



FROM THE AUTHOR OF
"THE MUSIC EDUCATOR'S GUIDE TO THRIVE"

THE MUSIC BOOSTER MANUAL

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Introduction

Your school music program should be 100% funded by the school, the district, and the state. Unfortunately, for most of us that simply isn't the case. Our programs are running on bare-boned budgets and as music educators and parents we often find ourselves over-worked trying to raise funding to establish a thriving music program.

Fortunately, the best music programs never fail to attract supportive parents, alumni, administration, and community members at large. This makes creating and managing a booster program a particularly easy and attractive way to gain essential funding for establishing programs, and for providing the financial resources to enhance the learning of students while increasing their opportunities to perform, travel, and experience music on a deeper level.

This manual is set out for the music director looking to start a booster program, and the director that already has one but wants to increase its effectiveness and efficiency. But this manual is also for the boosters themselves, to help guide the organizations motivations, actions, and legal compliance.

A few things to keep in mind before you get started:



- Always **comply with the legal requirements** of your district and school. Before beginning any booster activities it is best to clear the action with your principal to ensure their backing and support. Additionally, funds should always be sought from the school and/or district before any other type of fundraising should occur.

- The goal of the booster program is to **support the music director**, not to guide or subvert the director. The content and priorities of the music program are the responsibility and directive of the music director, and the booster program is

supplementary to that.

- Booster groups are not only intended to support the music program financially, but in all **advocacy efforts as well**. Boosters have the ideal role of being liaisons to the community at large, while being the largest stakeholders for the program and advocates for their students.

- In some communities fundraising is seen as a negative action; the common belief that it takes time, effort, and expense that doesn't justify the profit, or even that fundraising for school programs is seen as **additional taxation**. These sensitivities must be addressed prior to fundraising activities that may involve the community at large.

Regardless of these cautions, booster programs are one of the greatest assets available

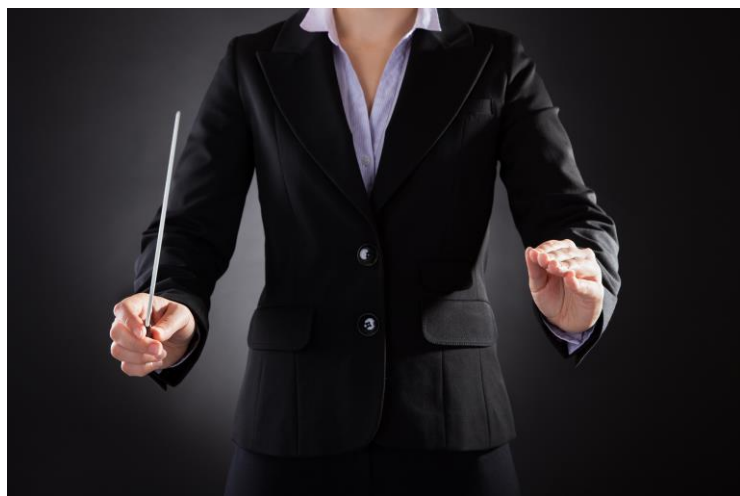
to programs of any size and in any locale. The efforts of the booster group can have lasting positive effects in the lives of music students. And isn't that what it's all about?

Why Start a Booster Group?

With so many other tasks on the metaphorical plate of the school music director, why might one want to go through the efforts of starting, or improving, a booster group? Most music directors tend to think things can get done better and more quickly if it's handled by the director themselves.

In some ways this is true. A booster group will meet on a monthly basis which will require more of the director's time in attendance and preparation for the meeting. There are concerns about organizing volunteers, and managing the leadership. A booster group may open the director up to conflicts and power struggles.

But the benefits of a booster group that is successfully managed can be a massive boon to large and small programs alike. Here are just some of the reasons you may want, or need, to start a booster group for your school music program, in spite of the foreseen challenges of doing so:



- In addition to fundraising, your group could completely manage volunteers for events as well as all the aspects of travel and tour planning.
- Your booster group becomes your core advocacy group, assisting with marketing your music program and public relations. From concert promotion to requests for increased budgets from the school district, your booster group will be at your back to support and help manage these tasks and challenges.
- By asking boosters to volunteer their time, effort, expertise, and financial assistance you are ensuring their commitment to your music program on a psychological level as well. People care more about organizations that they give to.
- Volunteers from your group may also be able to help with student leadership retreats, band camps, parades, uniform fittings, organizing the music library, shuttling instruments, taking care of sick or injured students...and anything else that is not associated with the teaching of the curriculum.

As you can see, your booster group can truly be your right-hand in many ways, assisting

with the wide variety of tasks. And remember, these are adults, not students, and will not require the same level of micro-management that your students do.

So put aside thinking that a booster group may not be able to help you- they can help you in any way that you feel comfortable.

CHAPTER ONE

Starting from Scratch

This section is for those of you who may not have a booster group at all, but are now determined that it's the right fit for your program.

Congratulations!

Getting your booster group off on the right foot requires communication and cooperation. Ensuring excellent communication right from the start mitigates any risk that someone will feel 'out of the loop' and prevent future misunderstandings. Truly, every individual that can be considered a shareholder in your program should be part of this circle of communication.

Begin by making a list from your circle of influence outward to help you identify those who need to be involved first. This might include:

- **Other teachers in your school**- especially if you're creating a booster program that might support all of the music, arts, or electives. In a smaller school, tapping into these other teachers is essential.

- **Your school administration**- ensure that they understand the need for the booster group and what types of activities they will be engaging in.

- **Dedicated parents**- think of those who show up to concerts, already volunteer, communicate regularly, with students that are engaged as well.



Next, make a list of all the tasks that you feel the booster group could take over, as well as the things they won't. Many of these were mentioned previously, but you can also grab the free download of '**Booster Group Activities**' from the online resource page: ProfessionalMusicEducator.com/Boosters

You should now have three lists:

- 1) **Reasons why your program needs a booster group**
- 2) **People to communicate with first**
- 3) **Activities you'd like the booster group to manage**

Once you have these, it's time to engage in a series of informal yet important (and exciting) meetings.

