

Ontario Square & Round Dance Federation

Board of Directors

Guidebook

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Guide Book
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Issue Date for this page: April, 2020

Administrative Guidelines



THE ONTARIO SQUARE AND ROUND DANCE FEDERATION INC.

Friendship Set to Music

Issue Date: November 5, 2012 **Bursary Application Criteria** Page AG-BAC 1 of 1
Administrative Guideline

Bursary Application Criteria for Caller/Cuer/Leader Schools and Clinics

General

1. Any dancer wishing to become a square dance caller, round dance cuer/leader, or leader for clogging or line dancing, or any current caller/cuer/leader wishing to upgrade his/her skills may apply through their Association to the Ontario Federation for a bursary to help offset the expenses incurred. If your area has no Association, a Club may act as a sponsor.
2. As unlimited funds are not available, new callers/cuers/leaders and applicants from remote areas will be given preference over callers/cuers/leaders wanting refresher training. Preference will also be given to those wishing to attend Ontario schools and clinics, and also if a Club is being started by the applicant.
3. Assistance may also be approved for a "qualified" instructor to conduct a school or clinic in a remote location of the Province. This may be necessary in order to encourage attendance at the school or clinic by local students.
4. Early application for bursaries is encouraged. However, bursary applications **MUST** be received by the Professional Development Committee by September 15th of the current calendar year of a course. Applications will be reviewed by the Committee and recommendations will be presented to the Federation at the Board's November meeting. Applicants will be notified by November 30th of acceptance or rejection.
5. a) Only one application for a bursary may be applied for per person in any calendar year; and
b) No person will be considered for a bursary two calendar years in a row.
c) *All applicants must be members of the Federation and CSRDS.*
6. The bursary will be paid to the applicant upon receipt of a report from the school or clinic, showing attendance and participation, as well as an itemized list of expenses incurred while attending that school.
7. It should be understood that the Bursaries are for, and must be used within that calendar year.
8. The total amount to be awarded is budgeted at the beginning of the Federation's fiscal year, April 1st and is limited to the maximum amount of \$300 per application, however, lesser amounts may be applied for and/or approved.
9. It is recommended, that any unused funds remaining in Federation's budget at the end of any fiscal year, be carried forward to the next year and be included in the next year's budget.



THE ONTARIO SQUARE AND ROUND DANCE FEDERATION INC.

Friendship Set to Music

Issue Date: May 5, 2012

Bursary Application Criteria

Page AG-BAC 1 of 1 page

Administrative Guideline

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THE ONTARIO SQUARE AND ROUND DANCE FEDERATION INC.

Friendship Set to Music

Issue Date: May 5 2012

Bursary Application Procedure Page AG-BAP 1 of 2 pages
Administrative Guideline

Bursary Application Procedure for Caller/Cuer/Leader Schools and Clinics

Application Procedure

1. If applications are not available from local Associations, forms may be obtained from the Secretary of the Ontario Square and Round Dance Federation or the Professional Development Committee.
2. The Bursary Application form should be filled in by the applicant and forwarded to the local Association. Sufficient lead time should be allowed for the Association to process the application and forward it so it is received by the Federation (Professional Development Committee) by the September 15th deadline.

If there is no local Association, the Club officers should provide the information requested *and process the application directly to the Federation.*

Applications must have area Association approval and comments before being forwarded to the Professional Development Committee of the Federation.

3. Applicants will be notified by November 30th of acceptance or rejection. It is understood that applicants must attend the school/clinic applied for and incur the expenses before December 31st of the calendar year bursaries are approved.
4. Applications can be filed subsequent to taking the course, but must be filed during the current calendar year.

NOTE:

Applications for Bursary Assistance may also be obtained and submitted to the **Canadian Square & Round Dance Society**. The CSRDS awards bursaries up to \$500.00 per applicant from the present annual budget of \$5,000.00. Applications to the CSRDS must be submitted to the Chairperson of their Professional Development Committee. Applications for this assistance are available from the Ontario Director of the CSRDS, Secretary of the Ontario Federation, or the Chair of its Professional Development Committee. See also the CSRDS website at <http://www.csrds.ca>. These applications are completed and submitted to the Association (or local Club, in areas without associations). After review these are submitted to the Federation, for its comments, before being forwarded to the CSRDS. Applications must be submitted to CSRDS and approval granted **prior** to taking the course.

Note: Changes from previous version are indicated in italics

**Ontario Square and Round Dance Federation
Bursary Application Form**

The Ontario Federation Bursary is available to new callers/cuers/clogging/line/contra/western dance instructors, and current instructors who wish to upgrade their skills.

Applications are to be received by September 15th.

Name: _____ Partner's Name: _____
(Last) (First)

Address: _____ City: _____

Postal Code: _____ Phone(s): (Home)(____) _____ CSRDS Membership No. _____

Name of Club: _____

School or Clinic you wish to attend: _____

Have you applied for any other financial support for this year? _____. If yes, please provide the details: _____

Have you received financial support before for similar training? _____. If yes, please provide the details: _____

If possible enclose a flyer or description of the school or clinic. Preference will be given to recognized Canadian schools and clinics.

Personal History

Dancer experience in levels and years: _____

Caller/cuer/leader experience, if any, in levels and years: _____

Please provide on an attached sheet of paper a brief summary of the reason for the application, and any other details that would help in the evaluation. Attach a copy of the report/certificate from the school/clinic showing attendance and a listing of expenses.

Applicant's Signature

Date

Area Association Comments: (or Club, if no area Association exists in the home area)

Association/Club Signature

Date



THE ONTARIO SQUARE AND ROUND DANCE FEDERATION INC.

Friendship Set to Music

Issue Date: May 5, 2012

Communication

Page AG-C 1 of 3 pages

Administrative Guidelines Communications

General

1. The square and round dance movement is unique organizationally compared to other volunteer organizations. The key word is "independent". Although national, provincial, area, and Club levels exist, each level is self governing. This could be contrasted to other organizations in which the national level sets the policy and method of operation for the provincial, area, and club levels. Indeed in the square and round dance movement, the basic building block is the Club level, and all other levels exist to support its operation.
2. The word "independent" gives the clue about the nature of the relationships that exists between the various organizations in the movement. There is no branch office-head office relationship at any level. Every action must be done in the spirit of cooperation, and the action must be in a subject area where an organization has a role to play.

Communication Tone

3. In keeping with the volunteer and independent nature of the movement, it is essential that all communication, whether written, verbal, or electronic, be polite and respectful. Personal remarks about any person should never be made.
4. Under the authority of this Guideline, it is the duty of the Secretary of the Federation to ensure both internal and external communication is in keeping with the nature of the movement. Accordingly, all Board members, are to monitor communication and refer to the Secretary any communication which is considered inappropriate. After investigation, the Secretary shall take whatever corrective action required, ranging from a letter to the offending member requesting retraction and an apology, to bringing the matter before the next meeting of the Board of Directors for resolution as it sees fit. In the event of offending communication from the Secretary, the President shall initiate corrective action.

Internal Communication

5. Board members are free to communicate internally to any other Board member, with an information copy if desired to the Secretary. In order to prevent wasted duplication, copies should only be circulated when essential. The Secretary reports on communication at Board meetings, and if any member desires a copy of any communication, it can be provided or ordered at that time.

External Communication

17. In keeping with standard business traditions, external communication to other organizations should be addressed to the president or secretary of the organization. Typically as well, external communication should be signed by the president or secretary, except in cases where a Director's task requires direct communication, such as membership and convention coordination. Informational copies should usually be addressed to the president or secretary of an organization as well

18. Federation letterhead or equivalent computer generated format shall be used for all written external communication.

19. A copy of all external communication shall be sent to the Secretary.

Envelopes

20. The use of Federation envelopes is encouraged to provide a ready means of identification of incoming letters, and provide advertising and promotion of the Federation to the general public. The title of a person or couple should be omitted from the address on the envelope.

21. Because Directors represent Associations, a retiring Director from an area Association should turn over remaining supplies to the incoming replacement Director from that same area.

Communication Files

22. Copies of minutes of Board and General meetings, annual financial reports, and significant communication shall be kept by the Secretary, and may be kept by other Directors if the subject matter warrants inclusion as an historical document.

23. Directors may keep files of communication sent and received. For Directors charged with the specific responsibilities of membership, legal information, public relations and publicity, and professional development, a separate subject file shall be kept with sufficient information to provide guidance for future holders of the office. It is important to bear in mind that responsibilities for an office will often be turned over without the benefit of a specific turnover meeting.

24. Because the Federation does not have a permanent office and storage area, it is important for all Directors to purge files from time to time of unnecessary communication. This should be done particularly before turning over the files to another Director. It is always a matter of judgement on what to keep and what to throw out. A suggested criterion is simply to judge the documents on whether they will aid a new Director in doing his or her job. Bear in mind as well that the Secretary keeps all the critical documents, and all minutes and yearly financial statements.

25. Outgoing Directors or executives shall pass files to the replacement as soon as practical.

Computer Formatted Files

26. File copies of significant computer generated documents should be provided to the Secretary, either in writing or other electronic medium to prevent retyping. This should include all guidelines, terms of reference, significant reports, etc. Please note that there is no requirement for any Board member to own or use a computer, but if a computer is used, then a copy of significant documents should be given to the Secretary.

27. The files should be provided, if possible, in WordPerfect or Word format, however, if this is not possible, the file should be supplied in the original format and also in the text file format (also called ASCII format). Most word processing programs can read or convert WordPerfect or Word formats, and most conversion programs can change between the most popular word processing programs.

28. The Federation letterhead format is available from the Secretary for any members wishing to use it.

Phone, Fax, and e-mail

29. Directors should use the phone as required to perform their duties. Calling during times of reduced rates is encouraged. For those who have fax facilities available without charge, it is a cheaper means of transmitting documents. If the fax facilities have to be paid for, the mail is usually the cheaper method.

30. For phone or fax bills, a Director should keep a list of the person called with the charge and give it to the Treasurer for reimbursement. Both GST and PST are charged on phone bills.

31. *With the increased use and common availability of e-mail, this means of inexpensive communication is encouraged. However, either a hard (paper) copy of the message or a computer file should be created for retention of this information.*

Changes from the previous version are made are indicated in italics.



THE ONTARIO SQUARE AND ROUND DANCE FEDERATION INC.

Friendship Set to Music

Issue Date: December 5, 2012

Directory/Webmaster

Page AG-DI 1 of 2 pages

Administrative Guideline Ontario Square & Round Dance Federation Directory/Webmaster

NOTE: The Federation Directory is no longer printed. All of the information is still collected and listed on the Federation web page <http://www.squaredance.on.ca.html>

General

1. In order to establish a database of organizations and clubs to aid in the coordinating work of the Federation and to provide a guide for the travelling dancer, the Board shall arrange for the publication of an Annual Directory. The Board responsibility for the Directory shall be with the Chair of the Membership Committee.
2. With the approval of the Board, the Chair of the Membership Committee shall appoint a *Web Master* who shall have the responsibility for collecting the information, arranging advertising, and publishing the Directory. Removal of a Web Master requires a motion of the Board, duly moved, seconded, and carried.
3. The Web Master shall operate within this Guideline without interference from individual Board members. However, a motion of the Board duly moved, seconded, and carried shall be binding upon the Web Master.
4. The Web Master shall prepare an annual budget and submit it, through the Membership Committee, for approval.
5. The *web-site* shall publish the names and addresses of the Federation's Board, EOSARDA, T&D, SWOSDA, and Lakehead Associations, Ontario S&RD publications, Ontario clubs, callers, cuers, and leaders, and Association sponsored dances..

Information Gathering

6. The Chair of the Membership Committee, in concert with the Web Master, shall arrange a suitable format for the collection of Directory information. The information should be obtained at the same time as the membership and insurance information. A suitable form is contained in the Administrative Guideline on Membership.

Publication Date

7. The Directory shall be posted on the web-site as soon as the information is available.

Listing of Members

8. Active Clubs and Associations which fail to obtain membership in the Ontario Federation for two years in a row shall not be listed in the Directory for the third year. Clubs or Associations which dissolve or become inactive will not be listed in the Directory unless they become reactivated. Association dances from a non-member association shall not be listed.

Once a listing has been withdrawn for a Club or Association, it shall not be recommenced until the current year membership dues have been paid.

Changes made from previous version are shown in italics



THE ONTARIO SQUARE AND ROUND DANCE FEDERATION INC.

Friendship Set to Music

Issue Date: June 30, 2014

Director Expenses

Page AG-DE 1 of 1

Administrative Guidelines Director Expenses

General

1. Any person serving on the Board of Directors of the Federation incurs expenses for stamps, telephone calls, paper, photo copying, etc. The tradition has been that the director provides his or her time free of charge and that the Federation provides the materials. The Federation will cover any reasonable expenses incurred by a director in carrying out budgeted Federation tasks. Note the word budgeted. The Federation operates from an approved annual budget, and changes to the budget require prior approval.

