

Chapter Tool Kit

**A Resource For Building
Strong PTG Chapters**





Chapter Tool Kit

Introduction

Thank you making the commitment to become a PTG chapter officer.

This handbook was designed as a guide to help PTG chapter officers manage local PTG activities. The name, Chapter Tool Kit, came from a strong belief that all PTG chapters can be successful if they have the right tools to manage local operations.

Included in these pages is information for both new officers and experienced leaders. We hope this material will stimulate chapters that are struggling and build upon the successes of chapters that are doing well.

This is not meant to be a "one-size-fits-all" document. Regardless of your chapter size and activity, you will find that most issues affecting PTG chapters are covered in this material. If you do not find the information you need in or would like to know more about a specific topic, please feel free to contact your RVP or the Home Office at any time.

For this tool kit to be useful, it must also be kept current. Chapter officers will be notified when updates or additions are made available. Normally, these updates will be distributed via the Chapter Resources Web Page in the Members Only section of www.ptg.org, as a [notice in the Chapter Leaders community at my.ptg.org](#) or through the PTG Home Office.

In most chapters, the president will be responsible for maintaining the "Chapter Tool Kit." When a chapter president leaves office, he/she should review all of the materials in the tool kit with the incoming president. This can serve as basic chapter leader training and help the new president assume his/her duties more quickly and smoothly.

PTG is especially grateful to Richard West, RPT, for developing the original prototype of the Chapter Tool Kit during his service as Regional Vice-President for the Central West Region. Much of his original design is contained in this document and was the inspiration for additional resources.

Thanks also go to Richard Bittner, RPT, for his vision for chapter growth. Under his leadership as Chairman of the Chapter Resources Committee, several resources--including the Chapter Tool Kit--were released. His committee included RPTs Gina Carter, Paul Monroe and Board Liaison Bob Bussell.

How to set up your Chapter Tool Kit:

1. You will need a portable file box large enough to hold a 2" binder, fifteen (15) or more file folders, a member directory and local chapter records.

Choose a covered box with a handle so that you can easily carry it with you to meetings.

2. Be sure your Chapter Tool Kit handbook is in a three-ring binder. An insertable cover and section dividers are included with the handbook. Place your assembled binder in your file box.

3. Mark a set of file folders with the label names below. Use extra file folders for extra chapter records. Put the current year's records and information in the appropriate folders. Store older materials in a separate container. There are additional recommendations in Section 3 describing how the chapter Treasurer and chapter Secretary can maintain their records. Place the file folders in your file box.

Pending Membership Applications

Chapter Roster/Mailing List

Committee List & Charges

Meeting Minutes

Budget and Financial Reports

Chapter Bylaws

Chapter Charter

Chapter Newsletters

Correspondence In

Correspondence Out

Contracts

Legal Documents (tax, insurance, etc.)

Sample Forms

4. The total contents of your Chapter Tool Kit file box should include the following items:

- Chapter Tool Kit handbook, CD or other media with CTK files
- 13 labeled file folders
- Current "Piano Technicians Guild Guide to Resources in Piano Technology & Membership Directory"
- Current PTG Bylaws & Regulations
- Local chapter materials

Chapter Tool Kit

Contents

1. PTG ORGANIZATIONAL STRUCTURE & POLICIES

- Mission Statement & Code of Ethics
- Online Document List.
- Graphic Standards Manual

2. CHAPTER ROLES AND RESPONSIBILITIES

- PTG Bylaws References for Chapters
- PTG Bylaws Proposal Template
- Protecting Your Chapter from Antitrust Violations
- PTG Chapter To Do List
- Chapter Deadline Calendar
- Sample Chapter Bylaws
- PTG Membership Application & Instructions
- Processing Member Applications
- Chapter Notification Form & Review/Appeals Process
- Effective Meetings
- Maximize Member Attendance
- Reaching Long Distance Members
- Sample Job Descriptions
- Financial Assistance
- Committee Resources
- Volunteer Recognition
- Leadership Transition & Development

3. FINANCIAL MANAGEMENT

- Managing Financial Reports
- Safeguarding Chapter Funds
- Budget Worksheets
 - Income Account Ledger
 - Profit/Loss Statement
 - Balance Sheet
 - Trial Balance
- Records Retention
- Chapter Insurance
- Revenue Generation
- IRS Information for Chapters
- Chapter Property Inventory Sheet

4. EDUCATIONAL RESOURCES AND CERTIFICATION

- Convention & Technical Institute (convention.ptg.org)
- PTG Foundation Scholarship
- Developing Chapter Technicals
- Class Planning Checklist
- Exam Resources Flyer
- RPT Exam Brochure
- PACE Checklist
- Written Exam Study Guide
- RPT Exam Pre-screening Manual
- Piano Technology Training
- Seminar Request Form

5. MEMBER COMMUNICATIONS

- Disclaimer & Logo Usage
- Tips for Developing a Chapter Newsletter
- Communicating Electronically
- Chapter Newswire
- Using my.ptg.org

6. RECRUITMENT AND PROMOTIONS

- Member Recruitment Packet
- Member Retention Tips
- Member Recruitment Ideas
- Tips for Making Group Presentations
- Tips for Designing Exhibits
- PTG Resources for Exhibits & Presentations
- Sample Chapter Ads
- Piano Learning Center Guide

7. APPENDIX

8. LOCAL CHAPTER RESOURCES