



# Portland Modern Quilt Guild

## Guide for a Thrilled Guild

v. 2022

**The mission of the PMQG is to support and encourage the growth and development of modern quilting through art, education and community.**

The Portland Modern Quilt Guild (the “Guild” or “PMQG”) fulfills its mission through charitable activities, member education, monthly member meetings, Guild administration and organization and volunteer opportunities. This guide describes the leadership and actions taken by the PMQG officers and volunteers to drive the continued success of the Guild.

This guide sets expectations and supports PMQG Board members and volunteers. Contained herein are lessons learned by previous PMQG Officers to help Guild officers and volunteer coordinators be successful in fulfilling their duties and accomplishing Guild objectives. Board member assignments referenced in this document are merely historical and not intended to be absolute. Officer roles and responsibilities are at the discretion of the PMQG Board for each term.

The PMQG has been a 501(c)(3) charitable organization since 2016. The 501(c)(3) status benefits the Guild and the community. The 501(c)(3) status authorizes Guild officers to document donations and offer donation letters to donors for tax reporting. The Guild receives tax benefits available to nonprofit organizations, is eligible to rent community rooms at lower rates, and may accept donations from Guild members and others.

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## MONTHLY MEMBER MEETINGS

### MONTHLY GUILD MEMBER MEETINGS

The monthly member meetings are the heart of the Guild. Over 150 members typically attend these meetings, where Guild information and updates are provided. There is usually a speaker (Guild member or visiting) who gives an inspiring presentation about quilting and related subjects. Guild member Show and Tell is always a favorite part of these monthly gatherings.

These meetings require the participation of all Officers, and many volunteers, to prepare, carry out, cleanup and summarize.

#### BEFORE MEMBER MEETINGS

1. Manage all aspects of meeting set up **(President; VPs)**
  - a. Peripheral tables are available for each member need (Member Check-in, New Members and Guests, Membership and Information, Free Table(s), Refreshments, Charity Quilts, Charity Projects, UFO Club, Raffle Table and Speaker Table(s) (for setting up the speaker trunk show and for speaker vending)
  - b. Equipment and supplies to support each table are ready in individual bags
    - i. Bags are organized and then stored between meetings
  - c. An Officer or Volunteer Coordinator is assigned to oversee each table
2. Manage meeting space and facility renewal **(President)**
3. Prepare slide deck and notes for monthly Guild meetings **(President)**
4. Block of the month: Prepare BOM Powerpoint slide for meeting and send to President. **(BOM Volunteer)**
5. Share meeting slide deck with VP for Technology and Social Media (“VP-TSM”) for editing for errors and completeness **(President)**
6. Procure and prepare raffle prizes **(VP for Membership and Procurement (“VP-MP”))**
7. Send reminder email to all members prior to monthly meeting approximately a week prior to the meeting **(VP-TSM)**
8. Post teaser images to Instagram the days prior to the meeting featuring upcoming speaker and door prizes **(VP-TSM, VP-MP)**
9. Manage the New Member and Guests Welcome Program for monthly meetings **(VP-MP; Secretary)**
10. Send email reminder to Meeting Hosts to arrive early for monthly meeting and be ready to host new members and guests

## NIGHT OF IN-PERSON MEETING PREPARATION

1. Organize the setup of chairs and tables for meetings. Access to room is typically limited to 30 minutes prior to meeting start time during the school year - sometimes one hour in the summer **(VPs)**
2. Setup Guild computer and projector. Church has a bright projector that they have been allowing us to use. **(VP-TSM)**
3. Set up design wall for display of blocks of the month at the meeting **(BOM volunteer)**
4. Greet speaker and help set up vending and trunk show tables **(Programs Coordinator for Meetings ("PC-M"))**
5. If necessary, **VPs** runs monthly Guild meetings and monthly Board meetings in President's absence
6. For featured speaker/presenter, reach out in advance to share meeting info, welcome them to PMQG, and create an introduction **(PC-M)**

## DURING IN-PERSON MEMBER MEETING

1. Monthly meetings are a full night's work for **all Officers**
2. Come early, work through the entire meeting, tear down chairs/tables and leave late **(all Officers)**
3. Guide new members and guests to new member host **(VP Membership, Treasurer)**
4. Greet latecomers, direct people to meet member needs, monitor needs of meeting **(VP-MP)**
5. Run monthly Guild meetings and monthly Board meetings **(President)**
  - a. Present slide show
  - b. Make announcements and introduce other speakers
6. Block of the month: Present BOM update and reveal new block of the month **(BOM volunteer)**
7. Take meeting notes throughout formal meeting **(Secretary)**
8. Manage Show and Tell line (online list)
  - a. Manage online spreadsheet list, using guild tablet to enable signup during meeting. Spreadsheet to include name of quiltmaker, name of quilt, social media handle **(President)**.
  - b. Ensure spreadsheet order exactly matches order of photos for reference and photo posting following meetings.
  - c. Spreadsheets saved under the name of each month [here](#)
  - d. Get SD card from Matthew Stovall at close of meeting with that month's photos and either upload to drive immediately or exchange for previous month's SD card.
  - e. Monitor Show and Tell line process to keep things moving
9. At end of meeting help tear down tables and chairs **(Officers; members)**

## AFTER MEMBER MEETING

1. Email meeting recap is sent to all members **(VP-TSM)**
  - a. **Secretary** drafts bullet points and meeting recap the day following meeting and adds necessary links to items mentioned during the meeting

- b. Note answers to questions raised at monthly meeting
  - c. Record raffle winner(s)
  - d. **Secretary** emails draft to President and VP-TSM
  - e. VP-TSM prepares meeting recap blog post
  - f. President and VP-TSM make final edits, and then VP-TSM posts meeting recap blog posts on the website and sends email to all members with edited versions of recap through Mailchimp.
2. Edit photos and upload all monthly meeting photos to Google Docs (**Secretary**)
  3. Add captions to meeting photos on the website. This includes the name of quilt, maker and any provided social media contact information. (**Secretary, VP-TSM**)

### RUNNING MEETINGS VIRTUALLY DURING COVID PANDEMIC

1. Reach out to featured speaker/presenter to welcome them to PMQG, sharing Zoom link and inviting them to arrive 15 minutes early to test technology and meet board members. Request info for an introduction and answer any questions they may have. (**PC-M**)
2. Send out Meeting reminder email via Mailchimp, a week in advance.
  - a. Send to the entire newsletter subscriber audience, and ensure that a guest pass is linked, as long as the guest speaker has allowed guest passes to be sold.
3. Log into Zoom and create a Zoom meeting (**President or VP-TSM**)
  - a. Ensure that the waiting room is enabled.
  - b. Best practice is to have those that join the meeting have the default options be cameras and microphones off.
4. Communicate the Zoom meeting invitation to members. (**VP-TSM**)
  - a. During the 2021 year, we instituted a Members Only section of the website and posted meeting information there
5. If able to, sell guest passes for \$5 prior to the meeting (**VP-TSM**)
  - a. During the 2021 year, we instituted an automated way to purchase the guest pass.
    - i. Set up a "Download" shop item on the website with a PDF of the guest pass uploaded to the shop item.
    - ii. Squarespace automatically sends the purchaser the download link. This link is viable for 24 hours, if they wait to download, they'll just need to relick the link, and Squarespace should enable another download.
  - b. If not automated, sell guest passes via the website
    - i. Utilize a spreadsheet to organize who to send the passes to.
6. On the night of the meeting, join the meeting 10-15 minutes early in order to meet up with that meeting's presenter and ensure tech is working. (**President or VP-TSM**)
  - a. VP-TSM should be the host of the meeting, and serve as "director,"
  - b. President should be the co-host of the meeting.
  - c. Guest presenter should be made co-host of the meeting.

