

Barbershop Harmony Society

Mid-Atlantic District

Chapter Advocate Manual 2018



Chapter Advocate Manual, 2018 edition

Table of Contents

CHAPTER ADVOCATE.....	3
Who are we? What do we do?.....	3
Job Description & Skills (refer to Society Operations Manual Feb 2012 edition).....	4
Duties and responsibilities.....	4
Required Training	5
Advocate goals should include:	5
Chapter visit report guidelines	5
Chapter Relationship Management (CRM).....	7
Some 'good advice' guidance.....	9
Things you should try to do:.....	9
Things you should avoid:.....	10
Who can YOU contact	11
Critical Thinking TOOL KIT	12
Emotional Intelligence	13
Healthy Chapter Initiative	14
THINK!.....	15
Guide for Good Communications	19
Working through Chapter Problems.....	20
The Law of Process.....	21
Sample S-M-A-R-T goal setting.....	22
SWOT Analysis	24
Links to additional helpful material	27
Books which may be helpful – to the advocate or the chapter leadership	29

CHAPTER ADVOCATE

Who are we? What do we do?

A Chapter Advocate is a Society, District, and chapter member who cares about our hobby and the chapters he represents.

The Advocate is a man with a working knowledge of the District who is willing to learn, and to help chapters with their administrative questions and challenges. He is not a music coach, but a man who can get answers to a chapter's questions and help chapter members work through their problems. He is looking at chapters to see what things are being done that might be considered "best practices" and used as examples for other chapters to emulate. Finally, along with the other Chapter Advocates in his Division and the Division VP, he is always looking for ways to bring chapters together with inter-Chapter events.

It is not a difficult job, but one that needs a love of this hobby and a willingness to help. The Chapter Advocate is a direct link between the Chapter he is assigned to by the Division VP and the District. He is someone the Chapter can turn to when it needs some help or when it has ideas for other Chapters, the Division, the District, and/or the Society. The Chapter Advocate is a high integrity person who will help in identifying chapter needs in concert with the chapter leadership.

There are many men in the Mid-Atlantic District with this kind of knowledge and a strong desire to help. Thank you for being one of them!

Chapter Advocate Manual, 2018 edition

[Job Description & Skills \(refer to Society Operations Manual Feb 2012 edition\)](#)

A chapter advocate should be a 'people person' and poses good communication skills. The chapter advocate will develop a positive and ongoing relationship with the leadership of assigned chapters. The advocate is a district leader and a local connection point and conduit for the chapter. Advocates are 'in-the-know' regarding current chapter problems, potential solutions, and additional resources such as learning materials and other district leaders who can help the chapter work through a problem. It is important to maintain a positive outlook and to view problems as merely an opportunity to explore a creative and alternative approach.

The advocate program is meant to provide local district leadership for the purpose of helping the chapter. In some cases the advocate will help the chapter learn about programs which are available to them. At other times they will serve the district and society by reminding the chapter of certain policies and procedures, such as compliance with certain filings (if necessary), or other programs which are being made available.

It is often the case that chapters operate within their own bubble and consider only themselves and maybe the district, forgetting that other local chapters even exist. Some chapters believe that the district is only interested in 'telling' them to do this or that, such as to compete at a convention, or to perform some membership drive and to have x number of members. You may have seen this in your own chapter, where all the problem solving and brainstorming is only internal to the chapter and the district has not been as helpful as some would have liked. As a chapter advocate you can bring a valuable and precious perspective, and can recommend networking and connecting with people in other chapters or at the district level. There is no reason a chapter has to feel isolated and alone.

There are more details about the Chapter Advocate and Chapter Support Leadership Training (CSLT) roles in the Society Operations Manual and the MAD District Operations Manual. If you have not read through the Society Operations Manual, you should invest a few minutes to become aware of what's there – in case you need it when talking with your chapter. Here are relevant topics and locations for Advocate and CSLT:

- Mid-Atlantic District Statement of Policy, 2015 Revision (last editorial change 31-January-2017), Article XII (page 12).
- Society Operations Manual, dated February 2012 (latest copy available), "District Vice President for Chapter Support and Leadership Development Job Description" (page 31)
- Society Operations Manual, dated February 2012 (latest copy available), Section 3.2.2.2.1 Vice President for Chapter Support and Leadership Training (page 78)
- Society Operations Manual, dated February 2012 (latest copy available), Section 3.2.3.4 Chapter Counselor Job Description (needs to be renamed to Chapter Advocate)

[Duties and responsibilities](#)

As an advocate make every attempt to establish a regular communication cadence with chapter leadership for your assigned chapters. You should plan some 'in-person' visits and also be connected via email. Ideally you should have your email address added to their chapter internal communication email lists so you can be aware of chapter activities – as if you were a member.

Chapter Advocate Manual, 2018 edition

Be prepared to help your assigned chapter work through problems, develop good Vision, Mission, and Goals (see S-M-A-R-T goal setting in the reference material section).