Your First Meetings

Start by meeting with your **administration** and getting approval for moving forward. This is a very important step not to skip. Regardless of how involved your school leadership is, letting them know your plans can go a long way to gaining their support, especially if conflicts arise in the future.

Once you have obtained the appropriate approval, contact the list of **dedicated parents** that you feel comfortable with first. Set up an informal meeting and share with them the same discussion points you did with your administration: why there needs to be a booster program, and the types of things that you would like them to help with. Review with them the types of commitment that they can expect: monthly meetings, fundraising efforts, volunteerism, and organizational support. You'll be asking for their time, skills, equipment, and expertise.

Keep in mind as you are having these discussions that the focus might feel like it's on the organization, or the school, or your program, or the parents. But really the efforts moving forward have one benefit: supporting the students. You'll be helping provide better organization, improved resources, and more opportunities for the students involved in your program.

That is the real reason you do anything, right?

If the parents are **very** supportive already at this information meeting, ask if they would be willing to serve as officers of the booster group. At the very least you will need a President, President-Elect, Secretary, and Treasurer [or Secretary/Treasurer]. If these parents agree, create an email list or thread so that you can easily contact these parents exclusively.

Kicking it Off: Your First General Meeting

Now that you have your administration and a handful of parents in the loop, it's time to **schedule your first general meeting**. Beforehand, you'll want to ask those same parents if they would be willing to serve as officers and ask for their support during this first meeting.

Create an agenda for the meeting, including what time the meeting will start and how long discussion will be on each point, as well as the objectives that you hope to accomplish by the end of the meeting. It's kind of like a lesson plan! You can grab a meeting template download on the resources page: ProfessionalMusicEducator.com/Boosters.

In addition to officers, you'll want to think about committees that you may want, and add electing all of these positions to the meeting agenda. Some of the other things you may want to discuss are:

- **Membership:** Will it just be parents or can other community members and/or alumni serve?
- **Policies:** How long will terms be, what are the volunteer requirements, how often will meetings be held, and how will decisions be made?
- **Goals:** what are some of the long-term and short-term goals that the organization would like to accomplish? What are the major needs of your music program?
- **Organization:** What committees are necessary, how will files be managed, and how will communication work?

There's going to be a lot to cover, but if you keep everyone on track and reach the goals, you'll be on the fast-track to having your booster group up and running.

As a bonus, offer refreshments.

Considerations

Your next steps should be taken into consideration at the first meeting, too. Having a task list that you can assign to officers and committee chairs will help you feel extra accomplished and on your way. Here are some of the next steps that we'll be addressing, and you should have ready to assign to volunteers:

- **Establishing bylaws**
- **Name, addresses, phone-** you'll need a primary person on your Articles of Incorporation as well as an address, phone, and email address. See if a parent would be willing to charter a PO box for the organization, or if they want to use the school address or home of a primary officer.
- **Creating the corporation through your secretary of state and receiving your Employer Identification Number (EIN)**
- **Filing for federal 501(c)3 nonprofit status**
- **Opening a bank account for the organization (which will require two signatories)**
- **Begin tracking financial decisions (even if you have spent nothing, creating a budget is a good start)**

The processes for each of these is detailed further, but for now make sure your membership knows that you're doing everything necessary to **ensure the long-term success and legitimacy** of the organization.

Chapter 2

Organizing Your Organization

An entirely volunteer organization is unlike any other type of business or nonprofit, though they share many of the same aspects. To help give your volunteers reasons to continue striving for achievement of the goals you establish, you must continually motivate them by helping them see a clear vision of the good they are doing, of the goals that are being achieved.

One of the most confusing aspects of starting a new organization is to establish the 'why' of the thing. For businesses this involves creating a mission statement and a vision statement, and this should be the same for your booster group.

These statements are a single line or paragraph that state what the business is for, which in the long run establishes policy and drives decision making. You may choose to use some time at your first meeting to work with the parents to create a mission and vision statement for the booster group.

This is different from a goal in that a mission or vision statement can never be 'accomplished' or 'fulfilled'. Here is how the two statements differ:

The **Mission Statement** is *outward facing*; it's for the general public to read and understand clearly and concisely why you do what you do. The mission statement says three things very clearly:

- What you do
- Who you do it for
- The desired outcome of the actions you take

Let's try one!

- What you do: *Increase program funding beyond what the district provides*
- Who you do it for: *The high school band*
- What's the outcome: *Educational, enjoyable, rewarding music experiences*

So here's our complete statement...

"The mission of the Boosters is to increase program funding beyond district support for the High School Band so that our students have more educational, enjoyable, varied, and rewarding musical experiences."

Nice.

If you had that printed on a card and handed it to anyone in line with you at the coffee shop, could they easily and quickly understand what you're about? Absolutely!

The **Vision Statement** on the other hand is internal facing; it's for the internal decision making of the officers and director. It can be much more like a goal in that it can provide a more descriptive *vision* for the future, just as goals are also about the future. Unlike a goal, a vision is far-reaching and does not have to be as clearly defined.

So if the Vision Statement helps us to see the future, then to create it you simply have to decide what you want the future to look like for your program! Easy!

What types of things do you hope to see for your program? A larger facility? Competitive advantages? More staff? More options for ensembles, like adding a show choir or a marching band? What about tours? Performing at conferences? Ensuring every student can participate regardless of family contributions? No one needs to rent an instrument.... Your vision statement can encapsulate anything that you desire.

Just remember these points:

- It is not a goal, but a guide
- It is used for decision making. If something doesn't bring you closer to achieving that vision then you shouldn't dedicate resources to it.
- It is far-reaching, long-term, and exciting

Once you have these over-arching determining factors in place, then solidifying your incorporation documents and bylaws will be a breeze.