7. Enable Otter.ai for Zoom captioning. **(VP-TSM)**. [See Appendix for screenshot instructions](#)
  - a. Only the host of the meeting can enable the otter.ai captioning.
  - b. Open Zoom meeting as usual
  - c. In the toolbar at the bottom, select “Closed Caption” and then “Copy the API Token”
  - d. Log into Otter.ai and select “My Conversations”
  - e. Find your meeting listed in the conversations, it should have a red “LIVE” label. Click on the Title of the meeting.
  - f. If there are people talking, this is where you will see live transcription. In the top right hand corner, there should be three dots. Click on that.
  - g. Paste the API token copied in step b and save.
  - h. Closed captions should now be live.
    - i. To change the appearance of the closed captions, go to the Zoom preferences and “Accessibility.”
8. Enable recording of the meeting to the cloud.
  - a. If the presenter has not given the permission to record their portion, pause the meeting recording. Resume for the Question and Answer portion.
9. At 7 pm (or at time agreed with that meeting’s presenter), admit all who are in the waiting room into the meeting. **(President, VP-TSM)**
  - a. Optional: Under security, turn off the waiting room function for at least the first 15 minutes of the meeting to ensure that hosts do not get the waiting room notification.
10. Welcome members to the meeting, small talk prior to the 7 pm start in order for members to get settled and not miss the first few slides. **(President)**
11. Serve as emcee over guild meetings. **(President)**
12. Serve as host of the meeting **(VP-TSM)**
  - a. Ensure that members are muted and cameras are off as the meeting begins.
  - b. Mute anyone/turn cameras off as necessary during meeting
  - c. Spotlight President/Guest Presenter/any other speakers as appropriate.
  - d. Introduce featured speaker **(PC-M)**
13. At the end of the meeting, allow members to stay over to socialize. (If host needs to leave they should “leave meeting” rather than “End Meeting.” **(President, VP-TSM)**)
14. After the meeting, download the meeting recording. **(VP-TSM)**
  - a. If VP-TSM has movie editing software like iMovie or Adobe Premiere, they should edit out any parts of the meeting recording that do not need to be posted.
    - i. Blur out any private information as needed.
    - ii. YouTube also has the option to edit video, but the post-processing takes longer.
  - b. Post edited video to the Guild’s YouTube channel.
    - i. In the video description box, be sure to link to the PMQG website all of the information talked about during the meeting.



1. It's helpful to Copy/Paste one meeting's notes, and paste in a word processing program, as YouTube does not save the hyperlink information in an easy to copy/paste form.
- c. Notify guild that the video has been posted to YouTube thorough:
  - i. A social media post
  - ii. Post to the blog
  - iii. Linked in the weekly newsletter.

## ANNUAL MEETING

15. Present an annual report to the membership at the annual meeting **(President)**
  - a. Annual financial report (Oct or Nov) summarized P&L **(Treasurer)**
  - b. Announce results of matters voted on by membership **(President)**
  - c. Introduce next year's officers and volunteer coordinators **(President)**

## MEMBER EDUCATION AND QUILTING

### ANNUAL QUILT RETREAT

Organize Spring Retreat several months prior to retreat date. Retreat date is chosen and reserved at the time of the prior year's Spring Retreat **(Retreat Coordinator(s))**

#### PREPARATION BEFORE RESERVATIONS OPEN

1. Confirm retreat date with retreat facility **(Retreat Coordinator(s))**
2. Coordinate with retreat facility **(Retreat Coordinator(s))**
3. Determine suitable number of total retreat attendees to be accommodated **(President; Retreat Coordinator(s))**
4. Design table set up for expected floor plan, previous years are in the drive. There are tools online to accomplish this as well. **(VP-TSM; Retreat Coordinator(s))**
5. Procure raffle grand prize and swag bag contents **(Retreat Coordinator(s) VP-MP)**
6. Determine retreat activities, not all have to be included. **(President; Retreat Coordinator(s))**
  - a. Quilt swap activity
  - b. Socializing scavenger hunt
  - c. Shop plans
  - d. Fire pit evening
  - e. Short hikes
  - f. Etc....

7. Set price(s), include linens cost as needed, charge a credit card payment fee. Be sure to pay attention to any fee increases from the facility before repeating last year's cost to members. **(Retreat Coordinator(s))**
8. Squarespace has the option to have members fill in a form with the extra information we need, including emergency contact information etc., used for online retreat sign-up and payment **(VP-TSM; Retreat Coordinator(s))**
9. Determine your price for retreat. Historically members have had the option for paying with a check vs. credit card for a small cost difference. However, in 2019 we decided to do away with this and only charge one flat fee and had members pay online so they could fill out the Squarespace form with the required information. Special diets cost extra (fee determined by the retreat facility). Special diets are a separate item in the web store.
10. Develop information fully describing retreat **(VP-TSM; Retreat Coordinator(s))**
11. Announce retreat details **(VP-TSM; Retreat Coordinator(s))**
12. Notify members of dates and times retreat sign up will open for reservations and payment **(VP-TSM; Retreat Coordinator(s))**
13. Post retreat information and cost, and member sign-up process on PMQG website **(VP-TSM)**

### AFTER RESERVATIONS OPEN

1. Publish page and "Go Live" as announced to members. (Squarespace has the option to schedule a time where items go live in the web store) **(VP-TSM)**
2. Post online form(s) to sign up and make payments **(VP-TSM; Retreat Coordinator(s))**
3. Issue confirmation of reservations **(VP-TSM; Retreat Coordinator(s))**
4. Manage reservations and answer questions **(VP-TSM; Retreat Coordinator(s))**

### PREPARATION AFTER RESERVATIONS CLOSE AND BEFORE RETREAT

14. Manage wait list and reservation cancellations **(VP-TSM; Retreat Coordinator(s))**
15. Gather special dietary needs forms from attendees. Dietary limitations must be received by retreat facility 2 weeks prior to retreat **(Retreat Coordinator(s), VP-TSM)**
16. Finalize menu **(Retreat Coordinator(s))**
17. Process roommate preferences and complete room assignments for all attendees. Complete room assignments **(Retreat Coordinator(s))**
18. Set up scavenger hunt/member mixer activity to encourage member socializing between sewing rooms **(Retreat Coordinator(s))**
19. Coordinate with a volunteer to introduce, lead and manage exchange (swap) activity **(Retreat Coordinator(s))**
20. Key communication in final four weeks prior to retreat **(VP-TSM; Retreat Coordinator(s))**:
  - a. Send table set-up plans (Used internet app to design table layout plans) to retreat facility prior to retreat. This enables tables and ironing boards to be set up by facility staff prior to arrival. We typically have ~1 hour for setup before members arrive.

- b. Send multiple email reminders to all retreat attendees
- c. 4 weeks prior – remind attendees of location, date and times
- d. 2 weeks prior – remind attendees of location, date and times
- e. 1 week prior – remind attendees NOT TO ARRIVE EARLY
- f. Assist with carpooling requests and coordination
- g. Monitor email traffic and respond to questions about retreat

### AT TIME OF RETREAT

1. One hour prior to retreat start **(all attending Board Members)**
  - a. Distribute power strips and irons
  - b. Tape electrical cords in traffic zones
  - c. Set up extra tables
  - d. Distribute cutting mats
  - e. Display raffle prize in prominent location
  - f. Delivery goodie bags to individual sewing workstations or in rooms.
  - g. Distribute room assignment cards to each room
2. During retreat **(Retreat Coordinator(s))**
  - a. Respond to needs of attendees and facility staff
  - b. Coordinate raffle prize give away
3. Participate and enjoy retreat **(all attending Board Members)**
4. Pay remainder of retreat cost **(President, Treasurer)**
5. At end of retreat, work with retreat center to pick date for following year and pay deposit (If using Camp Tilikum, they have the option to roll over the previous year's deposit) **(President, Retreat Coordinator(s))**
6. Remind attendees of retreat end time and pack up procedures **(Retreat Coordinator(s))**

### FOLLOWING RETREAT

1. Pack up all extra tables, irons, power strips **(all attending Board Members)**
2. Remove tape from floors **(all attending Board Members)**
3. Check each room to make sure nothing significant was left behind **(all attending Board Members)**
4. Using Google Forms, send out a retreat evaluation survey to all attendees. **(VP-TSM)**
5. Debrief about what went well and where there are opportunities for improvement **(President; VP-TSM; Retreat Coordinator(s))**

## BLOCK OF THE MONTH

Create the Block of the Month Program, including all content and instructions **(BOM volunteer, except where noted)** In 2021, Tara Lee designed and sold the BOM thru her website and provided a discount to PMQG members. In this way the designer was paid for her work.