Required Training

The Society is an organization which includes all ages, including Youth. In recent years it has become necessary to ensure everyone who may interact with children have sufficient training for what NOT to do.

As a chapter member, chapter leader, district leader, or society leader, you must complete training on a regular basis.

Refer to this page for more details: <http://www.barbershop.org/youth-policy-procedure-faqs/>

Advocate goals should include:

- 1) Attending four in-person visits per year – more if possible. Chapter meetings and board-level meetings are both good opportunities to meet and greet, and to work shoulder to shoulder with them.
- 2) Having direct communication with board members via email. Stay connected and be proactive. You should reach out regularly and do so without becoming a nuisance.
- 3) Learning about and reading governing documents – for the chapter, the district, and the society. It may be helpful to also understand state government documents as well.
- 4) Learning about other society or district programs and resources such as the Healthy Chapter Initiative or the Ready, Set, Sing program.
- 5) Developing relationships with leadership in the district and other local chapters.
- 6) Developing your own leadership skills. Work through some of the material in the appendix in this manual but also drawn in your own good resources.
- 7) Entering relevant information about your assigned chapter(s) in the Chapter Relationship Management system, available in the Mid-Atlantic District website (refer to CRM section in this guide).
- 8) Attending Division meetings as called by the Division VP. It is recommended that the Chapter Advocate attend the House of Delegates meetings and Leadership Academy.
- 9) Submitting expenditure report to the Division VP (enter into MAD website expense form) after every visit and meeting, even if no reimbursement is claimed.

Chapter visit report guidelines

The following guidelines are meant to ensure that the Chapter Advocate, Division VP, and VP-Chapter Support and Leadership Training (CSLT) are aware of the health, activities, and needs of our chapters. The summary is not meant to be a report card or audit. Both positive items and areas of concern should be included. The Chapter Advocate is the first and closest resource available to provide advice and to assist in resolving concerns. If resolution is beyond the Chapter Advocate's capabilities, he should seek advice or assistance from other district officials or persons with expertise in the area in question.

The bottom line is that visit summaries provide a means to ensure chapters and chapter members receive the attention and support they deserve, and that division and district officials are alerted when outside support is needed.

Chapter Advocate Manual, 2018 edition

Details about the visit should be entered into Chapter Relationship Management (CRM) sub-system of the Mid-Atlantic District website. Items that should be covered include:

- Date of event
- Reason for visit (e.g., chapter or board meeting, performance)
- Current chapter membership
- Members present
- Guests
- Potential members present
- Overview of activity
- Chapter comments/requests/concerns, etc.
- Chapter Advocate observations/comments
- Items for follow-up or other resources required

Note: An expense report (<http://www.midatlanticdistrict.com/?Code=ExpenseReport>) must be filed after every visit, whether reimbursement is requested or not. This is not an arbitrary requirement. Together, the reports will provide a sound basis for making budget decisions regarding chapter support line items in the annual district budget.

Chapter Advocate Manual, 2018 edition

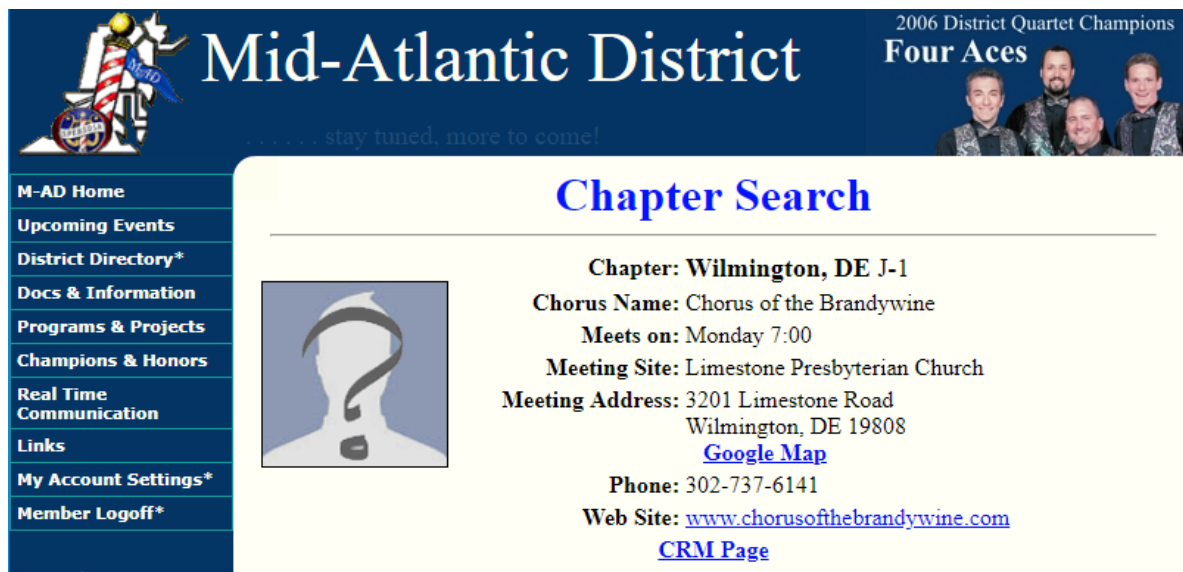
[Chapter Relationship Management \(CRM\)](#)

The CRM sub-system is a collection of input forms in the district website which replaces the need for a paper-based system.