Reimbursement

2. Directors should keep adequate records and receipts for reimbursement. Although there is no set amount, typically a request for reimbursement should be submitted when expenses total \$100 or more, or at the February meeting to enable expenses to be included in the year-end report. Itemized records and receipts should be collected, allocated to different budget items (if applicable), and certified as valid Federation expenses, and then given to the Treasurer at a meeting. The Treasurer will arrange for reimbursement.

Travel Expenses

3. The policy of the Federation is to reimburse, upon request, directors and staff, not supported by an Association, for reasonable out of pocket expenses for accommodation, food, and travel while on Federation business or attending Federation meetings outside their own areas where the meeting is not scheduled as part of an official dance (such as T&D in May).

Travel mileage may be paid at the rate of 30¢ per km (effective June 30, 2014).

Meals may be claimed to the following maximums per person per day (effective Feb. 6, 2000):

Breakfast \$10.00; Lunch \$10.00; Dinner \$20.00; to a maximum of \$40.00 per day

Receipts should be kept, certified by the member, and given to the Treasurer either at the follow-on meeting, or if desired, forwarded to the Treasurer before a meeting.

Updated Jun 30, 2014 2007

Note: Changes made from the previous version are shown in italics



THE ONTARIO SQUARE AND ROUND DANCE FEDERATION INC.

Friendship Set to Music

Issue Date: May 5, 2012

Guide Book

Page AG-G 1 of 1 page

Administrative Guidelines Guide Book

General

1. This Guidebook has been prepared for use by the Board of Directors of the Ontario Square and Round Dance Federation. It contains the Articles and By-laws of the Federation, Administrative Guidelines, Committee Terms of Reference, and Information Sheets. Its purpose is to ensure the availability of essential reference material and a standard method of approach for Board members in the administration of the affairs of the Federation.
2. Ten copies of this Guidebook have been prepared and distributed as follows:
Past President, EOSARDA 1, EOSARDA 2, T&D 1, T&D 2, SWOSDA 1, SWOSDA 2, Lakehead, Areas without Associations, and Society Representative. *The copy may be produced in either electronic or printed format.*
3. The Secretary of the Federation shall have overall responsibility for the Guidebooks. Each holder of a Guidebook shall be responsible for updating and amending it. Extraneous material should not be kept in a Guidebook.
4. All members of the Board should bring their Guidebooks to every meeting so it can be brought up to date, if necessary.
5. Outgoing members of a position or of the Board shall turn over their copy to the incoming members.

Guidelines

6. The Federation Board of Directors must approve a Guideline for it to become effective. The Board may add to, remove, or amend any Guideline at any meeting.
7. Each amended Guideline shall be reproduced completely and distributed to members as soon as possible after amendment
8. A Table of Contents for the Guidebook shall list the Guidelines and contents, together with the issue date. The Table of Contents is the responsibility of the Secretary.

Guideline Format

9. Although the format of a Guideline is not critical, paragraphs should be numbered, an issue date should be at the beginning, and headings should be used to aid in the easy use of a Guideline. This Guideline may be used as a guide.
10. If a Guideline refers to a policy established by the Board at a meeting, then the meeting number and specific paragraph number should be referenced.



THE ONTARIO SQUARE AND ROUND DANCE FEDERATION INC.

Friendship Set to Music

Issue Date: May 5, 2012

Information Sheets

Page AG-IN 1 of 1 page

Administrative Guidelines Information Sheets

General

1. Information Sheets are short documents on a number of topics of interest and use to Club organizers. They can be used to:

- a) set up or change the format of a caller-run or executive-run Club;
- b) obtain information on how to incorporate a Club;
- c) write a Club constitution;
- d) hire a Canadian or non-Canadian caller/cuer/leader for a one or more dances; rent facilities;
- e) obtain insurance information;
- f) set up a promotional campaign for a Club or an event; and,
- g) obtain additional help as required.

Responsibility

2. The Information Sheets are common to and may be used by all Board Committees. Any Director or other individual with knowledge about a subject area may be asked or may produce an Information Sheet. If the subject covers more than one committee, the Chair of the Legal Information Committee shall have overall responsibility. The Secretary shall be responsible for the format of the Information Sheets.

Drafting Method

3. Generally, the drafter of an Information Sheet should collect existing information on the subject, gather the key points, and draft a suitable document that can be used by Club members to assist them in Club-related duties. The reading level of the Information Sheets should be kept at a minimum level to ensure that it is readily understood by as many dancers as possible.

4. A draft should be circulated to all Board members *via e-mail prior to a Board meeting at which it is reviewed and discussed*. Further drafts may be required at the discretion of the Board. If possible, a computer file of an Information Sheet should be given to the Secretary by the drafter.

Approval

5. When the Board is satisfied with an Information Sheet, it shall approve it by majority vote. Publication shall be the responsibility of the Secretary. The date of approval shall be noted on the document.

Availability

6. The Information Sheets should made available on request to Clubs or individuals in the square and round dance movement. The Board of Directors shall decide if there is any charge for the Sheets. *At the Board's discretion, information sheets may be posted on the Federation web-site*

7. The Secretary, or other Board member as decided by the Board, shall distribute the Information Sheets as requested by members or Clubs.



THE ONTARIO SQUARE AND ROUND DANCE FEDERATION INC.

Friendship Set to Music

Issue Date: May 5, 2012, 2007 **Leadership Training Grants** Page AG-LT 1 of 4 pages

Administrative Guideline Leadership Training Grants Program

General Guidelines and Operating Procedures

Purpose:

The purpose of establishing a Grants Program is to provide financial assistance for Associations/

Instructors groups affiliated with the Ontario Square & Round Dance Federation to sponsor leadership training for new dancers or upgrade established callers/cuers/dance instructors.

Eligibility:

1. Grants are available to sponsor leadership training in the following dance categories: square, round, clogging, line, contra and western.
2. Any Ontario S&RD Federation affiliated group is eligible to receive a training grant providing it is able to establish:
 - a) the program could not be held without financial assistance
 - b) it has not received an Ontario Federation Grant for a period of 3 years.

RULES:

1. The most recently approved Ontario Federation application form must be used.
2. Groups must demonstrate financial need by submitting:
 - a) a copy of the previous year's financial statement
 - b) a proposed budget for the training course including any financial assistance received from another organization
3. A written application must be received by the Professional Development Committee at least six months prior to the clinic. Applicants will be notified of the committee's decision within sixty days of the year in which the clinic is to be held.
4. A summary of the clinician's training and experience must be included.
5. Include a course outline with the application
6. Those attending the course must be willing to complete a course evaluation and return it to the sponsoring group.
7. No application will be considered for clinics or workshops that have already been held.
8. Include a copy of the promotional/advertising literature being used.
9. Individuals are not eligible for a leadership grant.
10. Those attending an Ontario Federation Grant Receiving Course are not eligible for an Ontario Federation Bursary.

Recommendations:

Favourable consideration will be given to a group if:

1. It has not sponsored a training course during the past three years using grant money from the Ontario Federation.
2. The program is open to all Ontario Dance Instructors whether they are members of the sponsoring body or not.
3. The course is twelve to sixteen hours minimum.
4. The number taking the course is five or more.
5. The sponsoring group must be prepared to pay 50% of the costs either through matching funds or the collection of tuition fees.
6. Any additional cost incurred will not be covered by the Ontario Federation.

Grant Amount

1. The amount of the grant is 50% of costs but no greater than \$500.00.
2. All conditions being equal, grants will be awarded on the first come - first served basis.
3. Half of the grant will be paid in advance of the clinic - the other half when the evaluations have been received.
4. If the clinic is canceled, for whatever reason, the money must be returned to the Ontario Federation.
5. A portion of the grant is to be returned should the clinic realize a profit or have lesser expenses than budgeted.

Exceptions:

1. Clinics or workshops held in remote areas will be given extra consideration.
2. One day courses and courses with less than five students will only be considered in extreme circumstances.

APPLICATION FOR LEADERSHIP TRAINING GRANTS

Applications must be received by the Professional Development Committee at least six months prior to the clinic/training.

Name of Sponsoring organization _____

Name & address of contact person _____

Position in the sponsoring committee _____

Number of members _____

Total cost of clinic _____ Amount of assistance required _____

Cost for members _____ Costs for non-members _____

INCLUDE A COPY OF THE PROPOSED BUDGET FOR THE TRAINING COURSE AS WELL AS A COPY OF THE PREVIOUS YEAR'S FINANCIAL STATEMENT.

Dates of clinic _____ Number of hours of instruction _____

Subjects to be covered during the clinic and reasons for the selection. _____

Anticipated attendance at clinic _____

Name of clinician(s) under contract for the clinic (attach biography). _____

Other pertinent information that might help the PD Committee decide to provide financial assistance. _____

Applicant's Signature & Date _____

Comments & Signature of Association (or club if no area association exists). _____

Association Signature & Date _____

Ontario Square & Round Dance Federation

LEADERSHIP COURSE EVALUATION FORM

Course attendees - Please complete the following clinic evaluation form and return to the sponsoring organization.

1. Name of the sponsoring organization _____
2. Name of the clinician(s) _____
3. Did the clinician cover the designated subjects and meet all expectations as outlined in the advertising literature? _____

4. Do you feel the clinic will result in an improvement in your calling/cueing/dance instruction? _____
Explain _____

5. Did the clinician conduct himself/herself in a professional manner? _____
6. Were you pleased with the overall educational program? _____
7. Would you attend another clinic sponsored by the same organization? _____
8. If you were not pleased with any portion of the clinic, please comment. _____

9. Any additional comments you wish to make.

Attendees: Please return this questionnaire to the sponsoring organization.

All evaluation forms are to be sent by the sponsoring organization to the Ontario Square & Round Dance Federation, Professional Development Committee before final payment will be received.



THE ONTARIO SQUARE AND ROUND DANCE FEDERATION INC.

Friendship Set to Music

Issue Date: May 5, 2012

Membership

Page AG-M 1 of 9 pages

Administrative Guidelines Membership

1. This Guideline deals with the basis of membership and membership insurance for the Ontario Square and Round Dance Federation.

Membership

2. Membership in the Ontario Square and Round Dance Federation is open to all organizations or individuals participating in square dancing, round dancing, line dancing, contra dancing, clogging, country/western dancing, or other forms of dancing.

3. A member is defined as an organization or individual who has paid the prescribed membership fee. The full rights and privileges of a member of the Federation become effective when the membership fee is received by the Federation.

4. Except as noted in paragraph 6 below, individuals or organizations who have not paid the prescribed membership fee are not members of the Ontario Federation.

Membership Fee

5. The Membership fee is set by the Annual Meeting of the Federation. At the date of this Guideline, the Federation's membership fee is \$3.00 per individual (dancers, callers, cuers, or leaders and partners) and \$6.00 per organization (Clubs, groups, or Associations). *This includes the Canadian Societys membership fee.* Fees for an individual only need to be paid once, regardless of the number of Clubs at which the individual dances. It is expected that individual members would belong to Clubs, that Clubs in turn would belong to Associations, and that Associations would belong to the Federation. However, in areas of the Province with dancing Clubs but no local Association, or if a local association opts out of Federation membership, membership fees may be accepted directly from organizations or individuals. New Clubs and/or new dancers starting in January/February of the registration year should submit fees for the club/dancers with a registration form. To encourage Clubs from Northwestern Ontario (Dryden, Kenora, Barwick and Fort Frances) or elsewhere to register with the Ontario Federation, registration fees will be reduced by the amount of the CSRDS fees, provided they can provide proof that the club and their members to be registered have paid these fees through a Manitoba Association/Federation.

New Dancers

6. All new organizations, clubs and dancers which begin participating in the activity following June 30th in any year, are considered to be members of the Ontario Square & Round Dance Federation until the next membership year which starts on January 1. No fee is required until that time. *Note, this exemption applies only to Federation membership. The Canadian Society requires all members and Clubs to pay the annual membership fee regardless of when they join. The Society will not give insurance coverage for the current annual year for dancers and Clubs joining after December 15th of the previous year.*

Individual Membership

7. The method of collecting fees for individual members is left to the discretion of member organizations.

8. The names of individual members are not *currently* required by the Federation. Dance Clubs are expected to maintain a record of the names of their members *and allocated membership card numbers* in a manner that would satisfy the requirement of establishing membership for insurance purposes. This is discussed later in this Guideline.

Organization Membership

9. The method of collecting fees for organization members is left to the discretion of member organizations.

10. The name and municipality of a member organization is required by the Federation. A record of member organizations shall be kept by the Treasurer and/or Membership Chairman.