1. Determine goal of the block of the month (BOM) program
  - a. Design something or procure a design that members can start and stop at any time over the nine months and still have a quilt
  - b. Outcome should be a modern style, pretty, good for piecing, and good for quilting
  - c. Blocks should be FUN! and not too time consuming
2. Sketch full quilt
3. Write monthly instructions and send to Board members to test and suggest technical edits
4. Finalize instructions and write website blurb about block
5. Post new BOM photo and instructions on website the day of the monthly meeting **(VP-TSM)**
6. Post new block photo to Instagram **(VP-TSM)**
7. Advertise BOM to members **(President; BOM coordinator)**

## OPEN SEW DAYS AND HAND SEW GATHERINGS

1. Manage monthly Open Sew Day and oversee volunteer coordinators **(board)**
2. Store irons, cords, cutting supplies, etc. between events where equipment is used **(Volunteer Coordinator)**
3. One week prior to Open Sew Day, post reminders on social media **(VP-TSM)**
4. Assign volunteers to “open” and “close” Open Sew Day **(President or Volunteer Coordinator)**
  - a. Set up and take down irons, cords, cutting mats
  - b. Remove PMQG equipment and supplies from Open Sew Day facility
5. Host Eastside and Westside Hand Sew Happy Hour
6. Call location to remind them of upcoming Hand Sew Happy Hour at their facility **(Volunteer Coordinator)**
7. Monthly meeting reminder and recap emails include a reminder about Hand Sew Happy Hour **(VP-TSM)**
8. Optional Instagram post of gathering **(President; Volunteer Coordinator; VP-TSM)**

## GUILD WORKSHOPS

The Programs Coordinator role realistically requires two people to drive and complete all tasks. It is helpful if one Programs Coordinator is comfortable with technology. **(Programs coordinators, except where noted)**

### WORKSHOPS

#### Workshop Cancellation Policy:

If you cancel your workshop more than 48 hours in advance, you'll receive a 100% refund as long as we find another member to fill your spot.

If you cancel with less than 48 hours notice, no refunds will be given.

1. Coordinate with President and Board to set monthly programs
  - a. Set up several programs immediately to allow time to coordinate follow on programs
  - b. Set up a few programs for the following year to keep the plan rolling for next year. Also, some speakers need to be booked more than 12 months in advance
2. Coordinate with President and Board to choose workshop topics/teachers
3. Research and contact speaker candidates for monthly meetings
  - a. Reach out to prospective teachers and speakers
  - b. Request speaker availability and cost sheets from prospective candidates
  - c. Select speakers for monthly meetings
  - d. Assess cost and availability of monthly speakers that can also teach cost effective workshop(s)
  - e. Choose monthly meeting speakers and workshop instructors
4. Research, negotiate and reserve workshop venues
  - a. Booking low cost venues is a challenge and requires attention early in the year
  - b. Locate non-profit venues and lock in dates as soon as possible
    - i. Mill End can be a low cost option.
    - ii. Kenton Fire House has proved to be a good location.
  - c. Venue needs to have facilities to support needs of workshops
    - i. Air conditioning and heating
    - ii. Tables
    - iii. Electrical circuits to support four irons
    - iv. Ample light
    - v. Parking
    - vi. Accessible in inclement weather (snow, rain, extreme heat)
    - vii. Instructor requests
5. Monitor emails regarding negotiations with speakers and venues
6. Negotiate and prepare contracts for speakers/teachers and coordinate with them to get contracts signed
  - a. Accommodate contract requests
  - b. Agree on payment and cost structure
  - c. Price workshop to break even. Keep price reasonable as part of PMQG's mission.
  - d. Contract includes dates, class titles and themes when available at time of contract (there is a contract template)
  - e. Approve and sign final negotiated contract **(President)**
7. Once contract is signed, instructor is contacted to supply all preparatory information
  - a. Find out exactly what the speaker needs during the monthly meeting / workshop (equipment, racks for quilts or clothing, projector, screen, quilt holders, sales table, payment e-reader, etc.)

- b. Is wi-fi required; what is backup if wi-fi fails
  - c. Workshop participant supply lists
  - d. High quality photographs of speaker/workshop projects for promotion of workshop sales.
8. Coordinate all aspects of out-of-town speakers'/teachers' Guild visits
    - a. Make travel/lodging arrangements for speakers/teachers
      - i. Travel, lodging, transportation and per diem is paid by PMQG
      - ii. Book flexible travel (ticket changes allowed, etc.)
    - b. Arrange transportation for speakers/teachers while in Portland on PMQG business
      - i. Local transportation to and from monthly meeting
      - ii. Local transportation to and from workshop

### BEFORE WORKSHOP IS POSTED

1. Market workshops at monthly meetings **(President)**
  - a. Two months prior to workshop, market program at monthly meeting
  - b. Provide members with teasers for upcoming programs. However, try not to market more than one workshop at a time in order to have a better chance of selling out workshops
  - c. Market workshop on social media **(VP-TSM)**
2. Post workshop scholarship to website prior to workshop sales. Keep scholarships open for about a week for members to apply **(VP-TSM)**
3. Award scholarship **(President)**
4. Post workshop to website for PMQG member sign ups **(VP-TSM)**

### AFTER WORKSHOP IS POSTED FOR SIGN UP

1. Track workshop sign ups (Gmail) and administration to coordinate students, supply list distribution, waitlist, refunds, etc. **(Programs Coordinator for Workshops ("PC-W"))**
  - a. If workshop is not full, then open it to non-PMQG members. Price it at least \$10 more for non-PMQG members
2. Create a waitlist and post it to the website once a workshop is full; it can be used to fill cancelled spots. Refunds should not be given to cancelling participants unless their spot can be resold
3. Two weeks prior to the start of the workshop, open the workshop up to non-guild members. Non-guild members will be required to pay an additional \$10 fee for workshop attendance
4. Prior to non-guild sales, "last chance" notice will be posted to social media and/or in guild newsletter postings **(VP-TSM)**

### AFTER WORKSHOP SIGN-UPS ARE COMPLETE

1. Optional: Take order for lunches for participants
  - a. Elephants Deli has been well reviewed by members and they will deliver

- b. New Seasons had mixed reviews
  - c. Research based on workshop location
2. Provide supply list and pre-class instructions for the workshop to all participants at least a month in advance. If a workshop is cancelled for any reason, and members have received a quilt pattern as part of their supply list, registration fee MINUS cost of pattern is refunded.
3. Manage last minute changes if participants need to cancel

### AT TIME OF WORKSHOP

1. Ensure that an officer who is not taking the workshop is available to support the workshop.
2. Optional: Supply coffee and donuts for early classes
3. Deliver ordered lunches, if applicable.
4. Bring petty cash to make change for people to pay for lunches they ordered, if applicable.

