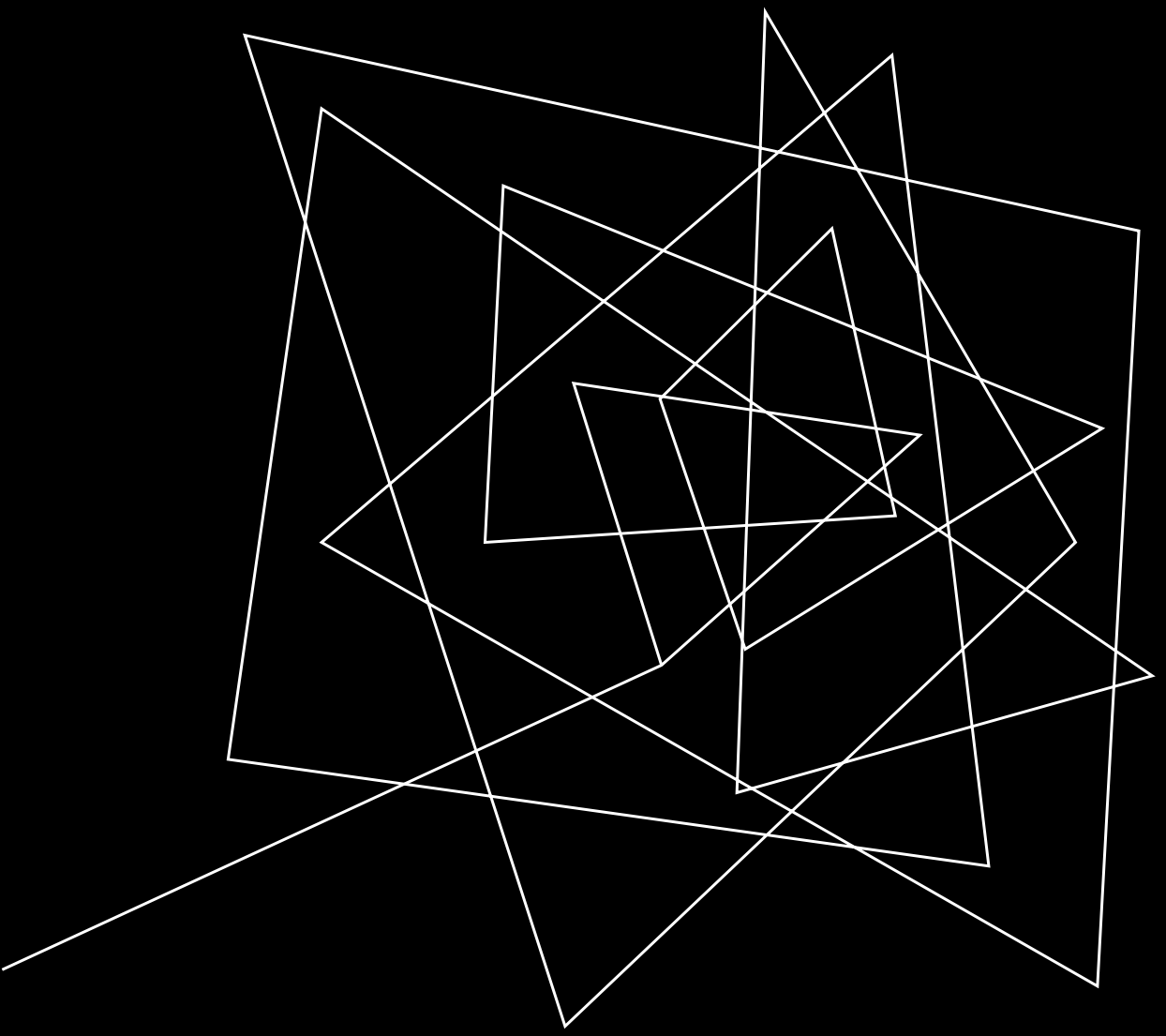
1. What partnerships would lead to greater success?
2. What changes and trends in the market align with your strengths?
3. What threats do you see?
4. Are there gaps in the market that you could fill?