11. For contact and directory purposes, the name and dance location of the organization, level and frequency of dancing, Caller/Leader's name and address, and the name, address, and phone number of a contact for that organization are required. For ease of communication, an e-mail contact address is recommended for each member organization. A suggested Club format information sheet that provides both Club directory and membership information is attached to this Guideline, although any format providing the basic information is acceptable.

Membership Period

12. The Membership fee for the Federation covers the period from January 1 to December 31, of each year. Membership is in effect as soon as the fee is received by the Federation. Membership lapses, if not renewed, on or before January 1 of the year directly following a year of membership.

Remitting Fees

13. Fees and information forms should be remitted to the Federation *Treasurer-Membership Chairman*. Cheques should be made payable to the Ontario Square & Round Dance Federation. In areas served by a local association, fees should be remitted to the Association Treasurer, or other designated person, and the cheque made out to that particular association. In areas not served by an association, or if an association opts out of Federation membership, organizations or individuals may remit membership fees directly to the Federation Treasurer *or Membership Chairman*, with the cheque made out to the Ontario Square & Round Dance Federation.

Certificate of Membership

14. A Certificate of Membership shall be provided to member organizations by or through the Membership Chairman. The Certificate shall show at a minimum the member organization's name and location.

Member's Liability Protection Insurance

15. As part of membership, the Federation provides or arranges for provision of third party liability protection insurance. The intent of the insurance is to protect members from claims for bodily injury, or damage to the property of others, should the Federation or Federation member become legally liable to pay. Settlements are usually the result of legal action, although small claims may be handled by the insuring company, without the involvement of the legal system.

Policy

16. The Treasurer shall be responsible for ensuring that the minimum policy limit shall be at least \$5,000,000 Comprehensive and Tenants Legal Liability. The policy shall include the following areas:

- a. Bodily injury;
- b. Property damage;
- c. Medical payments;
- d. Personal injury;
- e. Tenant's Legal Liability (limit \$250,000.00)
- f. Cross liability; and,
- g. Defence, settlement, investigation, and negotiation costs.

17. Unless otherwise directed by the Board, appropriate insurance coverage shall be obtained as part of the Canadian Square and Round Dance Society membership. The Society's membership fee shall be collected as part of the Federation fee.

18. The policy duration shall be the calendar year, or from January 1 to January 1 of the following year depending upon the issuer.

Establishing Insurance Protection

19. For insurance purposes in the event of an accident or incident, two facts must be proven to establish protection of a member under the policy:

- a. The organization or individual was a member at the time of an accident or incident; and,
- b. The accident or incident occurred during a dancing related activity.

20. For an accident or incident that occurs during a club sponsored activity, it is the responsibility of the club executive to establish the two facts outlined above.

21. For an accident or incident that occurs during an open dance, or a dancing related activity attended by more than one club, it is the responsibility of the dance executive to establish attendance at the activity, and if required, the home club of an individual to establish Federation membership.

22. For a dancer travelling outside Ontario who is involved in an accident or incident, the home club shall be responsible for establishing Federation membership, and the dancer involved for establishing proof the accident or incident occurred during a dancing related activity.

23. Note that establishing the right of an individual to protection does not involve club badges, or how long a person has been dancing with a club, or whether fees are collected by the night, by the season, or by the year, or whether tickets, ribbons, or cash are used for admission to an open dance. An individual's right to protection must be established through adequate records. These records may face legal challenge.

Keeping Club and Open Dance Records

24. For insurance purposes, there are two type of records required: membership lists, and attendance records. Clubs are responsible for maintaining a membership list of individuals. Club and dance executives are responsible for maintaining a record of individuals attending a dancing activity. A dated sign-in book, dated sign-in sheet, or a dated attendance book provides an acceptable method for Club activities. For open dances or other similar activities, a dated sign-in sheet, sign-in book, or guest book is an acceptable method.

25. In the event of an accident or incident, members should render first aid and assistance as considered practical in the situation. If warranted, emergency services should be contacted. At the first available opportunity, notification should be given by phone to the Director for Membership/Insurance providing the following details:

- a) time, place and description of accident or incident;
- b) name(s) and address(es) if the injured party or parties;
- c) names and addresses of all available witnesses

Note This insurance is 3rd party liability not medical insurance.

Directors and Officers' Liability Insurance

26. As part of membership, the Federation also provides or arranges for provision of liability insurance for Directors and officers of member Associations and member Clubs' executives against suits brought for errors and /or omissions. The limit of this insurance is \$2,000,000 annually. Similar specifications to those stated previously are required to establish coverage should a suit be lodged against a Director or Executive of an Association or Club. Note: This policy does not cover bodily injury, property damage, acts of libel or slander, nor income security.

Changes from previous version are indicated in italics.

Ontario Federation Membership and Directory Information Sheet

This form should be forwarded through your area Association or to the Federation at the address below. Any other format is acceptable provided the basic information is supplied. **To be returned by Oct.31.** Please complete the full form so that we can update the directory, noting changes from last year.

For a multi-section club, indicate the level, night, location, and caller/leader for **each** section. Use a photocopy of this form for each section for clarity.

Please fill in or circle the appropriate words.

Club Name: _____

Club City: _____

Club Province: ONTARIO - or _____

Dance Hall Name & Location: _____

Club Type: Square, Square & Round, Round, Contra, Line, Clogging, Country/Western,

Square Dance Level: New Dancer/Basic, Mainstream, Plus, Advanced 1, 2, Challenge 1,2,3,4

Round Dance Level: New Dancer, 2, 3, 4, 5, 6 (usually two level 2/3, 3/4, 4/5, etc.)

Contra, Line, Clogging, or Country/Western Level: _____

Day & Time: SU, MO, TU, WE, TH, FR, SA Morning _____ Afternoon _____ Evening _____

Frequency of Dancing: Every Week _____ Every Other Week _____ Other _____

Club Dances All Year: Yes _____ No _____ indicate start _____ and stop _____

Number of Dancers in club: _____ (Census information only - not published)

Caller/Leader/Cuer Information:

Surname: _____ First Name: _____ Partner: _____

Address: _____

City: _____ Postal Code: _____

Phone: (____) _____ e-mail: _____

Date Caller/Leader started calling _____ **started for Club** _____

Club Officer/Contact Information:

Same as above: Yes _____ No _____ If no, please provide the following:

Position: _____

Surname: _____ First Name: _____ Partner: _____

Address: _____

City: _____ Postal Code: _____

Phone: (____) _____ e-mail contact for club: _____

Date Club was formed _____

Ontario S&RD Federation Membership Return:

For EOSARDA, T&D, SWOSDA Clubs, please return through your Association, with cheques payable to the Association.

All other Clubs, please send this form and your cheque to the Membership Chair of the Federation:

Peter Courdin, 28 Goldora Private, Kanata, ON K2T 1K7 (613)270-9371 e-mail: petercourdin@rogers.com

MAKE CHEQUES PAYABLE TO: Ontario Square and Round Dance Federation

The annual membership fee per organization/Club, Caller/leader/partner, or individual dancer is made up of the Canadian Society membership/insurance fee (\$5/2) and the Ontario Federation membership fee (\$1). Dancers with a valid Federation membership card are not required to register with more than one club. Clubs and dancers which are members of another provincial federation are not required to pay the annual CSRDS membership/insurance fee - see Membership Guideline.

Note: Local Association fees are in addition to Federation fees.

Please note insurance coverage is for the calendar year.

Club 1 X \$6.00 = \$ 6.00

Total number of club dancers: _____ X \$3.00 = \$ _____

Total number of Callers/Leaders/Partners: _____ X \$3.00 = \$ _____

Total Remitted: \$ _____

Please duplicate locally as required.

MEMBERSHIP REGISTRATION FORM**Page __ of __**

Name of Association: _____ Date Remitted: _____

NOTE: "Membership must include callers, cuers, leaders and instructors.
 "Fees paid" must include \$6.00 per organization and \$3.00 per member.

	Name of Club/Assn	City/Town	Assn	Club	Members	Fees Paid
1.	_____	_____	_____	_____	_____	\$ _____
2.	_____	_____	_____	_____	_____	\$ _____
3.	_____	_____	_____	_____	_____	\$ _____
4.	_____	_____	_____	_____	_____	\$ _____
5.	_____	_____	_____	_____	_____	\$ _____
6.	_____	_____	_____	_____	_____	\$ _____
7.	_____	_____	_____	_____	_____	\$ _____
8.	_____	_____	_____	_____	_____	\$ _____
9.	_____	_____	_____	_____	_____	\$ _____
10.	_____	_____	_____	_____	_____	\$ _____
11.	_____	_____	_____	_____	_____	\$ _____
12.	_____	_____	_____	_____	_____	\$ _____
13.	_____	_____	_____	_____	_____	\$ _____
14.	_____	_____	_____	_____	_____	\$ _____
15.	_____	_____	_____	_____	_____	\$ _____
16.	_____	_____	_____	_____	_____	\$ _____
17.	_____	_____	_____	_____	_____	\$ _____
18.	_____	_____	_____	_____	_____	\$ _____
19.	_____	_____	_____	_____	_____	\$ _____
20.	_____	_____	_____	_____	_____	\$ _____
Totals			_____	_____	_____	\$ _____

Number of Associations: _____ X \$6.00 = \$ _____

Number of Clubs: _____ X \$6.00 = \$ _____

Number of Members: _____ X \$3.00 = \$ _____

Totals _____ \$ _____

MEMBERSHIP REGISTRATION SUMMARY

Submitted by:

Name: _____ Title: _____

Address: _____ Apt # _____

City: _____ Province: _____

Postal Code: _____ Phone: (____) _____

Name of Area Association

Summary:

1. Number of Associations _____ X \$ 6.00 = \$ _____

2. Number of Clubs _____ X \$ 6.00 = \$ _____

3. Number of Members _____ X \$ 3.00 = \$ _____
(Including callers, cuers, leaders, etc. and partners)

(Items 1, 2, and 3 are totals from Members Registration Form)

Total Remittance \$ _____

**Please make all cheques payable to the
Ontario Square and Round Dance Federation**

Remarks:

Please duplicate locally as required.

Canadian Square and Round Dance Society

CERTIFICATE OF MEMBERSHIP

This is to certify that, _____

and its _____ dancers are paid up members in good standing of the Canadian Square and Round Dance Society for the period 01 Jan 201X to 31 December 201X.

The membership card serial numbers for 201X issued:

The Canadian Square & Round Dance Society was formed in 1978 to promote square and round dancing in Canada, it is governed by a Board of Directors elected at the annual meetings. (Consult the CSRDS web site)

The insurance policy purchased by the Society for its members, and summarized on the reverse of this Certificate, places certain obligations on those insured in case of an accident or incident. Please familiarize yourself with the procedures given on the reverse side of this Certificate of Membership should such an event occur.

Sign-in procedures are required for dance functions effective 01 January, 201X. The insurance company does not require any record of attendance at functions, but it is in the *Members* best interest to keep a record in the event of an accident. It is the recommendation of the CSRDS Board of Directors that all Clubs, Associations, Federations and Canadian National Conventions use whatever method they wish to record attendance, but some record should be kept. (Revised 01 Jan 2009)

Questions regarding the work of the Society should be sent to the Society Secretary or Director for the Province concerned. Names and addresses can be found on the website.

Questions regarding insurance coverage should be sent to the Insuring Agent (See Reverse side) or the Director responsible for Membership. Information is also available on the Society web site at: <http://www.csrds.ca>

**Stephanie Charters & Mathieu Laporte
Directors Membership. email : smlapdance@gmail.com
Revised 19 September 2011**

STATEMENT OF INSURANCE COVERAGE (Effective Jan 1, 200X)**Insuring Agent**

Aon Reed Stenhouse Inc.

Susan Fedyck

Suite 1000

2103 - 11th Avenue

Regina, SK S4P 3Z8

Ph: (306) 569-6715

FAX: (306) 359-0387 e-mail: susan.fedyck@aon.ca

Name of Insured: Canadian Square and Round Dance Society, A/O Member Provincial, Territorial, Regional Federations, A/O Member Associations and other organizations, A/O Member Clubs, A/O Member dancers, Callers, Leaders

Insuring Company: AVIVA Insurance Company of Canada

Policy Number: AVIVA; AS2569

Allianz: AON1788

Effective Term: 1st January, 200X to 31st December, 200X inclusive

Coverage:

Commercial General Liability \$5,000,000

Directors & Officers Liability \$2,000,000 subject to \$500 deductible

* Tenants Legal Liability \$ 250,000 Property Damage subject to \$500 deductible

* Does not cover normal wear and tear of floor, only sudden or accidental damage. **“Sudden and Accidental refers to an action which occurs without prior knowledge of that action occurring”** (dragging of chairs, tables, furniture, etc over floors is not sudden or accidental.) Cloggers should inform the owners of the facility where they are dancing that they are wearing taps on their shoes, particularly if it is a wooden floor. **Please read the CSRDS website on floor care.**

This Statement of Insurance coverage is furnished for information only; further information will be available from the Society's web page <http://www.csrds.ca>. The actual policy is held by the Society Director responsible for Membership. Copies will be available on the web or from your CSRDS representative shortly.

