



Chapter Officers Common Skills Workbook

BHS Evergreen District – Chapter Management Series



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Introduction

Hello and Welcome. If you are watching this, you are probably a new or returning Chapter Officer. Congratulations! You are making a difference in your chapter, well done.

This course will show you the ropes, and help you have a great time leading your chapter.

Watch and listen, keep notes and questions, and bring your thoughts and ideas to the group learning session.

Your course materials are made up of a written guide, audio-visual presentations, and an online facilitated course.

The podcast style presentations are about 5 to 7 minutes in duration. There is a companion workbook for the course. Some people find it useful to pre-read the workbook. Others might print it out, and keep it handy for notes and questions.

You will be assigned a Master Online Coach to help you understand the materials, and offer guidance for your specific needs.

In this course, you will learn the common role and duties of all Chapter Officers.

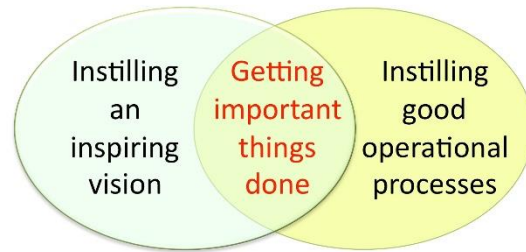
Leadership

You are in a key leadership role in your chapter. Your member look to you to build the chapter in size and retain new members, to manage the finances and organization of the chapter, to define a vision and work toward that vision.

As a team, Chapter Officers need to have a direction, some kind of roadmap. You need to know where you are going, and why.

Build all this into your own vision for your role, and share it!

Leadership & Management



By David Truss - <http://paradigma.davetruss.com/leadership-and-management/>



Management

In this course, you will learn how to work in teams,
get and stay organized,
make plans and
manage your paperwork



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The Job

Your chapter needs you to get on the job. That job is to build your chapter, to teach yourself and others how to grow and sustain, and to improve your chapter – both through people and processes. When you do all that, you will be getting the important things done



People Skills

Any leader needs good people skills. Your role is no different. One good description of people skills uses five terms to define what you need.

"A person with good people skills exhibits

good Communications,

Patience,

Empathy,

Tolerance, and

Conflict Resolution."



Be curious

There is no magic wand to gain these skills, nor should you despair if you don't naturally and already have these skills.

They are aspirational in nature – we all seek to learn and grow strong in these skills.

A good rule is to do your best to be curious about other people, openminded and kind, to show compassion for them and for yourself, and to keep trying. When you care about your chapter and your members, they will find it easier to care about you.

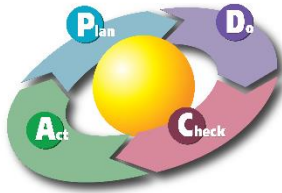


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Planning



Planning is one of the Organizational Skills you will need.

Planning involves setting goals and putting strategies and action plans in place to achieve those goals.

It's a straightforward process of writing up your intentions, trying things out, learning from your results, and trying again.

Your chapter may hold annual events such as Shows, Guest Nights, public performances and social events.

The Chapter President, Secretary and Treasurer and Board Members all have a role in planning these activities.

Budgeting

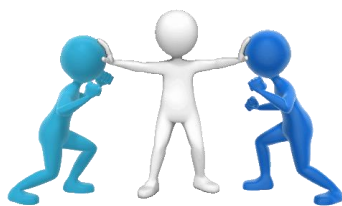
As a leader and a manager, you need to be able to organize teams to work toward accomplishing your goals.

A key activity is Budgeting. A Budget is a plan that states your earning and spending intentions. To succeed in the budgeting process:

- You need to work with others in your chapter.
- You need to plan for your term and beyond.
- You need to develop and set a budget for your chapter.
- You need to act – to get things done.



Managing team interactions



You are one of several Leaders within your chapter. You will come to rely on the good interaction between all these people.

There are only 3 absolutely required Chapter Officers.

President – sets direction and vision, receives and approves plans, acts as a key supporter for all your initiatives.

Treasurer – manages the budget approved by the Board, ensures compliance with budgets, manages the cashflow and general financial health of the chapter.

Secretary – process paperwork such as member applications, keeps all records for the chapter.

Three very common Vice President roles are:



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VP Music – Sets musical direction and vision, along with the Board. Sets singing standards along with Music Director.