Aspirations

1. What do you want to achieve in the future?
2. What should your future business look like?
3. How can you make a difference?
4. What are you passionate about?

Results

1. What measures will tell you that you are on track to achieve success?
2. How do you translate your vision of success into tangible outcomes?
3. How do you know when you've achieved your goals?



SIX—
LIVING YOUR MISSION + VALUES

Core values represent the lens through which [organizations] see the world.

—Carl Dixon, CEO of RescueStat

If you don’t have a mission statement and defined values, it is worthwhile investing the time and money to do so. These bring focus to the organization, and it is through these lenses that all organizational decisions will be made.

It is important that everyone in the organization understand them. Post them internally and externally, including on your website. Discuss them with leaders and other members of your organization regularly.

Key to truly living your mission and values is ensuring they are expressed both administratively (internally and externally) as well as through service delivery (rehearsals, concerts, recordings, etc.). For example:

- Is the imagery on your website and other documents reflective of your current mission and values?
- Do the tone and vocabulary on your website, registration forms, in your e-newsletter, etc. reflect your core values?
- Do the values of your vendors, sponsors, collaborators, and partners align with those of your organization?
- Are the priorities expressed in your strategic plan well aligned with your mission and values?
- If you have staff or contractors, are they hired and evaluated through the lens of you your values?
- Does your budget dedicate funds to things that enhance your organization’s ability to live its mission and values?

SEVEN—
LEVERAGE TECHNOLOGY
(BUT DON’T LET IT BE A BARRIER)

Although technological tools can increase our administrative efficiency, it is important to remember that technology be experienced as a barrier to participation.

ONLINE PLATFORMS

Project management software (Basecamp, Trello)

Board management software (Boardable)

Forms (Google Forms, JotForm)

Online ticket sales (TicketLeap)

Audition scheduling

Choir management platforms

Volunteer management (VolunteerLocal)

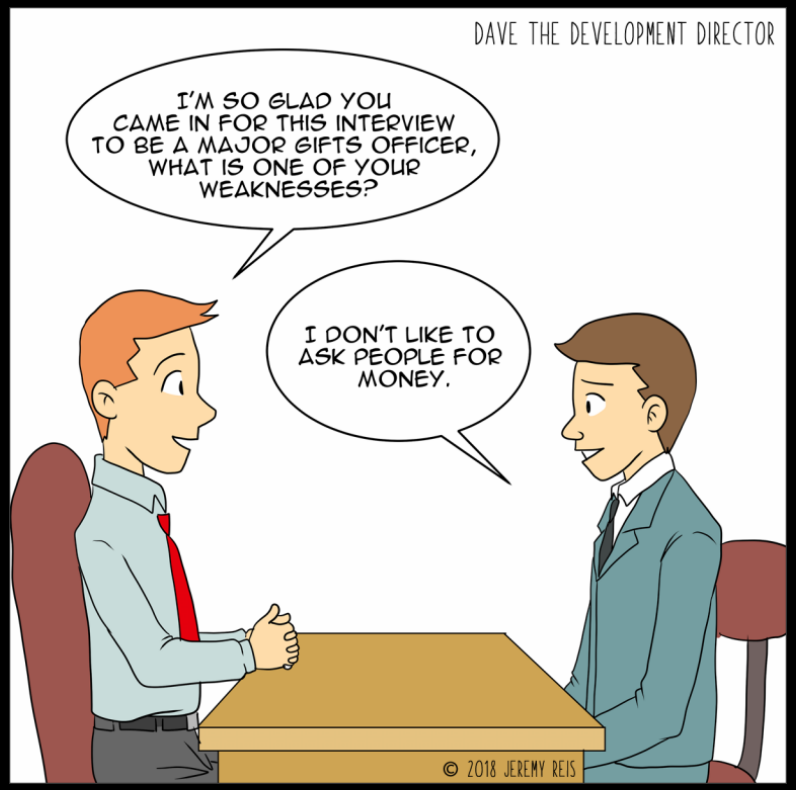
Financial record keeping (Wave, QuickBooks)

Graphic design (Canva)

- If you are using technology to help manage your Board, consider putting together a **Board Buddies** system that pairs tech savvy members with those who do not have tech access or experience.

