MTNA Leadership Toolkit

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Creating a Welcoming Environment

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Welcoming Experience

1. Welcome Letters
2. Personal Meeting Invitations
3. Invitations for Leadership Roles
4. Accommodations for those with disabilities or different learning/leadership styles
5. Variety of Meeting Times/locations

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Welcoming Experience

6. Childcare
7. Not having specific requirements for service
8. Including collegiate members and young professionals
9. Mentoring and Partnering Opportunities for Career and Leadership Development

Protecting Your Members from Scams

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Scams

1. Reception and Event Invitations
2. Mailing List Sales
3. Conference Room Solicitations outside of Dedicated Room Block

Representation and Advocacy

Finance Basics



EIN

- Employer Identification Number
- Allows MTNA affiliates to open bank accounts not associated with one specific member
- Protects personal privacy of affiliate officers
- Needed to apply for MTNA's group exemption or any other tax status

Budgeting

- A nonprofit budget is a planning document used to predict expenses and allocate resources for your affiliate. It details both the costs that your association will incur as well as the revenue you expect to receive over a set period of time.
- It's a dynamic document and will change
- Every affiliate should have a budget

Budgeting

- Clear financial tracking
- Better decision making
- Donor trust and transparency
- Risk Management
- Mission alignment

Getting Started with Budgeting

- Define goals and program costs
- Project realistic revenue
- Pull past year's receipts and deposits to start with a baseline for the budgeting process
- Have emergency funds
- Use a template and review monthly

It’s ok to make a profit and have reserves!

Otherwise, you’ll go out of business

Maximize Your Savings

- Make your reserves work for you!
  - High interest money market accounts (most liquid and lowest risk)
  - Certificates of Deposit (less liquid, but low risk)
  - Investments (least liquid, higher risk, higher return over time)

Access to Digital and Physical Assets

- Multiple people should have access to bank accounts and check signing permission on all your accounts
- Multiple people should have access to your website and social media accounts
- Multiple people should have access to your governing documents and historic records

Transparency

- Provide regular financial reports to the Board and membership
- Establish an audit procedure
  - Bylaws might include audit procedures
  - Don’t have to have an outside professional audit. An audit committee can also ensure transparency and protect officers from accusations of wrongdoing

Form 1099 Updates

- Starting in the 2026 tax year, the federal reporting threshold for Form 1099-NEC and Form 1099-MISC increases from $600 to $2,000
- Make sure you continue to get a W-9 form even if you don’t think the compensation will reach $2,000

Code of Ethics



Code of Ethics

- Provides goals and ideals that each MTNA member should strive to make an essential part of their professional commitment to students, to colleagues, and to society
- Not a condition of membership
- Cannot include any anti-competitive practices such as student recruitment restrictions

Can we kick someone out of our association for not following the Code of Ethics?

That's a pretty sticky issue

Termination of Membership

- May be closely scrutinized by courts to see if there are any anti-competitive motives in the expulsion.
- Expulsion should be based upon publicly available requirements of membership. (Remember Codes of Ethics aren't conditions of membership)
- Must provide procedural due process to the member, Must provide an appeal process

Avoid doing this if at all possible!

Member Expulsion for Other Reasons

- Must follow your bylaws
- Recommend adopting MTNA's Member Termination Policy

Termination of Membership

- Must follow your bylaws
- Recommend adopting MTNA's Member Termination Policy

Termination of Membership

- Board may terminate membership by a two thirds majority vote if the Board determines that termination is in the best interest of MTNA or the purposes of MTNA
- Vote happens only after the member has been advised of the alleged reason for termination and been provided an opportunity to present information to the Board on their behalf
- If membership is terminated, the individual may appeal for reconsideration of that decision to the Board of Directors.

Avoid doing this if at all possible!

Safety of Minors In Affiliate Events



Resources from MTNA

- ✓ Best Practices for Protecting Minors in Student Programs Guide
- ✓ Safe Studio Practices Article
- ✓ MTNA Student Event Privacy Policy
- ✓ MTNA Affiliate Guide to Collection of Information for Program Participants Under the Age of 13

MTNA Student Event Privacy Policy

- In compliance with the Children's Online Privacy Protection Act (COPPA) the policy outlines our collection and use of information gathered regarding students under 13 years of age in our programs
- Developed by the MTNA attorney for our use and for the use of our affiliates

MTNA Student Event Privacy Policy

- All registration forms must be completed or approved by a parent or legal guardian for any participant under 13
- Information gathered is only for the event
- Student information only shared with individuals involved in running the event
- Student information retained only as long as necessary to administer the event and related activities
- Allow parents to access, correct, or request deletion of information

How are we going to manage this?