### AFTER WORKSHOP

1. Using Google Forms, send out workshop evaluation forms **(VP-TSM)**

### WORKSHOPS IN THE TIME OF COVID

During the 2020 COVID-19 Pandemic, PMQG had to pivot to provide workshops virtually, via Zoom. It's best to include the following in the planning of virtual workshops.

1. Ensure supply list is posted to the PMQG website when the page goes live. **(VP-TSM)**
2. Send a reminder email one (1) week in advance of the workshop, including the link for the supply list. **(PC-W)**
3. Send a final reminder email with Zoom link for meeting at minimum two days in advance. **(PC-W)**
4. Send the instructor the Zoom link as well as an invoice reminder. **(PC-W)**
5. PMQG workshop coordinator or another board member/volunteer will need to serve as workshop moderator.
  - a. At minimum, sign in 15 minutes ahead of the start of the workshop to give the instructor the chance to deal with any technological issues. Arrange with the instructor how the instructor would prefer the moderator to handle questions posed during the class.
    - i. Utilize the waiting room function of Zoom to admit students only when the Instructor is ready.
  - b. If available, assign a fellow PMQG board member co-hosting duties in case the main host has internet issues. This allows uninterrupted moderation for the workshop. Assign co-host role to the instructor.
  - c. Observe the workshop and mute participants as necessary.
  - d. Enable closed captioning. [Step by Step instructions in the Appendix.](#)

- e. Moderate any questions posed to the instructor in the format the instructor prefers.
  - f. Provide members information on how to contact PMQG in case of technological issues. It's best to suggest that members first try closing their Zoom session and then logging back in--this usually fixes most issues.
6. Upon completion of workshop, send out Workshop Evaluation **(PC-W)**

### SOCIAL MEDIA POST CHECKLIST FOR PROGRAMS/WORKSHOPS

As of September 1, 2020, we need to include the following in all Social Media posts about upcoming programs and workshops.

- Teacher Name (@ the instructor, if applicable)
- Project/Technique of workshop
- Date
- Cost
- Virtual/in person
- Location (if applicable)
- Website to PMQG shop
- Reference link in bio for IG
- Link to PMQG website for instructor
- PMQG Member sale date/time
- Open to all sale date

Website needs to include all of the above, plus:

- Supply List
- Hours of workshop
- Class description
- Key dates section (include scholarship dates!)
- Photos of workshop
- Links to instructors Instagram/website



## QUILT CHALLENGES AND EXHIBITS

### QUILT CHALLENGES

1. Manage the Quilt Challenge projects and fit them into the programs calendar and monthly meeting agenda(s) **(President; Programs Coordinators, Quilt Challenge Volunteer)**

### PMQG SPECIAL EXHIBIT AT SISTERS OUTDOOR QUILT SHOW

1. Provide web interface for Sisters Outdoor Quilt Show submissions **(President; VP-TSM)**
2. Google Forms can be used to create a form for online quilt show submissions. Members should email the guild with their photo submissions
3. 2021 Renewal Quilt Challenge
4. 2020 Bauhaus Quilt Challenge - To celebrate 100 years of Bauhaus.
5. 2019 Rainbow Quilt Challenge – Rainbow Quilts will be PMQG's theme for its Special Exhibit at the 2019 Sisters Outdoor Quilt Show
6. 2018: Words, Unbound Challenge

### PMQG MEMBER QUILT SHOWCASE

1. Manage all aspects of PMQG Quilt Showcase **(Programs coordinators, except where noted)**
  - a. oversee attendance
  - b. arrange for food donation and delivery
  - c. pipe/drape rental
  - d. quilt hanging
  - e. room design
  - f. food disposal
  - g. beverage accessibility and OLCC compliance
  - h. food handling compliance
  - i. quilt show breakdown
2. Budget for food and beverages
3. Confirm PMQG quilt hanging equipment is available (purchased in 2018)
4. Space large enough for most of the members, consider outside

## UFO CLUB

The UFO Club inspires members to complete unfinished quilted objects (UFOs). Members pay \$10 to participate at the beginning of the year. They provide a list of ten (10) UFO projects, which are recorded by the UFO Club Volunteer Coordinator. If members want to enter more than 10 projects, they pay another \$10. Members check in with the UFO Club Coordinator at the monthly meetings to record completed UFOs. They are encouraged to show their completed UFOs at Show and Tell and on social media with the hashtag #PMQGufo. A UFO raffle ticket is completed for each finished UFO and placed in the UFO raffle jar. At the end of the year, a winner is chosen from the jar and 50% of the money collected is awarded to them. A chosen charity is awarded the other 50%.

1. Coordinate with the UFO Club Coordinator to set up that year's program **(President)**

2. Post UFO Club sign ups on website **(VP-TSM)**
  - a. Set up online UFO program sign ups for time period UFO sign up is open
  - b. Remove UFO shop item from website when sign ups are closed
3. Forward online sign ups to UFO Club Coordinator **(President)**
4. Annual prize is determined by UFO Club sign up fees
5. UFO Club Coordinator monitors UFO completion at monthly meetings and adds tickets with members' names to the UFO raffle jar for each completed UFO
6. UFO raffle prize is awarded at the December meeting.

## Charitable Activities

The PMQG has a very active charity quilts program, headed by Cath Hall and Sam Hunter. The Charity Quilts program that is run independently from the PMQG Board. Through the hard work of the Charity Quilts Coordinators, many charity quilts are donated each year in the name of the Guild. Other charity programs provide zipper bags and other items to people in the community in need. If there is a charity program that the guild board feels strongly about adding, a guild small group can be started to address the need.

1. Support charity programs by providing time at monthly meetings for short presentations and tables for providing quilt block kits, quilts needing quilting and binding, and information **(President, PC-M)**
  - a. Coordinate with charity volunteers
  - b. Determine number of zipper bag charity organizations to support for the year
    - i. Winter – Charity Organization 1
    - ii. Summer - Charity Organization 2
    - iii. Fall - Charity Organization 3
  - c. At monthly meetings, introduce charity organization(s) and Guild activity(ies) and encourage members to participate in each activity throughout the year
  - d. Collect charity handiwork at meetings
  - e. Store charity handiwork between collection and delivery to charity **(Board member and Charity Quilts Coordinator)**
  - f. Deliver donations to charities
  - g. Notify members of charitable donations

**Fabric Fundraiser** (current volunteer coordinators/leads Susan Beal, Alyson Evans, Renee Pype), 2018-19 in person, 2020-22 virtual on Instagram. The Fabric Fundraiser benefits 2-3 organizations aligned with PMQG's Values and all funds go directly to the organizations, not PMQG or donors.

In person, the Fabric Fundraiser has taken place in July in place of a speaker or long program. Members and companies (procurement led by **VP-MP**) donate fabric, supplies, patterns, and sewing machines/tools. All items

are priced consistently. Members shop for an hour, then ring up with the **Treasurer** and volunteers using cash or check only. All funds are donated to the chosen organizations.

Virtually, the Fabric Fundraiser has been hosted on the PMQG Gives Back Instagram in fall (October or November), over a 3-day weekend.

Use the Canva pink FF template created by Erin Case in 2020, adding item photos and the correct date and year to the frame. Download and save the formatted images to post to Instagram. Create a simple spreadsheet with item details including crediting donors and feel free to group smaller items into lots.

