



CHAPTER GUIDE

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EdTA Chapter Guide

July 2016

Welcome to the Educational Theatre Association, and thank you for agreeing to serve in the critical role of leader and CEO of your chapter.

This guide is the place to turn for answers to basic questions about best practices for organizing and operating an EdTA chapter, and we will update this guide as policies and best practices evolve. We hope you find this document to be a useful supplement to the Leadership Toolbox.

All the forms mentioned in this guide are available at EdTA's website, www.schooltheatre.org.

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Association and Chapter Responsibilities

The association will provide support and services that: make the chapter director's job easier; make chapters more successful; save time and money; and fulfill financial and legal requirements. The chapter will extend the reach of events, membership, and advocacy down to the local level.

Legal Guidelines and Requirements

Both the Chapter and the Association recognize that all are working to accomplish the mission of the Association as stated in the Association's Code of Regulations.

- A. A Chapter is established to support the mission of the Association within a geographic area and will be led by a Chapter Director who is the principal administrative volunteer, conducting the business of the Chapter. This Chapter Director will be supported by a Chapter board whose role it is to assist the Chapter director in his/her administrative responsibilities.
- B. Chapters (including international chapters, where possible) will exist as separately incorporated entities affiliated with the Association.
- C. The Association and the Chapters will adhere to IRS regulations:
 - 1. The Association provides guidance to the Chapter to ensure compliance with IRS tax-exempt regulations. All monies of the Association and Chapters must be reported.
 - 2. No principal/agent relationship exists between the Chapter and the Association. The US Chapters (including commonwealths) will be included under the Association's IRS tax-exempt status group letter of determination and the Association will include the Chapter's information when completing the IRS's Form 990 (annual federal return for exempt organizations).
 - a. Chapters are encouraged to leverage the Association's IRS tax-exempt status, as permitted by state and federal law, when making purchases or contracting services for Chapter business.
 - 3. The Chapter will not be required to maintain their own tax-exempt status, nor will the Chapter do anything to jeopardize their existing tax exempt status or that of the Association. International chapters are not required to file US reports but are requested to file annual financial reports.
- D. The Association will file and pay the Ohio Statement of Continued Existence for all Ohio incorporated Chapters when due.
- E. The Chapter will pay the initial legal fees to file the startup Chapter incorporation documents for the State of Ohio. U.S. Chapters are also required to file the documents necessary to be authorized to conduct business in their home state and pay any necessary fees in connection with such filings (and all renewals).
- F. The Chapter Director leads his/her Chapter activities and is expected to be in touch with state members. All Association members, including Chapter Directors, are equal, individual members of the Association and, thus, vote on policy, and in elections, as individual members and not on behalf of the state or Chapter.

Financial & Risk Management

The Association will:

- Maintain the Association's status as an organization exempt from federal income tax under Internal Revenue Code section 501(c) (3) and comply with IRS regulations, including the Chapter in the Association's group exemption ruling.
- Provide the direct and indirect financial support on a Chapter basis. (See *Attachment A*).
- Develop and manage a sound risk management program, in support of the Association and Chapters.
- Negotiate services, coverages, and the use of tools, software, licenses, and applications for Chapters use at favorable or discounted rates.

The Chapter will:

- Follow all procedures that are necessary for reporting on the IRS's Form 990. Submit a balanced annual financial report of all accounts. Financials must be submitted by September 30, 2016 for the fiscal year ending June 30, 2016.
- Comply with all requirements related to Scholarship Support and Administration and the reporting of such activity as necessary for completion of filing the IRS's Form 990.
- Ensure that the Association's designee is an authorized signer on all Chapter financial accounts (checking, savings, CD, etc.)
- Participate in the mandatory insurance programs as provided by the Association and pay all invoices within the limits established by the Association.
- While not mandatory, Chapters are encouraged to elect additional insurance coverages through the Association's sponsored insurance program.
- Chapters will, with the Association's assistance, purchase any and all insurance required by contractual agreements currently in place or those contracts entered into in the future. Chapters are encouraged to utilize the Association's risk management team to address exposure to risk.

Professional Development

The Association will:

- Provide leadership training, mentoring and support for Chapters and Troupes.
- Provide a Leadership Toolbox that includes marketing, branding, and advocacy materials, risk management related guides and forms, and other support tools.
- Provide a quarterly dashboard to track trends and Chapter specific data.

The Chapter will:

- Enhance the members' experience through appropriate activities focused on support and growth for students and teachers.
- Support the attendance of an authorized representative(s) to the Association's annual Leadership Summit.
- Make best effort to attend (and encourage members to attend) both the EdTA National Conference and the International Thespian Festival.

Communications

The Association will:

- Provide a link from the Association website to the Chapter website.
- Provide access to the Chapter Director Data Center to use contact information for the Association and International Thespian Society activities. Such information is to be used, primarily, to promote membership growth at the Chapter level.
- Partner with Chapter leadership to grow membership and promote activities.
- License (at no cost to the Chapter) use of the Association's registered service marks and other intellectual property owned by the Association.