Access to CRM is not wide open for everyone – it is limited to district leaders and advocates. You must be logged into the MAD website in order to access and enter your report.

You can access a chapter's CRM page by displaying the chapter page and then clicking on the 'CRM page' link. This will take you to the CRM Chapter Profile page which shows fields for collecting various fields of data.

Refer to the following figures:



The screenshot shows the Mid-Atlantic District website interface. At the top, there is a banner with the Mid-Atlantic District logo on the left, the text "Mid-Atlantic District" in the center, and "2006 District Quartet Champions Four Aces" with a photo of four men on the right. Below the banner is a navigation menu on the left with items: M-AD Home, Upcoming Events, District Directory*, Docs & Information, Programs & Projects, Champions & Honors, Real Time Communication, Links, My Account Settings*, and Member Logoff*. The main content area is titled "Chapter Search" and displays the following information for the Wilmington, DE J-1 chapter: Chorus Name: Chorus of the Brandywine, Meets on: Monday 7:00, Meeting Site: Limestone Presbyterian Church, Meeting Address: 3201 Limestone Road, Wilmington, DE 19808, Phone: 302-737-6141, and Web Site: www.chorusofthebrandywine.com. There is also a "CRM Page" link. A placeholder image of a person with a question mark is shown on the left side of the search results.



- M-AD Home
 - Upcoming Events
 - District Directory*
 - Docs & Information
 - Programs & Projects
 - Champions & Honors
 - Real Time Communication
 - Links
 - My Account Settings*
 - Member Logoff*
- Wednesday, Jun 27, 2018

[Dashboard](#)
[Refresh / Hide](#)

- 3042 Members
- 244 HCE Attnds
- 56 HCE Youths
- 0 HCE Unpays
- 54 HCE Faculty
- 46 Chapters Status
- 44 Chapter Events

CRM Chapter Profile

Chapter: (1) [Wilmington, DE](#) - Chorus of the Brandywine {Central Division}
Creator: [Mike Kelly](#) 2014-11-12
Updated By: [Mike Kelly](#) 2014-11-12 14:33:21 (Saving this will change it to you!)
Chartered: Year: Month: Day:
Status: Inactive Active
Mission:
Mission Date: Year: Month: Day:
Vision:
Vision Date: Year: Month: Day:
Culture:
Goal1:
Goal2:
Goal3:
Challenge1:
Challenge2:
Challenge3:
Competition:
Grants:
Grants_Desc:

Chapter Advocate Manual, 2018 edition

Some 'good advice' guidance

Chapter advocates need to learn about their chapter to develop a sense for where they are at. Some chapters are 'strong' while others seem to struggle along all the time.

You should consider the following elements when developing your impression of the chapter:

- Does this chapter seem to be a strong active chapter with good administrative and music programs! (Celebrate!)
- Is membership in decline? Retention and recruiting problems?
- Does the chapter have new member orientation program and mentor or buddy program?
- Does the chapter have a guest book or information book for a prospective member?
- Does the chapter have a planning session with goals and objectives?
- Strength of the administrative and music programs?
- Is the chapter financially sound? Does it have a budget?
- How does the chapter raise funds for operations?
- Has the chapter complied with the IRS filing requirement?
- What are the IRS filing rules?
- Does the chapter attend Leadership Academy, Harmony College East (HCE), and House of Delegates (HOD) and Division meetings?
- Has the chapter reported the new officers to the Barbershop Harmony Society (BHS) before December 31st?
- Does the chapter have an annual show? Does it submit a show clearance prior to the show?
- Does the chapter adhere to copyright laws and the Society regulations to ensure that the music is legal?
- Are the members motivated to sing better and grow?
- Are there conflicts between Administration and Music?
- Does the chapter leadership understand the Society's liability insurance policy, the limits of the policy, and the option to add liability coverage for all chapter members? (See Legal Matters, Secretary manual)

If you do not have information for any of the above, seek answers from the chapter president or other chapter board members.

If you need clarity in understanding the purpose for any of these points, please reach out to your district leadership – DVP for your Division or DVP CSLT.