If you are in need of a “Certificate of Insurance”, please contact:

Susan Fedyck @ Aon Reed Stenhouse Inc. (above) after January 1, 200X

In the Event of an Incident, have the incident reported directly to Susan Fedyck (above) and a copy to the Director responsible for Membership (T.M. Mallard, #202 - 405 Nelson Rd., Saskatoon SK, S7S 1P9 (306)472-0899 e-mail: sqduck@aol.com)

Details required include:

- 1 Time of the incident.
2. Location or place of incident.
3. Description of incident with all relevant details.
4. Name(s) and Address(es) of any injured person(s).
5. Names and addresses of all witnesses.

(Make notes of the incident to assist in any resulting inquiry. Try to answer “who”, “where”, “what”, “when”, and “how”.)

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THE ONTARIO SQUARE AND ROUND DANCE FEDERATION INC.

Friendship Set to Music

Issue Date: May 4, 2012

Newsletter

Page AG-N 1 of 1 pages

Administrative Guideline Ontario Square & Round Dance Federation Newsletter

General

1. In order to provide dance activity information to all areas of the Province, the Federation shall publish at least two Newsletters each year. The Board responsibility for the Newsletter shall be with the Chair of the Public Relations Committee.
2. With the approval of the Board, the Chair of the Public Relations Committee shall appoint an Editor who shall have the responsibility for the content and publishing the Newsletters. The Editor shall take into consideration all suggestions provided by members of the Board. Removal of an Editor requires a motion of the Board, duly moved, seconded, and carried.
3. The Editor shall operate within this Guideline without interference from individual Board members. However, a motion of the Board duly moved, seconded, and carried shall be binding upon the Editor. The Chair of the Public Relations Committee should provide input to the Editor on the content of the newsletter. It is desirable that the newsletter be reviewed by the Public Relations Committee before it is finalized and distributed.
4. The Editor shall prepare an annual budget and submit it, through the Public Relations Committee, for approval.

Publication Format

5. Normally, the publication would be on letter-size 8-1/2"x11" portrait. However, with the advent of electronic mail and other electronic communication devices, size is less regimented and is fairly well at the discretion of the editor. The Newsletter shall be distributed to the publications in a suitable format to meet their publication method.

Publication Dates

6. Normally the Newsletter shall be published on or about the August/September and February/March each year. The dates coincide with the Trillium Award announcements, and the results of the Federation elections and membership information in September.

Newsletter Distribution

7. *The Newsletter shall be sent by electronic mail to Clubs outside the EOSARDA, T&D, and SWOSDA Associations. Copies of the Newsletter shall be provided to the Editors of Square Time, Topics, and the Bugle to cover EOSARDA, T&D, and SWOSDA, respectively. A copy of the Newsletter shall be provided to the Federation web master and to other Canadian square and round dance publications for mutual exchange. Copies of the Newsletters shall be sent to each of the current Federation Board members.*



THE ONTARIO SQUARE AND ROUND DANCE FEDERATION INC.

Friendship Set to Music

Issue Date: August 2001

Replacement Delegates

Page AG-R 1 of 1

Administrative Guidelines

Replacement Delegates to Federation Meetings

1. The Ontario Federation Board has very few members and even the absence of one member decreases its ability to do business. There are no overlapping tasks and each Director has a specific responsibility. With only four meetings per year, even missing one meeting delays action on a subject area.
2. As defined in the By-Law 4(c), Board members are expected to attend all meetings, participate in discussions, and take part in decision making. This Guideline expands By-Law 4(c) for any Board member who is unable to attend a meeting.

Board Member

3. Except in emergencies, when it becomes apparent that a Board member cannot attend a Board meeting, he or she should at the earliest time, at least:
 - a) Notify the sponsoring Association and request or suggest a replacement;
 - b) Notify the Secretary that he or she will not be attending; and,
 - c) Notify the hosting couple that he or she will not be attending.
4. The Board member who cannot attend should ensure that any needed report is prepared and *circulated to all Board members* before the meeting, or that copies are given to the replacement delegate.

Suggestions for Sponsoring Associations

5. Finding a replacement Director is the responsibility of the sponsoring Association with consultation from the Federation Board member who cannot attend the meeting. From the Federation viewpoint, the replacement should be someone with sufficient background to make a contribution to the pending work of the Board. If possible, a replacement should be chosen who already has Board experience and some knowledge of the subjects under discussion. Possible sources are an immediate past delegate, or a former Federation president.
6. The Association Secretary or other designated Association member should notify the Federation Secretary of the name of the replacement. If time permits, a letter should be sent. If not, a phone call (*or e-mail*) should be made. If an Association Secretary or other designated Association member is not sure of the place and time of the next Federation Board meeting, he or she should request the information from the Federation's Secretary.

Federation Action

7. When the Federation Secretary is notified of a replacement, he or she should call the hosting couple to make sure they are aware of who is coming. As well, the Federation Secretary should ascertain if the replacement is aware of the time and place of the next Board meeting.
8. At the meeting, the President shall introduce the replacement(s) and ask for a motion of welcome to extend the powers of a voting delegate to the replacement(s)

Note: Changes from previous version are indicated in italics

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THE ONTARIO SQUARE AND ROUND DANCE FEDERATION INC.

Friendship Set to Music

Issue Date: May 5, 2012

Trillium Award

AG-T 1 of 7 pages

Ontario Trillium Award Guidelines

Purpose

1. The original **Trillium Merit Award** was established in 1985 to officially recognize excellence, dedication and outstanding achievement in the advancement of the Square and Round Dance activity by dancers, Callers, and Leaders, of the Province of Ontario. The first presentations were made in the Spring of 1985. Two classes of the award are now authorized, the **Trillium Merit Award** and the **Trillium Long Service Award**. The **Trillium Merit Award** recognizes those who have made an outstanding contribution beyond the scope of their normal regular activities. The **Trillium Long Service Award** recognizes those whose who have devoted many years of faithful service to the dance community in Ontario.

Not more than twelve Award winners will be selected in any one-year, of which not more than six shall be for Merit. The decisions of the Board are final.

Nomination

2. Any individual, Club, or Association may originate nominations. The maximum number of nominations that may be submitted to the Federation per year is two per category per Association, and one per Club where there is no Association. These nominations are received by the Federation, following review and approval by the Regional Association (or Club where there is no Association). No nomination should be forwarded to the Federation unless it has the support of the executive of the Regional Association (or Club where there is no Association). Guidelines and nomination forms are available from the Federation or Federation web-site <http://www.squaredance.on.ca.html>. The deadline for receipt of Nomination Forms by the Federation's Secretary is April 30th. This provides the time required to photocopy and mail the submissions to the Directors for their review before the summer meeting (usually August).

Eligibility

3. Nominees for the **Trillium Merit Award** must have been active in Square and Round Dancing for not less than five years. Nominees may be current or no-longer-active Dancers, Callers, or Leaders, who qualify according to the criteria defined under 1. Purpose, above. Nominations for posthumous awards will also be accepted, according to the same criteria.

4. Nominees whose contributions reflect a continuing dedication to the normal activities of their classification (i.e. dancer or Caller/Leader) for a period of *at least* 25 years shall receive the **Trillium Long Service Award**. One or more periods of time may be added to meet the requirement for the **Trillium Long Service Award**.

5. Nominees, who are current dancers, Callers, or Leaders must be active members of the Canadian Square and Round Dance Society. Unsuccessful nominees can be nominated again in subsequent years if additional supporting documentation is provided for consideration.

Criteria to be included in Supporting Documentation

6. When evaluating a nomination, the Board will consider activities such as:
 - a) Executive Member of Club/Association/Federation/Society or representative on such executive committees - dates and positions held;
 - b) Involvement in other dance-related committees;
 - c) Caller's Clinic involvement - positions, dates, number of years, etc.;
 - e) Participation at Frosh Dances - other recruiting involvement;
 - f) Volunteer participant in dance demonstrations - locations such as hospitals, malls, nursing homes;
 - g) Actively promoting the Square and Round Dance movement - public demonstrations, recruiting of new dancers, acting as angels, developing innovating new methods of advertising and recruiting;
 - h) Family history - significant personal activities, when they started dancing, activities in other Clubs, churches, organizations, children, hobbies;
 - i) Any other factors illustrating the nominee participated noticeably different than other dancers/Callers.

Awards

7. The physical awards, provided by the Federation are:

Trillium Merit Award

- a) Scroll of quality parchment paper, with decorative art work, inscribed "Achievement Award for Outstanding Contribution and Dedication to Square and Round Dancing" and including the date and the name(s) of the recipients. The scroll is signed by the President of the Federation and of the Nominating Association (or Club);
- b) Wooden wall plaque with the insignia of the Federation (white trillium on a blue background) inscribed as above; and
- c) Gentleman's bolo tie clip/scarf slide and/or lady's pin, bearing the insignia of the Federation.

Trillium Long Service Award *(Include Plaque - Rev Oct 27,2019)*

- a) Scroll of quality parchment paper, with decorative artwork, inscribed "Award for Long Service and Dedication to Square and Round Dancing" and including the date and name(s) of recipients. The scroll is signed by the Presidents of the Federation and of the nominating Association (or Club); and
- b) Wooden wall plaque with the insignia of the Federation (white trillium on a blue background) inscribed as above; and
- c) Gentleman's bolo tie clip/scarf slide and/or lady's pin, bearing the insignia of the Federation

Presentation

8. The place, time and event for the presentation of an Award is decided by the Executive of the Regional Association (or Club) to which the recipient belongs. Whenever possible, award presentation are made by one of the regional delegates to the Federation's Board of Directors.

When there are no such delegates available, the Federation appoints a couple to present it. The Secretary sends the physical awards directly to the appropriate Federation delegates prior to the date of the presentation ceremony.

TRILLIUM MERIT AWARD - NOMINATION

DATE: _____

To: Secretary of Federation,

We hereby nominate the following couple or person as a candidate for the Trillium Award.

Name(s): _____

Activity _____
(Dancer, Caller, Leader)Address _____
Street and No., Apt. No., P.O. Box No. or RR No._____
City/Town Postal Code Phone No. and Area CodeClub Affiliation _____
Name of Club(s) and LocationNominator:
Name _____Address _____
Street and No., Apt. No., P.O. Box No. or RR No.

City/Town Postal Code Phone No. and Area CodeNomination Supported by:Name of Regional Association, or
Club, where there is no Association _____Signed by: _____
Association President or Club President, where there is no Association

DATE: _____

This application and the supporting profile must be received by the Federation Secretary
before April 30th*Application is being made for:**Trillium Merit Award _____ or Trillium Long Service Award _____****Note: Please choose the one award being applied for.***

TRILLIUM MERIT AWARD

SUPPORTING PROFILE

Name of Nominee(s): _____

Supported by: _____
Name of Association, or Club where there is no Association

A. Brief background information of dancing activity, with length of time dancing.

B. Accomplishments - Personal Involvements - (Local, Regional, Provincial, National, International).

Administrative Guidelines Ontario Trillium Award Board Procedures

1. This guideline details the internal administration of the Ontario Trillium Awards by the Board. The Ontario Trillium Award Guidelines details the handling of nominations for the Award. The guideline also establishes the maximum number of nominations that may be received and made each year. Not more than **twelve** Awards winners will be selected in any one year, **of which not more than six shall be for Merit**. The decisions of the Board are final.

After Receipt of Nominations

2. Nominations for the Award are received by the Secretary from the Associations, or from Clubs in areas without Associations. The Secretary should review the nominations to ensure they are technically correct. If they are not correct, the Secretary should try to have the corrections made prior to the approving Board meeting in August. Prior to the meeting, the Secretary shall forward a copy of each nomination to the members of the Board. Board members should study each nomination prior to the Board meeting and come to the meeting prepared to vote. The Secretary shall ensure that the Awards are on the Agenda for the summer meeting.

Selection

3. The annual selection of Ontario Trillium Award Recipients is made by the Board of Directors of the Federation at the August meeting. In the process of selecting the recipients, the Board will decide whether the nominee will receive the **Trillium Merit Award** or the **Trillium Long Service Award**. Nominees whose accomplishments reflect extraordinary contributions of an innovative or improving nature shall receive the **Trillium Merit Award**. Each nominee should be judged in the context of his/her Association (or Clubs).