VP Programs – Sets the tempo for rehearsals. Manages the rehearsal to keep it moving, interesting. Needs to know the joy levels of the members.

VP Membership - Recruits new members, develops and retains existing members and builds chorus capacity

Your chapter may have many other roles. Learn them, and learn who sits in those positions. This is your team.

Other Responsibilities

Communicating with your Chapter, Evergreen District and the Society

Communications matter! Chapter Board, District and Head Office messages, queries, surveys, reports – these all help keep the wheels turning. It is your responsibility, the responsibility of every Chapter Officer, to stay on top of Society communications.

This can be a bit mundane at times, and feel well removed from singing, musical and chapter development. Let us thank you now, on behalf of Evergreen District and the Barbershop Harmony Society, for your diligence on this. Communications really is everything when it comes to Management.



Personal Training and Development

You have another, perhaps more pleasant duty, and that is one of self-development. You should be ready to seek out and find good Officer training.

This course is only one such offering. You will find many others within Evergreen District, and from the Society.

End

This marks the end of the Introduction presentation. Your next course is the “People Skills” module. Have fun!



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People Skills

Welcome to the People Skills Module of your Chapter Officer course.

Today we will talk specifically about People Skills that you will find useful in leading your chapter.



I Care



People skills is an overused term, so let's define it closely for this course. As a leader,

- You need to show that you care about your members.
- You need to understand how to get them to cooperate.
- You need to learn how to engage them, heart and soul, in the goals of your chapter.
- And you need to lead them to accomplish those goals, and grow as a chapter.

5 characteristics of a good leader

"A person with good people skills exhibits good Communications, Patience, Empathy, Tolerance, and Conflict Resolution."

That may sound like a lot to remember. Let's break it down into smaller pieces.

Communications

Communications is a combination of skills, sometimes referred to as the 7 C's.

#1 COMPLETEMESS

To be effective, communication should be complete, i.e. it should include all the information the recipient needs to evaluate its content, solve a problem or make a decision.

#2 And #3 Be CLEAR and CONCISE

To be effective, communication has also to be clear and specific. The message should focus on a single objective, to emphasize its importance and allow a quick understanding of the message.

Conciseness is not about keeping the message short, but rather about keeping it to a point. The message should not include any redundant or irrelevant information.

#4 CONSIDERATE

When engaging in communication, a sender should always consider and value the recipient's needs, moods and points of view.





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Tailoring the contents and style of your messages based on their target audience strengthens the key points delivered.

#5 CONCRETENESS

Concreteness in communication is about answering questions quickly and consistently, based on real-life examples and situations rather than on general scenarios or theories

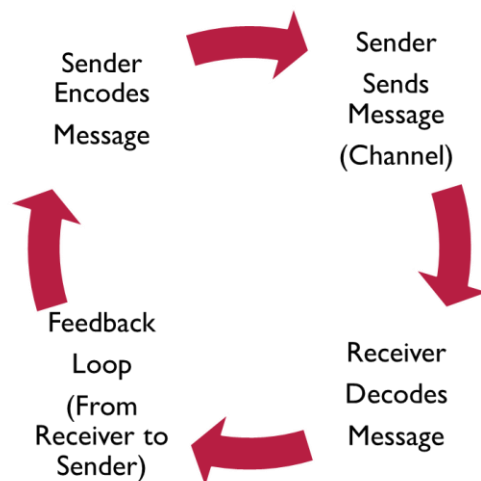
#6 COURTESY

Courtesy in communication implies being respectful of the recipient's culture, values and beliefs. Courteous communication has a positive impact on the overall communication

#7 CORRECTNESS

Correctness mean using grammar and syntax correctly to increase the effectiveness and credibility of the message. Grammar and syntax mistakes make it harder for the recipient to decode the message and understand its contents.

The Communications Model



It is useful to have a basic understanding of a communications model.

In this cycle, a sender decides what to communicate, and encodes the communication. Your choice of terms, syntax, content - the 7C's that you just learned about – will have an impact on the encoding process.

The sender selects a communications channel. That channel might be a text message or email, or a phone call, or a face to face conversation. Every channel has strengths and weaknesses, and most can



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and will introduce “noise” that distorts the message. Knowing this can help you avoid that noise and create or select a clear channel.