Bylaws

For those of you who are inexperienced in the ways of organizations, 'bylaws' are basically **the rules** you're going to stick to.

Do you think that your booster group needs a new president every 3 years, or 2? State it in the bylaws. Do you think that officers should attend every single meeting, or can they be excused? And if they are excused, how much notice do they need to give and do they need to identify a proxy in case there is a vote? And how many meetings can they miss before they are relinquishing their position and thus need replacing? And if an officer needs to be replaced, how does that happen?

The good news is that you don't have to reinvent the wheel here. **Plenty of nonprofit organizations have bylaws you can start with**, then read over with your own booster group and make alterations that make sense for you.

For example, if your high school only has grades 9-12 then does it make sense to require a 4-year term for officers? What if their student is a junior their first year and they have no other students? Can they be expected to continue service for 2 years after they have no children involved in the program? Conversely, if the school is K-8, how long should the term be then?

The good news is that I've provided you with a set of bylaws you can use as a template to guide your organization. You can find them on the resource page at ProfessionalMusicEducator.com/Boosters.

You're welcome.

Incorporation

In addition to bylaws, you're going to want to have your organization incorporated through your secretary of state. This can be done in a matter of minutes and with less than \$100 in most states. Just navigate to your secretary of state website and find where you file a document. In most states the system will walk you through it and even provide Articles of Incorporation.

In case your state doesn't offer to just let you snag a copy of Articles of Incorporation, I've also provided you a sample you can take and tweak for your own on the resources page: ProfessionalMusicEducator.com/Boosters.

You are going to need to decide ahead of time who the incorporating officer will be. This doesn't have to be the same person that files the paperwork. You also need to have an address. A post office box is ideal, but will be an annual recurring event. Ask a parent if they would be willing to manage getting that as well, as mentioned in the previous section. Just be aware that people tend to move, so if you use a parent address that may become a concern. Using the school address should be fine, as long as the director communicates urgent paperwork to the officers.



Chapter 3

Roles and Responsibilities

One of the very first things you're going to want to lay out in these beginning stages as well is the Roles and Responsibilities of the boosters, the executive board, committees, and the director.

A great way to do this is to first consider which regular tasks each party should oversee. For example:

Director:

- Planning curriculum and activities
- Music selection
- Instruction
- Ensures school and district policies are upheld
- Identifying areas for growth, improvement, or expansion
- Communication with students and parents

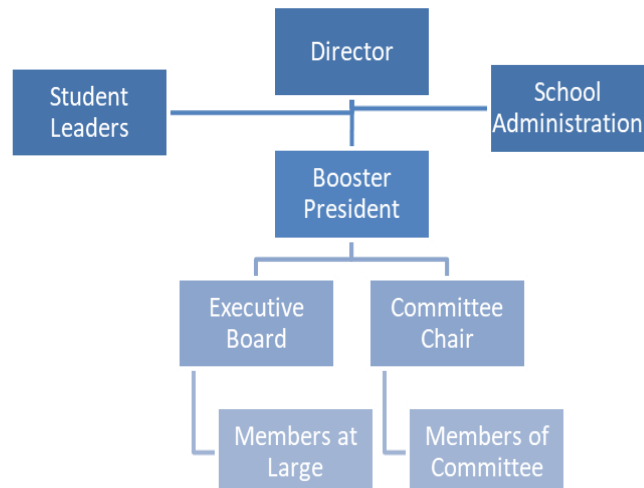
Boosters:

- Planning and managing fund-raising activities
- Awards, banquets, special equipment, trips
- Chaperoning activities
- Food and travel for trips and off-campus activities

Keep in mind this guideline: the Director determines **what** needs to happen or be purchased and the Boosters determine **how** to make that happen. It is important that the money and support given by boosters is seen as supplementary to what the school and district already supply; it is in no way a replacement for what should already be getting done.

Once you have determined what needs to be done, you get to decide who does what and who answers to whom. A fantastic tool for doing this is to use a hierarchy chart. You can easily create one in Microsoft word or PowerPoint or really any variation of the two. In Word it's called "Smart Art".

Here's an example of what your hierarchy might look like:



This isn't exactly how your booster group organization *will* look, but hopefully it gives you the idea of how it *could*.

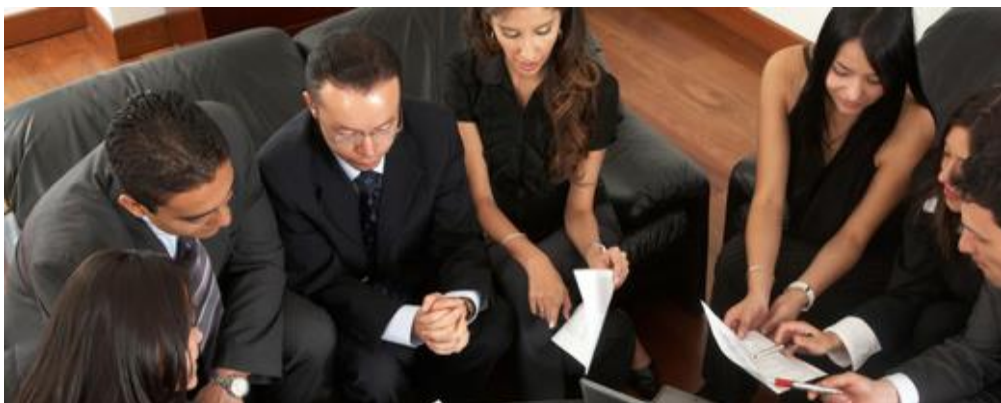
Now that you have a distinction between the roles and responsibilities of the director, let's talk about how you might organize the internal structure of the booster group.