MTNA Affiliate Guide to Collection of Information for Program Participants Under the Age of 13

Registration for Students Under 13

- Teachers should not independently submit personal information without parental involvement
- Teachers may assist with or pre-fill registration forms
- Require parent/guardian review and consent before submission
- Apply the same practice to both online and paper registrations
- Include a parent/guardian consent or attestation statement

Who Should Provide What?

Teachers can enter:

- Repertoire/composer
- Timing
- Instrument
- Event/division information
- Teacher information

Who Should Provide What?

Parents should provide or approve:

- Student name/contact information
- Parent contact information
- Consent forms
- Privacy/COPPA acknowledgment

Collect Less Information

- Avoid collecting birthdates unless necessary
- Use “Age as of [date]” or age divisions instead
- Collect only what is needed to establish eligibility
- Less personal information = less privacy and compliance risk

Records and Retention

- **Maintain two types of records:**
  - Active Event File
  - Permanent Recognition Record

Active Event File

- Registration and contact information
- Repertoire, schedules, and administrative records
- Retain for a defined period, then destroy

Permanent Recognition File

- Student name
- Year(s) of participation
- Program/division
- Award or recognition earned
- May be retained for historical/multi-year recognition purposes

Three Steps for Affiliates

- Add a parent confirmation step
- Require parent approval for participants under 13
- Establish an event records retention policy

Bottom line: Minimize the information you collect, keep parents involved, and retain student information only as long as there is a legitimate need.

Questions?

Review the guide and submit your questions before Sunday's Q&A Session

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More than a Facebook Post

Marketing Your Affiliate with *Purpose*

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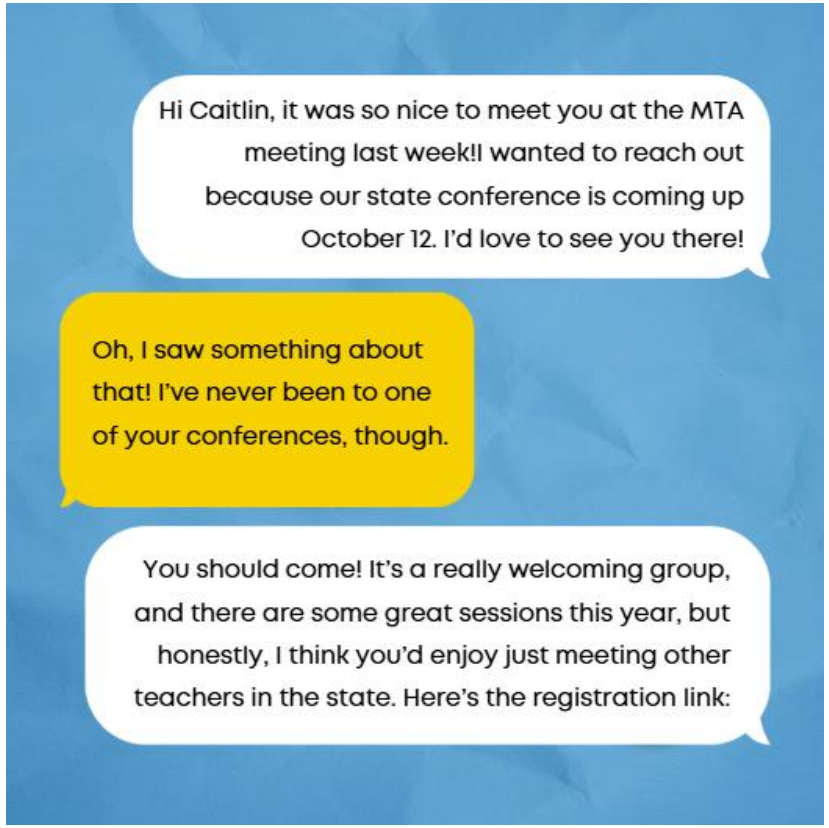
What is Marketing?









Your Affiliate Has a Brand

Welcoming

Helpful

A place where I belong

Innovative

Relevant

MTNA's Brand



"Your Partner in Teaching" = Brand Identity

"For A More Musical Tomorrow" = Brand Narrative

"You Belong in MTNA" = Brand Promise

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Your Marketing Formula



What + So What + Now What

What's happening? *Why should I care?* *What do you want me to do?*

Let's Try It!