Things you should try to do:

- Meet with the Chapter President
- Understand the chapter culture
- Visit chapter regularly
- Establish a good relationship
- Build trust
- Be a friend
- Listen and observe
- Ask questions

Chapter Advocate Manual, 2018 edition

- Identify problem areas (opportunities)
- Celebrate chapter successes
- Be knowledgeable
- Provide prompt response to inquiries

Things you should avoid:

- Being a 'know-it-all' (be knowledgeable but don't shove it in their face. It's not about you, it's about them!).
- Offer unsolicited advice
- Fix things that aren't broken
- Audit the chapter
- Behave domineering or overbearing
- Use other chapter's names when describing successes and failures

Who can YOU contact

Realize that not everyone will have the right answer for every situation. You are not expected to know every answer. If you get stuck, contact other folks to gain their perspective, input, or redirection to another great resource.

Tip: Refer to M-AD Who Do You Call?

To navigate: Log in to Mid-Atlantic District website: "District Directory*-Who do you call?*"

LINK: <http://www.midatlanticdistrict.com/pdf/WhoDoYouCall.pdf>

Some resources that can be helpful:

- On-line Mid-Atlantic District website: (<http://www.midatlanticdistrict.com>)
- On-line Society website (<http://www.barbershop.org>)
- Fellow Chapter Advocates
- Your Division VP
- District Officers
- Chapter Officers
- Other district websites (from all 17 districts)
- Society publications (e.g., music, officer manuals, videos, tapes)
- Society Staff Members
- Society Committee Members
- Society Officers
- Society Judges and Coaches
- Harmony Marketplace

Note: You should seek out chapter and district level resources first before reaching out directly to the CEO or Society President. That is not to say that it is never to be done, but often times the answer can be had without going all the way to the top right away.

Critical Thinking TOOL KIT

Critical thinking is not “sharing negative observations and criticisms”. Being a critical thinker means being a “truth-seeker” who keeps in mind the need to understand all facets of a situation, both positive and negative, if that even applies. Critical thinking explores a topic or problem to fully understand what we are dealing with. Critical thinking usually gives rise to questions, methods, and attitudes which will help unravel difficult situations.

The following sections are ‘systems of thought’ and processes which may be helpful in applying critical thinking when trying to solve problems. The items below are collected for your convenience. There are whole books and studies in support of each of these methods. Note that the tools included in this section are not meant to be exhaustive. They’re very likely may be other critical thinking tools which are more applicable for a given situation (if so, please let the CSLT know so it can be included in the next version of this manual 😊).

Important to note, though, that these tools may or may not work for a chapter. Perhaps some of these have been already tried? That doesn’t mean that they cannot be used again, but maybe there is opportunity to try another method. Note every tool in your tool box will be applicable to every chapter. Be flexible; try something else.

Chapter Advocate Manual, 2018 edition

Emotional Intelligence

Emotional Intelligence has become a bit of a buzz-word, but the concept is simple and effective. You may know that effective communication involves verbal and non-verbal components. In many cases the difference between effective and ineffective communication, and further, effective and ineffective interpersonal relationships, boils down to Emotional Intelligence, or EI.

Since being a Chapter Advocate hinges critically on effective communications and relationship building, it is essential that you are at least aware of this topic. Chapter leadership also must consider and understand their own emotional state especially when discussing problems and opportunities.

Emotional Intelligence is being aware of, and in control of, the emotional component of your relationship with another person. Taking the high road, NOT flying off the handle, developing patience with others and exploring your own reactions to others is part of the broad spectrum of EI.

There are several books and numerous articles, and probably several doctoral theses on this topic.

In short, the following shows the four main skills EI skills (adapted from Emotional Intelligence 2.0, © 2009 by Travis Bradberry & Jean Greaves)

PERSONAL competence →	Self-awareness	Self-management
SOCIAL competence →	Social awareness	Relationship management

The **Social** aspect of EI is very important. There is a further study beyond EI regarding the way we behave, the way it is perceived by others, and the way we perceive how others behave. The reaction to what we observe is pre-wired into our brains and nervous (limbic) system. When we see or experience events where we are not actively involved, the effect in our brains and nervous system is very powerful, even to the point of causing a 'fight-or-flight' reaction within ourselves. (Social Intelligence, © 2006 by Daniel Goleman).

Chapter leaders and advocates need to be aware that how they behave has an effect on everyone around them.

Chapter Advocate Manual, 2018 edition

[Healthy Chapter Initiative](#)

From the BHS website:

The Barbershop Harmony Society believes that the success of our organization rests in large part on the health of our diverse array of chapters. Healthy chapters mean a strong membership pipeline, a higher level of artistry and musical credibility, and a more reliable grassroots distribution mechanism through which our charitable and service aims can be actualized, measured, and refined. For the majority of our members, the local BHS Chapter is the single most significant point of contact with the Society. For this reason, and in partnership with Harmony Foundation International, we've created the Barbershop Harmony Society's Healthy Chapter Initiative.

You should become familiar with the materials available on the BHS Healthy Chapter Initiative pages. There are documents, videoa, a blog, and linkage to the BHS Customer Support FAQ page.

