

Note: This is being built out over time, and formatting may continue to adapt.

At any point that members wish to help support the drafting of this document please reach out to Guild President, Ashley Jane McIntyre to schedule a meeting to help draft a portion.

Despite being a “draft form” all points listed are active and should be observed.

We will continue to draft this through the 2022-2023 as procedures fall into place, and will edit the document after this time to have more organization. From that point forward, policies and procedures may be edited by active Guild Officers.

C.R.A.F.T. Guild Policies and Procedures

Table of Contents will include

- Timeline of Operations: Officers, Budget, Membership, Voting
- New Member Organization and Welcome Letter
- Budget: Annual Budget building, and voting practices on spending - Treasurer
- Joining a Committee - Committee Liaison
- Committee Expectations - Committee Liaison
- Volunteer Events - Community Committee
- Vendor Events - Marketing Committee
- Monthly Meeting Topics + classes - Officers
- Member Tee Shirts - Vice President
- ***Learning Scholarships - need to record process and policies!!!***
 - ***Change up amounts/tiers***

Timeline of Operations

- Officer Term
 - Positions Held December - December
 - August = Officer Nomination Announcement
 - September = Officer Nominations
 - October = Officer Voting
 - November = Officers Announced
 - December = Officer transitions
 - Per bylaws, outgoing officers are expected to mentor new officers for a period of 3 months
- Budget Term
 - Per bylaws, the operating budget for the year must be voted in by February of each year

- Note, the dues schedule for each year is not required for presentation to membership until March, but should be considered during budget discussion for operating needs.
 - New officers have the opportunity to adjust the budget proposals, to present to membership for voting
- Membership
 - Per our Bylaws, Membership dues for the year are to be presented by March of each year, or undergo no change
 - Membership Period runs May - May
 - Membership renewals are in May of each year
 - ½ Membership Period runs from November - April
 - ½ dues scale is at the discretion of current leadership, and must be accounted for by March, when the dues structure is presented.
- Voting
 - Per our Bylaws, voting issues must be presented to membership at least 1 week prior to a meeting in a digital format.
 - The secretary is responsible for communication of items up for vote.
 - Members have at least 1 week to vote digitally before that month's meeting to have the opportunity to vote in case they are not in attendance.
 - Voting must then also take place during a meeting, for attendees to vote in person or via online attendance.
 - Votes may close by the end of a meeting and be announced at that meeting, or as is timely.

New Member Organization and Welcome Letter

- Transfer the member information from the Chargebee application to the necessary records locations. Tip, pull up the three record locations in a separate window and copy paste over from email.
 - To locate member information:
 - Log into Chargebee (see passwords doc)
 - Go to the Live Site
 - Click on "Customers" to view the list of active members
 - Click on their name then copy paste information over
 - [Officers: Full Membership Records spreadsheet](#)
 - Located in the main space of Guild Google Drive (not in a folder)
 - Place information in either the Full Members or Associate Members page based on their membership level
 - [Member Roster spreadsheet](#)
 - Located in folder "Members: Bylaws, Member Rosters, Newsletters"
 - Only put designated information here if they answer "yes" to being visible to other members
 - [Newsletter Subscription \(responses\) spreadsheet](#)
 - Located in folder contact lists + email drafts

- Place on the “Guild Member Emails” page
- Change the member renewal date in Chargebee to May 1 of the following year from when they joined. This will set their renewal date to fall within our calendar timeline. (note, each member can access their membership from the customer portal on our site. They can change their card info, and change their membership status)
 - Log into Chargebee (see passwords doc)
 - Go to the Live Site
 - Click on “Customers” to view the list of active members
 - Click on their **subscription type** to view and make edits to the subscription
 - Click on “Edit Next Billing Date”
 - Change the date to May 1 of the following year from when they joined, ignore the time zones, click “apply”
 - Ignore prorate credits/do not click prorate credits
 - Type reason as “changed subscription renewal to May 1”
 - Click “update”
- Send the Welcome email and record in the Officers: Full membership Records that it’s done
 - Create a new email in the Guild Gmail
 - Addressed to the new member. Cc the officers
 - Copy Paste the [New Member Welcome Letter](#) draft from the folder contact lists + email drafts
 - Make sure the stitch-n-bitch locations and any current events that may be referenced are all accurate before sending
 - Change the [Name] to the new member’s name then send