The receiver of the message decodes the message. Many well-intentioned messages break down at this stage. That is why it is so important to have a Feedback loop, to allow the receiver to confirm the message and get a better understanding.

This cycle communications continues until the sender or receiver decides to stop it.

Look at some of your recent conversations and see if you can spot where the communications broke down or became confused.

Patience

Patience is not the ability to wait. Patience is to be calm no matter what happens, constantly take action to turn it to positive growth opportunities, and have faith to believe that it will all work out in the end while you are waiting.”

— Roy T. Bennett, The Light in the Heart

“The capacity to accept or tolerate delay, trouble, or suffering without getting angry or upset.

synonyms: forbearance tolerance restraint self-restraint stoicism calmness”

Some people are naturally more patient than others, and they often benefit from stronger relationships as a result. If you are the type who tends to be impatient or hot tempered, you can grow by learning how to move toward a calmer, more patient and loving style. Drop the annoyance and embrace the journey.

You may find this website helpful - <https://www.wikihow.com/Be-Patient>. Wikihow is a great platform – their mission is to try to get everyone on the planet to learn how to do anything. Go take a look sometime.



Impatience

- Pick up on the thoughts and physical feelings of being impatient
- Figure out what’s causing your impatience
- Interrupt the impatience before it gets too strong
- Take 5 deep breaths to slow your heart rate down
- Shift your perspective about your situation, if you can
- Find something good or interesting in the situation if you can



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Empathy

Being able to practice empathy is one of the most important skills you can learn.

Being empathetic means caring and doing your best to feel as the other person feels, walking a mile in their shoes if you will.

It means trying to remain curious about the other person at all times.

It means suspending judgement, listening -really listening – and showing your interest for the other person.

<https://www.wikihow.com/Show-Empathy>



Tolerance



Helen Keller said “The highest result of education is tolerance”. A leader has to be tolerant of many things. Your team is made up of people, and your chorus is too. Many people with many different backgrounds, experiences.

This takes practice. Put yourself around people of different backgrounds.

Try out different situations or new experiences, to challenge your ability to be tolerant.

Take some risks, and listen to different opinions.

Conflict Resolution

Kilmans model of conflict resolution is based on two axes; one’s assertiveness and one’s cooperativeness. Organizations exhibit the same continua. Your chorus may be inclined to be more assertive than cooperative for example.

We are all taught that compromise is a good method for resolving conflict, but the most positive result actually comes from Collaboration – the sharing of knowledge and teamwork to move toward the



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ultimate good. This combines high assertiveness (chasing a solution) with high cooperativeness (sharing the load)

“Avoiding” behaviours, such as avoiding a decision or allowing bad team behaviours to slide without correction, may signal that your chorus is low on assertiveness AND cooperation. There is a big growth opportunity there!

Commanding behaviours, such as not asking team members for opinions, or not sharing tasks, might mean your chorus could improve on the cooperative front, while Accommodating actions such as giving in to the loudest team member all the time, may mean your team needs to learn about helpful assertiveness (not aggression)



Recap

You have covered a lot of ground in this module. The combination of good communications, patience, empathy, tolerance and good conflict resolution skills will make you stand out as a leader.

Take a fearless inventory of your strengths and weaknesses, and move on!

End

This marks the end of your People Skills module.

Your next module is Planning. Have fun!



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Planning

Welcome to the Planning Skills Module of your Chapter Office Common Skills course.

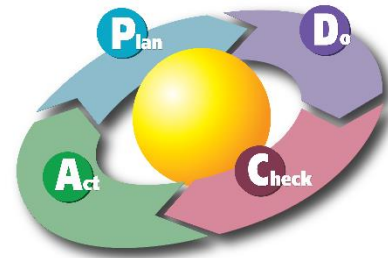
Today we will talk specifically about Planning Skills that you will find useful in leading your chapter.

Planning is the process of figuring out how to get something done. Defining a goal, and exploring the strategies and actions to accomplish the goal, can seem daunting.

As a Chapter Officer, you might have to plan for guest night or other events; marketing and recruiting activities; maybe even social events. It depends on the vision and goals of your chapter.

You should turn to your President and Board members for a clear vision to pursue, and to your chapter membership for team members to act on your plans.

You are not expected to do this alone.



Goals



Depending on your chapter vision and goals, you may be asked to help build a larger membership base for the chapter.