The Chapter will:

- Understand and follow the *Guidelines for the Use of Member Contact Information* in order to use Association lists and other data provided, whether in print or electronic form. (See *Attachment B*).
- Agree to use of the Association, International Thespian Society, and all other marks in accordance with the *Non-royalty License Agreement*. (See *Attachment C*).
- Help maintain and grow awareness of the work of the Association in supporting school theatre and Thespians by participating in the Association's social media activities (i.e. "like:" ITS and EdTA on Facebook and "like" and share posts; follow on Twitter and re-tweet posts and engage on thespiannation.tumblr.com).
- The chapter is encouraged to provide content (stories, pictures, video) of Thespian activities that the Association may use to promote the mission and work of the Association and Chapters.

Intellectual Property

The Association will:

- Apply to register trademarks and copyrights, and submit applications for patents, in such cases as may be found to be advisable by the Association in consultation with legal counsel.
- Manage and maintain such registrations of intellectual property, to the extent adequate financial resources are available to the Association.
- License (at no cost to the Chapter) to each Chapter use of the Association's registered trademarks and other intellectual property owned by the Association.
- In instances where the Association does not have adequate financial resources available to pursue registrations desired by Chapters, work with the Chapter to apply for joint ownership, for example, "© Educational Theatre Association and Minnesota Thespians. All rights reserved."

The Chapter will:

- Notify the Association of any new trademarks, inventions, patents, copyrightable materials, copyrights or other intellectual property developed, desired or planned by the Chapter.
- Assign to the Association all copyrights, patent rights, trademark rights and other intellectual property rights in any such new service marks, inventions, patents, copyrightable materials, copyrights or other intellectual property.

- Make a formal request to the Executive Director of the Association to pursue registration of such intellectual property by the Association on behalf of the Association and all Chapters.
- In instances where the Association does not have adequate financial resources available to pursue registration, work with the Association to apply for joint ownership, for example, “© Educational Theatre Association and Minnesota Thespians. All rights reserved.”

Chapter Festival/Conference (When one is held)

The Association will:

- Provide an official representative of the Association at the Chapter’s annual festival/conference.
- Promote annual Chapter festival/conference information on the Association’s website and publications.
- Negotiate the use of a scheduling/communication tool for Chapters’ use at a discounted rate.

The Chapter will:

- Submit the necessary Pre- and Post-Conference materials within the limits and deadlines established by the Association.
- These materials (available in the Leadership Toolbox) include:
 - Pre-conference and Post-conference forms
 - Thespian Festival Main Stage Adjudication Request form
 - Thespian Festival Chapter Select Showcase Recommendation form
 - Matching Scholarship Program Administered by EdTA form
 - National Individual Events Qualifier form
- Pre-conference forms are due to the Association no less than 60 days prior to the first day of the Chapter’s Festival or Conference. Fees may be incurred if forms are submitted late, after a courtesy reminder.
- Post-conference forms are due no more than one week after the completion of the Chapter’s Festival or Conference. Fees may be incurred if forms are submitted late, after a courtesy reminder.

Individual Events Policies and Guidelines

The Chapter must adhere to the categories, rules, and policies of the National Individual Events (NIES), which can be found on the EdTA website, in order to qualify for NIES and in order to award National Qualifier pins. In order to qualify for NIES, Students must earn an overall ‘superior’ rating in a sanctioned category at a recognized Chapter event.

If a Chapter does not follow NIES regulations, it is the Chapter’s responsibility to notify students that they are not in compliance with national rules and that the student(s) will not be able to participate in the NIES program.

Scholarship Support and Administration

The Association will:

- Match scholarship monies awarded by the Chapter, up to a limited amount (see *Attachment A*).
- Administer Chapter scholarships—Association-matched and additional Chapter scholarships—at no cost to the Chapter, if submitted by the published deadline.

- Fees will be incurred if forms are submitted late, after a courtesy reminder.
- Support includes:
 - Verifying the recipients' attendance at the post-secondary school
 - Managing compliance with the Chapter's scholarship criteria
 - Making all payment distributions and completing scholarship distribution reporting as required by the IRS.

The Chapter will:

- Comply with the Association's scholarship program requirements and submit the required information.
- Send matching scholarship amount to the Association by September 30, each year. Submit additional scholarship funds (unmatched) and Chapter requirements for the Association to administer by May 1 each year.
- Submit scholarship winners form within one week of the completion of the Chapter Festival/Conference or when selected.
- Chapters must provide required information for inclusion with the group's IRS Form 990.

Service Fees and Billing of Direct Expenses

The Association does not, currently, charge fees for services provided to Chapters.

Chapters are expected to recompense the Association, in a timely manner, for direct expenses incurred by the Association on behalf of the Chapters. Examples of such expenses include (but are not limited to): direct Risk Management and Insurance expenses, and the use of Guidebook.

There are no additional expenses charged to Chapters by the Association for the management of these services. However, reasonable late fees may be assessed should a Chapter be delinquent in the payment of invoices, up to 2.0% of the amount past due. The Association will work with Chapter leadership to ensure that sound business practices (including budgeting, cash flow management and financial reserves) are in place and, as necessary, provide support, guidance, and coaching.