Criteria to be included in Supporting Documentation

4. When evaluating a nomination, the Board will consider activities such as listed in Section 6 AG-T2 (page 44)

Voting Procedures

5. Each Director may speak for or against any nominee, based on their personal knowledge, however, the feelings of the Regional Association must be declared by their delegate, if it should be different from their own. The selection will be made by secret ballot, after the discussion is complete and a motion to Approve has been made. A simple majority is required.

Board Handling of Nominations

6. When the Ontario Trillium Award agenda item is reached, the President of the Board meeting shall outline the procedure to be used as follows:
 - a) Only Board members shall be present for the discussion and voting. Visitors to the meeting at which the Award selection is made will be asked to leave for the duration of the Awards discussion and voting part of the meeting;
 - b. Each nomination shall be dealt with separately, usually in the same order as they were sent out by the Secretary;

- c. The President, with the consent of the Board, shall choose two scrutinizers;
- d. The President shall announce the prospective award winner(s) and request a motion of acceptance. Members from the home area of the nominee should normally move and second the motion of acceptance, however any member may do so;
- e. A discussion may then take place adding to any information contained in the nomination forms;
- f. After the discussion has finished, the scrutinisers shall pass out a blank piece of paper to each member. The President shall vote at the same time as the rest of the Board. Each voting member shall mark either "Yes" or "No" on the ballot, and if "Yes" then mark either "Merit" or "Long Service" on the ballot, then fold the ballot so the writing cannot be seen. After voting is completed, the scrutinisers shall collect and tally the ballots then pass the results to the President. The President shall declare the motion either carried or lost, and, if carried, the level of the Award. The procedure shall be repeated until all the nominations have been processed; and
- g. After voting is complete, the Secretary shall record in the minutes the successful results. No mention of unsuccessful candidates shall be made. Actual vote counts shall not be recorded. Board members shall not report any discussions or actual vote counts outside the Board meeting. At the completion of the voting, the information about the successful candidates is unclassified.

Procedure After the Approving Meeting

- 7. As soon as practical after the meeting, the President shall write a suitable personal letter to each successful Award recipient, with an information copy to the nominator, and to the Association or Club President and the Secretary expressing appreciation for their participation. If needed, the President may request copies of previous letters from the Secretary.
- 8. As soon as practical after the meeting, the Secretary shall order the physical awards as described in the ONTARIO TRILLIUM AWARD GUIDELINES. The Secretary shall also write officially to the Associations;
 - a. Informing them of the successful results;
 - b. Advising them that an awarding ceremony should be planned to give as much exposure as possible to the successful recipients, and that the Federation delegate from the area should normally be included in the award ceremony; and
 - c. No mention of the unsuccessful candidates shall be made.
- 9. The Chair of the Public Relations Committee shall prepare a press release with a lead-in about the Ontario Trillium Award and about one paragraph for each successful Award recipient. As a minimum, it should be sent to Ontario square dance publications, CDN, and American Squaredance. It is usual to include the Awards in the Fall Ontario Federation Newsletter.
- 10. If an Association or Club desires, they may seek a private comment from the President as to why some nominee was unsuccessful. The President should provide as much information as possible without compromising the secret ballot results. Past history indicates that poor substantiation is the major cause of not approving a nomination.

Recording

11. A file has been set up to document the presentation of the Awards. It includes the profiles of the recipients, names and addresses of the Regional Association (or Club) to which the recipients belong. The Award file is the responsibility of the Federation Secretary for entries and safe-keeping. It is passed on to succeeding Secretaries.

Confidentiality

12. In order to make the award process as positive as possible and to reduce the possibility of generating negative feelings, no information relating to the discussion on voting will be disseminated beyond the Directors of the Federation. It is recommended that the Regional Associations follow a similar practice.

Revenues

13. Funding for the ONTARIO TRILLIUM AWARDS is provided by the Ontario Square and Round Dance Federation

REVISION #16 involved the rewriting of these guidelines to illustrate the typical criteria to be considered by the Board in evaluating nominations, and to eliminate duplication in previous sections.

Revision #17 changed the application filing date to April 30, for consideration at the August Board meeting.

Approved by the Board of Directors Meeting, November 15, 2008

Prior approval by the Annual General Meeting, May 8, 2008

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Letters Patent Constitution & Articles and By-Laws

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THE ONTARIO SQUARE AND ROUND DANCE FEDERATION INC.

Friendship Set to Music

Issue Date May 5, 2012

By-Laws

Page LCB-B 1 of 5 pages

Letters Patent, Constitution & Articles, and By-Laws

1. Membership

Membership is open to area Associations, area Association Clubs, non-association Clubs, and individuals, including but not limited to square dancing, round dancing, clogging, traditional dancing, line dancing, country/western dancing, and contra dancing, that support the aims and objectives of the Ontario Square & Round Dance Federation.

Individuals and organizations in an area with an area Association are encouraged to effect their membership through their area Association.

The full rights and privileges of a member of the Federation become effective when the membership fee is paid.

2. Membership Fees

Membership fees shall be set by the Board of Directors at the Annual General Membership Meeting, at a level depending on the Federation's projected financial needs and the deemed value of the services to its members. The fee may be per organization or per individual.

3. Representation

For the purposes of representation, the Province of Ontario comprises the following areas:

- a) The Eastern Ontario Square & Round Dance Association Area (EOSARDA);
- b) The Toronto & District Square & Round Dance Association Area (T&D);
- c) The Square and Round Dancers of Southwestern Ontario Association Area (SWOSDA);
- d) The Lakehead & District Square & Round Dance Association Area; and
- e) All remaining Areas without Associations.

4. Board of Directors: Composition, Terms of Office and Duties

a) Composition

The Board shall be comprised of a maximum of four members from each of the four Association representation areas, plus up to four Board members-at-large to represent all remaining areas without Associations.

The Board members-at-large may be elected at the General Membership Meeting, and may come from any of the four representation areas, although preference shall be given to persons residing in areas without Associations.

The member Associations should advise the Federation of their *nominees* to the Board of Directors before the end of July each year. Officers shall be elected annually at the first meeting following the General Membership Meeting by the Board of Directors to the following positions:

- i) President
- ii) Vice President
- iii) Secretary
- iv) Treasurer
- v) *any other position at the discretion of the Board.*

b) Terms of Office

The term of office for Directors appointed by the Association shall normally be for a two year period commencing August 1st and ending July 31st. In case of a vacancy arising, the member Association shall *nominate the replacement* Director.

The term of office for Directors-at-large shall be one year.

c) Duties

The **President** shall exercise all the powers and perform all the duties of the Chair of the Board and act as Chair of all meetings of the members of the Federation. The President shall also be responsible for the general management and supervision of the affairs and operations of the Federation. The President, with the Secretary or other Director designated by the Board for the purpose, shall sign all amendments to the by-laws. The President may authorize the payment of individual items to a value not exceeding \$100.00.

The **Vice President** shall exercise the duties and powers of the President during his/her absence or inability to act, or upon his request, as may any other Director if so appointed for the purpose and period.

The **Secretary** shall give all notices required to be given of meetings or other purposes, to Directors and members of the Federation. The Secretary shall attend all meetings of the Board and General Membership Meetings and record all facts and minutes of all proceedings in the books kept for this purpose. The Secretary shall be the custodian of all records, including the Trillium Award records, papers, correspondence, contracts and other documents belonging to the Federation, which shall be delivered when authorized by a resolution of the Board of Directors to do so, and to such person or persons named in the resolution. The Secretary shall perform such other duties, from time to time, as will be required by the Board. During the absence or inability of the Secretary, the duties and powers may be exercised by the Vice President or such other Director of the Board so appointed for the purpose and period.

The **Treasurer** shall have care and custody of the funds and security of the Federation and shall deposit the same in the name of the Federation in such financial institutions as designated by the Board of Directors. The Treasurer shall keep full and accurate records of all receipts and disbursements of the Federation in proper books of account.

The Treasurer shall disburse funds under direction of the Board, taking proper voucher/receipts and shall render to the Board of Directors at the regular meetings or when required, an account of all transactions as Treasurer and of the financial position of the Federation. The Treasurer shall perform such other duties as required from time to time by the Board of Directors.

The **ex officio Directors** of the Federation, who shall have all the rights and powers and obligations of a regular Director, will include:

- i) the immediate Past President of the Federation, who will remain in office until replaced.
- ii) the Director of the Canadian Square & Round Dance Society from Ontario.

The **Directors** shall attend all meetings and are expected to debate and vote upon all issues. In cases where attendance is not possible, any Director may submit a written brief on any agenda item for consideration by the Board, or may arrange for an alternative delegate. This alternate delegate representation is to be confirmed in writing.

Special Committees will normally be formed by appointment of one or more Directors who may, upon approval of the Board, obtain such additional assistance from outside sources as is necessary for the purpose of the committee. All Special Committees shall be responsible to the Board and all minutes and business transactions must be reported to the President. Special Committees are expected to serve for the duration of the time required to perform the task or function.

Standing Committees will be set up by a resolution of the Board. The Board shall also appoint Directors to be Chair of these Committees, who will be required to recruit and staff their committees as required. The purpose of Standing Committees is to further the aims and objectives of the Federation and to assist the Board with implementation of their policies and their programmes of activities.

Such Committees may be identified as:

- i) Public Relations and Promotion
- ii) Finance & Membership
- iii) Professional Development
- iv) Legal Information

A definition of 'Scope and Responsibility' of each committee shall be developed/ reviewed by the Committee Chair and approved by the Board.

5. **Expenditures**

Any non-budgeted expenditures in excess of \$100.00 must receive the approval of the Board of Directors. In instances where a special or standing committee is formed, the Directors on that committee shall be empowered to expend funds that have been authorized by the Board and included in a committee budget established for the specific requirements of that committee.

6. Signing Authority

Cheques and legal documents may be signed by any two of the President, Vice President and Treasurer.

7. Proceeds

The proceeds of any Federation function or project shall be turned over to the Treasurer with a statement of receipts and expenditures within ninety days of the end of the function or project.

8. Protection and Indemnity of Directors

No Director or Officer shall be held responsible for any loss to the Federation, however incurred, unless the same happens through dishonesty. Every Director or Officer shall be indemnified against any claim against him, unless such claim should be as a result of willful neglect or default.

9. Auditor

The Treasurer shall be responsible for an official auditing of the Federation financial records before the annual general meeting.

10. General Membership Meeting

The Federation shall hold at least one General Membership Meeting per year. The business of this meeting shall include:

- i) President's Report
 - ii) Treasurer's Report
 - iii) Auditor's report
 - iv) Setting the Membership Fee
 - v) Revisions and amendments to the Constitution and By-laws as required, proper notification having been given.
 - vi) Appointment of Members at Large - proper notification having been given
- The General Membership Meeting will normally be held within the period May 1st to July 31st.

11. Directors' Meetings

In addition to the General Membership Meeting, the President will normally call three or more Directors' meetings per year, at times and places to be decided by general agreement of the Directors. Every attempt will be made to rotate the location of the meetings throughout the areas of Ontario, keeping in mind the availability of delegates and the costs and difficulties of extensive travel.

12. Trillium Award

The Federation shall administer a Trillium Award Programme to recognize outstanding contributors to the square and round dance movement in Ontario.

13. Winding up or Dissolution

In the case of 'winding up' or dissolution of the Federation, the disposal of the assets of the Federation to like minded organizations will be determined by the existing Board of Directors at that time.

14. Rules of Order

The Rules of Order shall be as appended.

NOTE: Changes made in May 2012 are shown in italics

Approved at the General Membership Meeting - May 7, 1993

Amended at General Membership Meeting - May 4, 2012

President

Secretary

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THE ONTARIO SQUARE AND ROUND DANCE FEDERATION INC.

Friendship Set to Music

Issue Date: May 4, 2012

Constitution

Page LCB-C 1 of 3 pages

Constitution

Article 1: Name:

The name of this organization shall be "The Ontario Square and Round Dance Federation Inc." The address of the Federation shall be that of the Secretary.

Article 2: Aims and Objectives

The Federation shall support, without duplicating in any way, the role of the Area Associations.

The aims and objectives of the Federation are:

- a) To provide a forum at the Provincial level, for the discussion of, and interchange of, information concerning all matters pertaining to the square and round dance movement and to facilitate the flow of information within the movement.
- b) To encourage the growth and advancement of the square and round dance movement within Ontario. This will be achieved by:
 - i) Providing assistance in the organization, development and promotion of Clubs and Associations when requested;
 - ii) Encouraging the development of square and round dance callers, cuers and leaders;
 - iii) Assisting in the co-ordination of major square and round dance functions throughout Ontario, when requested;
 - iv) Encouraging and facilitating the production and standardization of relevant statistics and directories;
 - v) Administering the Trillium Award Programme to recognize outstanding contributions by Ontario square and round dancers, and callers, cuers and leaders;
 - vi) Encouraging and promoting the square and round dance movement and acting to strengthen it's overall growth.