Or – you may be asked to plan and deliver an outstanding annual show.

Perhaps your chapter is at heart a social chapter. You may be asked to arrange a social event for your members.

Your Board sets these goals. Your plans should align with those goals. Remember, as a Board member, you are one of the pivotal voices in setting goals for your chapter.



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Eat an elephant

There is a joke that asks How do you eat an Elephant? The answer is “one bite at a time”. Good planning involves breaking down big seemingly impossible tasks into smaller and smaller pieces until you can see how you can get there.

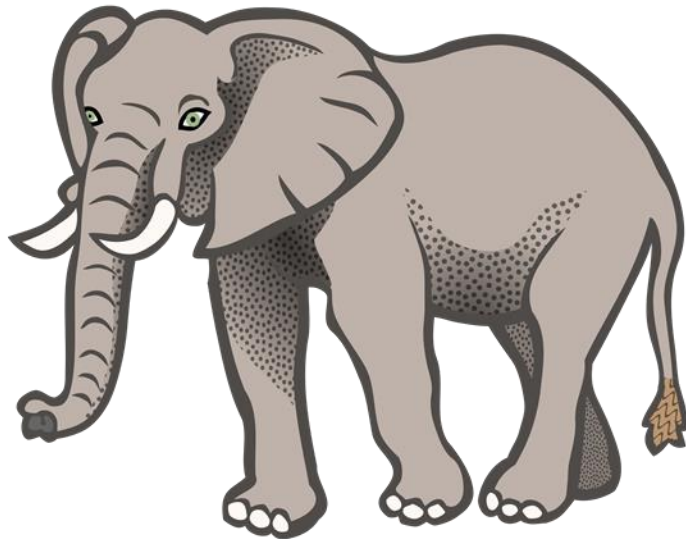
It is about getting organized.

Order out of chaos.

It is also about bringing order out of chaos, one little piece at a time.

You want to decide what it is you are going to aim for – setting Scope. What do you want to do? When? How big, or small, in scale?

Then you want to organize your deliverables – the things or objects you need to create to make your scope happen. You can use these to estimate costs and put things in the right sequence.



Finally, you determine what activities are necessary to get the deliverables created, and assign those tasks to people.

Cake Ingredients

For example, if you want to have a cake, you first need to acquire a recipe, which in turn might call for flour, eggs, butter and milk.

The cake is your Goal and your end deliverable. The ingredients you need are also deliverables. But just having the ingredients does not bake a cake. You need to follow a process (sequenced tasks, a recipe) to end up with a cake.

Scoping

Scoping is where you decide what cake you want, which recipe to use. Scope is also about deciding what you do not want – say, no cupcakes.



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Break it down

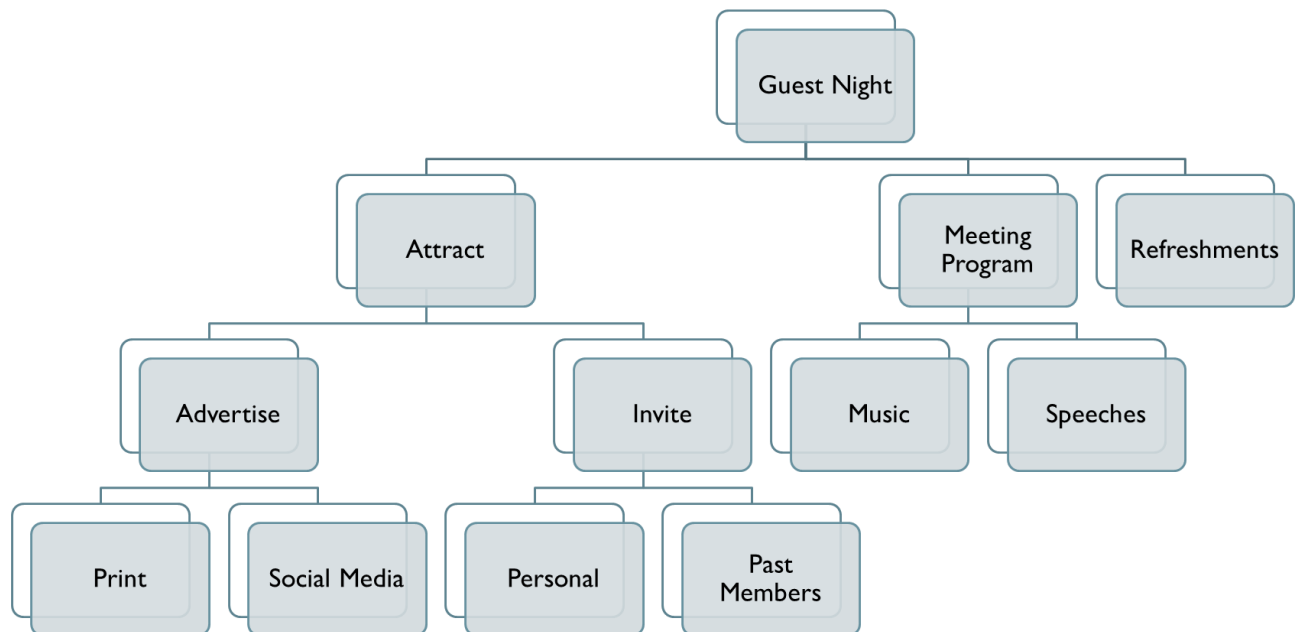
A common planning technique is to break the work down into pieces, smaller elephants if you will. A Guest night plan might include Attraction activities using social media or traditional print media, or other methods.