As noted above, Chapters do not, currently, recompense the Association for indirect expenses (such as the cost of staff resources and time) incurred by the Association acting on behalf of Chapters. Examples of such activities include (but are not limited to): Scholarship support and administration, preparation and submission of IRS filings, and Chapter Festival/Conference support. Chapter Directors and their Boards are responsible for the timely submission of forms and other data to the Association. Delayed submission of such materials and information require Association staff to take time away from mission focused activities. Should a Chapter require the extension of a submission deadline, it is the Chapter's responsibility to make a request in writing. Failure to meet a submission deadline may result in the Chapter being charged a fee for service to account for the cost of time spent pursuing the delinquent forms or data. Fees will be charged on the following schedule:

- | | |
|--|--------------------------------|
| • Overdue by 15 days: | Courtesy reminder |
| • Overdue by 30 days: | \$25 fee per item |
| • Overdue by 45 days and every 15 days thereafter: | \$15 fee (additional) per item |

Chapter Director Responsibilities

Chapter directors will:

1. cover all bases, ensuring that chapter board members know their duties and stay focused on their mission;
2. stay on top of financials, keeping receipts for all purchases and documenting where all funds are dispersed;
3. communicate, returning emails to troupe directors and to EdTA in a timely fashion;
4. be professional. Chapter directors represent not only their schools and troupes but also their entire chapter, which demands a high level of responsibility and a good reputation;
5. attend EdTA events, with Leadership Summit being a must;
6. have a succession plan in place at least two to three years in advance, identifying potential leaders and providing them leadership training, including shadowing you throughout the year at different events and with different vendors;
7. promote the board and the chapter's troupe directors;
8. market the chapter effectively;
9. train the chapter board to "speak with one voice" about chapter Thespian matters.

Working as co-directors and dividing responsibilities, the chapter directors together will:

1. meet throughout the year to discuss who is responsible for specific tasks and meet briefly before board meetings to discuss the agenda and to decide who will present which topics, disagreeing in private and presenting a united front during the meeting;
2. focus on each director's individual strengths and interests so that all are motivated to be active participants, understanding that responsibilities may never be completely equal, and allow each director to take the lead at different events and for different responsibilities;
3. be flexible, compromise, and communicate often.

Advice from Chapter Directors

1. Delegate. Do not take on every job.
2. Write thank you notes and recognize others at meetings and Thespian events.
3. Acknowledge your strengths and seek individuals with skills you may be missing.
4. Don't be afraid to make a mistake and apologize.
5. Always look for young, talented people—they don't need to be theatre teachers—to add to your chapter board.
6. Assess your board's strengths and recruit board members with skills that may be missing.
7. Network with local arts leaders, especially those in theatre organizations.
8. Be clear with family, friends, and fellow staff about the time commitment of a chapter director, so they can provide support.

Financials

Reporting: Chapters are responsible for reporting all their financials from the previous fiscal year, which runs from July 1 through June 30. The completed financial report package is due to the National Office no later than September 1 of the current academic year. The financial report package should include:

1. copies of the past twelve monthly bank statements (specifically, July to June) for each account open or closed during the year;
2. copies of any required Form 1099-MISC and Form 1096 for the current or prior year; and
3. the following forms (all available in the Leadership Toolbox):
 - a. Financial Report Spreadsheet (SIGNED);
 - b. Blanket Approval for Modification of Chapter Budget Submission (SIGNED);
 - c. EdTA Chapter Financial Report Check List;
 - d. Scholarships and Grants Administered by Chapter (if applicable);
 - e. Chapter Board Member List.

Tax Identification: Each chapter is an exempt organization under Internal Revenue Code Section 501(c)(3) and is issued a unique Taxpayer Identification Number, which may be used for tax-exemption on hotel, food, and conference expenses. However, each chapter doesn't file an individual IRS Form 990; instead, the National Office files one IRS Form 990 after it receives and checks all the financial report packages. After the National Office files this group return, the IRS will post the IRS Form 990 on GuideStar.

Opening a Bank Account: The chapter director must open a bank account in the chapter's legal name, using its federal Taxpayer Identification Number. At a minimum, the chapter director and EdTA's Director of Chapters and Community must be signatories on the account. The chapter treasurer or other board member may be an additional signatory.

Handling Money: The chapter director is ultimately responsible for chapter funds. However, the chapter board can appoint a board member as treasurer to manage the funds.

Organizing Receipts: Chapter transactions should be organized as in the budget approved by the chapter board, using either an Excel spreadsheet or other accounting software such as QuickBooks, the method to be decided by the chapter board.

Chapter Board

Types of Boards: You may organize a chapter board in several ways to carry out chapter business, primarily planning and running the chapter conference and other events and providing scholarship opportunities.

1. An elected board includes troupe directors and other members the troupe directors elect. Members usually have rotating terms, so that everyone is not chosen at once. Sometimes people run for the board with the intention of performing specific duties, sometimes the chapter director appoints specific duties to a member after election.
2. An appointed board includes members the chapter director appoints, usually to perform specific duties of chapter business.

Size: There is no set size for a chapter board, but it ideally consist of thirteen to sixteen people, including six to eight Student Thespian Officers and their troupe directors, the chapter director, a conference chair, and committee chairs for various event activity (such as main stage coordinator, tech challenge coordinator). Adult board members should serve the organization with selflessness, integrity, and professionalism. You can recruit members by:

1. hosting a table at your conference with information on how to get more involved in chapter activities;
2. presenting a workshop at your conference about getting involved;
3. enlisting troupe directors of student leaders;
4. using basic “word of mouth” from active troupe directors;
5. posting a calendar of open board meetings;
6. welcoming interested members.

Defining Roles and Responsibilities: The bylaws/constitution should include the election process and opportunities, including the job roles listed below.