Contact information available at the BHS website page

<http://www.barbershop.org/education/healthy-chapter-initiative/>

Chapter Advocate Manual, 2018 edition

THINK!

From the BHS website:

THINK! Curriculum

Welcome to a journey of self-discovery... a journey of your chapter's self-discovery. Too often chapters find themselves caught up in programs and activities that have been a part of their existence for a long time or programs and activities that consume plenty of valuable resources. This process allows a chapter to visit just who they are and why they exist. The program also causes introspection as to what the chapter does to support that identity and how it delivers its product. A chapter can get wrapped up in what it's doing without understanding why it's doing or why it exists. The conclusion of this formal classroom setting is only the beginning of your chapter as what is presented is a process for each chapter to take home and call to action as it sees fit, specifically a constant refocusing tool that ensures sustainable chapter direction. Empower your chapter to identify itself, align what it does and engage with its members and with its chapter life.

NOTE: The THINK! Curriculum is originally intended for facilitation with a single chapter. However, the program has been successfully offered as a THINK! presentation either as part of an open invitation or in a general session setting. From this session, our goal is that attendees will speak to the remainder of their chapter leadership of the benefits of undertaking the process. The BHS Leadership Operational Project Team (LOPT) along with the BHS Leadership Facilitators will then continue advising chapters individually as they work through the process of discovery. This "introductory" course is effective in a two-hour timeframe.

Contact information available at the BHS website page

<http://www.barbershop.org/education/healthy-chapter-initiative/leadership-facilitators/>

Chapter Advocate Manual, 2018 edition

[Chapter Assessment survey tool](#)

If you are advocate for a chapter that needs to assess where they are, you should have them reach out to the BHS Leadership Operations Project Team to request a Chapter Assessment survey.

From the BHS website:

BHS Chapter Assessment

The Chapter Assessment is a tool developed for our Society Chapters to gather information to ultimately assist chapters who are seeking to improve in one or more areas. It is designed to be a tool for a chapter advocate or coach to collect information to assist and make recommendations to the chapter. It can also be used by the chapter for self-assessment.

Contact information available at the BHS website page

<http://www.barbershop.org/education/healthy-chapter-initiative/chapter-assessment/>

Chapter Advocate Manual, 2018 edition

Sample Chapter Annual Planning Meeting

Elements of Effective Planning sessions:

- Vision
- Mission
- Goals
- Objectives
- Action Steps

Annual Chapter Planning meetings should be facilitated. Annual Planning should be a time to come together, review (to a degree) where we are, and to envision the future course for the year.

WARNING: it is easy to get bogged down in minutia details and / or ruminating about past failures. The Annual Planning meeting can be a place to assess chapter direction and purpose, and to try to get on a better course, but to be effective, the conversation needs to be facilitated so that it stays on track. Consider establishing a 'Parking Lot' for items that could get too long or emotional. Consider separate working sessions or task forces for things like drafting a new vision or mission, conducting a SWOT analysis, conducting a chapter survey, or brainstorming. These activities should be concluded before the Annual Planning Meeting so that the summary results can be considered as inputs.

Some items that every chapter grapples with:

- Who are we?
- Where are we now?
- Where do we want to go?
- How will we get there?
- How are we doing (measuring present state)?

Some steps along the way, in this order:

- Create or affirm the chapter vision and mission.
- Analyze the current plan (if one exists) and the program, financial, and administrative performance of the chapter.
- Assess and document the community needs to which the chapter is responding.
- Assess constraints, opportunities, resources, and environment – factors that will affect the chapter and influence planning.
- Prepare preliminary goals and objectives, based on the information gathered and assessed in steps above. If necessary, revisit and reaffirm the vision and mission in light of new information.
- Review and validate the goals and objectives.
- Develop a financial plan and budget to support the validated goals and objectives.
- Develop an action plan for each objective.
- Prepare a comprehensive plan for review, approval, and implementation.
- Evaluate progress and update the plan on a regular basis

Reviewing the Plan

- Is our Vision/Mission Statement current, reflecting who we are and what we do? If not, what do we want our community to think when they hear/see our name? How do we wish to be viewed by our community?
- What were our successes this past year (what did we do well)?

Chapter Advocate Manual, 2018 edition

- What were our deficiencies this past year (what did we do poorly)?
- What were our opportunities this past year (what more could we have done)?
- What will be considered success for this chapter in the coming year?

Vision vs. Mission

- **Vision** = inspiring, clear, empowering, challenging, and acts as a beacon for the future. Short, concise sentence or phrase.
- **Mission** = statement of purpose, market, services, direction, core values, and measures of success. Three or four sentences.