- Consider offering basic training to your members/Board members on the technology you plan to use.

- It is worthwhile to make paper registration forms, pre-printed concert tickets, and printed newsletters/updates available at rehearsal or your organization's office.



EIGHT—
FUND DEVELOPMENT
(THE MOST DREADED THING ON THE LIST)

Especially as it has become increasingly complex with respect to the expectations of sponsors, donors, and public sector funders, this is the most dreaded topic discussion around many Board tables.

SOME IMPORTANT FUND DEVELOPMENT CONSIDERATIONS

Your goal as a fundraiser is to provide a prospective sponsor/donor/funder to support what you do. When there is a good match between what you're doing and what they're interested in supporting, they will contribute.

Always tailor your ask to align with funder goals. This is often quite manageable given the many different benefits of group singing.

Be sure to create a strong donor recognition plan and to steward donors as well as you can.

All members of your Board should give. That is the best starting place with respect to meeting your annual donation goal.

A fund development plan is key. Your plan should include four areas for each initiative:

1. What are you going to do?
2. How are you going to do it (this includes the human resources)?
3. When are you going to do it (what is the timeline)?
4. How much funding to you expect to generate.

The best fund development plans are realistic and creative.

NINE—
REPORTING + RECORD KEEPING
IT'S BORING BUT ESSENTIAL

- Records should all be stored in one place. Project management software ideal, Google Workspace a possibility, or even in a file box (although this is less ideal).

- Templating reports makes it easier for new Board members and ensures a consistency in reporting. Leave a space for commentary from the writer.

- Certain information should be available to the Board/membership and be included with the meeting records. For example, a concert report should include such information as number of audience members in attendance, number of comp tickets, number of volunteers and total hours worked, concert sponsorship and values, etc.

TEN—
COMMUNICATION IS THE KEY TO EVERYTHING

Regular – Find a rhythm and stick to it.

Concise – Details can live on your website; everything else needs to get straight to the point.

Tailored – Write with your audience in mind and personalize communications when possible.

Includes both internal and external (and includes marketing and publicity).

Always know the "**why**" behind your communications.

Remember that external communications needs to involve more than concert promotion.

Here are the **4 main reasons for external communications** for choirs:

- To market an upcoming concert or event
- To promote awareness of choral singing and your organization
- To share your impact
- To build/engage (your) community

All communications should be centered around your mission and values with respect to vocabulary, tone, and images.