Budget - Treasurer

- Forming Annual Budget
 - First: Guild annual operating expenses and general member spending should be determined. The operating expenses is the primary balance that should be preserved each year.
 - Second: Committee annual budgets should be determined
 - Third: Committee one-time purchases from their wants/needs lists should be determined
 - Last: If there are any long term large spending goals. I.e. trailer for storage/one day having a brick and mortar cafe/meeting space, we can determine an amount each year to be saved towards these goals as long-term operations.
- During the year, feedback on building the next years annual budget should be sought out. Note, Feedback for annual budget/ potentially recurring costs should be considered before allowing for larger one-time purchases
- Guild Annual Budget
 - Officers only are required in order to vote and weigh in on most whole guild expenses. Examples include: one time purchases for supplies for monthly meetings, recurring operations expenses, etc.

- Membership should have the opportunity to weigh in on expense items that relate to member experiences. Examples include: determining the annual guild retreat and spending towards such an event.
- Committee annual budgets
 - Consult with committees about wants/needs by x date
 - Collect range of requested budget for the year for member voting by x date
 - Examples: annual allowance amounts
 - Community Committee requests an annual budget for art installation supplies
 - Vote on: \$100 annually, \$150 annually, “reject request,” “suggest other amount”
 - Marketing Committee requests an annual budget for paid vendor opportunities
 - Vote on: \$50 annually (approx 1 event), \$200 annually (approx 4 events), “reject request,” “suggest other amount”
 - Example: \$ amount per member
 - Membership Committee requests a budget per member for day of celebration
 - Vote on \$5 per member, \$10 per member, etc.
- Committee One Time Purchases
 - Consult with committees about wants/needs by x date
 - The available balance for one-time purchase requests will have to be looked at AFTER annual expense requests have been voted on for feedback. It should be communicated that not all items selected may be granted purchase based on remaining budget.
 - Example: one-time purchase for supplies/large item
 - Marketing committee requests a one-time purchase allowance for the following items. Please vote on which items we feel we can grant, you may select more than one item. Items with the highest votes will be selected based on available budget.
 - Vote (select multiple) on “\$ amt - item” “\$ amt - item” etc...
- Timelines should be considered in a manner that the final budget voting each February has enough data to support proposed budgets. If Collecting feedback falls on a year that a New Treasurer will be taking office by the time of the February vote, then the incoming Treasurer should begin consulting with the outgoing treasurer as soon as they are voted in so they may have a sound base for proposing their first budget.

Joining a Committee - Committee Liaison

- Prospective committee members are directed to fill out the committee interest form on the member site
- Committee Liaison is responsible for checking this form monthly, before guild meetings, and directing the interested member to the committee chair
- Committee Liaison lists the joined committees in the membership records using the drop downs provided. Record to be updated are:

- [Officers: Full Membership Records](#)
- [Member Roster](#)