Creating an Exciting Vision

- A vision comes partly from listening to others and partly from the possibilities you generate by yourself
- An exciting vision is one that lights you up and compels you to share it with others
- a powerful and exciting vision is one that you share with others

Enrolling Others in the Vision

- Enrollment is not selling or convincing or about getting someone to do something that you own.
- Enrollment is authentic and passionate
- Enrollment is generating “possibility” in another such that they step into that possibility and act.

Steps for Developing a Plan

- Tactical planning – Planning to reach a specific and well-defined objective.
- Strategic planning – Planning to reach broad based objectives.
- Long-range planning – Planning to reach objectives over a long period of time (3-5 years)

Chapter Advocate Manual, 2018 edition

Guide for Good Communications

Communicating & Listening

- Speak distinctly and loud enough to be heard
- Use a well modulated voice
- Avoid use of acronyms
- Enunciate well
- Really listen to what is being said by others
- Ask questions for clarification
- Ask for repetition if needed
- Avoid interrupting

The S-M-R Model

(sender-message-receiver)

Sender	<ul style="list-style-type: none">• Give clear, concise, consistent messages• Make messages constructive• Deliver messages with confidence• Try to leave space between thoughts so RECEIVER can ask clarifying questions
Receiver	<ul style="list-style-type: none">• Try to not interrupt so SENDER can maintain train of thought• Listen carefully• Ask questions• Paraphrase to assure clear understanding
Feedback	<ul style="list-style-type: none">• Encourage good performance with praise and emotion (increased effect when done in front of others)

Consider the tone, and direction, you are using during communication. Sometimes it is easy for folks who have been parents to assume a voice which is clearly 'parent-to-child' tone. This subtlety in our message can inhibit positive communication flow. If possible, try to be on the same level with the receiver. Try to both be reasoning adults talking through a concern.

Chapter Advocate Manual, 2018 edition

Working through Chapter Problems

A. Identify the Problem/Data Collection

- Brainstorming
- Surveys
- Suggestion box
- Outside observer (Chapter Advocate)

B. Analyze the Problem/Review the data

- Establish a committee
- Let the Executive Board do it
- Have the Chapter Advocate assist
- Determine the desired outcome. Maybe do nothing.

C. Identify Resources for Solving the Problem

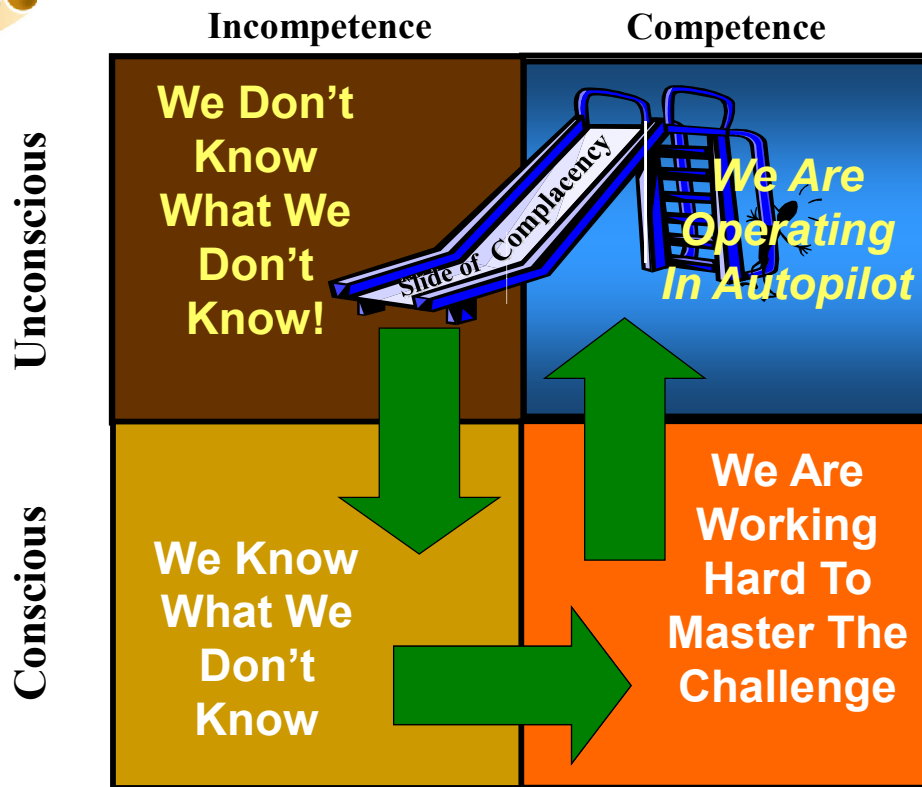
- Chapter Advocate
- Chapter Officers
- Chapter Members
- District Officers
- Society Publications
- Chapter Management Guide
- What is available from Society
- Society Officers
- Society Staff
- Other chapters
- Non-barbershop community resources

D. Action Plan

- Assign responsibilities
- Assign personnel
- Prepare a time line
- Determine a budget for the process
- When the problem is solved, analyze the results.
- If it remains UNSOLVED, then return to Step C.
- After the analysis is completed, report is submitted to proper committee/individual/group that instigated the action plan



The Law of Process*



*As adapted by M.Ray Overdorff from William Gordon's Ladder of Learning

(graphic © Paradigm Associates LLC. Used by permission. 30-Sep-2018)

Chapter Advocate Manual, 2018 edition

Sample S-M-A-R-T goal setting

10 STEPS TO SUCHAPTER ADVOCATEESS

Specific, Measurable, Achievable, Realistically High, Time Bound

1) Set S-M-A-R-T GOAL:

Example: Increase active membership by 20% during the next 12 months.