**2021 version: create FF Instagram posts** in FB business suite in PMQG Gives Back FB page: click the calendar icon on the left vertical tool bar, and hover over the first day (generally a Friday). At the bottom you will see a gray popup that says "schedule" - click that, select post (not story) and it will preset a new option for Friday at 10 am. Hit Save. (You can also hit Create button in the upper left, but then you have to manually change the date and time, so this is a bit faster)

Select Instagram (top left area, check the box) and DESELECT FB which is the default that is already checked. You don't want to cross post everything and have people bid there. Click Add photo on that left area, below the text box waiting for description. Add a Canva formatted photo from the google drive (it may be easiest to put them on my desktop and grab from there). If there are additional photos (sewing machine package, guild membership package, a few others), please add them one by one as secondary photos. The hero pink framed photo will go first.

Copy in the text from the spreadsheet, starting with a fun first intro sentence like "Warm & White batting, twin size new in the package and perfect for your next quilt!" Add any other details, then write "Donated by @XYZ (company, specific guild member's instagram or name if they don't use IG, "a generous guild member" if it's anonymous), starting bid \$XX". Unless it is an expensive item, set most opening bids between \$10 and \$20.

Hit return so there is a line space and then add the shipping or pick up options. This option is to the far right of the spreadsheet descriptions in a column near the end of the info.

**EITHER OPTION:** This item is available for no-contact porch-pickup in the Portland, Oregon metro area or shipping within the US (winner to reimburse donor for shipping costs).

**LOCAL ONLY:** This item is only available for no-contact porch-pickup in the Portland, Oregon metro area.

SHIPPING ONLY: This item is only available for shipping within the US (winner to reimburse donor for shipping costs).

NO SHIPPING/PICKUP: This item is a PDF or other downloadable format and does not require any shipping or pick-up. [gift cards, PDF patterns]

Add 2-3+ hashtags of the company/brand, item designer or type, and #pmqggivesback . Click the Schedule Post blue button in the bottom right.

The day of, monitor to make sure all posts went up correctly and manually push any that didn't post through. Volunteers should check posts to make sure bidders are correctly tagging previous bidders.

When the fundraiser ends, divide the posts up so volunteers can tag winners and send them Instagram messages with their donation options. Ask them to send screenshots of donations to PMGQ Gives Back and the donor. Answer any questions and/or confirm shipping/pick up details. Keep a running total of donations (some winners may round up, and some members may be able to make a personal or workplace match) in the spreadsheet and share that at the conclusion of the event.

## Guild Organization and Administration

### BOARD MEETINGS

#### BEFORE BOARD MEETING

1. One week prior to Monthly Board meetings, prepare agenda in consultation with the President **(Secretary)**
  - a. Secretary drafts agenda prior to meeting
  - b. President modifies/approves the agenda
2. Finalize Board meeting agenda two days prior to meeting and email to all Board members **(Secretary)**

#### DURING BOARD MEETING

1. Runs meeting, usually held two weeks prior to monthly Guild meeting **(President)**
2. Brings a copy of the agenda for Board members **(Secretary)**
3. Takes meeting notes and ensures decisions are final and recorded **(Secretary)**
4. Confirms date of next meeting **(President, Secretary)**

#### AFTER BOARD MEETING

1. Prepares minutes of monthly Board meetings **(Secretary)**

2. Edits/revises and approves Board minutes **(President)**
3. Emails Board meeting minutes to officers for comments with action items assigned with deadlines when necessary **(Secretary)**
4. Posts Board meeting minutes on Google Drive **(Secretary)**

## GUILD ADMINISTRATION

1. Primary contact for the Guild **(President)**
2. Oversee high level and details of administration while achieving Guild goals **(President)**
3. Act as President's backup and sounding board whenever and wherever necessary. VP-TSM is communication champion behind President **(VP-TSM)**
4. Create content for and update Guild website **(VP-TSM)**
5. Oversee Gmail account and incoming email. See Guild Gmail Management section of this guide. **(President; VPs)**
6. Maintain and use MailChimp for Guild, delete "unsubscribed" and "cleaned" emails once a year as Mailchimp is limited to 1,000 contacts. **(VP-TSM; VP-MP)**
  - a. Maintain email distribution lists
    - i. Current members
    - ii. Past plus current members
7. Draft emails to Guild members in consultation with the President **(VP-TSM)**
  - a. Reminder emails prior to monthly meeting
  - b. Recap email following monthly meeting
  - c. Special announcements
8. Contribute to social media as necessary **(President; VP-TSM)**
9. Maintain 501(c)(3) non-profit status **(President; Treasurer)**
  - a. File/sign paperwork with Department of Justice (annually, due May 15)
  - b. File/sign paperwork with Oregon Secretary of State to maintain active standing (annually, due June 13)
  - c. File/sign paperwork with IRS... (annually, due in May) See Treasurer Section
    - i. Responsible for filing Guild tax returns and state charitable organization filings in consultation with the Treasurer
10. Enter into contracts on behalf of the Guild **(President)**
  - a. Programs Coordinators draft contracts for speakers and teachers using either Virtual/Covid template or in-person template
  - b. President reviews, revises and signs contracts
  - c. Programs Coordinator files contracts in Google Drive. Hard copy is maintained in Guild filing system
  - d. Renews Guild insurance annually
  - e. Monthly meeting facility (Church) contract is signed and paid for one year in advance

11. Use the Guild debit cards and PayPal account and write checks to conduct business on behalf of the Guild  
**(President; Treasurer; Programs Coordinators)**
  - a. At the beginning of the Board Term, new debit cards need to be issued for President, Treasurer and Programs Coordinators. The Programs Coordinators use debit cards the most.
  - b. Check signers need to go to bank (or PMQG member Emily Goodman, who is a Key Bank Manager, may be willing to come to you) and get set up for writing checks
  - c. Note: - During the Covid Pandemic & online meetings the treasurer has been the only one with a debit card and has held the checkbook (2020 & 2021)
12. Maintain Guild roster and PMQG roster on MQG website and act as MQG contact **(VP-MP)**
  - a. In February of new year, MQG roster needs to be cleared of non-renewing members
  - b. New members are added as they join
    - i. Request addition to MQG roster, entering name and email address
    - ii. Welcome email is sent to new members (canned response in Gmail)
    - iii. New member is added to MailChimp for Guild group email distribution
  - c. MQG contact to get clarification when needed for PMQG members
13. Manages Guild social media accounts **(VP-TSM)**
  - a. In cases of harassment of guild accounts, VP-TSM is allowed to block other accounts, and the VP-TSM should use their best judgement in blocking other social media profiles.
  - b. Instagram
    - i. Follow all members and speakers
    - ii. Post photos and “like” member photos
    - iii. Maintained daily
    - iv. Post raffle donor thank you messages
  - c. Facebook - Post PMQG news and information; reminders; raffle donor thank you messages
  - d. Twitter - Post PMQG news and reminders
  - e. Facebook Business Suite is an option to broadcast messages to Instagram, Facebook and Twitter if preferred.
14. Create content and update Guild website **(President; VP-TSM)**
  - a. This is a BIG job and members RELY on the website for information.
  - b. Two or more people should share this responsibility to keep the website as up to date as possible
  - c. Website is hosted by SquareSpace
  - d. Photos of member work are used to brighten website and social media
  - e. Monitor bulletin board to make sure postings are appropriate and timely. Remove expired postings