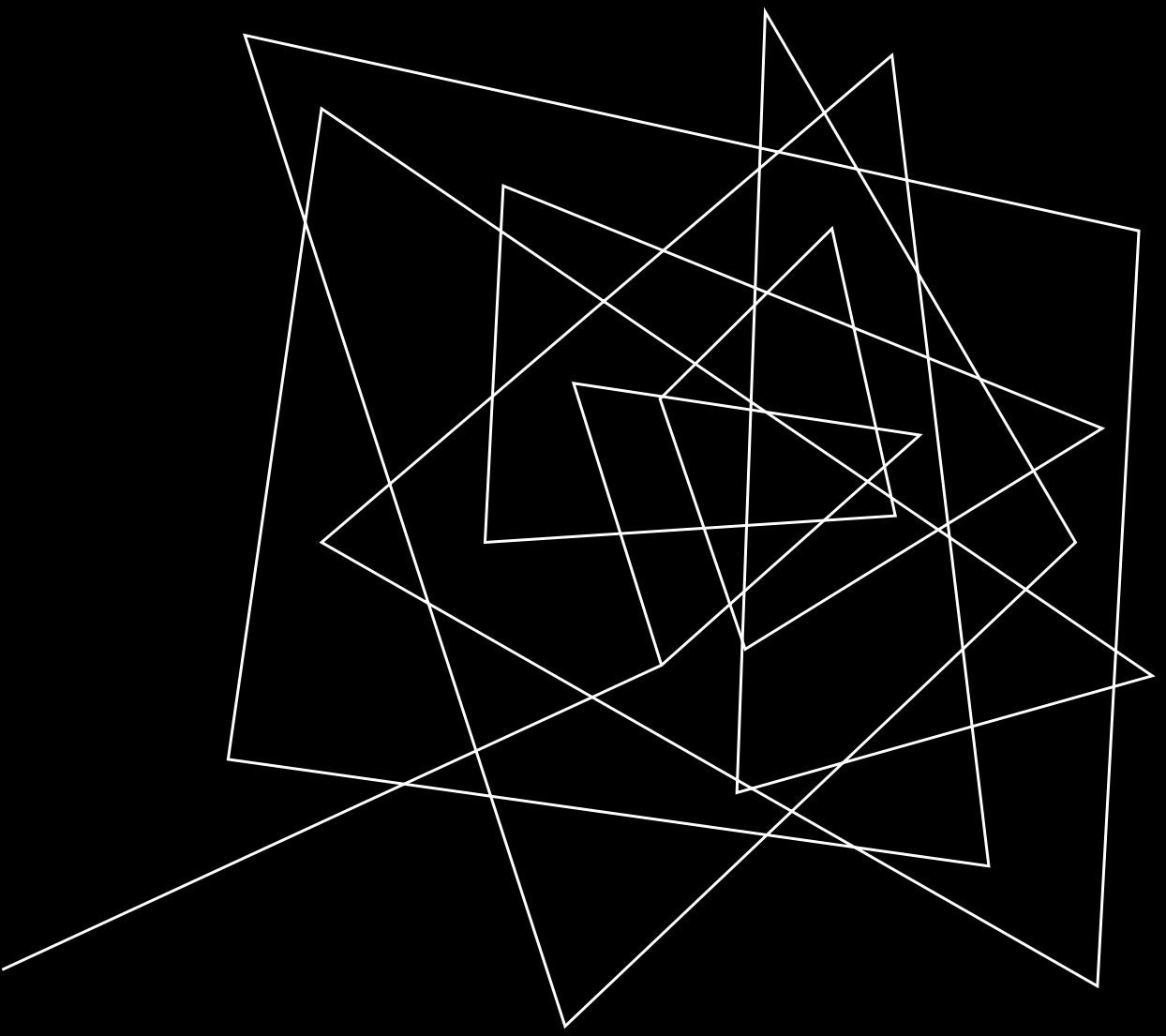
A **communications plan** is a helpful tool. CanadaHelps.org has an excellent guide on key considerations when creating a communications plan.

Internal communications tend to serve 3 main purposes:

- To keep the choir informed with respect to upcoming activities
- To motivate and enhance their understanding of the music and/or the projects you are pursuing
- To build community within the ensemble

A shared online calendar can be a useful tool. Many management tools include shared calendar functionality, but if you're not using software that does, **teamup** is a simple and inexpensive option.

A "singers only" area of your website is another good option to list upcoming dates.



ELEVEN—
MARKETING + AUDIENCE DEVELOPMENT

Because people deserve to know what you do!

Marketing is finding the people who want what you're offering and motivating them to take action. **Audience development** is building relationships and fostering loyalty to your organization. **Publicity** is promoting your organization's brand.

Building audience loyalty is especially important during the COVID era where patrons are less willing to make bigger longer-term commitments like season tickets.

MARKETING + PUBLICITY CONSIDERATIONS

SOCIAL MEDIA

- 70% scheduled, 30% flexible
- Repost related events/info from other organizations
- Use images and videos with every post
- Tag, but be selective and strategic
- Make sure all posts align with your values
- Gear posts toward your target audience
- Use emoticons
- Humanize your organization

OTHER MEDIA

- Posters still have value!
- E-newsletters are particularly important
- Don’t forget about the post
- Keep your website up to date