2) **Methods:** What are some of the events/activities that you will use to reach this **GOAL?**

Examples: Plan a Guest Night, Set up a Holiday Chorus, Improve Singing Quality.

3) Appoint High Performance Team Members to work toward this S-M-A-R-T GOAL:

Team Leader for this specific project: (Title) _____

Choose Team Members for this specific **S-M-A-R-T GOAL** project and assign tasks:

Title	Tasks
President	_____
Immediate Past-President	_____
Chapter Development/Membership – VP ...	_____
Marketing & Public Relations – VP ..	_____
Music & Performance – VP	_____
Program – VP	_____
Secretary	_____
Treasurer	_____
Youth In Harmony Chairman ..	_____
Members-At-Large	_____
Musical Director	_____
Chapter Advocate	_____
Other _____	_____
Other _____	_____

4) **Rewards:** How will the Chapter be rewarded if it reaches this **GOAL?**

Examples: Real chapter growth, improved morale, financial stability, More Fun.

Chapter Advocate Manual, 2018 edition

Rev. 1/2015

5) Consequences: What is likely to happen if the Chapter does not reach this **GOAL**?

Examples: Continued loss of members, Decline in singing quality & fun, Loss of income.

6) Obstacles: Why have you not reached this **GOAL** before now?

Examples: Did not use High Performance Team, Lack of proper strategic planning.

7) Solutions: List ways to overcome each obstacle to reaching your **GOAL**.

Examples: Learn how to plan effectively, Have all officers attend Leadership Academy, every year.

8) Action Steps: What specific steps will you take to reach your **GOAL**?

Assign responsibility for each step to one or more High-Performance-Team members.

9) Evaluation: When and how will you measure progress toward your **GOAL**?

Example: After each guest night or other event, review the results and make adjustments.

10) Follow Up: If you see progress toward your **GOAL**, what will you do next?

Example: Use the **S-M-A-R-T** **GOAL** approach to work on other important **GOALS**.

Conclusions & Comments:

Chapter Advocate Manual, 2018 edition

SWOT Analysis

(Understanding Strengths, Weaknesses, Opportunities and Threats)

Why use a SWOT Analysis

SWOT Analysis is a very effective way of identifying Strengths and Weaknesses, and of examining the Opportunities and Threats faced by your Chapter or Chapter Leadership Team. Carrying out an analysis using the SWOT framework helps you to focus your activities into areas where you are strong and where the greatest opportunities lie.

How to use a SWOT Analysis:

To carry out a SWOT Analysis, write down answers to the following questions. Where appropriate, use similar questions:

Strengths:

- What advantages does your Chapter offer over other Chapters and volunteer organizations?
- What do you do well?
- What relevant resources do you have?
- What do others see as the strengths of your Chapter?

Consider this from your own point of view and from the point of view of others you deal with. Don't be modest. Be realistic. If you are having any difficulty with this, try writing down a list of your Chapter's characteristics. Some of these will hopefully be strengths!

In looking at your strengths, think about them in relation to other Chapters or volunteer organizations. Is it necessary for you to strengthen your performance, leadership, and administration to attract and retain new members, sell tickets to annual and package shows, bring in youth, get Members to accept leadership positions?

Weaknesses:

- What could the Chapter improve?
- What does the Chapter do poorly?
- What should the Chapter avoid?

Again, consider this from an internal and external basis: Do others seem to perceive weaknesses that you do not see? Are other Chapters and volunteer organizations doing any better than your Chapter? It is best to be realistic now, and face any unpleasant truths as soon as possible.

Opportunities:

Where are the good opportunities facing the Chapter?

- What are the interesting trends you are aware of?

Chapter Advocate Manual, 2018 edition

Useful opportunities can come from changes in technology and markets; changes in Society or District policy; changes in social patterns, population profiles, lifestyle changes, local events, etc. A useful approach for looking at opportunities is to look at the Chapter's strengths and ask if these open up any opportunities. Alternatively, look at the Chapter's weaknesses and ask if opportunities could be opened up by eliminating them.

Threats:

- What obstacles do you face?
- What are other Chapters and volunteer organizations doing?
- Are the parameters of your Chapter's products or services changing?
- Is changing technology, demographics, etc. threatening the Chapter's position?
- Do you have cash-flow problems?
- Could any of your weaknesses seriously threaten your Chapter's existence?