1. The chapter director (chief executive officer, executive committee member) orchestrates the overall chapter, schedules meetings, and assists and encourages others in fulfilling their roles and responsibilities on the board. This person is ultimately responsible for ensuring that the final report is sent to EdTA and that the financials balance, has sole access to data in the EdTA chapter director portal, and is strongly encouraged to attend Leadership Summit. The chapter director has a strategic role in representing the organization’s vision and purpose, ensuring that the chapter board functions properly, that there is full participation at meetings that all relevant matters are discussed, and that effective decisions are made and carried out. The following points outline a chapter director’s typical responsibilities.
 - a. Ensure the chapter board functions properly
 - To plan and run meetings according to the governing document (such as chapter bylaws)
 - To see matters dealt with in an orderly, efficient manner
 - To bring impartiality and objectivity to meetings and decision-making
 - To facilitate change and address conflict in the board

- To review governance performance and skills
 - To plan for recruitment and renewal of the chapter board
 - b. Ensure the organization is managed effectively
 - To work with the board's executive committee, as appropriate, keeping an over-view of the organization's affairs
 - To coordinate the committee so that responsibilities for particular management as-pects (such as personnel matters, financial control) are met, employing specialist expertise as needed
 - To facilitate change and address conflict in the organization, in cooperation with the executive board
 - c. Support and supervise staff
 - To directly line manage the chapter's senior staff
 - To attend appointment and final appeal grievance panels, as appropriate
 - d. Represent the Educational Theatre Association and the chapter
 - To effectively communicate the vision and purpose of EdTA and the chapter
 - To advocate for and represent EdTA and the chapter at external events
 - To be aware of current issues that might affect EdTA and the chapter
 - e. Required qualities and skills
 - Good leadership skills
 - Good communication and interpersonal skills
 - Impartiality, fairness, and the ability to respect confidences
 - Ability to ensure decisions are taken and followed
 - Good timekeeping
 - Tact and diplomacy
 - Understanding a management committee's roles/responsibilities
 - Organizational and people management experience
2. The treasurer (chapter director, executive committee member) maintains the chapter's finan-cial accounts and keeps the chapter running on budget. This person also reports annual finan-cials to EdTA by September 1 and preserves financial records for seven years, as required by federal and Ohio nonprofit laws. The following points outline the typical treasurer's responsi-bilities. In every area, the treasurer is responsible for seeing that effective financial systems and procedures are established, are consistently followed, and are in line with best practice and legal requirements.
- a. General financial oversight

- To oversee and present budgets, accounts, and financial statements to the chapter director and the board
 - To work with designated staff on financial matters
 - To put appropriate financial systems and controls in place
 - To keep records and accounts according to the conditions of EdTA
 - To comply with relevant legislation
- b. Funding, fundraising and sales
- To advise on fundraising strategy
 - To ensure spending complies with conditions set by EdTA and the IRS
 - To ensure fundraising and sales comply with relevant legislation and are bound by effective financial systems and controls
 - To provide effective monitoring and reporting
- c. Financial planning and budgeting
- To prepare and present budgets for new and ongoing work
 - To advise on the financial implications of strategic and operational plans
 - To present revised financial forecasts based on actual spending
- d. Financial reporting
- To present regular reports on current financial position
 - To prepare accounts for audit, working with the EdTA auditor as required
 - To advise on financial reserves and investment policy
- e. Banking, bookkeeping and recordkeeping
- To manage bank and credit card accounts
 - To set up appropriate systems for bookkeeping, payments, and petty cash
 - To ensure everyone handling money keeps proper records and documentation
- f. Control of fixed assets and stock
- To keep proper records (seven years)
 - To put required insurances in place
3. The secretary (executive committee member) keeps a written record of all board and executive committee meetings, storing these records for future reference. The following points outline the typical secretary's responsibilities.
- a. Ensure meetings are effectively organized and recorded
- To work with the chapter director in planning meetings
 - To receive agenda items from committee members and board members

- To circulate agendas and reports
 - To take minutes
 - To circulate approved minutes
 - To check that agreed actions are carried out
- b. Keep effective records and administration
- To keep up-to-date contact details (including names, addresses, phone numbers) for the management committee
 - To file minutes and reports
 - To compile useful lists of names and addresses, including those in appropriate voluntary organizations
 - To keep a record of current and past activities
 - To keep a diary of future activities
- c. Uphold legal requirements
- To act as custodian of governing documents and other permanent records
 - To check that a quorum is present at meetings
 - To ensure elections are in line with stipulated procedures
 - To ensure activities are in line with organization objectives
 - To ensure charity and EdTA requirements are met
 - To attend appraisal, recruitment, and disciplinary panels, as required
- d. Communication and correspondence
- To respond to all committee correspondence
 - To file all committee correspondence received and copies of replies sent
 - To keep a record of any publications (such as leaflets, newsletters)
 - To report organization activities and future programs to members, the press, and the public (unless there is an information or publicity officer)
 - To prepare a report of the organization's activities for the annual general meeting
4. The membership coordinator recruits schools to charter Thespian troupes and attend chapter events, retains existing troupes by encouraging involvement and making them aware of opportunities, and invites withdrawn troupes to reinstate their membership.
 5. The workshop coordinator organizes the workshop schedule for your chapter conference, contacting and finding presenters as well as arranging their transportation to and from the event.
 6. The Individual Events coordinator organizes the IE schedule, including securing judges, door guards, and timers. This person also keeps accurate records about performances, manages the

tab room, assigns participants to the callback list, conducts callbacks, and organizes the showcase presentation.