- c) To represent Ontario square and round dancers and their organizations:
 - i) To government departments and their agencies within the Province;
 - ii) To other provincial and territorial Federations;
 - iii) To the Canadian Square and Round Dance Society;
 - iv) To others outside the province.
- d) To ensure that appropriate liability protection insurance is available for square and round dancers, callers, cuers, leaders and their organizations in Ontario and to facilitate the implementation thereof.

Article 3: Membership

Membership in the Federation is open to all organizations and individuals in Ontario, with aims and objectives similar to those of the Federation, upon payment of a yearly membership fee. The membership fee shall be determined by the Board of Directors.

Article 4: Directors and Officers

- a) **Board of Directors.** The purpose of the Board of Directors is to represent the membership in interpreting and carrying out the aims and objectives of the Federation. The Board of Directors shall be responsible for conducting the affairs of the Federation. A Director may serve for more than one term either as a Director or in any other office, if so elected. Directors filling any vacated office, do so for the remainder of its current term.
- b) **Officers.** The officers of the Federation shall be elected by the Board of Directors from among themselves and shall be President, Vice President, Secretary and Treasurer, and each shall be appointed as provided for in the By-laws. The President shall have chair responsibility at all meetings of the Board.

Article 5: Meetings

- a) **Board of Directors Meetings:** The meetings shall be held as provided for in the By-laws. A minimum of six or twenty percent of the Directors, whichever is the greater, will form a quorum provided that the majority of the Associations are represented. A simple majority of the Directors present will determine all issues.

b) **General Membership Meetings:** The meetings shall be held as provided for in the By-laws. At least one meeting of the Membership and the Directors shall be held annually. Special Membership meetings may be called by the Board of Directors or by petition of ten or more members. The reason for any special meeting shall be stated in the notice of petition.

A quorum shall be a minimum of twelve voting delegates or twenty percent of the voting delegates, whichever is greater, provided that the majority of the Associations are represented.

Each Association shall have eight votes, comprising those of the Directors and four designated voting delegates. A simple majority vote shall determine all issues.

Article 6: Fiscal Year (revised May 11, 2001)

The fiscal year of the Federation shall be from April 1 to March 31 each year.

Article 7: Committees and Delegates (revised May 11, 2001)

Special committees may be formed by the Board of Directors and composed of members of the Board and/or members of the Federation. Such committees shall be responsible to the Board. The Federation President shall be an ex officio member of all committees.

Delegates to represent the Federation on matters of business concerning the Federation shall be appointed by the Board of Directors.

Article 8: Constitution

This Constitution may be amended at a General Membership Meeting. Amendments to this Constitution shall require the approval of a two-third majority of voting delegates present and voting at a General Membership Meeting. Notice of motion to the membership shall be provided at least sixty days prior to the General Membership Meeting at which the amendment is to be considered.

NOTE:

Approved at the General Membership Meeting - May 7, 1993

Amended at the General Membership Meeting May 11, 2001, *and restored to original at the General Membership Meeting May 4, 2012.*

President

Secretary

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THE ONTARIO SQUARE AND ROUND DANCE FEDERATION INC.

Friendship Set to Music

Issue Date: August 2007

Letters Patent

Page LCB 1 of 4 pages

Ministry of Consumer and Commercial Relations

Ontario Corporation Number

Letters Patent

511056

WHEREAS an application has been filed to incorporate a corporation without share capital under the name

THE ONTARIO SQUARE AND ROUND DANCE FEDERATION INC.

AND WHEREAS the Minister of Consumer and Commercial Relations is the member of the Executive Council to whom the administration of The Corporations Act is assigned.

THEREFORE I, by virtue of the aforesaid powers vested in me, do by these Letters Patent issue a charter constituting the applicants named in the application which is attached hereto and which forms part of these Letters Patent, and any other persons who become members of the corporation hereby created, a corporation without share capital in accordance with the provisions of the said Act.

AND IT IS HEREBY ORDAINED AND DECLARED that the Letters Patent shall also contain and be subject to the following terms, conditions and provisions:

(a) The corporation shall be carried on without the purpose of gain for its members and any profits or other accretions to the corporation shall be used in promoting its objects:

(b) The corporation is prohibited from occupying and using a house, room or place as a club which, except for the provisions of paragraphs (a) and (b) of subsection (2) of section 179 of The Criminal Code (Canada), would be a common gaming house within the meaning of "Common gaming house" as appears under subsection (1) of the said section 179; and if it is made to appear to the satisfaction of the minister that the corporation purports so to use a house, room or place, these Letters Patent may be cancelled by and in the discretion of the Lieutenant-Governor;

(c) if it is made to appear to the satisfaction of the Minister that the premises occupied by the corporation are equipped, guarded or otherwise constructed or operated so as to hinder or prevent lawful access to and inspection of such premises by police or fire officers or are

found fitted or provided with any means or contrivance for playing any game of chance or any mixed game of chance and skill, gaming or betting or within any device for concealing, removing or destroying such means or contrivance, these Letters Patent may be cancelled by and in the discretion of the Lieutenant-Governor;

(d) Nothing in these Letters Patent shall be construed as a grant of a licence within the meaning of subsection 2 of section 179 of the Criminal Code (Canada).

SEAL

Given under my hand and seal of office at the City of

Toronto in the said Province of Ontario this 23rd day

Of April

1982 A.D.

Robert G. Elgie, M.D.
Minister

Per

SIGNATURE



THE ONTARIO SQUARE AND ROUND DANCE FEDERATION INC.

Friendship Set to Music

Issue Date: August 2007

Letters Patent

Page LCB 3 of 4 pages

- b. To provide guidance and Leadership in the encouragement and promotion of Square & Round Dancing and act to strengthen and assist in the overall growth of the movement.
- c. To provide services and a means of communication for the mutual benefit of all Federation members in such matters as Education, Public Awareness, Physical Fitness, Leadership, Social & Cultural Development.
- d. To provide an organized and concerted front in dealings with government and related agencies who possess powers and authority that could be utilized to benefit Modern Square and Round Dancing.
- e. To promote the increasing use of the talents of Ontario Callers and Leaders by the encouragement of travel and exchange within the province.
- f. To provide a link with Federations in other provinces and territories in Canada by means of official representation to the Canadian Square and Round Dance Society.
- g. To assist in the coordination of functions throughout the province in such matters as conventions, festivals, etc. and to assist in the provision of news, ideas, advice and topical information in Ontario.
- h. To coordinate and organize any functions throughout the Province of Ontario that are conducted under the auspices of the Ontario Square and Round Dance Federation.

4. THE HEAD OFFICE OF THE CORPORATION IS TO BE SITUATE CITY OF
KINGSTON IN THE COUNTY OF FRONTENAC IN THE
PROVINCE OF ONTARIO.

5. THAT NAMES OF THE APPLICANTS WHO ARE TO BE THE FIRST
DIRECTORS OF THE CORPORATION ARE:
EDWIN SEWELL CHRISTIAN, 63 FOREST ST. AYLMER, ONT N5H 1A5
EDWARD JOHN McQUAID, 36 LAMBERT ST. BELLEVILLE ONT. K8N 4K6
FREDERICK JOHN PARCHER, 168 AVENUE ROAD, KINGSTON ONT K7M
1C5

DATED THIS 6TH DAY OF APRIL 1982

SIGNATURES OF WITNESS

IVY HUTCHINSON
IVY HUTCHINSON
IVY HUTCHINSON
IVY HUTCHINSON
IVY HUTCHINSON
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IVY HUTCHINSON
IVY HUTCHINSON

SIGNATURES OF APPLICANTS

JEAN LUELLA CHRISTIAN
EDWIN SEWELL CHRISTIAN
FREDA MERLE PEARSALL
EDWARD JOHN McQUAID
GAIL LENNISE McQUAID
FREDERICK J PARCHER
KATHLEEN M PARCHER
ROBIN W GILBERT
LORAIN GILBERT
R. J. HUTCHINSON

SECTION 9 OF THE ACT IS AS FOLLOWS:

9. ON AN APPLICATION FOR LETTERS PATENT, SUPPLEMENTARY LETTERS PATENT OF ANY ORDER, THE LIEUTENANT GOVERNOR MAY GIVE THE CORPORATION A NAME DIFFERENT FROM ITS PROPOSED OR EXISTING NAME, MAY VARY THE OBJECTS OR OTHER PROVISIONS OF THE APPLICATION AND MAY IMPOSE SUCH CONDITIONS AS HE DEEMS PROPER.

SUBSECTION 1 OF SECTION 127 OF THE ACT IS AS FOLLOWS:

127 (1) A CORPORATION, EXCEPT A CORPORATION TO WHICH PART V OR VI APPLIES, SHALL BE CARRIED ON WITHOUT THE PURPOSE OF GAIN FOR ITS MEMBERS AND ANY PROFITS OR OTHER ACCRETIONS TO THE CORPORATION SHALL BE USED IN PROMOTING ITS OBJECTS AND THE LETTERS PATENT SHALL SO PROVIDE , AND WHERE A COMPANY IS CONVERTED INTO A CORPORATION, THE SUPPLEMENTARY LETTERS PATENT SHALL SO PROVIDE.

Committee Terms of Reference

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THE ONTARIO SQUARE AND ROUND DANCE FEDERATION INC.

Friendship Set to Music

Issue Date: May 5, 2012

Finance & Membership

Page CTR-F 1 of 1 page

Committee Terms of Reference Finance and Membership Committee

1. The Finance and Membership Committee shall be chaired by the Treasurer and shall consist of one or more members appointed by the Board.

Scope:

2. The Committee shall receive and spend all monies, and co-ordinate the administration of all Federation funds, investments, and other financial matters.

3. The Committee shall administer membership programs for the Federation.

Responsibilities:

4. The Committee shall:

- present an audited financial report for the last financial year to the Annual General Meeting in May;
- prepare and present a budget for the coming year at the Annual General Meeting in May. The Budget should cover the coming year, broken down by quarters and highlighting anticipated revenues and disbursements;
- arrange for an auditor as per By-Law 9.
- arrange for suitable insurance for the Federation and its members;
- present a motion at the Annual General Meeting in May recommending the membership fee for the coming year;
- publish an Ontario S&RD Directory annually;
- prepare an annual Finance and Membership Committee budget;
- provide membership information for the Federation Newsletter; and,
- perform other duties as assigned by the Board.

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THE ONTARIO SQUARE AND ROUND DANCE FEDERATION INC.

Friendship Set to Music

Issue Date: May 5, 2012

Legal Information

Page CTR-L 1 of 1 page

Terms of Reference Legal Information Committee

1. The Legal Information Committee shall be chaired by a member elected by the Board. The Committee shall consist of one or more members as appointed by the Board.

Scope:

2. Square and round dance activities frequently require attention to various legal responsibilities. In a volunteer organization such as the square and round dance movement, it is hard to keep abreast of current developments in the many areas that are encountered. To assist dancers, Clubs, and Associations, the Ontario Federation prepares and distributes Information Sheets based on actual experience. The Information Sheets provide the up-to-date information on the selected topics as they relate to the square and round dance movement.

Responsibilities:

3. Under the general direction of the Board, the Committee shall:
recommend subjects of interest to the Board for Information Sheets;

prepare or have prepared Information Sheets on subjects approved by the Board;

review current Information Sheets to ensure they are accurate and up-to-date;

coordinate with the PR Committee to ensure details of information available is made available to the movement; and,

prepare an annual Legal Information Committee budget for the Federation *provide an on-going review of the Guidelines, recommending amendments to reflect current Board policies and decisions.*

Note: Changes from previous version are indicated in italics

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THE ONTARIO SQUARE AND ROUND DANCE FEDERATION INC.

Friendship Set to Music

Issue Date: May 5, 2012

Professional Development Committee

CTR-PD1 of 1 page

Committee Terms of Reference Professional Development Committee

1. The Professional Development Committee shall be chaired by a member elected by the Board, and shall consist of at least one or more *people* selected by the Chairperson, from the local area, *if possible*, to assist in the evaluation of applications.

Scope:

2. One of the objectives of the Ontario Federation is to promote the development of callers/cuers/leaders in Ontario. The Professional Development Committee is the prime focus of this objective on the Board. The Committee is to encourage and support the work of area Associations in the development of Callers/Cuers/Leaders within the Province. The maximum amount available is budgeted at the beginning of the Federation's fiscal year, April 1.