Another stream might involve inviting individuals.

You will need to set up a meeting program with your Program VP, perhaps including singing and speeches from the President.

You may want to provide snacks.

Using a breakdown structure like the one presented here can help your team organize their thoughts and not forget anything.





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Sequence



During planning, it is helpful to decide on what sequence things should be done.

It may be a good idea to have the location and date for your event tied down before you start advertising, since that information is critical to an effective advertising message.

Snacks could be decided upon, and probably purchased later, close to the date of the event.

Sequencing can have a big effect on the success of any plan.

Estimating

Finally, you will want to estimate how much each element will cost, and add it up. This is your event budget. This is much easier to do when you have sorted out what deliverables you really want, into clearly measurable pieces.



Share the plan with others

Even though you built your plan with a team, you are still going to have to share the plan with your Board and chapter members if you want them to help you make it all go. They may have critical feedback about timing, scope, costs, or even member availability and participation.

It is possible your plan is beyond the capacity of your chapter, and might have to be scaled back. Perhaps there is insufficient funds.

If you get them onside with a good plan, you will be more likely to get their support, and the whole thing is likely to be more fun!



Your workbook contains a sample guest night plan, with activities defined and set into a sequence. It shows the breakdown tool to set your scope, and a calendar to decide what should be done when.

Study this example, and see if you could fine tune it to your own chapter.

End

This marks the end of your third module – Planning Skills.

Your next module is Budgeting. Have fun!



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Budgeting

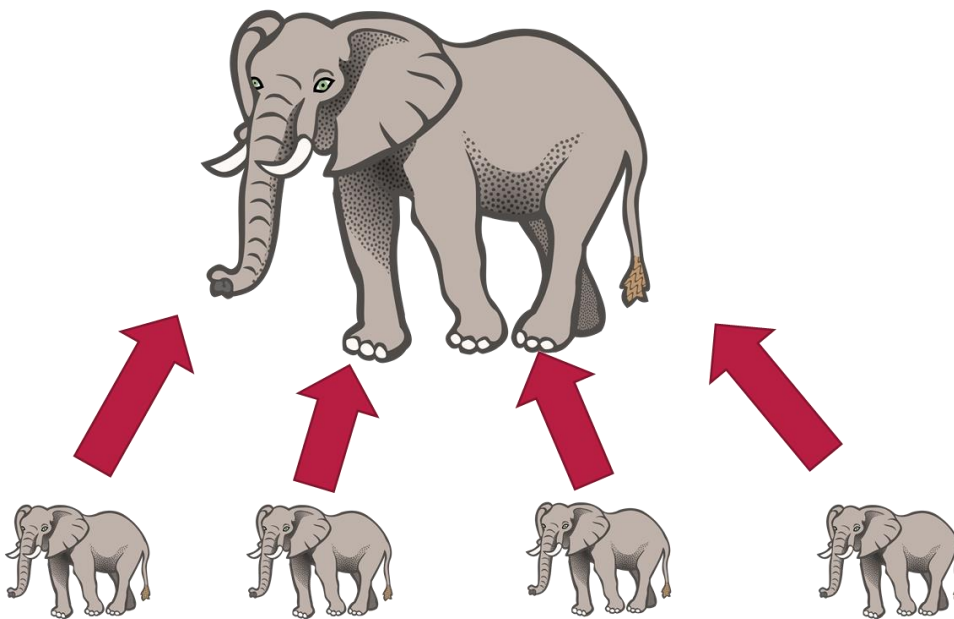
Welcome to the Budgeting Module of your Chapter Officer Common Skills course.

