



## Policies for the Baldwin Highlander Music Patrons 17-2018

### 1. Outgoing letter policy (February 19, 2008)

The following steps were recommended by the Executive Committee for sending correspondence outside of the organization:

- a. The BHMP member wishing to send correspondence will ask the Board of Directors and Executive Committee for permission.
- b. Secretary will send sample letters to that person.
- c. The patron writes the body of the letter.
- d. The patron will send a draft to the secretary, and then the secretary will send the letter to the Executive Committee members for their review of the letter and to make comments.
- e. Comments are sent back to the patron.
- f. Second edition is sent to the Executive Committee for final approval.
- g. Secretary prints the letter with letterhead.
  - i. Originals to patron.
  - ii. Copies to secretary's files.
- h. Correspondence is signed by patron and/or president of the Baldwin Highlander Music Patrons.

### 2. Act 33/34 Clearances for chaperones (*August 2017*)

- a. A chaperone has to be a patron's member
- b. The issue concerning the Act 33/34 Criminal Check and Child abuse clearances was passed. BHMP member obtained the clearances, they would be valid for as long as that member remained active in the organization.
- c. This is for all members who plan on being chaperones, working logistics, *uniforms* or volunteering for any other position which would involve sustained contact with students for all trips including football games, parades, and overnight trips.
- d. When you get the certificate back, make a copy of it
  - i. The Chairperson for the Chaperone Committee will maintain the file of certificates for both chaperones and logistics
- e. If a member has a new certificate from an outside group obtained within a year it will be accepted by the BHMP as satisfying this policy requirement.
- f. *If Patron Act 114 requirements would apply*

### 3. Chaperone policy for student accounts (September 18, 2007)

- a. Parents who are chaperones or logistics personnel can use their children's account to pay for their trip.
  - i. Our accountant has stated that legally the parent can use their children's account because the student account is still part of the Baldwin Highlander Music Patrons.
  - ii. This must be a universal policy and must be the same for every year
- b. This is only for the spring/yearly trip for the Baldwin Highlander Band.



4. NSF Checks (same as prior years – September 18, 2007)
  - a. Checks received with non-sufficient funds or for which service charges are assessed, will be treated as follows:
    - i. Bank fees charged to BHMP due to returned or NSF checks will be assessed to the student's fundraising balance.
    - ii. After two (2) NSF checks have been received from an individual, all future payments to BHMP for the remainder of the school year shall be made as a money order or cashiers check.
  
5. Trip payment for officers and chaperones (Effective 2014-2015 school year)
  - a. Those officers of the BHMP serving as chaperones or logistics personnel on major overnight trips taken by the marching band will have their trip payments waived at 100% up to \$700.00. If the trip expense is greater than \$700.00 per chaperone, each individual officer is responsible for the additional cost. ***All payments must be received prior to the trip.***
  
  - b. Those individuals serving as chaperones or logistics personnel on major overnight trips taken by the marching band will have their trip payments waived at 50% up to \$450.00. If 50% of the trip cost is greater than \$450.00 per chaperone, each individual will be responsible for any cost in excess of \$450.00. ***All payments must be received prior to the trip.***
  
  - c. The individual serving as the nurse on major overnight trips taken by the marching band will have their trip payments waived at 100%.
  
6. Credit card convenience fee for trip payments (August 22, 2007)
  - a. Any convenience fees charged by credit card companies when BHMP members use a credit card to make account payments or to purchase items required by our organization (i.e. Band shoes, tights, etc.) will be passed on to the members making the payment or purchase. This policy does not apply to individuals purchasing tickets for our DCI Show.
  
7. Surcharge for Non-members (January 8, 2008)
  - a. A surcharge will be charged to all non-members of the Baldwin Highlander Music Patrons, for the banquet.
    - i. This charge will be determined by the committee in charge of the event
  
8. Student Gifts (January 8, 2007)
  - a. Usually at the banquet, the seniors are given a gift, we will do away with this after the 2007-2008 banquet. A gift will be given to the sophomores.



- b. . This gift will be something the student can wear, to show support for the band.

9. Student Quota (March 25, 2008)

- a. The quota for all students will be \$100/year.
- b. *The Fair Share will be determined by the Executive Committee. (August 2017)*

10.

Incidental trip expenses (March 25, 2008)

- a. The amount a student can withdraw from their accounts is based on a suggestion from the Band Director, and approved by the Board of Directors. This amount can vary by year. If the student does not have the amount in their account, they can withdraw the account balance for the trip

11. Sibling Policy for Student accounts (February, 2014)

- a. Seniors who are graduating and have money left designated in their name may choose to designate this money to be used for a sibling. Before graduating, the student must designate the funds to a sibling. The funds will be held for that sibling. (The money cannot be designated to a different sibling at a later date) If the sibling does not join marching band in his/her freshman year, all of the designated funds will be placed back into the Baldwin Highlander Music Patrons (BHMP) general fund to be used by BHMP as they deem necessary.

12. Records Retention (June, 2008)

- a. The following records shall be maintained by the corporation and disposed of in accordance with this policy.

**TYPE**

**RETENTION**

Minutes

*Permanet (August 2017)*

Board of Directors

Permanent

Bylaws/Charters

Permanent

Incorporation Records

Permanent

Annual Audits

Permanent

Annual Budgets

Permanent

Legal Cases

Permanent

Tax Returns

Permanent

Contracts

Active + 3 Years

Insurance Policies

Active + 3 Years

Personnel Records

Employment + 6 Years

FICA/W-2 Records

7 Years

Bank Statements

7 Years

Expense Reports

7 Years



# Baldwin Highlander Music Patrons, Inc.

Cancelled Checks	3 Years
Bank Deposit Slips	3 Years
Fundraising Information	3 Years