Committee Expectations - Committee Liaison

- All Committees should track participation of members at events in the Guild Participation Form
- Committee Chairs should follow expectations of the [Committee Chair Guide](#)
 - 1 meeting per month on zoom for accessibility
 - Reminders of upcoming meeting each month
 - Reporting outcomes of meeting to Guild Secretary in time for the Newsletters
 - Maintain all notes/materials in their designated google folder to link to member site
 - Ensure member participation is during events is tracked properly
- Committees serve the following purposes
 - Membership Committee
 - Membership content/spotlights for newsletter and social media
 - Celebrate Member Birthdays
 - Coordinate Gift Exchanges
 - Provides Monthly Free Patterns
 - Plans outings for guild members
 - Minimum 1 per quarter
 - Works with VP to maintain records of teeshirt and keychain delivery
 - Marketing Committee
 - Identifies opportunities for members to teach classes
 - Not volunteer classes. This is identifying locations that desire to house classes, and providing this information to members who may wish to teach a class as a gig/to make money for themselves.
 - Identifies opportunities for vendor booths
 - View Vendor Events section of P&P for more details about vendor booths
 - Creates at least 1 fundraising opportunity for the guild in addition to the annual CRAFT Fest
 - Helps approach Community Partners about business memberships and member benefits
 - Community Committee
 - Create Quarterly Projects for the Guild to participate in
 - Art Installations or “yarn bombs”
 - Donation projects (example: blood drive, giving away a red hat to blood donors)
 - Create Quarterly volunteer donation opportunities per year or volunteer opportunities per year
 - Can be craft or non-craft oriented
 - Donation opportunities for programs like [The Red Scarf Project](#) and more.

- Volunteering in-person in a learning environment where skills are passed on
 - Workshops or demonstrations

Volunteer Events - Community Committee

- Sign In
 - Committee chair is responsible for making sure members who participate fill out the Guild Participation Form

Vendor Events - Marketing Committee

- Supplies (chair tracks inventory, committee members responsible for assisting/gathering)
 - Frame for Monetary Donations and payments
 - (venmo @wecraftclt) (paypal craftguildclt@gmail.com)
 - Ask those giving funds to note what it is for (product or donation)
 - [Tracking sheet for set-up supplies](#):
 - Located in folder Members: Marketing Committee
- Marketing support
 - Officers monitoring Instagram will help post and promote
 - Officers in charge of Facebook Page will make an event
 - The committee chair and members are responsible for making the flyers/content for promotion and turning these over to social media handlers in a timely manner
- Cash/check exchange procedures
 - Cash and Checks turned in to Treasurer with sales record of the day + location within 1 week of the event.
- Cost Tracking
 - [Spreadsheet HERE](#)
 - Donate items vs maker opportunities
 - Donate items
 - Upfront, or rolled over from non-selling (maker doesn't want it back)
 - Maker items
 - Kick back 20% to Guild, 80% to member
 - Tagged with CRAFT branding (if supplies are available)
 - Assigned a letter (plus number of item)
 - Sale price on tag
 - Tags removed when selling and
- Agreements
 - Pricing = price out so % comes back, they need to consider this when determining price points
 - They should do an inventory sheet for us

- Numbered item
 - Price
 - description/type
 - Color
 - Care instructions
- Print off signed agreement form, inventory, tags and turn in with product.
- Care instruction tags
 - Filled out by maker. Turned in with agreement + inventory sheet.
- Volunteer Procedures
 - Sign in on the Guild Participation Form
 - Volunteers wear their guild shirt (if applicable)

Monthly Meeting Topics + Classes - Officers

- Network throughout the year to find people who may come speak, demo, or teach a class at a meeting
- If they are interested, send them this [TEMPLATE EMAIL](#)
 - details/description of what being a guest entails
 - Expectations of conduct
 - Outlines options for talk/demo/class
 - Includes ask for discounted price for members
- Once confirmed:
 - Get their topic posted as an upcoming event
 - Guild site
 - Guild FB
 - Guild Calendar meeting description
 - If a class - make price button in Square Dashboard
 - Get class links and add to above postings
- Track the Class in the [Classes/Workshops Folder](#)
 - List description + pic
 - Price for public/members (with links)
 - Class Size Cap (if applicable)
 - Tracking chart as class tickets sell
 - Tag treasurer in a comment as it's updated

Member Tee Shirts

- VP helps to create this process.
- Tee shirt sizes collected from members in their joining information and is stored in the Full Membership Records