The Executive Board

The executive board is the leadership of your booster group. This typically consists of a President, Vice President or President Elect, Secretary, and Treasurer, but the titles can be completely up to what will work best for your organization. A smaller program might combine the jobs of Secretary and Treasurer and larger programs might have both a Vice President and President Elect. A very large program that is heavily focused on travel may have a Trip Coordinator on the executive board, and one focused on a large capital project (more on that later) may have a Project Coordinator.

Do what makes the most sense for your situation.

Typically, whether in a school booster group or the largest nonprofits in the country, the responsibilities of the executive board consist of the same things. Here are some examples of how the duties and obligations of the executive board might break down:



President- This is the chief executive officer of the organization and is responsible for the actions of the organization. This might be the primary liaison between the boosters and the director, or the boosters and the administration. The president is the one who runs the meetings, guides the discussion, ensures the timeliness of meetings, and mitigates conflict. It's best to have a strong leader in this position that manages people well.

Vice President or President Elect- Supports and assists the president. If there is a task or meeting the president cannot manage, the Vice President steps in to fill that role. In addition, this member may be given specific duties like representing the organization or managing a specific activity.

Secretary- This individual is responsible for keeping the membership and contact lists, keeping meeting minutes and providing them for the executive board, and handling all the documents for the booster group activities.

Treasurer- The treasurer is responsible for the financial activities of the organization. This role ensures that financial records are kept current and accurate, and reports to the board the financial progress of the booster group at each meeting. The treasurer is in charge of making sure the budget

is kept to, and writes the checks or makes the payments when someone needs to be reimbursed or a payment needs to be made.

All of these executive members are leaders and should be confident meeting moderators. These roles cover the basics of the organization. Let's talk about some of the additional positions you may want to create for your organization.

Committees

The number and assignments of your committees should directly reflect the goals of your music program. If you are focused on replacing the 50-year-old instruments that you inherited when taking the job and don't care about traveling, then you may select to have an Instrument Purchasing committee but not a Travel Committee. And vice versa.

All of the committees should have a Committee Chairperson who attends the Executive Board meetings and reports on the activities of the committee.

Here are some of the typical committees school music booster groups may elect to have:

Budget- This committee is in charge of making sure the budget reflects the goals of the organization, and that expenses remain in check. This committee is led by the Treasurer.

Fundraising- This committee is responsible for deciding on the most effective fundraising solutions for the group, as well as putting them together and ensuring their success.

Volunteer Coordination- Works with the needs of the activities to recruit and organize volunteers from the general membership.

Publicity and Public Relations- Sends out press releases, creates marketing materials, and does whatever it can to publicize the anything from concerts to fundraisers to the program successes.

Communications- Creates and sends out the monthly newsletter, informs the general membership of volunteer opportunities.

Uniforms- Manages the inventory, maintenance, sizing, stitching, and purchasing of uniforms or robes.

Equipment- Manages the inventory, maintenance, repair, replacement, and purchasing of new instruments or equipment.

Committees may come and go as their goals are met. For example, you may host a large banquet at the end of the year to celebrate the success of your students, recognize major donors or volunteers, and create rapport with your students. Putting on this kind of event may require a committee for only half of the year. The same could be said for a **Parade** committee, or **Band Camp** committee, or **Choir Tour** committee. Their work may not require them to attend meetings year-round.

When deciding on who will be in what committee, it is important to ask your members who has experience in that field, or a strong desire to volunteer in this way. One parent may feel very comfortable building sets for your marching band show, and one may feel more confident asking corporations for donations. *Use the talents, experience, abilities, and interests of your members effectively.*

Speaking of meetings, executive board and committee meetings should happen outside of the general membership meeting. It is the responsibility of the committee chair to schedule, organize, and moderate the meetings. These can be less-formal than the general meeting, and the resulting actions and decisions of the committee should be passed along to the executive board.

By maintaining your communication between the director, executive board, and committees, your organization will be highly effective in achieving all they set out to accomplish. There is one more group that's part of your booster organization that we need to discuss, at that's the Members.

Members

Whether your membership requires a document and fee, or your members are simply 'anyone with a student enrolled in the program', your membership is the energy that turns the wheel. The director, executive board, and committee members may be the ones to decide what needs to be done, but it's the members who will do it.

Members should be invited to attend meetings regularly, informed of opportunities to volunteer, and encouraged to exert their energies for the mission of the booster organization. Members should be invited to join committees that interest them, and should be provided a list of opportunities with which to volunteer, according to their talents, experience, and desires.

New members should be made to feel welcome and encouraged to participate. The more members your organization has and the more important these members feel, the better your organization will be able to reach its goals.



Chapter 4

Getting Things Done

Now that you have your organization set up, let's talk about how to make sure things get done.

That means you're going to have meetings.

Meetings are when decisions are made, actions are communicated, and a cohesive group is formed. They are important but should never feel like drudgery.

There are a variety of meetings that your booster group may elect to have, so let's talk about them and how they can be used to keep your group organized, motivated, and reaching its goals while fulfilling the mission.

Board Meetings

Most booster groups will want to have an executive board meeting once per month. Some may elect to meet as an executive board only every other month, and some more often than once per month. How do you decide? It depends on the activities being done.

For example, a marching band program may require more attention on organizing volunteers for band camp, transportation, tours, support at competitions, or food for the students. When the season winds down they may not need to meet more frequently. You may also want to take into consideration frequency of committee meetings when planning your executive board meetings. You may elect to have a meeting every month, with an executive and committee meetings scheduled for one month, and general membership meetings the next.

It is recommended that for consistency that you **select one day and time per month** that is always the same: the 3rd Thursday at noon, for example. Try to have your meetings always in the same place. This way it becomes **expected** and **predictable**.

Membership Meetings

Your membership meetings need to be even more effectively moderated than your executive board meetings.

General membership meetings may happen as little as once per year, or as often as once per month; it's entirely up to the needs of the organization. Remember that the time your members give is very valuable, so be respectful of that time

Committee Meetings

The committee meetings are where the metaphorical rubber meets the road. The committee chairman is responsible for scheduling the meeting, encouraging attendance, keeping the minutes (unless this is assigned to another member), and moderating the meeting.