Marketing & publicity calendar

	DATE	Jan				Feb			
	PLATFORM	1	2	3	4	1 — Concert week	2	3	4
PAID	Facebook	Tickets on sale now	Draw for comp tickets	Preview highlights A	Preview highlights B				
PAID	Instagram	Tickets on sale now	Draw for comp tickets	Preview highlights B	Preview highlights C				
PAID	Twitter	Tickets on sale now	Draw for comp tickets	Preview highlights C	Preview highlights A				
ORGANIC	Facebook					Ticket reminder			
ORGANIC	Instragam					Ticket reminder			
ORGANIC	Twitter					Ticket reminder			
ORGANIC	YouTube		60 sec video of conductor highlighting 1 or 2 aspects of the concert						
OTHER	Website	Add ticket link; update HOME page	Comp ticket draw link						
OTHER	E-newsletter	Concert preview and ticket link							
OTHER	Print ads	Buy ad space	Send ad to paper	Ad published					
OTHER	Posters	Order 250; confirm volunteers	Posted						

AUDIENCE DEVELOPMENT

THE PROCESS

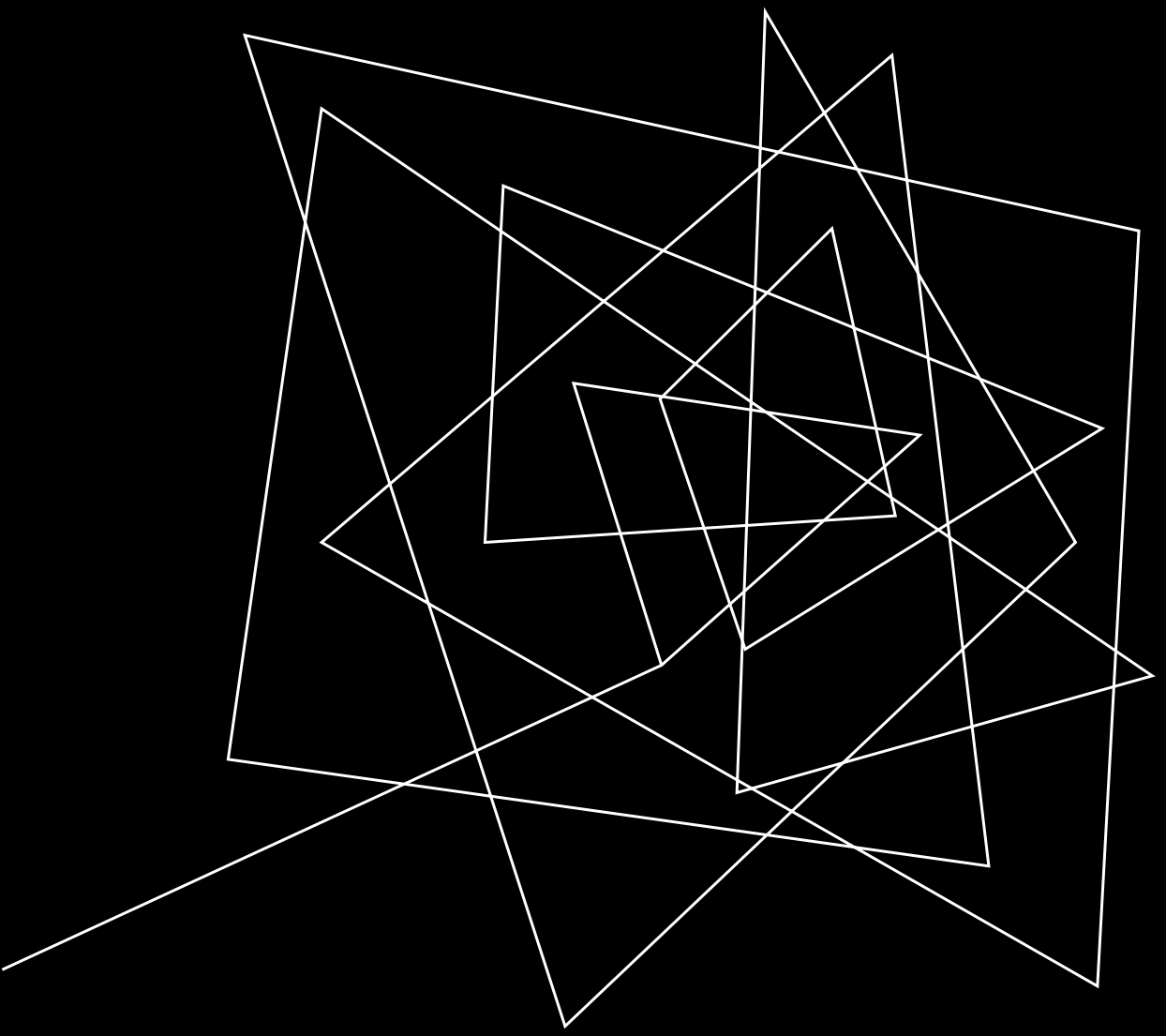
1. Identify who is and who isn’t already attending your concerts.
2. Decide which audiences you want to focus on – your ‘target audiences’
3. Develop a strategy for how you will increase those target audiences
4. Decide how you will measure the success of your plan
5. Put the strategy into action
6. Evaluate the success of your Strategy (using the measures you set out earlier) and making adjustments/improvements