Today we will talk specifically about Budgeting for your term as a Chapter Officer.

Budgeting is the process of assembling all the costs you think you will incur in your position, and getting those funds approved by the Board. Without an approved budget, you should not spend chapter funds.



Little Elephants



In the Planning module we talked about breaking things down into smaller and smaller pieces to understand them. Most likely, each of those small pieces has a cost associated. That is the item level budget, and that piece is called a “budget item”.

When we add them up we might get an Event budget, like a guest

night or social event.

When you add all of those planned events together, you get your annual budget.

Just like during planning, this process is about getting your information organized in a way that can be used by your team and the chapter as a whole.

Based on plans

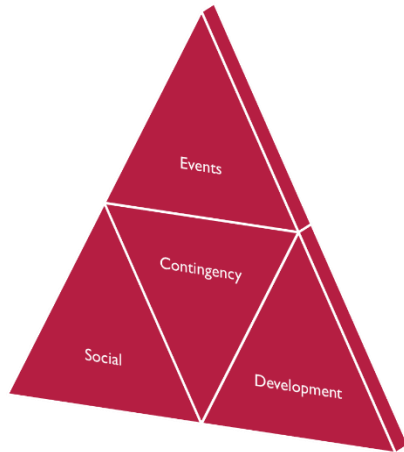
As you can see, any good budget has to be based on your plan of action for the year. Budgets are an output of Planning.



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It is a good idea to add a contingency budget item as well, to allow you to take advantage of unplanned opportunities that may arise, or to manage an unexpected cost overrun during your year. The more certain you are about your costs, the smaller your contingency can be. Why not try 10% this year and see how it goes?

The fully assembled budget should be put into a readable format for your Treasurer and Board to review. Ask your Treasurer for a budget request form. Look it over, and adapt it to your own needs.

Other budgets

Your budget is likely to face competition from other teams in your chapter. The music team needs to purchase music. Perhaps you are buying new uniforms this year. You might send your Director or chorus to school, or take part in competition and conventions.

Your chapter may have limited income to fund all these activities, and hard choices sometimes need to be made.

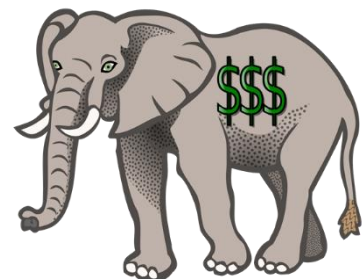
By linking your budget to clear plans, and linking your plans to the objectives of the chapter, you will make it easier for your Board to make those decisions

Build it back up

Let's take another look at that elephant. If your budget has been reduced by the Board, you will have to go back and choose what does not get done. If your budget is well structured, you can make it much easier for the Board to see the impact of their decisions.

Sometimes people want it all – the whole year plan, but also not spend money. You might go back to your plans and see where you could trim costs and still keep your plans intact.

This is one of the most important parts of your planning and budgeting process. Accept it with a positive attitude and make the very best of what you are given.





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Cash Flows

Once you have an approved budget, it can be very helpful to your Board to see your spending plan. If you are the Treasurer, you will be especially interested in this.

In what month will your chapter spend funds? How much? Inflows from membership, performance and annual shows, or even grants, all come in at different times. Even if the inflows equal the outflows on an annual basis, if they don't happen at the right time you could run out of cash.



Cash Flows II

Communicate with your Board before making any expenditures, even if you have the approved budget.

This simple courtesy can help them manage the chapter cash flows more efficiently, and avert financial trouble if revenues are not keeping up with expenditures.

If you are the Treasurer, communicate our cash and income position regularly to help your Board make good decisions.

You never want to surprise your Board. Keep track of your own budget and plans, and report these at your monthly Board meetings. Work with them if fortunes turn bad, and keep a team mentality.

End

This marks the end of the Budgeting module.

