

**80% OF THE JOB:  
NAVIGATING THE NON-MUSICAL RESPONSIBILITIES OF MUSIC TEACHING**  
NMMEA Summer Workshop - July 2019

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**GENERAL PAPERWORK**

- DOCUMENT, document, document!
- Have a SYSTEM for record keeping/documentation (Accommodations, Health/medical issues, Inventory, Finances, Budget, Discipline)
  - Folders, Digital/Online, binders, clipboards
- PLAN AHEAD/create task lists. Don't wait until the last minute – don't put things off! (forms, phone contacts, emails).
  - Create yearlong, month-by-month agenda: What do I need to do every month?
    - ❖ *Pro Tip: Keep a list of everything you do this year with the date/timeline. Make notes (in file) if you should have completed the task earlier or later in the year and what you would do differently for next year. Use your list year to year and edit as necessary. The following years will be so much easier and less stressful not having to remember everything.*
  - Use Backwards Planning (Plot all dates and work through timeline of "to dos" to prepare)
  - Use Google CALENDAR or planner for upcoming deadlines/reminders
- Stay ORGANIZED
  - If everything (papers, electronic files, emails) has a "place" or "home" (a.k.a. file it) you will not feel as buried.
  - If you tend to be a "stacker or piler" consider picking one day a week to spend 15 minutes filing/organizing your desk.
  - Keep and create a separate file for each event where correspondence, entry forms, Purchase Orders, etc. You can grab this file to access all info when need arises.
    - ❖ *Pro Tip: Get all of your regular/annual travel forms completed for the whole school year, send them through your school system's protocols (principal, assistant superintendent, then the superintendent) for their signatures. This way they all come back signed for the entire year, so when you need to pay an entry fee or meals, you have the forms you need to attach to the requisition. This saves a lot of time and you are able to get all of your fees in on time.*
- For OFFICIAL COMMUNICATION do not use social media (ie. Facebook) or personal email addresses
  - Use your school assigned email address for all official communication.
  - Keep a parent contact log for all communication with parents/guardians that include date, time, topic and resolution or follow-up needed.
    - Email is can be a "built in" log (have a file for parent emails)
  - Keep a notebook/journal for meeting notes, daily activities that you can refer back to when planning from year to year.
  - Be cautious about giving your cell number or personal phone number to parents unless you absolutely have to.
  - Make sure parents clearly understand your preferred method of communication

- BUILD PROFESSIONAL RELATIONSHIPS (always be kind, do not just speak to others when you have a need).
- KNOW intimately the procedures for your own district, especially those at the building level.
- FOLLOW DIRECTIONS & BE PROMPT Many applications, entries, purchase requests have been discarded due to lack of following specific directions or they were late.

## **FIELD TRIPS**

- ✓ travel approval from administrator
  - ✓ bus request
  - ✓ signed permission and medical authorization form
  - ✓ purchase orders or check for fees
  - ✓ check in with nurse for during school medical/medication needs
  - ✓ lunch/meal plan if traveling during this time
  - ✓ send list to teachers ahead of time if students will miss class.
- Sometimes band activities require students to miss other classes. Communication is the key. Contact teachers with a list of names, dates, and times as soon as possible so they can plan for student absences.
  - Keep these absences to a minimum. Take band students out of other teachers' classes as little as possible – never would be better (that is not the real world).
  - If band activities require your students to miss class work or tests, if possible, allow them to make it up during band time.
  - Remember to check with nurse prior to trip (week before) for any medical needs of students. You are lawfully obligated to make sure student medical needs are met.
  - Transporting students to events in personal vehicles (yours, parent or otherwise) requires paperwork for liability AND HS students who drive themselves to events may or may not be allowed per District Policy.
  - Overnight trips/travel have many other logistics, responsibility, and financial commitment; best not to attempt in first year.

## **FACILITY**

- ✓ Know who is the on-site facility manager for use of gym, Performing Art Center for all concerts (best to do at beginning of year).
- ✓ Get concerts/events on the school Master Calendar (each site has different procedures).
- ✓ Make arrangements for custodial, security, and/or adequate parking.

## **ACCOMODATIONS/IEPs/504s**

- Must follow – it is the law. 504s and IEPs are Federal required law-abiding documents.
- Consult with sponsor teacher or counselor for guidance on necessary accommodations.
- Communicate with parent on how to accommodate for what might be a non-traditional class.
  - ❖ *Pro tip: Keep binder of accommodations with lesson plans (hard copy or electronic file).*

## **SUBSTITUTE BINDER/EMERGENCY PLAN**

Keep a notebook easily found at the front of the classroom with emergency plans for a substitute.

- ✓ class lists - Update quarterly (Class lists can/will change).
- ✓ An emergency lesson plan
- ✓ attendance slips or record keeping plan
- ✓ emergency evacuation plan
- ✓ highlight any student medical needs

## **INVENTORY**

- You must keep up with the instruments and equipment owned by the school and band program.
- Make a list of all instruments and equipment and their district & serial numbers.
- Devise a check-out system to help you know where everything is at all times.
- Have a loan agreement/contract signed by parent and student for school instrument use to protect who pays for any damages. Check with your District to see if they have a standardized one.
  - Don't forget about percussionists – consider having them sign a usage form.
- You may want to take pictures of each school instrument on loan and save it on a computer with the serial number and fixed asset number or take a photo and attach to school loan agreement for documentation of condition.  
  