AUDIENCE DEVELOPMENT

It's all about building relationships!

STRATEGIES

- Send personalized invitations to concerts.
- Send first-time attendees a thank-you note for coming.
- Call loyal patrons (no more than) once a season.
- Hold a pre-concert reception for regular patrons.
- Offer comp tickets for long-time patrons to bring friends to a concert.
- Send a winter holiday card.
- Encourage staff/Board members/performers to interact with audience members at concerts.
- Ultimately, **communicate to patrons that you care about their concert experience** and their continued association with your choir.



TWLEVE—
ACCESSIBILITY, DIVERSITY, EQUITY, INCLUSIVITY

A choir for every voice.

ADEI CONSIDERATIONS

The ADEI lens will inform all administrative decisions for your organization.

Some questions to ask:

- Is the space accessible for individuals with mobility challenges, and have you reserved space for accessible seating?
- Are there large-print programs available?
- Can you provide an ASL interpreter?
- Is the ticket price an obstacle and, if so, what solutions can be found?
- Are sponsors recognized primarily by level of giving?

As a community, we are in a stage of learning and beginning to apply these concepts. Board/leadership development in this is area is a great place to start.

Beginning to understand your team's/organization's unconscious/implicit biases is key to opening the door to equity. The online Harvard Implicit Association Test is a useful took in this regard.

For most organizations, it is not possible to offer a full suite of ADEI initiatives all the time. However, you can respond to needs you know exist.

For example, if someone joins your choir who isin the process of learning English, perhaps you can engage a translator to communicate key information. Or if you have audience members with vision problems who regularly attend your concerts, perhaps you offer larger-print programs.

THIRTEEN—
MANAGE AND APPRECIATE YOUR VOLUNTEERS!

Because we really couldn’t live without them!

OUR RESPONSIBILITY

Volunteers support our organizations because they believe in what we do and want to be a part of it. But maintaining a robust volunteer program that includes experienced volunteers is dependent upon effective management and recognition.

Essential components of a volunteer program include:

- The creation of clear job descriptions
- Providing orientation (in person or online)
- Communicating in a clear and timely fashion
- Including volunteerism in the budget for things like the cost of background checks, recognition, reimbursements, etc.)

VOLUNTEER MANAGEMENT PLATFORMS

Use of a volunteer management platform can simplify the process of both volunteers and the organization. However, it is important to remember that technology can be an encumbrance to some, so it is always best to give volunteers the option to call.

Some free/low-cost volunteer management platforms include:

- VolunteerLocal
- RosterVolunteers
- iVolunteer.com
- SignUp.com
- VolunteerSpot
- Signup Zone
- VolunteerHub

VOLUNTEER APPRECIATION

It is important that all volunteers feel appreciate. Some simple but effective approaches to volunteer recognition include:

- Sending an email or a thank-you note
- Sending a $5 Starbucks gift card inviting them to have a coffee on you
- List their name a concert program
- Include a volunteer appreciation reception after a concert
- Provide complimentary concert tickets
- Have Board members reach out to them to express thanks
- Develop a volunteer award

THANK YOU

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