## MEMBERSHIP

1. Membership administrator (**Vice President for Membership and Procurement, unless noted otherwise**)
2. Manages membership ( sends welcome emails, manages MailChimp account, responds to membership issues)
3. Manages the New Member Welcome Program (**VP-MP; Secretary**)
4. Membership database maintenance
5. Begin member renewals in November or December for the following year
6. NOTE: Credit card payment options need to be in place prior to member renewals
7. Prefer: Check or Cash
8. Second best: Credit card payment on website
9. Start with previous year member list and monitor to encourage renewal
10. Full price memberships January through June. Beginning in July, memberships are half price
11. At member renewal, or new membership
  - a. Add member to Google Sheets PMQG membership database
  - b. Add member to Modern Quilt Guild database, (unless member opts out of MQG membership). Go to the Modern Quilt Guild home page, log on. Go to my profile. Under my profile, click on your organization, then click on individual profiles. Username is their email address. If you get a note that the member is not available, you need to send a note to the MQG team, template available.
  - c. Add a member to MailChimp distribution list; log in; go to audience then click on all contacts. Click on all contacts, then click on add subscriber. Fill out all the info. Fill out membership status, click the membership, click on tags + and highlight the appropriate title, member or business member. NEXT, click the box, this person gave me permission to email them. Click the next box to update their profile, then hit subscribe. When you go to the top of the page a message will appear if this person is a renewing member or a new member.
  - d. Send "Welcome Email" which is prepared canned response (can be sent to grouped new members, bcc'ing them to maintain confidentiality)
  - e. Print a membership card using mail merge (print at FedEx Office); send pdf of membership card with preferred name and pronouns
  - f. Have membership card available for new member at next meeting
12. In December, connect with Business members and Business sponsors about renewing or becoming for following year
13. Business Members pay \$10 more than individual members and are asked to provide either longarm quilting, volunteer service hours or a prize with a value of at least \$50 to the PMQG raffle
  - a. Website exposure
  - b. In 2019, the December meeting featured a showcase of business members
  - c. In 2021, each business member was able to give a short slide detailing their business as a "business member spotlight"
  - d. Businesses that were highlighted during the business member spotlight were highlighted on the Guild's IG and FB feed

14. Business Sponsors paid \$250 in previous years, in 2019 the guild accepted in-kind donations for business sponsorships.
  - a. Website exposure
  - b. Direct connection to PMQG
  - c. Acknowledgement as sponsor
  - d. Additional benefits are spelled out in the sponsor solicitation letter in the Google Drive.

## PROCUREMENT

Procurement contacts in the google drive, written in 2019, can be used for ideas on where to ask for donations. Address' may not be current. Try info@..... Or try google to look up email addresses. All items procured must be treated as Guild property and are not for personal use.

## FINANCIAL ADMINISTRATION

1. Prepare and monitor Guild budget for calendar year (**Treasurer, unless otherwise noted**)
2. Financial strategy is for the activities to pay for themselves
3. In December, an annual prospective budget should be prepared for the following year to help set expectations for the next Board and Treasurer. This budget is preferably developed with input from both year's Boards.
4. Needs to set up a meeting with the bank to ensure new signers are on account and old signers are removed, also that new debit cards are issued, (either end of year or beginning of new year).
5. Needs to file Corporation/LLC -Information Change with Secretary of State Corporate Division to update with newly elected officers.
6. Update Guild debit card info on the following accounts: SquareSpace, PayPal, Google, Zoom.
7. The first quarter of the year requires a lot of time and energy from the Treasurer to account for the high volume of financial activity.
8. Guild accounting functions and financial records.
9. Treasurer accounts and tracks Guild finances, income and outgoing, supports Board objectives, maintains solvency and reports to membership and tax entities re financial standing
10. Routine deadlines
  - a. Pay accounts and invoices in a timely manner
  - b. Check Gmail at least bi-weekly for invoices waiting to be paid
  - c. Reconcile and close books monthly
  - d. Complete quarterly reporting (this was done monthly 2020-2021)
  - e. Close books annually
  - f. Complete taxes annually, by April of the year following the year of the Treasurer's term
11. QuickBooks was used for 2019 - 2021 financial records (Note: in 2015 and 2016, QuickBooks was used)



- a. Chart of accounts is intuitive, not necessarily in accord with accounting conventions
  - b. Various “pots” of money are managed individually on the balance sheet
  - c. Charity Quilts Fund
  - d. Zipper Bag Fund (created in 2021)
  - e. Library Fund
  - f. Scholarship fund with dedicated donations
  - g. UFO money (half for scholarship fund, half for UFO annual drawing)
12. The Guild has a laptop that is utilized for QuickBooks files and for meeting and workshop PowerPoint presentations and files. (The computer does not currently have security software, since it is not used to surf the internet. The Microsoft Office suite needs to be renewed yearly) (This was not used for bookkeeping for the years 2019 - 2021, see 13 below).
13. As of 2020 the Guild used TechSoup to purchase an online subscription to Quickbooks. Up to 5 people can log onto the books if needed. It is highly recommended that this subscription be maintained so as to have consistent records of the Guild’s books over time, and to assist in any financial audits, or CPA services that might be needed in the future.
14. Accounts are closed monthly and reconciled with bank statement
15. At the end of each year, an annual financial statement is produced reporting the financial position of the Guild. The Guild's financial position is presented to membership at the November general meeting.
16. Works closely with the Workshops coordinator and Meetings Coordinator to insure speakers/instructors provide the Guild with their invoices for payment, and to ensure those invoices are correct, and paid in a timely manner.
17. Monthly meetings:
- a. Prior to the meeting a cash box is prepared
  - b. Cash box is prepared with petty cash
  - c. Envelopes of money to be distributed for specific expenses, reimbursement checks, etc.
  - d. Check to pay speaker is prepared
  - e. Empty envelopes are ready to categorize money and receipts collected at meeting
  - f. Cash log form is prepared to log cash income during meeting. This facilitates recordkeeping and provides an explanation of the money collected during the busy meeting
  - g. Treasurer is responsible for the cash box throughout the meeting
  - h. Treasurer is responsible for all money collected and distributed at monthly meetings.
  - i. The Treasurer must be ready when the door opens and remain at the table for the duration of the meeting
  - j. New members and non-members pay to attend meeting
  - k. New members can pay for membership with cash, check, using Square (highest merchant fees) or on the PMQG website (lower merchant fees)
  - l. Treasurer consolidates all petty cash collections
  - m. UFOs
  - n. Raffle ticket sales

- o. Scholarship Fund
  - p. Treasurer reimburses members for authorized expenditures then scans and files receipts from those expenditures
  - q. Writes PMQG check
  - r. Issues cash from petty cash
  - s. Treasurer works closely with Vice President of Membership and Procurement to manage money at monthly meetings
  - t. Treasurer spends much of the meeting answering questions and
18. Post-monthly meeting: One to two days after the meeting, all cash and checks are reconciled
- a. Cash and checks are deposited into KeyBank
  - b. All income and outgoing is entered into Quicken
19. Note for 2020/2021 due to the pandemic 95% of transactions are happening online. Log into Stripe and SquareSpace often to track online sales and maintain a record so bank deposits can be properly recorded in QuickBooks. Promptly issue credit card refunds as needed.
20. Board meetings
- a. Quarterly financials are placed on the Google Drive and Treasurer is ready for discussions with the Board (This was done monthly in 2020 & 2021)
  - b. Treasurer prepares for a financial audit (periodic and infrequent)
21. Assists the President with preparation of Guild tax returns and state charitable organization filings
22. Conducts financial business using the Guild's debit card and PayPal account and writes checks on behalf of the Guild
23. Monthly expenses:
- a. Zoom charges (large group fee) charged monthly to Guild's debit card
24. Annual recurring expenses
- a. Due January, SquareSpace hosting fee, charged to Guild's debit card
  - b. Due January, insurance renewal
  - c. Due half in January and half in June, Open Sew Day fees (Mill End)
  - d. Due February, renew online QuickBooks subscription through TechSoup.
  - e. Due February/March - Membership fees due to MQG, work with membership to verify number of MQG members before requesting MQG invoice.
  - f. Due at time of retreat in March, pay for retreat expenses and pay deposit to reserve retreat dates for the following year
  - g. Due April annual payment for Google One Storage fees
  - h. Due May, DOJ fee (CT-12)/Corporate Division Fee/File Taxes IRS 990-N.
- instructing attendees how the meeting is set up and where
  - u. Treasurer should have the expectation that s/he will not experience or participate in the monthly meeting the way general members experience the meeting
  - v. Treasurer has the privilege of meeting lots of people at the monthly meetings

- i. Due June, USPS PO Box
- j. Due August Library software (TinyCat)- must be paid through PayPal (renews automatically)
- k. Due October Zoom Pro Subscription renewal
- l. Due November, prior year Profit and Loss Report due to MQG, O & E insurance premium will renew.
- m. Due December, reserve church gym (or other space) for following year's monthly meetings, SquareSpace charges for our domain name.