Responsibilities:

3. Under the general direction of the Board, the Committee shall:

- administer the Bursary Program, following guidelines established by the Board, to encourage Clubs, Associations, dancers, callers, cuers, and leaders to hold and attend schools and clinics within the Province;
- create as much interest as possible in Professional Development with the area Associations, Clubs, and caller/cuer/leader groups within the province;
- maintain a list of schools and clinics within Ontario. Ensure that these schools receive a copy of the Bursary Application and Guidelines for both the Ontario Federation and the CSRDS, and that they be requested to give copies to those attending their schools clinics;
- provide information on the time and location of schools and clinics in Ontario to the Ontario Federation Newsletter, area Associations, caller/cuer/leader groups, and any other interested person or individuals; and
- receive, evaluate, and recommend to the Board, the acceptance of the approved number and amount of annual bursaries.

Note: Changes from previous issue are indicated in italics.

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THE ONTARIO SQUARE AND ROUND DANCE FEDERATION INC.

Friendship Set to Music

Issue Date: August 1994

Public Relations and Promotion

Page CTR-PR 1 of 1 pages

Committee Terms of Reference Public Relations and Promotion Committee

1. The Public Relations and Promotion Committee (PR) shall be chaired by a member elected by the Board. The Committee shall consist of one or more members appointed by the Board.

Scope:

2. The PR Committee of the Federation has a prime job of assisting Ontario Associations and Clubs in promoting the movement throughout Ontario. Probably the most useful function of the Committee is to gather up good ideas and promotional material from various sources and distribute them in Ontario. The Committee shall provide information both to the movement and the general public.

3. The Committee shall:

Assist in the organization, development, and promotion of Clubs and Associations, when requested;

Encourage and promote growth of square and round dancing both inside and outside the movement; and,

Represent the Ontario movement regarding publicity and promotion to government, business, and square and round dance organizations outside Ontario.

Responsibilities:

4. Under the general direction of the Board of Directors, the Committee shall:

Shall be responsible for publishing Ontario Federation Newsletters;

Produce for the Federation, or coordinate with other movement organizations, the availability of square and round dance promotion supplies;

Prepare and distribute Federation news releases to Ontario Associations, CDN, American Squaredance, and any other like-minded publications;

Work with the Canadian Society and other Federations regarding promotion programs;

prepare or assist with promotional material for use with the general public and/or news media;

Share through the Federation Newsletter, or other methods, successful ideas from other movement organizations;

Assemble a list and library of information on promotion and recruitment in the movement; and,

Prepare an annual PR budget for the Federation.

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Information Sheets

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THE ONTARIO SQUARE AND ROUND DANCE FEDERATION INC.

Friendship Set to Music

Issue Date: Feb. 7, 2004 **Attracting New Dancers Info Sheet** Page I-AND 1 of 4 pages

Information Sheets **Attracting New Dancers**

Aim

The aim of this Information Sheet is to provide ideas on how to attract new dancers through the traditional means of inviting friends and demo dancing. A list of other publications is provided at the end for those who wish to explore the subject further. For additional information on Marketing and Promotion check the Canadian Square & Round Dance Society web site at <http://www.squaredance.ca> look for 'Publicity / Public Relations' in the left frame. Attracting Through Friends.

Since the very first surveys were done back in the 1960s, the number one way of attracting new dancers to square and round dancing has been through friends. It is how about 80% of new dancers become introduced to the movement. It still is the best and by far the cheapest method. There is nothing like an enthusiastic dancer to sell the movement.

Why do we dance? There are many answers and each one of us has our own main reason. You know your friends best and what would be a reason for them to try dancing. Here are the most frequent reasons given:

1. Exercise. Dancing is good exercise. Traditionally we have used a value of 4 to 6 kilometres for a night of dancing. If you dance for two hours, you know you have been exercising. Square and round dancing are the no stress, no sweat, and no strain way of getting exercise - and in an excellent social setting as well. Like walking, dancing burns almost 80% of the calories of running for the same time period. Furthermore, walking, running, jogging, square dancing, round dancing, clog dancing, or line dancing, a kilometre of movement takes the same amount of energy. And dancers think that dancing is a great deal more fun than other methods.
2. Fun. Dancing is fun. When most people first start to dance, it takes an hour to get the grins off their face. Why is it fun? It is probably the first time in years that they have had to learn completely new things. When they step on the floor for the first time, they all start fresh and learn the calls, cues, or steps to dance. For most adults whose life is routine, it provides the only chance to use their basic brainpower.
3. Relaxing. You can't carry your troubles to the dance floor. You need total concentration to follow the calls, cues, or steps. It teaches you to accept mistakes and failures, and it shows you that every other dancer, no matter how good they are or how long they have been dancing, makes mistakes. You learn to laugh at your mistakes. And it is surprising how life's cares and tribulations seem to sort themselves out after a good night of dancing.
4. Social. Dancing is a social activity. Whether you dance in a square with seven others, or in a circle with your partner, or in a line, there are others with you. In dancing you make new friends, and don't be surprised if your friends grow by a factor of three. Party nights, pot luck suppers, cottage parties, conventions, jamborees, tours, and so on, are all part of the dance movement. All in all, it is one of the best ways to meet new people, because the dance formations make you interface with new people, and the break between dances is a natural lead-in to conversation.

Be positive when you invite your friends. The best way is to pick them up, take them to the dance, and dance with them. Make sure you introduce them to your caller, cuer, or leader. Introduce them as well to other dancers who are there. Make them feel welcome. Set the tone. If you can't take them, make sure

you give them an invitation including the date, time, place, and a map on how to get there. Tell your caller, cuer, or leader to expect them.

Demo Dancing

Demo dancing has been the number two way of attracting new dancers. One problem with our demo dancing is we forget why we are doing the demo. We are there to attract new dancers, not show the public how brilliant we are, or what level we dance at, or how nicely we dress. We are not putting on a performance. We are there to bring in the public and get them dancing. Callers, cuers, and leaders especially have to guard against trying to show off. The KISS (Keep It Simple Stupid) principle should be the norm.

Connections

In Club and Association publications consider the addition of a Column to encourage singles to find partners for dancing. The column might be called: DANCERS LOOKING FOR A PARTNER

Bookmarks

Les Greenwood has suggested clubs/callers/leaders make up bookmarks (5 to a page), and all of their local libraries might be happy to hand them out to their customers. They laminated some of them at a cost of approximately 25 cents each, but for the library they did not do laminating. They could be in full colour with a suitable dance graphic and message, caller/leader's picture, and the event they were advertising. The non laminated bookmarks are reasonable to produce.

Brochures

When developing and designing a brochure to promote the activity and club to new dancers consider using 8 ½ x 14 " paper of heavier material. This size accommodates 4 columns or panels in width and folds for easy insertion in an envelope. The 4th column or panel can form a tear-off portion - one side a pre-addressed format (to the Club) with the reverse side including responses to questions or indicating interest in square dancing; round dancing, etc; their address and phone information; where they received the brochure.

Other Publicity Promotion Suggestions

1. Club or caller could set up "Fri/Sat evenings" basically one night stands. Perhaps called "a fun western night" or something. Write local groups (church/parents without partners/ firefighters/police/photography clubs/badminton group/etc. etc.) and if they want to have a "Supper"△ (spaghetti/corn roast/bake sale etc) as a get-together for their group or a fund raiser. The Club/caller can offer to be the entertainment, but be sure that you tell them that you want them to participate and have fun too. This really works well. Sometimes it takes 2-3 years of repeat affairs but eventually you get some new dancers.
2. Start classes early in the evening, especially if there is more than one Club in the area. Have one that dances 7-9 or 7:30-9:30. How about a "Family" square dance club which would be maybe even only one hour or an hour and a half. This is plenty long enough if there are young people dancing. (Maybe 8-19 years old and up). Also a "Teen club" once or twice a month; perhaps a Sun. afternoon would get some interest for later on.

3. Contact the local Univ. or College about doing a Western party night on a Sat. Also a possibility in connection with the end of Frosh Week. Let them plan it, and if there is alcohol involved, keep them dancing with no breaks (they won't get drunk this way).

4. Set up booths at fairs/farmers markets etc., but always try to have videos so that it holds their attention. Have a free prize draw of 10 free lessons (First prize), 5 free lessons (Second Prize), 2 free lessons (Third Prize) so you can get some names and addresses to send follow-up invitations. You could also have other prizes not related to square dancing, although you might need a permit to sell tickets.

5. Have Club members buy a ticket for one night of dancing to your club's new class, and since they have put out \$\$\$, they will work harder to bring somebody new to class. Example; if someone asked you to go to a free dance night you might try to weasel out of it, but if your friends told you that they had bought tickets for an evening of dancing you would probably not want to hurt their feelings and have them lose their money by not going. You would probably go even if under duress! Believe me, that REALLY works.

It is really important that we let service clubs and small organizations know that we are available for an evening for them to be introduced to square dancing (plus just dancing to other kinds of music if they want that). We have been so busy for years as callers, just calling for square dance clubs that most of us don't do the one night stands any more, and that's where we generate interest in the activity. Otherwise, where are they going to be exposed to it? If doesn't happen at wedding dances, or "Stag and Doe" parties, or family picnics any more, square dancing will become a lost activity.

Other Reference Material

Many Associations have good guides on attracting new dancers. As well, ask around your club to see what other club members have in the way of reference material. Most of these are under \$20, and some are free of charge. Some publications that have been used successfully are:

1 United Square Dancers of America's "USDA News Leadership 1992". This is a collection of articles and advice on club organization and operation. Although the references are mainly for square dancing, it can be used for other parts of the activity as well. Contact Jim & Peggy Segraves, 8913 Seaton Dr, Huntsville, AL 35802 for availability and price.

2. Club Leadership Journal This is now a bi-monthly publication (6 times a year).

Club Leadership Journal 4852 County Rd K, Amherst, WI 54406.

715-824-3245 E-mail: clj@wi-net.com Bernie Coulthurst, Editor

For Clubs considering the development of a marketing and promotion program, a subscription to 'The Club Leadership Journal' would be an extremely valuable resource. Very much a useful tool and one all Clubs should subscribe to.

3. "The Square Dance Club Publicity Book" by Louise L. Bushell. A good basic book with lots of ideas and illustrations. For current price and availability, contact SDC Publicity Book, 287 Mountain Rd, Cheshire, CT 06410.

4. "Club Leadership Manual" from Legacy. An extensive manual on club organization and operation. For price and availability, contact Al & Vera Schreiner, 1100 Revere Dr, Oconomowoc WI 53066 (414) 567-3454.

5. "Five Steps to Better Publicity" by Barbara Florio Graham. This is a very readable general purpose publicity book that can be used for many organizations. For price and availability, contact B.F. Graham, 535 Charles-Desnoyer St, Gatineau, QC J8P 3X4 (819) 663-3206.

E-mail: simon@storm.ca

Canadian Square & Round Dance Society produces many brochures and manuals for use by the movement. For details and pricing, contact the Society Director responsible for Public Relations.

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Issued September 1995

Updated: 2001; 2003, 2012 Amendments are in italics.

THE ONTARIO SQUARE AND ROUND DANCE FEDERATION INC.
Friendship Set to Music

Issue Date: Feb. 7, 2004 Bookmarks For Promotion Information Sheet Page I-BFP 1 of 3

Information Sheets
Bookmarks For Promoting Square/Round Dancing

Business Cards

Preparing and handing out Business cards can also be effective reminders about the activity. You have been visited by a Square Dancer card - see the Canadian Square & Round Dance Society site (<http://www.csrds.ca/promotion.htm>)

Promote your Club's new Fun Nights and New Dancer Classes



Bookmarks

Les Greenwood has suggested Clubs/Callers/Leaders make up bookmarks (5 to a 8 1/2 x 11" page). These can be distributed to local libraries, community centres, Chambers of Commerce, Doctor's Offices and other locations. Local bookstores may agree to put one in every book they sell. The Greenwoods found their local libraries were happy to hand them out to their customers. They laminated some of them at a cost of approximately 25 cents each, but for the library they did not do laminating. They could be in full colour with a suitable dance graphic and message, Caller/Leader's picture, and the event they were advertising. The non laminated bookmarks are reasonable to produce. Some examples are on the following pages.