Just as with the executive board and membership meetings, there needs to be an agenda that includes a review of the last meeting, discussion points for this meeting, and assignments to be accomplished by the next meeting. By following this simple formula you will see your group make regular progression, which in turn establishes rapport while encouraging enthusiastic volunteers.

Some tips for optimizing your meetings:

- **Have an agenda and stick to it.**
- **Always stay positive. *Always.***
- **Acknowledge everyone's opinions and ideas**
- **Use humor, especially in tense situations**
- **Always start by following up with the tasks assigned the last meeting**
- **End the meeting by reviewing the new tasks assigned**
- **Vote before making major decisions. This is required for large expenditures, alterations to the bylaws, or changes in leadership.**
- **Be respectful of everyone's time**

Remember, you can snag a free meeting agenda template on the resources page:

ProfessionalMusicEducator.com/Boosters

Most of all make your meetings something people *want* to come to. No one likes to sit in long-drawn-out, unfocused, nonproductive meetings. If offering refreshments helps, then do! Keep on task, have fun, be productive, and be sure to thank everyone for coming. If you finish the business early, then wrap it up and let everyone go home.

Special Meetings

There needs to be one meeting a year where the Executive Board and the music director meet to revisit every aspect of the organization. It's at this meeting where the following decisions are made:

- The annual budget
- Goals
- Events calendar
- Board and Committee leadership
- Any changes to the bylaws
- Any financial or tax concerns
- General direction of the mission and vision

There should also be a full revisit to the progress or regress of the organization and its goals for the past year. Just as with all of the other meetings, there should be discussion of what was, what is, and what shall be. The major difference with this meeting is that its scope is for the year and not for the month, and each decision needs to be voted on and the vote recorded in the minutes.

Because this meeting may be longer and more committing, it is recommended to have it in a more comfortable place- someone's home instead of the music room at the school, for example- and bring in lunch or have a potluck.

Save the cocktails and beers for afterward.

Communication

In the digital age there is no excuse for poor communication. Emails can be sent in seconds. Meetings can be attended virtually using online services like Zoom. Meetings can even be broadcast live in a Facebook group, thus informing them members of what's happening and creating a digital record of the decisions that were made.

Booster groups need to commit to regular communication between the director, booster leadership, and members. By deciding right from the start the regular frequency of recurring communication, and then being consistent with that communication, you will establish expectation, confidence, and enthusiasm in your group.

For example, determine early how long before the executive board meeting the president will send out the minutes. How often will the president be in touch with the director? When will meeting minutes be sent out after the executive board meeting? Will there be a general membership newsletter and how often will that go out? What day of the month will it be sent?

Using online tools can help! Try scheduling regular communications as a repeating event on a shared calendar. Create the newsletter when time is available and then schedule it to be sent. Set up reminders that get sent to member's email, phone, and students.

Without consistent, informative communication your group may flounder, not achieve it's goals, and members may become discouraged. Before long, you may find you don't have a booster group at all.

So: stay in touch!

Chapter 5

Let's Talk Money

Though we can talk about coordinating volunteers and helping with advocacy all day, the reason why most booster groups exist is for the money. The problem is that when it comes to schools, taking money, and accounting for that money, too many teachers and booster groups get into trouble. By not knowing (or sometimes willfully not following) the guidelines of your school or district you may find yourself on a leave of absence or simply fired as the director. Fortunately, having a legitimate and legal booster organization can help you mitigate a lot of those risks, especially if the organization understands some of the basic rules of nonprofit management. Let's talk about some of those now.

Essential Principals of Nonprofit Management

Achieving your nonprofit status with the state and federal governments can do a lot of good for your organization. For example, donations that come in are tax-deductible for the donor. Your organization doesn't have to pay tax on purchases. You are frequently offered discounts and promotions as a nonprofit that for-profit businesses don't.

But to be able to take advantage of these bonuses, you have to follow the rules. Here are some of the more common rules nonprofits neglect or ignore that get them into trouble:

- Having only one signatory on the bank account
- Not voting on large expenditures
- Not tracking every dollar received or every dollar spent and what it is spent on
- Not filing the appropriate tax documents annually
- Spending money on things not associated with the mission of the organization
- Using restricted (ear-marked funds) for general expenses

Basically, the government wants to make certain that the money people give you is being spent on exactly what they are giving it to you for. If someone hands you \$5 expecting it to help fund a student's scholarship to a summer band camp and it gets spent on putting gas in the booster president's car, then that is something called *fraud*.

That's why tracking expenses, keeping receipts, reporting income, and ensuring more than one set of eyes on all the bank account transactions is so vital- you're mitigating the risk of fraud. The last thing you want is to have a director who is the only one who collects donations, the one who keeps the books, and writes the checks. If that is happening in your organization it's a big red flag for trouble.

But by abiding my these rules you can collect money from just about anywhere, at any time, and spend it appropriately. Have many ways for people to donate and encourage them to donate their time, expertise, and/or money often. Just stay legit.

Budgeting

The budget is what directs the major activities of the booster group and should be one of the first things discussed when starting from scratch. At monthly meetings the treasurer needs to refer to the budget, comparing where revenue and expenses currently sit with the established budget.

Not only can the budget help guide the organization, but it can be used in discussions of budgetary concerns with the school and district administration. It becomes a tool for grant applications and fundraising requests.

When beginning your budget, don't simply start with what you want, but begin with the consideration of what you need, and then prioritize them. You may *want* a fifth timpani, but your concert bass drum *needs* to be replaced. Also take into consideration the long-range versus the short-range needs. You may need to purchase new uniforms which is a major expense that will need to be allocated for over the period of years. Other purchases may deem immediate action.

By carefully planning your budget you will find you're able to secure everything from staff to staff paper; whatever *your* program needs.