## GUILD EMAIL MANAGEMENT

2019 Board used Guild Gmail account exclusively to keep history intact for future Board use (no Guild business conducted via personal email accounts).

1. As email is received, it is processed (minimum of daily) **(President)**
2. Manages Guild Gmail account and delegates email tasks to other board members and volunteer coordinators **(President)**
3. Subject folders are set up at the beginning of the year
4. Color coding is assigned to each officer
5. When email arrives, tag as appropriate and mark as "Unread".
  - a. Each officer checks email by color code, daily or at least bi-weekly
  - b. If an urgent action is needed, advise officer by email or text
  - c. All Guild business is available and searchable to future officers
6. Email is color coded and deployed to the correct email box (responsible Board member) for timely response **(President)**

## GUILD POSTAL SERVICE MAIL PICK-UP

1. Weekly Tasks **(Treasurer)**:
  - a. The current PO Box is at the main Post Office on NW Hoyt
  - b. Go to post office box to collect flat mail and packages
  - c. Open all mail
  - d. Process mail requests or transfer to others. It is important to transfer invoices and bills to Treasurer within seven days of receipt or at least two weeks before due date
  - e. The Treasurer has 1 PO Box key, the President has the other. New keys were issued in 2021, treasurer currently has both.

## MATERIALS AND PROCUREMENT PROGRAM

**(Vice President of Membership and Procurement, unless otherwise noted)** The purpose of PMQG's procurement program is to support the fabric fundraiser and to provide a raffle. The raffle is used to raise funds for the PMQG scholarship program. Members may receive one free raffle ticket at meetings and are eligible for additional free raffle tickets for wearing their name tag or during their birth month. Raffle tickets are sold for \$1 a piece with proceeds going towards PMQG's scholarship program. All procurement items must be treated as property of PMQG.

1. At the end of the prior year, it is critical to set up a prize pipeline for next year through February. This allows procurement time to get up to speed
2. At the beginning of the year, create spreadsheet of potential donor companies and gather contact information
3. Begin sending requests for donations. Record:
4. Date of request/query, business name
5. Date and description of donation received, donor information
6. Responses and information received from donors
7. When donations are received, add donation to inventory worksheet for give away management. Note on inventory worksheet
  - a. date of the donation and whether prize was a donation or a Guild purchase
  - b. date donation thank you letter (with Tax ID#) sent to donor
  - c. where/why/when inventory is used (prizes given)
8. For donations, communicate value of donations (prizes) via Donations spreadsheet to Guild Treasurer for IRS purposes. Do NOT include Guild purchases on this list
9. Store prizes
10. At time of giveaway, Instagram and Facebook acknowledgement of donor company **(VP-TSM)**
11. Make signs for Meeting Raffle Table acknowledging donor companies **(President)**

## Volunteer Opportunities

Volunteers are the lifeblood of the Guild. Volunteers support the goals of the Guild. Some include:

Charity Quilts

Challenge Quilts (not recruited for in 2018; but still can be if necessary)

Procurement and Meeting Raffle Table

QuiltCon Charity Quilt

Quilt Exhibits

UFO Club

Retreats

New Member and Guests Welcome Program

Small Quilt Groups

Open Sew Day

Meeting Location

Meeting Logistics

PMQG Photographer

Charity Table

Free Tables

Fabric Fundraiser

## Volunteer of the Year

Prior to the end of the year, the outgoing board selects a Volunteer of the year. This is a volunteer who has gone above and beyond their duties. The volunteer of the year is recognized at the December meeting. The Volunteer of the Year is awarded a lifetime membership to PMQG.

Past volunteers of the year include:

- Cath Hall
- Anne Matlak
- Sam Hunter
- Susan Beal
- Kimberly Bennefield
- Anne Marie Cowley

## Guild Resources

Guild resources including procurement items, and guild equipment (such as cutting mats, portable design walls), leftover fabric from a guild sponsored fabric challenge shall be treated as Guild property, it is not for personal use. In this electronic age, this extends to the Guild's Zoom account and paid services such as Canva and Otterai.

## OTHER STUFF

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At end of Officer terms:

1. Transfer all equipment, prizes, charity items to new Officers **(All Board Members)**
2. Fill prize pipeline with enough inventory to support giveaways in January and February of new Board term **(VP-MP)**
3. At bank, assign new check signers **(President; Treasurer)**
4. Transfer Guild debit card to new Board members **(President; Treasurer)**
5. Change PO Box to name of new Officer responsible for PO Box **(Treasurer)**
6. Transfer PO Box key to new Officer responsible for PO Box **(Treasurer & President)**

## APPENDIX

### Year-in-View

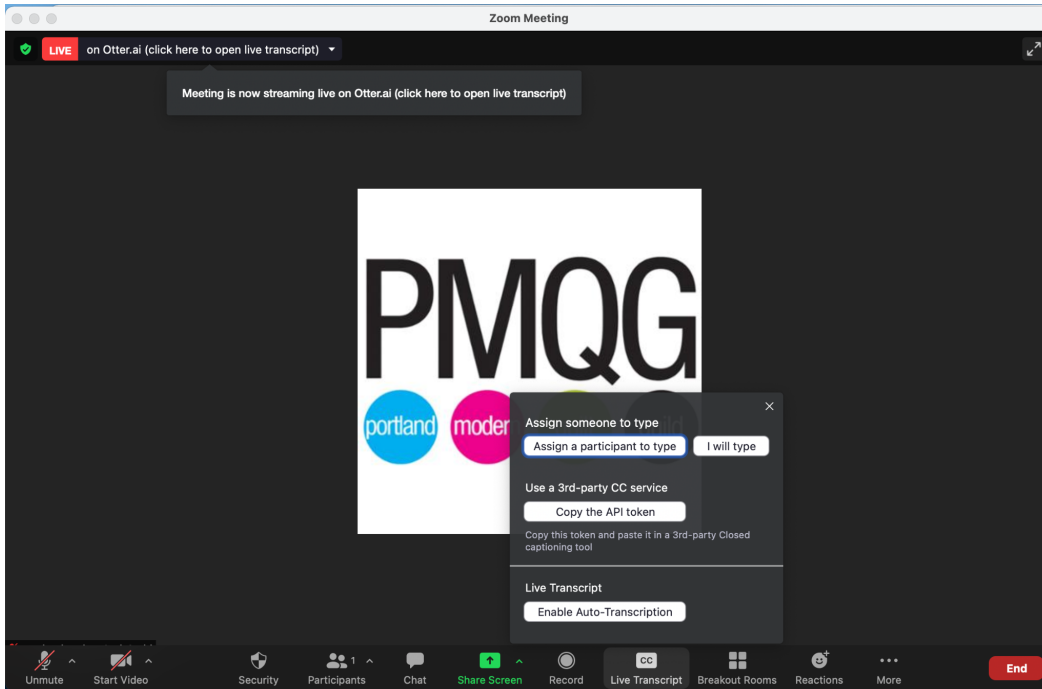
Q4, year prior to Officer term	Q1	Q2	Q3	Q4
Transfer of duties from incumbent Board to new Board	Membership renewals			
Transfer financial authority, materials, equipment and PO Box key to new Board	Annual program planning			
New Board planning meeting	Initiate prize and other procurement			
Membership renewals in December	Guild challenge project	Prior year Guild Taxes		
	Spring retreat planning	Spring retreat	Sisters Quilt Show	Quilt Showcase
	1 <sup>st</sup> Qtr Workshop instructor(s)	2 <sup>nd</sup> Qtr Workshop instructor(s)	3 <sup>rd</sup> Qtr Workshop instructor(s)	4 <sup>th</sup> Qtr Workshop instructor(s)
	1 <sup>st</sup> Trimester Charities	2 <sup>nd</sup> Trimester Charities	3 <sup>rd</sup> Trimester Charities	Annual meeting
	BOM planning			