*❖ Pro-Tip: For tracking personal instruments...Have the kids answer a Google survey where they enter their personal instrument brand, model and serial number. You will have an instant spreadsheet of everyone's instrument in case something gets lost or stolen, or an unlabeled instrument is found and I need to get it to its owner. Easiest inventory ever, and it takes only 5 minutes per class.*

## **MONEY**

- You will most likely have to FUNDRAISE.
- Anytime you touch money as an employee – it immediately becomes school and therefore public funds.
- New to a job – review old budget or financial records for reference.
- Make friends with school book keeper – ask questions, keep accurate records be aware of budget (do not rely solely on book keeper records).
- GASB 84 (effects activity accounts – you may want to discuss with your book keeper)
- Ask for reconciliation record monthly and compare with your own records.

- PLAN AHEAD
  - When will you accept money?
  - Make sure a Purchase Order (PO) is in place *before* any purchase or service is rendered. You could be financially responsible for any charges not pre-approved before the PO date.
- Anyone contracted to do work must be an approved vendor by the District (paperwork required).
- Money collected not only needs to be receipted but should also through an activity or booster account for purchases. For example, you want to take your group to a ticketed event. You collect money (cash) for tickets and take cash to box office to buy tickets (not ok). Need to collect money, receipt, deposit and have fund write check to vendor for tickets.
- Always write a receipt when you collect money and don't put it away thinking that you'll do it later. Follow your school's procedures!
- Do not leave monies unattended (especially cash). Most schools require you to deposit within 24 hours.
- Never leave one person (yourself, booster member, or student) alone with money. There should never be a question or concern that one person could have taken money.
- Be TRANSPARENT – create and follow a BUDGET (You will gain support when you be specific with income and expenses/needs). Review income/expenses monthly and revamp budget annually.
  - You must have complete control of all spending, but that doesn't mean you just buy things as you need or want them. Always have a justification for the things you need to purchase – how it will help the program and the students
  - Maintain a yearly budget and include all of your purchasing needs for the year (instruments, equipment, uniforms, color guard, show props, music, drill, instructors, travel, conferences/clinics, festival fees, etc.). Include all needs even those you intend to purchase with other funds (district, school, grants, etc.) and indicate in your budget the funds that will be used to fund each item. This will let the parents know you are using all funds available not just “their” funds. It will also give them a goal to reach in their fundraising efforts.
- It is a good idea leave a balance in the operating account year to year (if allowed) so that there will be funds in the future for beginning of the year start-up or savings for larger purchases.

## **BOOSTER CLUBS**

- Booster Club must obtain non-profit 501c3 status to operate legally as an agency independent of the school. There are two ways to do this:
  1. Find someone who is well versed in accounting or tax law. This will take a lot of time.
  2. Use *Parent Booster* (parentbooster.org) to act as the umbrella group. For an annual fee (\$495) you gain immediate non-profit status (tax id number) and they file all necessary paperwork on your group's behalf.
- It should be in the constitution and by-laws that ***the Band Director is the final word on, and has veto authority over all decisions of the organization.*** All functions of the Band Parent Organization must proceed only with the approval of the Band Director. You are ultimately responsible for what happens with the band program.

- Parents want to help. Their intentions are usually for the good. However, you will have to guide them in the right direction.
  - Make sure they know and understand your goals and direction for the band program. What are your goals for the band program? (festival vs. competition, projected numbers over the next few years, travel prospects, etc.)
  - Guide the nomination committee to help select parents for officer positions. Select parents who you know can do the job the way you want and who are supportive of your goals for the program.
  - Be careful of friendships with parents. Be friendly, but not close friends. Always return phone calls and emails.
  
- Structure (Executive Board/General Membership) can vary. However, the minimum positions needed to establish an Executive Board are 3 (President, Secretary, Treasurer).
  
- Have the President/Executive Board set up committees to get the work done. Get as many involved as you can. Most people won't volunteer, but they will help if you call them with a specific task that needs done (if they are available).
  - ❖ *Pro tip: Create a survey (Google form) where parents can fill out contact information and check if they are interested in helping with different events or have specific helpful skills (eg. Chaperoning events, band banquet, has medical training etc.). Then refer to this survey throughout the year when looking for specific volunteers.*
  
- Don't let Boosters meet without you present!
  
- Speak with administrators and make sure they have a copy of your bylaws.
  
- Most Districts have Board policies on Booster Clubs. Follow them.
  
- Some non-profit boosters do not use "School" in the name of Booster Club. (eg. Use Thunder Band Boosters instead of Tony Hillerman MS Band Boosters)
  
- The main function of the Band Booster Organization is raising money. Make sure the organization is always planning far in advance on their fundraising projects.
  - You cannot tie fundraising to a "grade" in the class.
  - There should be a parent or committee in charge of each fundraising project whose responsibility is to organize all aspects of the project. The burden and extra work of fundraising projects should not be the Band Director's responsibility.
  - Booster Club should help lighten the load of the Director not add more work or stress.
  
- Director or other school personnel should not have any personal ties to bank accounts (eg. credit card).
  
- Paper Trail/Document everything! Transparency is key!
  - No one person should be making purchases. Have thresholds in bylaws for approval. (eg. Up to \$250 Treasurer & President can approve, \$251 - \$999 Executive Board must approve, over \$1000 general membership must vote for approval).
  - Have an accountability chain to ensure that at least two people know money is being spent. Conduct an annual audit.

- There must be a treasurer's report monthly that shows balance in account, income, expenditures, and status of budgetary line items.
- Have general membership meetings (quarterly at a minimum) to allow parents at large a chance to ask questions, review financial reports and minutes.
  - ❖ *ProTip: Great MENC publication on NaFME website regarding Boosters: <https://nafme.org/wp-content/files/2014/11/Music-Booster-Manual.pdf>*
  - ❖ *Pro Tip: If you are using a Booster Club - have a locked safe/depository (and you do not have keys) for students to turn in monies in the band room. Saves class time, the Director is relinquished from handling money, the Booster Treasurers can collect money at their convenience.*