Though often the director already has some needs in mind, the first step you should take is assessing the various aspects of your music program, just to make sure that you aren't missing anything, and also so that you can justify your budget quantitatively and qualitatively. That means having hard-core data that your administration, boosters, and anyone else can easily understand.

Here are some of the areas to assess:

- Staff
- Music Library
- Technology Resources
- Instrument Inventory
- Non-instrument equipment
- Instrument Repair and Maintenance
- Travel
- Non-Traditional Ensembles
- Student Extensions

Now that you know what you need, identify those that are already paid for in full or in part with your current school budget. The booster group funds should never be focused on replacing the funds already allocated for the music program, they are *always* supplemental.

Include with your list of needs how much money you think is necessary to fulfill each of these needs. Use an Excel file to ensure that everything lines up and can be automatically calculated. Good news! There is an entire Data Collection template ready for you to download in the bonus resources: ProfessionalMusicEducator.com/Boosters. You can use it to develop and calculate your budgets, assess your inventory, and even track your program enrollment.

The next step is to figure in the revenue you're planning to obtain; in other words, show how you're going to pay for everything. Start with your school and district budget. Yes, always. Apply the amount you already receive or plan to receive to the areas of highest concern. Then, go to your administration and show them what you hope they can pay for, and why it is so necessary.

Remember that administrators love *data*! Give them charts and graphs, photos and video. Make your case in a way that leaves opinion completely out of it. Educating the students to the minimum level of the state-mandated curriculum is the responsibility of the school and district. It's simple: this is what is necessary for a successful program that is the pride of the school, and that's what the school needs to pay for.

Next, go to your boosters for the items that are supplemental to the curriculum-mandated needs, and for any items that are denied by your administration. Use your assessment research and data to make your case. Then work with your budget committee to create an annual budget that will accomplish the goals of the organization for the next year. This is the same budget that will be looked over in comparison with the actual amounts at every meeting of your executive and general membership meetings. Remember that the booster organization doesn't have to be your only source of supplementary income. You may have student fees, Summer Camps that generate revenue, or have ticket sale income. Take all of these into consideration in your final budget. When your budget is presented to the booster board, it requires a vote and will be approved or further discussed, whichever your bylaws state.

Your budget may look something like this:

TOTAL Budget			
Income	2018	2017	2016
District Contribution	\$1,500	\$1,400	\$1,300
School Contributions	\$2,500	\$2,500	\$2,500
Booster Contributions	\$1,500	\$1,000	\$500
Ticket Sales	\$100	\$100	\$100
Student Fees	\$1,000	\$1,000	\$1,000
Fundraising Revenue	\$500	\$500	\$500
TOTAL INCOME	\$9,118	\$8,517	\$7,916
Expenses			
Repairs	\$500	\$500	\$500
Small Goods	\$50	\$50	\$50
Printing	\$400	\$400	\$400
Recruitment	\$200	\$200	\$200
Staff	\$1,500	\$1,500	\$1,500
Instrument Replacement	\$5,000	\$5,000	\$5,000
Recruitment	\$100	\$100	\$100
Music Library	\$1	\$1	\$1
Uniforms	\$50	\$50	\$50
	\$7,801	\$7,801	\$7,801

If this area feels like a weakness to you, and you really want to know how to develop an equipment and instrument repair and replacement plan, you can discover a free online workshop that covers just that by going to [ProfessionalMusicEducator.com/inventory-plan-webinar](https://www.professionalmusiceducator.com/inventory-plan-webinar)

Accounting

As mentioned before, it's important to track every income and expense for the booster organization. Financial accounting is exactly that: accounting for every line item that comes in or out of the organization.

To ensure the maximum simplicity of your accounting and to help mitigate the risk of incorrect entries, it's best to set up a flow for how purchases and revenue get counted. For example, do you require paper receipts for all purchases, or will you be doing everything digitally? How will contributions made via the website be tracked? Will there be one person that collects them as they happen, and if so, how? Email? Text? Or can receipts just be turned in at the meeting? Will you print copies of online donation notifications or will you just print out an exported sheet monthly?

More importantly, who will your accountant be?

If you can find a parent who will volunteer their time to be your accountant, that would be ideal. But if you can't, it may be worth it to the executive board to have an accountant hired.

Remember that to mitigate the risk of fraud [intentional or accidental] you want at least two sets of eyes on the financial records as often as possible. Have a treasurer and an accountant if you can, then have someone else entirely as a signatory on the bank account.

Using a shared Google drive folder that the director, all of the executive board members, and the accountant have access to could be the best way to handle all of your financial tracking. Simply make it required that every financial statement, receipt, and donation be added to the shared drive. Have one folder for each: financial statements, revenue, and expenses. Then, when a board member accepts a check from a donor and gives them a receipt they can simply take a photo of that donation evidence and drop it into the appropriate file. At the meeting that month the accountant has added all revenue and expense line items into the accounting system and can produce an accurate view of the financial position of the booster group.

You'll want to keep track of every donor so that you can send them a thank you card and include them on your email list. You'll also want to label each donation with what it should be used for- especially if the donor tells you that they would like it to contribute to a specific expense. This can be done by adding sub-folders or labeling the image or receipt with a file name appropriate to the budget item that the contribution is for.

Keep in mind that the biggest reason for these financial statements is this:

Decision making.

Only by knowing where you are can you make decisions for where you're going.

Fundraising

Too often music directors and booster programs jump on the idea that getting funding requires fundraising; and fundraising has become synonymous with selling.

Do you remember back in high school when you went door-to-door selling window clings? Or maybe you were one of those who carried a cardboard case of candy from class to class?

Maybe it was frozen pies. Or cookie dough. Candles. Pizzas.

Whatever it was I can tell you this: your ensemble could have made a lot more by not selling anything at all.

It's true that when we find our music programs in need we instantly think of fundraisers. We may post on social media asking for what works well for others. We may ask about crowdsourcing pages and instant donation requests.