### Month-in-View

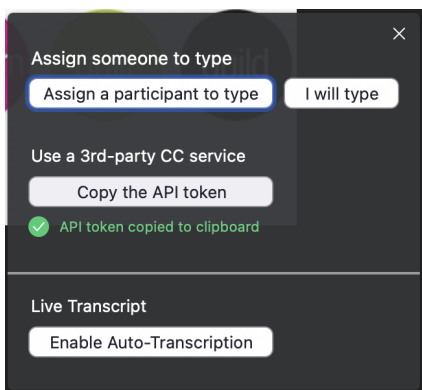
Wk 1	WK 2	Wk 3	Wk 4
Sew Day			
	Board Meeting		
		Monthly member meeting	
		Library book distribution	
		Block-of-the-month	
		Charity sew day	
			Hand Sew Happy Hour

## Adding Closed Captioning using otter.ai.

**Step 1:** Start your Zoom meeting as usual. Host then can go to the “CC Live Transcript” button and click on the Copy API token.

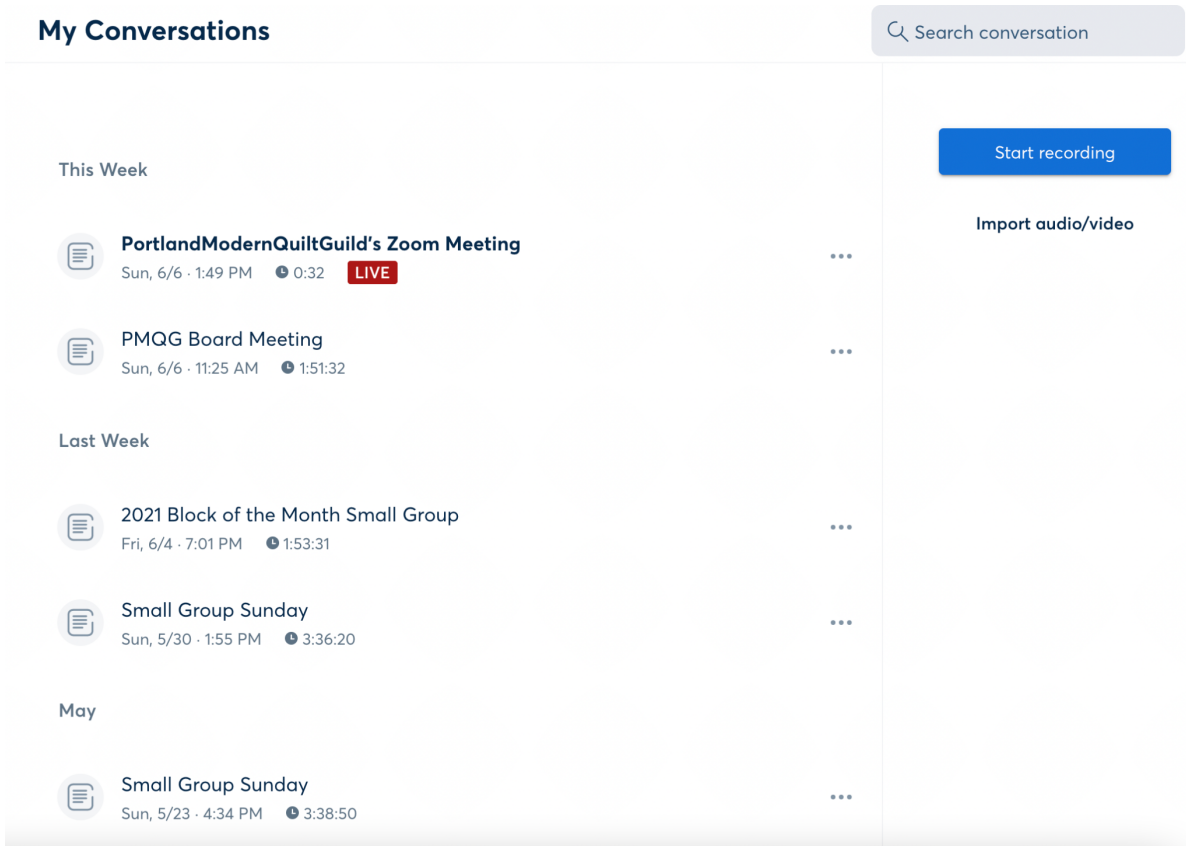


When successfully copied, it should go green like this:







Step 2: Log into [otter.ai](https://otter.ai), and select the “My Conversations” tab. You’ll see the current live meeting marked live. Click on it to open the transcript. (If anyone is currently talking, you should see it transcribing in real time)





**My Conversations** Search conversation


**This Week**

-  **PortlandModernQuiltGuild's Zoom Meeting** ...  
Sun, 6/6 · 1:49 PM 0:32 **LIVE**
-  **PMQG Board Meeting** ...  
Sun, 6/6 · 11:25 AM 1:51:32

**Last Week**

-  **2021 Block of the Month Small Group** ...  
Fri, 6/4 · 7:01 PM 1:53:31
-  **Small Group Sunday** ...  
Sun, 5/30 · 1:55 PM 3:36:20

**May**

-  **Small Group Sunday** ...  
Sun, 5/23 · 4:34 PM 3:38:50

**Start recording**

**Import audio/video**

Once the meeting is open, find the three dots in the button on the right hand side and click on them:



**PortlandModernQuiltGuild's Zoom Meeting**

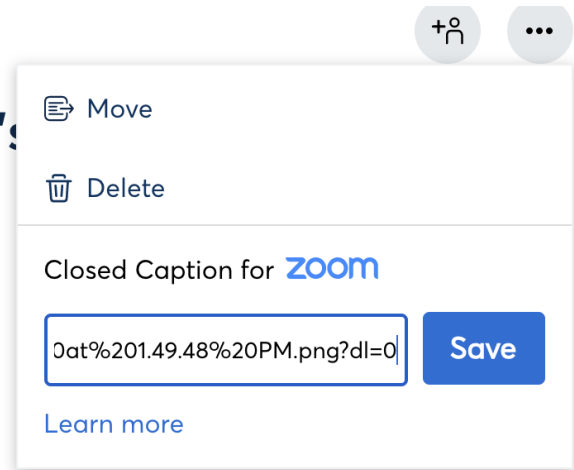


 Sun, 6/6 · 1:49 PM  Live

Paste the token copied in Step one in the dialog box and click save. Closed captioning should be live, and members should have a CC button on their Zoom screens.

# PortlandModernQuiltGuild's Meeting

 Sun, 6/6 · 1:49 PM  Live



The screenshot shows a Zoom meeting interface. At the top right, there are two circular icons: one with a plus sign and a person icon, and another with three dots. Below these is a context menu with the following items:

- Move (with a document icon)
- Delete (with a trash can icon)

Below the menu, the text reads "Closed Caption for zoom". Underneath is a text input field containing the URL "0at%201.49.48%20PM.png?dl=0". To the right of the input field is a blue "Save" button. At the bottom of the menu is a "Learn more" link.