7. The Junior Thespian coordinator organizes and supervises all elements for your Junior Thespian conference, handling committee assignments and budgeting for the event.
8. The scholarship/college audition coordinator organizes the room assignments, scheduling, and guest college judges for scholarship and college auditions.
9. The marketing (publicity, advertising, social media) coordinator develops and implements a plan that incorporates all public communications, print and electronic. This person is usually also responsible for printed programs and social media posts.
10. The IT coordinator manages all aspects of onsite internet connection as well as website posts, e-blast mailings, and website updates as needed.
11. The main stage coordinator (technical theatre director) coordinates the move-in and move-out of the main stage show, assisting the facility care during the chapter conference, as well as other assigned duties.
12. Your chapter may assign additional roles as needed, including new troupe director coordinator or advertising and social media coordinator.

State Thespian Officers

Members of the student board should be exemplary Thespian members and leaders. These officers are the voice of students across their chapter and should be actively involved in planning chapter conferences and other chapter events.

Selection Process: The executive/chapter board sets the number of State Thespian Officers.

1. The chapter board must have a clear process for selecting STOs, delineated in a place accessible to all members, such as the chapter website.
2. Candidates must fill out a written application. For samples, contact Chapter Relations.
3. Depending on the process that the chapter board puts into place, responses to applications should be posted publicly, so that voting delegates have access to them.
4. Depending on the process that the chapter board delineates, voting delegates should be able to ask questions of and interact with candidates. An opportunity for candidates to speak about or demonstrate their qualifications and leadership skills is ideal.

Best Practices: To empower students to participate in chapter events and meetings:

1. students must be made aware of all opportunities in chapter events and meetings;
2. chapter boards must clearly delineate student roles at events and meetings;
3. students must be guided yet allowed to have a true voice;
4. the chapter board must acknowledge the contribution of the students.

Roles and Responsibilities of Student Thespian Board Officers: Failure to comply with the chapter's rules may result in removal from the student board.

1. Plan and implement assigned aspects of chapter conferences.
2. Be available for all activities as identified by the chapter board.
3. Meet all deadlines.
4. Respond in a timely manner to phone calls, texts, emails, and Facebook postings.
5. Uphold the standards identified by the chapter board.

Chapter Conference

The largest event for most chapters is their annual theatre conference for students and teachers. Some chapters call their event a “festival,” but either way, the event involves multiple facets. Most chapters host an event of one to three days, though some larger chapters host an event of up to five days.

Venues: Small conferences (fewer than 400 delegates) use high schools. Medium-size conferences (700-1,500 delegates) use a high school and a local college. Large conferences (more than 1,500 delegates) use a conference center or combination of multiple sites. If contracting a conference center or hotel, the legalese can be daunting. Your Request for Proposal should clearly describe your needs and wants. When reading the final contract, pay special attention to deposit amounts, cutoff date, cancellation policy, space allotments, and room blocks. Be sure to:

- have more than one person read the contract and ask EdTA to review the agreement;
- contact EdTA’s National Office for support with insurance;
- pay special attention to dates and times;
- identify provisions and legalese that need to be rewritten, changed, or deleted;
- include diagrams or examples as needed to be sure your needs are clear;
- get answers to all your questions before signing the contract;
- always date your signature;
- retain all correspondence until the conference is over.

Events: The most common events include:

- general sessions, to include welcome addresses, perhaps a keynote speaker;
- workshops, to provide training for students and teachers in acting techniques, technical theatre, auditioning, preparing for IEs, etc.;
- productions of full-length or one-act plays for delegates to attend;
- Tech Challenge, either as a workshop session or general event;
- Individual Events in acting, musical theatre, technical theatre, etc.

Schedules: Most chapter conferences include time for arrival and registration early in the day, shows and workshops (and IEs) in the middle of the day, and a general gathering for an awards celebration or performance at the end of the day. Elements to consider include:

- Registration: The registration deadline is usually no less than two weeks and no more than six weeks before the event.
- Performances: Your event scheduling should start with the performances. Consider how much time each show will need to setup and to strike.
- IEs: Allocate time for the performance plus a few extra minutes (to allow judges to complete their evaluations). Don’t forget to include break times for the judges.
- Workshops and meals
- Awards and closing events

- Registration, check-in, and opening ceremonies
- Transportation (if provided)
- Internal: Create a private schedule of when staff should arrive, setup, deliver food, etc.

Programs: A print or digital program is an important organizational tool. Most essential is the listing of the time and location of each event. You may also want a list of workshops, presenters, exhibitors, places to find information, participating schools, etc.

Guidebook is a useful app for large events of several days. EdTA has negotiated competitive pricing for all chapters as part of our national contract. It is easily scalable from basic to detailed. Guidebook also offers push notifications, personal schedules, and feedback. It also provides statistics on usage.

Conference Events

Performances: The chapter decides the number and length of shows presented by schools at conference. Some chapters have an open application process, some chapters have use judges that review and choose which productions to invite.

Workshops: The number of workshops offered should be proportional to the number of students attending and the amount of space available. Generally, more students can attend a workshop on dance, improvisation, or stage combat; while fewer can attend sewing or mask-making. Some chapters don't pay workshop presenters but provide in-kind exhibitor or advertising space, although many chapters do pay a flat fee of \$25 to \$100 per workshop to their professional guests (but no more than \$599 total to any one person because of the tax forms required) and ask troupe directors to present for free.