And though collecting online donations is a great place to start, there are some important figures to keep in mind. This is where we get to learn some business terms:

Revenue is the amount of money the donor pays, whether it's through an online portal or a check your student collected when they ordered those Butter Braids. It's what they can claim they donated to you.

Expenses are the funds that went to collecting that revenue. For goods like t-shirts and hot dogs we call this the 'Cost of Goods Sold'(COGS). This is typically 50% of the revenue...or sometimes more. But it could also be the service fee that crowdsourcing site collects, typically 30% of the revenue, or even the processing fee from your PayPal button 3% of revenue is a pretty good rate.

Profit is the money you're left over with. This is what you've actually made.

So that fundraiser that you're so excited about and other teachers assure will make you the big-bucks may look like this:

Frozen Cookie Dough Fundraiser

Revenue		Expenses		Profit
\$1,200 in sales	-	\$600 COGS	=	\$600

Online Crowdsourcing Fundraiser

Revenue		Expenses		Profit
\$1,200 in donations	-	\$360 Service Fee \$60 Processing Fee Total: \$420	=	\$780

PayPal Donate Now Button

Revenue		Expenses		Profit
\$1,200 in donations	-	\$60 Processing Fee	=	\$1140

That’s right: the same total of donations can mean a whole different outcome for your program.

This is why it’s important to consider the largest-yielding fundraising actions first, before opting to sell anything. There are six steps you should take before opting for a fundraising sale or event of any kind:

Step 1: Craft an Awesome Proposal.

Step 2: Do your due diligence: ask for money from your admin, PTA, and other school-based funding resources.

Step 3: Use your platform: ask for money at your next concert or performance. Use donation boxes, envelopes or online collection. Ideally, all of the above.

Step 4: Go for Local Grants

Step 5: Get 3rd-party donations [passive income]. Use shop with Scripts, Amazon Smile, local shops and stores, bingo nights, and events, like running or bike races that aren’t already a fundraiser for another organization.

Step 6: Collect donations online. Create a paypal.me button on your own booster website, or your PTA or education foundation website before you use a paid crowdfunding site.

You can find this entire list in a free download on the resources page, and in that PDF you'll find links to support materials for most of these six steps! Grab yours now:

ProfessionalMusicEducator.com/Boosters

Once you've tapped out all of these resources, then you can start thinking about things that require even more effort. Some tips for getting the most out of your efforts:

- **Stack your events.** Have one night but a whole lot of ways to give. Have a silent or live auction, sell food or tickets. Ask students to create artwork to sell. Ask for event sponsors.
- **Give a heads-up.** Make sure your general membership is aware of all the fundraising opportunities by giving them a list of the planned activities for the year.
- **Promoting your fundraisers.** Help every member understand the important role they have in promoting the fundraising activities. From sharing your online campaign links to inviting friends and family to an event, it's the membership that will help bring in the donors from your community.
- **Be creative.** Yes, you can try the same fundraising events as the football team, but why? Consider what your community cares about, what they are already spending money on, and then create something that is not only unique, but also highly desirable. Sometimes the novelty of an idea can bring in substantially more donors.

Many music programs will choose to actively fundraise year-round, by staggering events and sales. You may also consider having a fundraising 'campaign', where for 4-6 weeks you do everything you can to raise funds: host a concert, promote your online donation page, write grants, sell logo-branded swag...all to reach a dollar amount goal. As the campaign continues you let everyone know how it's going- think about the 'thermometer' that so many organizations use to show visually how their campaign progresses toward their goal. You can do this too, it's a fantastic visual aid. At the end of the 4-6 week time you let everyone involved know how you did and how the money will be spent. Then you can promise to be finished with asking for money for an entire 11 months.

If your community has a lot of fundraisers going around, having an annual campaign and making it a point of saying, "This is the *only* time this whole *year* we'll ask you for money," can go a very long way to building rapport with your community.

As you can see, there are nearly infinite ways to generate funds. By selecting activities that give you the most profit with the least amount of effort you'll be generating excited participation and consistent growth right alongside revenues for your school music program.

Retaining Donors

One important aspect of running a business is employee turnover. It's expensive for a business to hire and train a new employee- far more expensive than giving a raise to keep employees happy, or offering current staff additional training.

The same is true with donors.

Whether they purchase a box of chocolates for \$4 to support your program, or write you a \$1000 check to buy a new bass trombone, by maintaining a relationship with those who give to your program ensures their willingness to give again. This is one important reason to always track the information of those who donate to your music program: so you can continue to develop the relationship.

Here are some important ways to make sure that those who give continue to care, and thus continue to give.

- **Say "Thank You"**. Say it soon after they donate (immediately if you can) and say it often. Most of your donors are going to be giving because they care about the students, so if you can, have the 'thank you' come from the students. From note cards to posters, photos and videos; the more creative and emotional the response, the more powerful the relationship building aspect of it.

- **Keep in touch**. Keep an email list of those who donate, segmented from your larger general information list. Send updates to your donors on how the money is being spent and how it's making a difference for the students. Did you finally raise enough for new uniforms? Make a video showing a student wearing the new uniform, with that big excited smile on their face. Have the student talk about what it feels like to have a new uniform, how it reflects on their performance. Have the student say, "We couldn't have made this happen without you". Send that out to your donors and be assured that it will put them in the emotional space to be very willing to give again.

- **Ask them to give again**. Seriously. You don't have to send a "give us money" email every month. In fact, you shouldn't. 80% of what you send to donors should be informative or entertaining. Only 20% should be asking them to do something. You can tell them about upcoming fundraising opportunities, but a direct ask should only be made once, or at the most twice, per year. You can actually set up an annual 'campaign', the one time per year that you want everyone to give as much as they can.

Keep in mind that most people don't donate for logical reasons, they donate for emotional reasons. It's your job to give them the emotional reasons, to make them *feel* something. To make them care. The more they care, the more they will give.