Your next module is Teamwork. You now know, from the Planning and Budgeting modules, how important it is to not only have a good team, but to BE a good team member in turn. Have fun!



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Teamwork

Welcome to the Teamwork Module of your Chapter Officer Common Skills course.

Today we will talk about Teamwork, and team building.

The Board

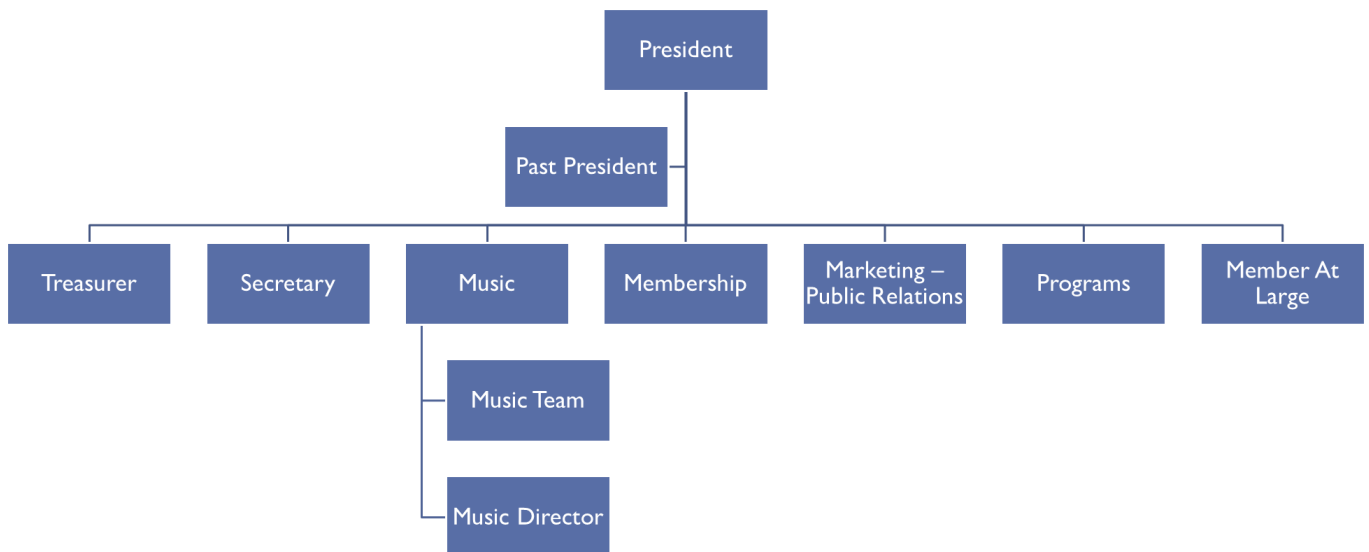
You are a member of a team of people called the Board of Directors. Each Board member has a specific task to own and manage, and all the different people have to integrate their activities to accomplish the goals of the chapter.

Your President is responsible for keeping the machine running, for setting goals and working to have the teams achieve those goals.

Your Treasurer keeps your finances in shape, and manages the bank account.

Your Secretary manages the records and paperwork for the chapter.

These are the three roles required by law for every chapter. Most chapters have several other roles on the Board.



Your Music team makes all the musical decisions for the chapter and chorus.

Your Membership team cares about the member experience, and works to build the chapter membership in the direction indicated by the Board.



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You might have a Marketing and Public Relations officer to keep you in the public eye and manage performances.

You might have a Programs VP or manager to manage the rehearsals.

Most Boards have a few Board Members At Large. They help where asked, but have no assigned portfolio.

You are one of these officers. You work in the middle of all this. You have a stake in every single office on your Board.

Other teams

There are usually other teams to be considered too. Your chapter might have a librarian, someone who keeps the old records safe and available. They sometimes remind us of who we have been in the past; previous accomplishments, past glories. Your librarian is your chapter memory.

Many chapters have a Contest Coordinator to manage the hundreds of details around getting your members to a contest, housed, fed and home again.

The Property Manager is often in charge of equipment and costumes for your chorus.



The Show Chairperson is in charge of everything to do with putting on a show. Coordinating the hundreds and hundreds of details needed to put on an annual show is a special skill, one that should be developed and supported.