Individual Events: We recommend you follow the National Individual Event guidelines. Many chapters offer the same events as the Thespian Festival, but some offer fewer or more than the Thespian Festival. Some chapters also offer "novice" events for freshman and sophomores, to balance the competitiveness. It is important for IE registration to be well in advance of your conference, to allow time to schedule performances, judges, and rooms. EdTA can provide IE adjudication forms, usually a rubric with an area for a judge's comments. Most chapters limit how many events a student can enter (usually up to three) to maximize the time, space, and judges available and to allow as many participants as possible. Most chapters also limit how many entries a school can submit (usually up to three per category). Chapter directors should give the National Office a list of students achieving Accomplished or Superior ranks, so the National Office can congratulate the student on their accomplishment and invite them to participate at the Thespian Festival.

Tech Challenge: This event allows technicians to showcase their talents in legging a platform, focusing a light, folding a backdrop, making quick costume changes, setting props, sewing, rolling cables, etc. Consider asking technical vendors to provide prizes for the teams with the top times. Each school can have one team of five to seven students.

Awards / Trophies: Most chapters will offer awards to celebrating student, teacher, and administrator successes. The National Office sells certificates, trophies, plaques, and other honors. The National Office also offers IE pins for qualifiers. Chapters are not required to use EdTA products but having the appropriate logo on items can save you time.

Scholarships: There are three major types of scholarships.

- **Chapter Scholarships:** Chapters usually offer scholarships to students of outstanding merit in acting or musical theatre, technical theatre or stage management, and theatre education. These are usually around \$500 per person and may be named after an influential student or director.
- **Outside Scholarships:** These are usually offered by colleges, which dictate the amounts and conditions, for students attending the school offering the award. College scholarships are usually given separately from IEs or chapter scholarship competitions.
- **EdTA Scholarship Matches:** The EdTA Matching Scholarship program provides up to \$1,000 for each chapter who participates. The chapter director will provide the National Office with the Chapter Scholarship Awardee forms and additional funds for each recipient. EdTA will then manage the scholarships, contacting each student and sending the funds to the appropriate college.

Conference Personnel

Some chapters create an executive council in which each member oversees an individual conference activity such as IEs, publicity, workshops, exhibitors, etc. Below is a representative list of other conference personnel to consider.

EdTA / ITO Representative: EdTA considers that having an official representative at each chapter event (who can advise troupes about the benefits that EdTA offers them) is critical to its success, and the National Office will send a representative to each chapter's primary conference. The representative's primary task is to host a town meeting with teachers and chaperones about EdTA's priorities.

The EdTA representative may:

- deliver the welcome address or closing remarks;
- host a town meeting for all adults, to share EdTA's national programs;
- judge scholarship auditions and Individual Events;
- chaperone the ITO.

The ITO representative should never judge IEs or scholarship auditions but may:

- assist in selecting a new chapter student board, non-talent-based scholarship recipients, and Honor Troupe, troupe displays, or other ITS awards;
- assist BC/EFA and chapter fundraising;
- lead group warmup and icebreaker activities;
- teach ITO Leadership and ITO Arts Advocacy workshops;
- assist in other specialty workshops (such as STO workshops);
- assist at the registration desk;
- lead volunteer activities (such as timing IEs, prepping rooms, doing headcounts)
- assist in the STO's conference activities and in planning their annual goals;
- present speeches at conference ceremonies about EdTA and ITS.

Exhibitors: These delegates sell products or provide information about an organization. Some chapters delineate those who sell products as "vendors" and those who provide information (such as college representatives) as "exhibitors." Regardless, the chapter decides the level of their participation and the amount of their attendance fee. Many chapters charge for the table space, but some chapters exchange table space for an in-kind workshop or judging.

Professionals: Most professionals will want something in return for participating in your event: payment, recruitment opportunities, networking. Colleagues and friends are the easiest to reach. Begin by asking your prospects to host an exhibitor table, then perhaps to lead a workshop, be a judge, advertise in the program, or become a sponsor.

Judges: You can use volunteers, hired professionals, troupe directors, or college instructors. With volunteers and hired professionals, determine their areas of skill and interest.

- **IE:** The chapter director or board chooses the number of IE judges, usually two to three per event or room. The chapter must hold a training meeting before the start of IE sessions, to review expectations, describe the process, and answer any questions.
- **Scholarship:** We recommend that scholarship judges don't appear biased; for example, a teacher shouldn't judge their students. Having multiple judges provides a wide range of experience and alleviates the view of any bias. This is a good role for the EdTA representative.
- **One-Act Plays (Chapter Select):** Each chapter may invite one one-act play to the Thespian Festival. Judges must view all the plays to be considered and choose one (and an alternate). The chapter director must submit a Chapter Select Qualifier Form to the National Office.
- **Full-Length Plays:** Shows to be considered for the Thespian Festival main stage must pay a fee for judges to travel to see their show. For details, visit the Thespian Festival page at schooltheatre.org.

Volunteers: In addition to serving on the chapter board, volunteers can help with specific projects and chapter events. Beyond individual contact information, ask the school's administration or lawyer if volunteers must complete specific paperwork to participate in an event. Parents, alumni, and colleagues are the easiest to reach. Students at nearby schools and local theatres and businesses can also provide free or in-kind services.