Carrying out this analysis will often be illuminating - both in terms of pointing out what needs to be done, and in putting problems into perspective.

You can also apply SWOT analysis to other Chapters and volunteer organizations, choirs, etc. with which you might be competing for members, a place in the community etc. This may produce some interesting insights!

Key points:

SWOT analysis is a framework for analyzing the strengths and weaknesses of your Chapter, and the opportunities and threats faced by your Chapter.

This will help you to focus on the strengths of, minimize weaknesses of, and take the greatest possible advantage of opportunities available to your Chapter.

SWOT Analysis is just one of many good techniques that can help you and your Leadership Team build a strong position for your Chapter

Follow-up Action:

Use the insights from the SWOT analysis to define, develop, and execute a specific, limited, and measurable plan to address a problem area.

Communicate to all chapter members the why, when, how, where, and benefit of undertaking the specific plan at this time.

Make sure specific milestones, resource and financial requirement, and in-process metrics are defined up front, so that if you make these, you are well on the road to succeeding in the overall problem area.

If you don't make the milestones, then you should go back and "re-SWOT" the SWOT to see what else needs to be known and included in the planning process.

Chapter Advocate Manual, 2018 edition

Sample SWOT Analysis Form

Describe the Issue or Problem:

Describe the results of any previous plans:

Were these plans and the previous results already documented (where?)?

Strengths	Weaknesses
Opportunities	Threats

Chapter Advocate Manual, 2018 edition

Links to additional helpful material

MAD “Who do you call?” list: (<http://www.midatlanticdistrict.com/pdf/WhoDoYouCall.pdf>)

Standard Chapter Bylaws (<http://barbershop.org/document-center/category/4-general-chapter-business-documents.html>) Standard Chapter Bylaws – third item from page bottom

Legal Matters (Excerpt from Secretary Manual) -
<http://barbershop.org/LAM/Chapter%20Secretary%202010/2010%20CS%20MANUALS/ChapterSecretaryManual.pdf>, pages 19-26)

Treasurer’s Annual List of Things to Remember (Excerpt from Treasurer’s Manual -
<http://barbershop.org/LAM/Chapter%20Treasurer%202010/2009-2010%20BHS%20Treasurers%20Manual%20-%20Oct09-Stk%204078.pdf>)

Benefits of BHS Membership (<http://barbershop.org/document-center/category/1-membership-documents.html>, see Detailed Benefits of Membership – 7th item)

Barbershop Harmony Society
<http://www.barbershop.org/>

Mid-Atlantic District website:
<http://www.midatlanticdistrict.com/>

Link to documents on BHS website
http://www.barbershop.org/documents.aspx#cb_00098.pdf

Society Operations Manual
<http://barbershop.org/document-center/category/79-general-society-business-documents.html>

Rules and Regulations Handbook
<http://barbershop.org/document-center/category/46-policy-documents.html> - 3rd item

Chapter Officers Manuals
<http://barbershop.org/document-center.html>

Contest and Judging Handbook
<http://barbershop.org/document-center/category/6-general-contest-judging.html> - 4th item

M-AD Statement of Policy
<http://www.midatlanticdistrict.com/pdf/BOD/SOP.pdf> (Being revised currently by MAD BOD)

Other Districts’ websites
<http://www.barbershop.org/sing/find-a-chorus.html>

Chapter Advocate Manual, 2018 edition

SHOW Clearance Procedures

<http://www.midatlanticdistrict.com/?Code=ShowClearances>

Copyright Basics for Barbershoppers

www.barbershop.org/files/documents/copyrightlegal/copyright%20basics%20for%20barbershoppers.pdf.

Chapter Advocate Manual, 2018 edition

[Books which may be helpful – to the advocate or the chapter leadership](#)

(Note that this is the start of a list to which we should add new/updated selections)

“Visions of Excellence”

A dialog with the finest directors in the Society

“Emotional Intelligence”, Daniel Goleman

“Social Intelligence”, Daniel Goleman

“A Whole New Mind”, Daniel Pink

To help with creatively thinking about problems

“How full is your Bucket?”, Tom Rath

Great short read to help us consider being bucket fillers!

“The Fifth Discipline”, Peter Senge

Specifically on “Balancing Inquiry and Advocacy” in chapter 10 ‘Mental models’

Be aware of these great resources to help us understand others:

- Myers-Briggs Type Indicator
 - o (as a guideline for choosing interpersonal communication)
- Strengths-Finder, Tom Rath
 - o What are your top five?
- Conative Connection, Kathy Kolbe
 - o What drives you? Why can you power through one type of task but not others.
- Twelve Inclusive Behaviors, Kaleel Jamison Consulting Group
 - o Check their website for great resources in learning inclusive behavior