A Word of Caution

Using GenAI





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Best Practices

- Have a human-first mindset.
- Fact-check and proofread.
- Pay close attention to generated images of instruments.
- Do not disclose confidential or sensitive information.
- Ask for MTNA marketing assets.
- Stay up to date.

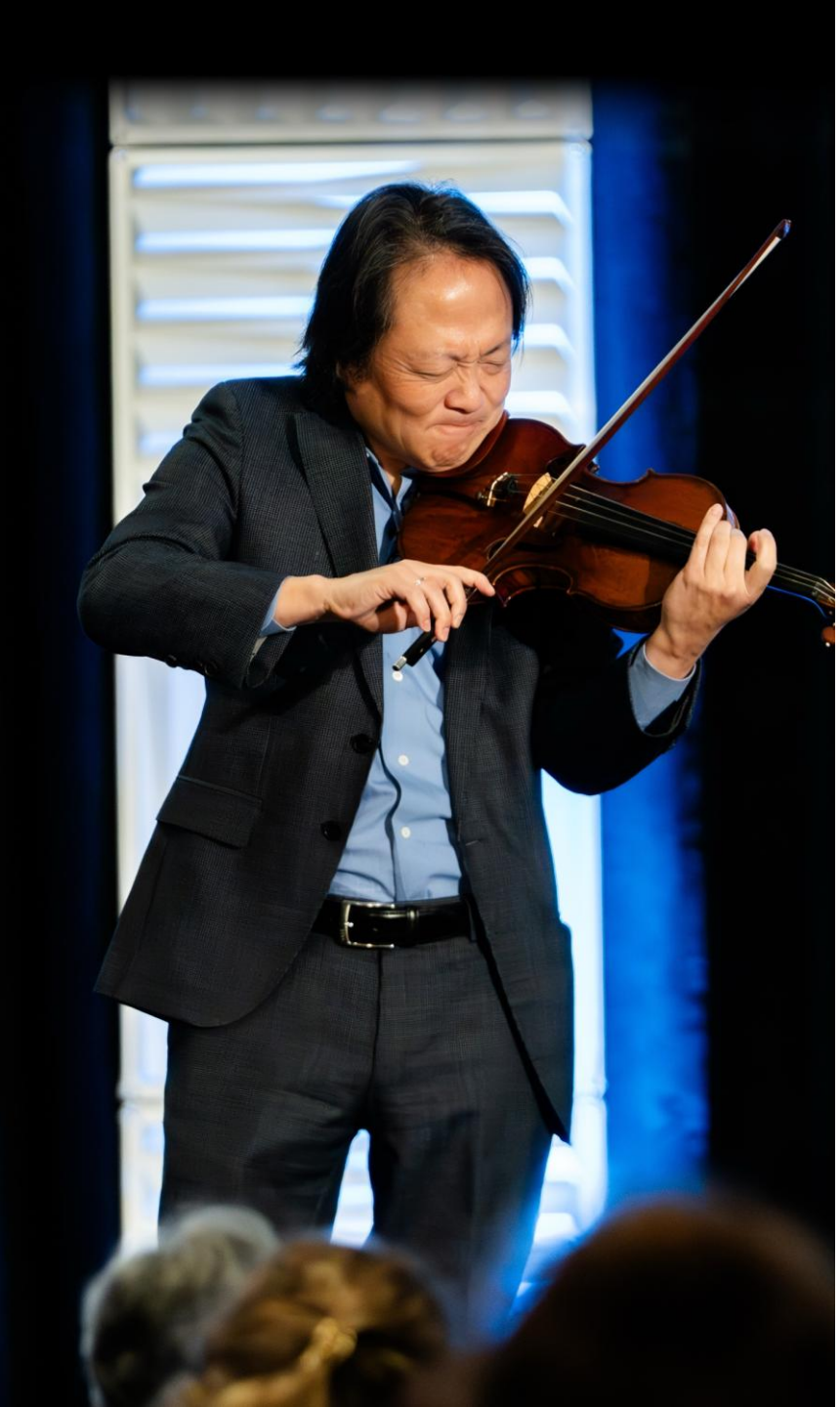
Your Marketing Toolkit

- ✓ A point person.
- ✓ A calendar.
- ✓ A shared photo library.
- ✓ A few templates.
- ✓ A willingness to experiment.



MTNA's Marketing Values

1. Empowerment of all members and music teaching professionals
2. Mission, vision, and brand alignment
3. Integrity, authenticity, and creativity
4. Community engagement
5. Advancement and celebration of the music teaching profession



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MUSIC TEACHERS NATIONAL ASSOCIATION

Your Partner in Teaching (and Marketing!)