Another important team is the Nominations Chair and Committee. This person and team keep constant watch for the leaders of tomorrow and work to groom them and prepare them for the tasks ahead.

Coordination and interaction

The Board and chapters members, you and the other officers, you are all part of a big team. You have roles to fulfill, and goals to achieve, in order for the entire team to achieve their goals.

A certain amount of vision and goal sharing is necessary if we are to get the important things done.



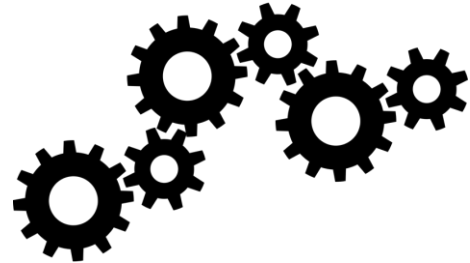
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Inter-dependency

It's not unlike gears and cogs in a machine. Our responsibilities are dictated by the roles we accepted when we joined the Board. But any time one of us moves, we affect another. Removing even the smallest cog in a gear set will cause the set to fail. We all matter, and we all matter to each other.



Our activities might seem independent, and sometimes in conflict, but in fact we are inter-dependent. The success and stability of the organization depends on us all working together.

Team Building

As a Chapter Officer, you care a great deal about developing your chapter as a team. Instilling a sense of common goals and a supportive caring environment is right in your domain.

You might propose and facilitate a Planning Retreat for your chapter, where all the different teams could work together to establish the 1, 3 and 5 year plan for the chapter and chorus.

Setting goals to work toward, and monitoring and reporting progress against that goal, is important. This might be in singing quality, or membership size, or in financial health.



Finding out what really matters to your membership and leadership is the first step, of course. But the objective is to work together toward the goals and instill that sense of common achievement.

Don't forget the importance of social interaction in team building. Every team member needs to find a personal connection within the chapter. Fun events such as a chapter dinner, cookout or campout, or who knows? Karaoke! Can bring your members closer together.

Teamwork makes everything happen

Once you start to figure out your own chapter, you will find opportunities to build fun, effective teams that work well together.

Go find them. Ask. Shake hands. Build your team.

Then build them up. Help them learn the job – the planning and executing, the goals setting and progress tracking, the actual tasks they need to do. Reward the good outcomes, ignore the mistakes, have fun and watch them pull together!

End

This marks the end of your Teamwork module. Your next module is "Other Duties". Have fun!



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Other Duties

Welcome to the Other Duties Module of your Chapter Officer Common Skills course.

Today we will talk about the Other Duties in your portfolio – Personal Development and Barbershop Harmony Society Communications.

Personal Training and Development

It is not quite right to refer to Personal Development as a “duty”. This could be viewed as a reward for your efforts and commitment to the chapter – the chapter should support your own musical and personal growth. The chapter and Society wants to see you do exactly that.

You might attend Harmony University in Nashville, or go to Harmony College Northwest here in Evergreen District. You might take Leadership programs, or singing or coaching programs.

There may be other opportunities in your area for coaching or mentoring.

We are specifically interested in opportunities for you to grow as a chapter leader so you can get the Important Things Done. Speak to your chapter Board about support for this “duty”. If you can’t get that support, speak to your District President.



Commitment to you

Your Evergreen District Board of Directors are committed to your success. We are on your team. Let us know how to help you succeed!

Responding to BHS



As an officer of your chapter, you may be required to respond to BHS information requests. You will need to communicate, respond to information requests or provide reports.

When we respond fully and promptly to information requests, we help the whole Barbershop Harmony Society operate better. Everyone benefits.

The smooth and constant exchange of data leads to better global information, and the knowledge needed to make decisions. THANK YOU for all you do on behalf of your chapter and the Society.



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Succession Planning

Another duty any officer owes to the organization is one of Succession Planning. Whether you are in your position for multiple terms, or only for one year, you should do your best to find your own replacement and ensure they are ready to take on your role.

You will be doing a great favor for your chapter if you plan for, prepare for and execute the transfer of duties from you to your successor, smoothly and professionally.



End

This marks the end of your Chapter Officer Common Skills course.

In this program you have learned about Communications, People Skills, Planning, Budgeting and Team Work. We hope this will support you in your term in office.

On behalf of your chapter, Evergreen District and the Barbershop Harmony Society – Thank you once again for your time and energy.