Want some advice on how to move forward? Schedule a session with the author:

ProfessionalMusicEducator.com/advice

Chapter 6

Advocacy, Marketing and Public Relations

One of the best uses of your new booster organization is advocacy.

In the music education world, we typically think of advocacy as 'sharing data as to why it's important for kids to be in music'. In business terms, the actions that to take to get this message across is called 'marketing'. Fortunately, for most of us we are already doing the most important thing to advocate or market for our program, and that's making it awesome. Our performances are talked about months after they have occurred. Kids sign up in droves. Parents thank us publicly and often. Our ensembles sound fabulous and are improving every year. The students love us and they love music.

Unfortunately, sometimes even the best music programs can come under fire for a variety of reasons. That's why the job of advocating for our program is never really over. And that's how your boosters can make a huge difference by taking on advocacy, marketing, and public relations as part of their core mission.

Every time we do or say something that establishes our classes, our ensembles, our needs as something of irreplaceable value to the school and to the stakeholders we are filling up an invisible 'account', so that when find ourselves in need we have that 'account' we can withdrawal from.

For most of us, advocacy comes as a back-burner item; something we just don't think about and we certainly don't want to focus on when it will just make more work for ourselves. We want to focus on the students, the lessons, the curriculum, the next performance...where our skills do the most good.

And that's not bad.

But when the metaphorical poop hits the fan and our advocacy 'account' is empty, we might find ourselves spending more time coming up with justification then we ever thought we would have to. Advocacy is definitely a tool best supported by the director, but managed by the boosters.

90% of advocacy is about communication (we talk about this in the next section); sharing a message to convince people to think how you want and do what you need. The other 10% is assets (don't worry, we'll get to those in a minute, too).

It's a simple 4-step process:

Step 1- Decide what you need

Step 2- Come up with all the reasons people should help you get what you need into an emotional message

Step 3- Create ways to share your message (these are your marketing assets)

Step 4- Communicate your message in as many ways as possible

As the director it's your job to do Step 1. Step 2 can be a collaboration with your booster group. Step 3 and 4 can be turned over entirely to your booster group. This is also a great opportunity to get students involved.

For help creating a powerful message, check out the tips for creating a powerful ask on the resources page, ProfessionalMusicEducator.com/Boosters.

Communication

Your booster organization can be your metaphorical mouthpiece to the world. By the nature of them having an interest in the success of your music program, but not the aspect of the program being their primary source of income, their message carries more weight and meaning than that of the music director alone.

As has been mentioned several times already, the vast majority of your success relies on the power of your communication. If you need volunteers to bring food to your marching band camp, that needs to be communicated. If you're having a concert and want community members to come, that needs to be communicated. If you're raising money for a trip to Dallas so your ensembles can perform for the National Association for Music Education conference, that needs to be communicated.

The better your communication, the more likely your success.

Due to the duality of our lives on- and off-line, and the wide variety of connectivity in our communities, it is important to share your message in as many ways as possible. The risk of a message being heard too many times outweighs the risk that the message won't be heard at all.

For each message that you have, whether it's 'We have a concert coming up and want you to come' to 'All of our instruments were stolen last night and we need \$50,000 immediately to recover', your message should be broadcast through the means that will capture your ideal target audience, and ideally capture their attention several times.

In the marketing plan section above we called this communication method 'Placement'. Here are the primary placement options that you should use based on the message you're communicating:

- **Email**- This is probably the most effective and efficient form of communication with parents, donors, and community members. Use it often. You should have several email lists: parents of students only, school faculty and administration, booster membership, donors...we call this segmentation. At minimum you should send out a newsletter to every segment once per month. If you don't already have an email list, it's time to get one started.

- **Social Media**- Facebook and Twitter posts in a group or on a page can capture many people's attention and allow you to use video and digital marketing assets. YouTube and Facebook Live are also great outlets for video communications.

- **Local News Outlets**- Ideal for attracting new shareholders; those who may not have a current interest in your program but may in the future.

- **Fliers and Brochures**- Printed single pages that can be handed out by students and boosters.

- **Direct Mail**- Written letters or other printed materials that can be mailed.

- **Phone Calls**- Need to get information out in a hurry? Set up a phone tree. Contacting new potential donors? Give them a call.

- **Networking**- This is meeting people in person to share your message. You can network one-on-one over coffee, or attend local events with a stack of brochures to hand out.

You can find an entire Music Program Performance Promotion Calendar on the resources page: [ProfessionalMusicEducator.com/Boosters](https://www.professionalmusiceducator.com/boosters)

Conclusion

Whether you're a well-established program or a brand-new school, creating a booster group can be one of the best things you can do for your program. Remember to check out all of the resources curated to help you along this journey of booster program success. You can find them at [ProfessionalMusicEducator.com/Boosters](https://www.professionalmusiceducator.com/boosters). All for you and all for free.

ACKNOWLEDGMENTS

The *Music Booster Manual* (1989), published by the Music Educators National Conference (now the National Association for Music Education, served as both inspiration and a template for organizing this book. It's a little out of date now, but still has some great information and can be found at NAFME.org.

Some of the information also came from a 2003 presentation by John Miller, former band director at American Fork High School in American Fork, Utah. I attended his presentation back then and the information Mr. Miller shared has been invaluable to me in my own music teaching career.

Most of these ideas are my own and come from my education and first-hand experience in opening a new school, managing an elementary music program, working in music retail, serving on nonprofit boards, managing my own businesses, and consulting organizations around the country on better management strategies and practices.

Resources

Final all the resources promised at [Professional Music Educator.com/Boosters](http://ProfessionalMusicEducator.com/Boosters)

And more on these sites:

Music Parents Guide- <http://www.musicparentsguide.com/book/>

Association of Music Parents- <http://www.amparents.org/>

**Want some advice on how to move forward? Schedule a session
with the author:**

ProfessionalMusicEducator.com/advice