First, make a list of your needs. People are more likely to volunteer if they know exactly what they will be doing and for how long. Then, prepare instructions for each job. Set up your volunteers for success by having guidelines in place. Give each volunteer an orientation and be sure they have adequate supervision. Volunteers should be expected to:

- arrive on time, ready to work and actively contribute;
- follow procedures and expectations;
- see their job to the end, completing tasks by set deadlines;
- communicate regularly and respond in a timely manner;
- behave ethically and professionally.

Other Chapter Events

Leadership Training: This opportunity to train chapter and troupe leaders is best held during summer over a single day or weekend. Consider having a keynote speaker to kick off the event. Some chapters provide two tracks, such as “bonding” and “leadership.” General workshop topics might include: time management, marketing and public relations, fundraising, etc. Professional development topics might include: lesson planning, implementing standards, technology and theatre, etc. A tight schedule works best, but be sure to include some fun events to balance the work sessions.

College and Scholarship Auditions: Auditions are often part of a chapter’s conference, but if your event is outside recruitment season (December to March), you may want a separate event. Auditions are win-win: students get more exposure than they would, and colleges see more prospects than they would. Be sure that auditions (and callbacks) don’t interfere with other programming, such as IEs. Individual rooms are more private but complicate scheduling; large rooms facilitate scheduling but are less private. Callbacks are a college’s opportunity to interview or re-audition students.

Acceptd (getacceptd.com) is an online audition service that charges students to create an account. If your chapter doesn’t want students to pay, then the chapter itself can pay Acceptd.

Junior Thespian Festival: This can be a powerful event to grow your chapter and to engage younger students who may become high school Thespians. Locating schools to participate can require some sleuthing, but high school troupe directors often know which middle school programs feed theirs. For your first Junior Thespian Festival, cast a wide net and consider inviting schools that don’t have a chartered troupe or inducted Junior Thespians, then offer a workshop about chartering and running a healthy troupe. It’s smart to begin with a one-day event immediately before your high school event. If your Junior Thespian Festival gains momentum, then consider making it a separate event of one or multiple days. Start small and listen to your delegates about the direction to grow.

All-State Show: All-State Shows display the best of a chapter’s performing and technical talent and allow fellow Thespians to meet and learn skills that they can take back to their individual troupes. The process should begin with staff assignments about one year ahead of production. The cast and crew may rehearse one or two weeks during the summer and several weekends during the school year, with group scenes being filmed and shared for the cast to use in individual rehearsals. Frequent email contact helps maintain communication, and if rehearsals are in multiple locations, be sure that any scenic elements are built to travel.

Field Trips: Many chapters host field trips to see shows at local theatres or to attend workshops with guest artists, using their size to bargain for group rates. These small events are great ways for nearby schools to collaborate. Chapters may also consider field trips for troupe directors alone.

Honor Troupes: Chapters may recognize troupes for their theatrical accomplishments, with bronze, silver, and gold plaques (or trophies) and ceremonies that the troupe directors can use to promote their programs to the school, school board, and community. The criteria for each level differ based upon troupe size.

Service Projects

Broadway Cares/Equity Fights AIDS: Thespian officers raise money to support BC/EFA, a theatre industry nonprofit providing needed services for people with AIDS, HIV, or HIV-related illnesses.

Send a Troupe to Festival: Thespian officers raise money to provide troupes the opportunity to attend the Thespian Festival by collecting an audience's spare change during a "Minute to Give It."

Theatre in Our Schools: This campaign raises public awareness of the impact of theatre education and the need for better access to theatre programs for all students. Schools may host TIOS events at any time, but AATE and EdTA promote March as the official TIOS month.

Trick or Treat So Kids Can Eat: Thespian officers conduct this annual food drive, with awards presented to troupes and chapters, as well as thank you letters sent to school administrators.

Glossary

Administrator's Award: to school administrators who support educational theatre.

Austin Yeatman Technical Theatre Scholarship: a one-time \$1,000 award to a graduating high school senior planning to study technical theatre in college.

Bob and Marti Fowler Future Theatre Educator Scholarship: to a student pursuing theatre education who demonstrates leadership, academic ability, organizational skills, etc.

Burnsworth Fund (or ITS Leadership Grant): to one exceptional student in the Thespian Festival Leadership Training, to cover basic registration for Thespian Festival and the leadership training.

chapter: Refer to them using their chapter name followed by Thespians, for example, Ohio Thespians, or the Ohio Chapter of the Educational Theatre Association.

chapter director: a chapter leader. Capitalize only with a name, e.g., Chapter Director John Smith. The acronym CD is sometimes used in forms.

Community: an online forum for students, teachers, artists and advocates to share their ideas, seek advice, connect with others, and ask questions. In full, Theatre Education Community. The Chapter Director Community is a closed section where chapter directors can communicate.

Daron Hawkins Award: to a chapter director or chapter board member to attend National Arts Advocacy Day.

Doug Finney Festival Grant: a need-based award to Thespians to cover the basic Thespian Festival registration fee and to reimburse travel expenses up to a specific amount.

Educational Theatre Association: on first mention, use the full name; on subsequent mentions, use the acronym EdTA.

EdTA Board of Directors (or EdTA Board): not Governing Board.

EdTA National Office: not EdTA Home Office.

Excellence in Theatre Performance Scholarship: to graduating high school seniors planning to major in communication or performing arts.

Founders' Award: to an individual or group who has made significant contributions to the growth and development of theatre education, research, and practice.

Future Theatre Educator Scholarship: a one-time \$2,500 award to graduating high school seniors planning to major in communication or performing arts.

Hall of Fame Award: to members who have dedicated twenty years or more to educational theatre.

Honorary Thespian of the Year Award: to individuals who go beyond standard volunteer duties.

Induct, initiate: Always use “induct” for the process of enrolling a student into ITS. “Initiate” is associated with hazing and other negative images.

Inspirational Theatre Educator Award: to individuals who inspire students and are dedicated to high-quality theatre education.

International Thespian Society: on first mention, use the full name; on subsequent mentions, use the acronym ITS.

Jhon Marshall/ITO Outstanding Student Achievement Scholarship: a \$1,000 award to two graduating high school seniors who exemplify the ideals of the International Thespian Society.

Junior Thespian: middle (or junior) school student members of ITS. Always capitalized.

Junior Thespian Festival: a three-day annual event in February, featuring performances, workshops, and college and scholarship auditions for students in grades six through eight.

Leadership Summit: an annual three-day event for EdTA's chapter directors, Board of Directors, student leaders, key staff members, and leadership mentors.

Leadership Toolbox: an online resource with marketing, advocacy, and other support materials.

Lifetime Achievement Award: to an individual or group for work in theatre or theatre education.

Master class: a three-hour course for educators taught by an expert at the National Conference and the Thespian Festival.

Melba Day Henning Scholarship: a \$4500 award (awarded over four years) to one graduating high school senior working toward a career in theatre education.

National Arts Advocacy Day: an annual event for advocates to meet members of Congress in Washington, D.C., during the last week in March or first week in April.

National Conference: an event for educators to fellow theatre professionals through workshops, networking lunches, and professional development programming.

National Conference Grants: to pre-professional members and theatre educators, to cover the basic registration fee and one professional development intensive.

National Individual Events: program that culminates in the National Individual Events Showcase (aka NIES) at the Thespian Festival.

Outstanding School Award: to high schools that exemplify high standards in educational theatre.

President's Award: to an individual who has made exceptional contributions to EdTA, the EdTA President, Board of Directors, or volunteer leadership.

Presidents' Leadership Scholarship: a \$1,000 award to Thespians who demonstrate leadership abilities, with an emphasis on troupe involvement.

Professional Development Intensive: a one- or two-day course for educators taught by an expert at the National Conference and the Thespian Festival. Attendees may earn continuing education credit.

Schooltheatre.org: EdTA's website. Capitalize as a title (Schooltheatre.org is a great resource), lowercase as a URL (Go to schooltheatre.org). Don't include www or https.

Send a Troupe to Thespian Festival Grant: to Thespian troupes that have not previously attended the Thespian Festival and can demonstrate financial barriers to attending.

Spirit of Thespis Award: to schools that faced challenges and demonstrated grace under pressure.

Sponsor: an individual or group that supports EdTA or its events in exchange for recognition, advertising, exhibit space, brand placement, etc.

Standing Ovation Award: to corporations who support EdTA's principles and mission.

Theatre Performance, Technical, or Playwriting Scholarship: a one-time \$2,000 award to a graduating high school senior entering a college program to major in theatre.

Thespian: high school student members of ITS. Always capitalized.

Thespian Festival: a weeklong annual event during June in Lincoln, Nebraska, featuring performances, workshops, and college and scholarship auditions for students older than 12.

TOTS-EAT: the acronym of Trick or Treat So Kids Can Eat, the International Thespian Society's national community service project.

Troupe: an active ITS high school or middle school group. Capitalize when part of a proper noun, e.g., Troupe 1234, Thespian Troupe 1234, Junior Thespian Troupe 88123.

Troupe director: a high school or middle school troupe's official contact with EdTA. Capitalize only with a name, e.g., Troupe Director John Smith.

Volunteer of the Year Award: to those who support EdTA through exceptional volunteer efforts.

Workshop: a ninety-minute class. EdTA offers workshops for educators and students the National Conference, Thespian Festival, and Junior Thespian Festival.

Appendix

Field Names: EdTA uses certain field names that may be difficult to decipher.

- Firstjoindate is the charter date on file.
- Homephone is the primary school/troupe phone number.
- Infostatusstt indicates an invalid address or email, flagged when material is returned.
- Nocallflg with a Y means the member doesn't want promotional information by phone.
- Noemailflg with a Y means the member doesn't want promotional information by email.
- Nofaxflg with a Y means the member doesn't want promotional information by fax.
- Nomailflg with a Y means the member doesn't want promotional information by mail.
- Nosellflg with a Y means the member doesn't want their information given to any third party.
- Nowebflg with a Y means the member doesn't want to be in online directories. *NOTE:* No member is excluded from lists we send to chapter directors or other authorized representative.
- Orgaltcd is the troupe number.
- Terminationdate is the paid-through date.

Member Types: Do *not* capitalize membership types, for example, EdTA professional member *not* EdTA Professional member.

- Affiliate professional members are adults affiliated with an active troupe.
- Emeritus members are retired theatre educators.
- Life members are former board members who have retired.
- Pre-professional members are full-time college students.
- Professional members are adults not affiliated with an active troupe.
- Troupe directors are active troupe directors.