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**For Fun, Fitness
and Friendship**

**Join A Square or
Round Dance
Club**

Canadian Square and
Round Dance Society

<http://www.squaredance.ca>

Find a Club in your area

Call 1-800-sqdance

(1-800-783-2623) or

1-800-rddance

(1-800-733-2623)

Ontario Square and
Round Dance Federation

<http://www.squaredance.on.ca>



**Come and Join Us
for
Fun, Fitness and
Fellowship**

Who: DoSaDo Square
Dance Club

Where: Community Hall
123 Ace Street
Carleton Place

When: Tuesdays
7:30-10pm

Call us: (613) 257-7188

www.squaredance.dosado.ca



Side One

Side Two

SQUARE DANCING

AT THE
 DIAMOND
 SQUARE DANCE
 CLUB
 CALABOGIE, ON

Call for Time / Location

257-7188 or 256-0012

**Come on out -
 have FUN,
 keep FIT
 and meet new
 FRIENDS!**

**Diamond Square
 Dance Club
 has been dancing
 every week
 September - May
 for 29 years!**



Bookmark

"Reading maketh a full man
 (woman)" ... Bacon

Square Dancing
 Makes Everyone
 Happy and Healthy

Learn to Square Dance
 with the
 Wow Square Dances

Starts Monday Oct. 10th, 2003
 8:00 to 10:00 p.m.

at the
 Community Hall
 just west of the library

Weekly Lesson:
 \$8.00 per couple



BOOK MARKER

Learn to Square Dance

Calabogie, ON

**The
 Diamonds
 Square Dance Club**

Class is October - April

Healthy, Fun, and
 Relaxing too

Everyone is invited
 Call for Location / Time
 257-7188 or 256-1234

Over 29 Years of
 Dancing in Calabogie



Other Options

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THE ONTARIO SQUARE AND ROUND DANCE FEDERATION INC.

Friendship Set to Music

Issue Date: August 2007

Sample Club Constitution #1

Page I-SC 1 of 3 pages

Information Sheets Sample Club Constitution Number 1

xxxxxxx SQUARE DANCE CLUB

1. **Name**

The name of the Club shall be the xxxxxxxxxx Square (and/or Round) Dance Club of xxxx, in the Province of xxxxxx.

2. **Purpose**

The Club shall be operated on a non-profit basis to provide club members a place to dance in an atmosphere of friendship, cooperation, and enjoyment.

3. **Membership**

a) Membership shall be open to all, *preferably* couples, although the said couple need not be married. Each member couple shall be encouraged to share in the organization. Each member of a member couple shall have full voting privileges.

b) Before joining the club, prospective members must visit and dance with the club for one evening. *Except for Basics* level, prospective members must be able to dance at the Club dancing level, and shall be approved by the Membership Committee.

c) The Membership Committee shall consist of the Membership Chair, the Caller, and one other member of the Executive Committee.

d) Under exceptional circumstances, Honourary Memberships may be awarded to deserving members of the club by the Executive Committee. Honourary members shall not be assessed annual dues, but they may be required to pay for special functions held by the Club and attended by them. Honourary memberships may be revoked by the Executive Committee when this action is deemed in the best interest of the Club.

4. **Dues**

a) Dues shall be set by the Executive Committee at the beginning of each dance year taking into consideration: hall costs; caller costs; number of dance nights; normal Club expenses; and other known factors such as visiting callers, etc.

b) Dues or fees shall be published and all members notified by the second night of dancing of the dance session, i.e. fall, winter, spring, summer, etc.

c) Dues or fees shall be paid as directed by the Executive Committee. Dues may be paid for the night, the dance session, or for the entire dance year.

5. Executive Committee

The Executive Committee of the xxxx Square Dance Club shall be members who fill any office.

President shall chair Executive meetings, act as Chief Executive Officer in the management of Club activities and carrying out the wishes of the Executive Committee; and liaise with Caller to maintain open and cordial communications between Club and Caller.

Vice-President shall assume the duties of the President in his or her absence; and co-ordinate the distribution and sale of tickets available to members for outside dances.

Past President shall act as an advisor and perform other duties as required or requested by the Executive.

Secretary shall keep correct records of all business proceedings, maintain correspondence files of those items significant to the Executive, and of interest to future Executives.

Treasurer shall be custodian of all Club funds, collect dues, pay bills, and shall report regularly to the Executive or, as required, the full details of any transactions; and provide financial report to the Club at the Annual Meeting.

Social Convenor shall co-ordinate the provisions of refreshments at Club meetings and party nights, and maintain a roster of host couples for each dance night.

Membership & Publicity Convenor shall be responsible for maintaining the Membership Role, recording attendance and investigating for two consecutive nights of absence, obtaining badges for members, sending cards publicizing the dancing season to members and the local media, submitting news items to the area publication, and contacting all members of short-notice news such as death of a Club member. The Convenor shall be the custodian of Club banner.

6. Election of the Executive Committee

- a) Elections are to be held annually at the next-to-last dance night of the Club dance year.
- b) Committee members shall be elected by a simple majority in open or secret ballot as decided by the meeting.
- c) All Club members in good standing shall be eligible for election to vacancies on the Executive Committee.

d) The Past President couple shall act as a Nominating Committee, or in their absence, the Executive Committee shall appoint another person or persons to act in that capacity.

The Nominating Committee shall:

Provide nomination forms for all members.

Check eligibility of all nominees.

Obtain approval of all nominees.

Publish the list of nominees at least one week prior to the election night.

Supervise and scrutinize the election.

e) Executive Committee members shall be elected for a one-year term to the Executive Committee. Any Executive Committee member may stand for re-election.

f). Vacancies in any office shall be filled by the Executive Committee.

7. Caller

The Caller shall serve in an advisory capacity to the Executive; design dance programs of modern square and round dancing which are consistent with the Members dancing abilities; and, at the request of the Executive, arrange for guest callers under agreed conditions.

8. Amendments

This Constitution and By-Laws may be amended at any General Meeting of the Club upon an affirmative vote by two thirds of the members in attendance, providing the full text of the amendment proposed shall have been delivered with notice of such meeting to each Club Member at least one week prior to the date of the meeting.

9. Wind-up of the Club

In case of wind-up of the Club, any assets shall be turned over to a like-minded organization by agreement of the remaining Club members, or failing that, by the last Executive Committee.

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Note: Changes from previous version are in italics

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THE ONTARIO SQUARE AND ROUND DANCE FEDERATION INC.

Friendship Set to Music

Issue Date: August 2001

Sample Club Constitution #2

Page I-SCC 1 of 5 pages

Information Sheets

Sample Club Constitution Number 2

XXXXXX DANCE CLUB

Section 1 - Name

1.1 This organization shall be known as the xxxxxxxx, hereinafter referred to as the "Club".

Section 2 - Purpose

2.1 The Club shall provide its members with modern square and/or other dance programs as decided by the members, in an atmosphere of friendliness, co-operation and enjoyment.

2.2 The Club shall provide the residents of xxxxxxxx and the surrounding municipalities with the availability and opportunity to participate in the Club dance programs.

2.3 The Club shall be a member of the xxxxx Square and Round Dance Association. The Club shall support the Association and other Clubs in the betterment and furtherance of the movement.

Section 3 - Membership

3.1 All dancers are eligible for membership upon payment of membership fees.

3.2 Prospective members should visit the club at least once, and must be able to dance at an acceptable level, and be approved by the Membership Committee.

3.3 Each member, in good standing, is eligible to vote at special or general meetings.

3.4 The Caller and Caller's Partner shall be deemed to be members in good standing, however, they will not be eligible to hold Executive Office, nor be required to pay membership fees.

Section 4 - Membership Fees

4.1 The membership fee shall be set by the Executive prior to the beginning of each dance season, and it shall be reviewed and adjusted as required at mid-season, taking into consideration that the Club is a non-profit organization.

4.2 The membership fee shall include: membership in any Associations or similar bodies serving the dance community; caller's fee; hall rental; new members' club badges; and other costs related to the operation of the Club.

4.3 The annual membership fee may be paid in instalments as established by the Executive.

4.4 Visitors shall be charged a nightly fee, as established by the Executive.

4.5 Guests of the Club, which may include non-dancers, members of other clubs advertising their club activities, formal visitors from Associations, and others as decided by the Executive will not be charged a nightly fee.

Section 5 - Executive Officers

5.1 The affairs of the Club are to be administered by an Executive consisting of Officers as follows: President, Vice-President, Past President, Secretary, Treasurer, and the following other officers: {insert position names, such as Publicity Convenor, two Social Convenors}. Executive offices may be held by an individual and/or individual and partner. The Caller and Caller's Partner, if any, are deemed to be advisors to the Executive and will not have voting privileges.

5.2 The Executive shall appoint committees, as deemed necessary, for the efficient operation of the Club.

5.3 All terms of office shall be for a period of one year, commencing July 1st.

5.4 Should a member of the Executive be unable to complete the members term, the Executive may elect a successor to the office for the remainder of the term or leave the position vacant, distributing any necessary duties among the remaining members of the Executive.

Section 6 - Duties of the Executive

6.1 The **President** shall:

- a) be the principal Executive officer of the Club;
- b) preside at all Club and executive meetings;
- c) call meetings of the Executive, other Committees, General Membership (Annual or Special) and others meetings as required;
- d) have the right to attend any Club Committee meeting as an "ex-officio member;
- e) be the liaison between the Club and the Caller;
- f) have the authority and responsibility to delegate and assign duties to the other officers as may be required in serving the best interest of the Club;
- g) enter into all contracts with the Caller, hall rental agency, etc. on behalf of the Club; and,
- h) maintain a supply of pins for presentation to visitors/guests from outside the Association area, and members moving from the Association area.

6.2 The **Vice-President** shall:

- a) assume the duties of the President in the President's absence;
- b) be the responsible officer for New Dancers, when that level exists in the Club;
- c) be responsible for the Club banner.

6.3 The **Secretary** shall:

- a) keep minutes of all Executive and general Club meetings;
- b) keep a record of all business proceedings and maintain correspondence files of those items required by the Executive and the Club;
- c) maintain an attendance record for all Club functions;
- d) be responsible for the Club Guest Book.

6.4 The **Treasurer** shall:

- a) collect all membership and visitor fees;
- b) be custodian of all Club funds;
- c) record details of all transactions and pay all bills approved by the Executive. (All cheques shall be co- signed by one other member of the Executive - normally the President);
- d) maintain the attendance record required for insurance purposes;
- e) present a financial report to the Club at the annual meeting and at other times as requested by the Executive;
- f) maintain a Club membership list of all members.

- 6.5 The **Social Convenor** shall:
- coordinate the provision of refreshments;
 - maintain a list of couples who will provide refreshments for dance nights and special occasions;
 - organize fund-raising as required; and
 - coordinate with the Past President, to organize activities associated with special entertainment nights.
- 6.6 The **Publicity Convenor** shall:
- prepare news items for the appropriate publications;
 - pick-up and distribute publications pertinent to the Club;
 - prepare news letters, bulletins and public relations material on behalf of the Club, as requested by the Executive;
 - plan, organize and coordinate an annual membership campaign.
- 6.7 The **Past President** shall:
- act as a liaison between the Club and other Clubs and organizations;
 - be responsible for the co-ordination of special entertainment activities;
 - assist/advise the Executive as required;
 - be responsible for obtaining nominations for Club elections.
- 6.8 The **Caller and Caller's Partner**, if any, shall:
- serve the Executive in an advisory capacity;
 - design a dance program of modern square and/or other dance activities which is consistent with the members' requirements and dancing abilities;
 - coordinate with guest callers and negotiate guest caller fees to meet the dance requirements of the Club;
 - organize a special graduation dance program for the new dancer class, if required; and
 - establish the acceptable level of dance for the Club members.
- 6.9 The **Membership Committee** shall consist of Executive officers, as designated by the Executive - normally the Vice President and Past President.

Section 7 - Elections

- 7.1 Elections shall be held once each year, normally during the last four weeks of the dance season, in conjunction with the Annual Meeting.
- 7.2 Elections shall normally be by a secret ballot. Election to any office shall be declared only on receipt of a majority of the ballots cast.
- 7.3 All Club members in good standing shall be eligible for election.
- 7.4 A nominating committee, consisting of the Past President, and others as appointed, will solicit and accept nominations for submission to the Executive prior to the election meeting. All nominations received shall be reported to the meeting and a call for further nominations from the floor will be made by the person presiding at the election meeting.
- 7.5 The Past President and other persons chosen, four in total, not seeking election, will supervise the elections, count the ballots and report the results to the meeting.

Section 8 - Meetings

8.1 The Executive shall meet at the call of the President or upon the written request of three (3) Officers on the Executive. A quorum for the purposes of conducting the Executive meeting shall be not less than five (5) Officers of the Executive.

8.2 In addition to an Annual Meeting, the Executive officers shall call general or special meetings, when it is deemed necessary, or upon the written request of xxxxx (x) Club members. A quorum for the purpose of conducting a general or special meeting shall not be less than 60% of the members in good standing.

Section 9 - Club Welfare

9.1 A member should not attend any Club dance or activity under the influence of alcohol or drugs.

9.2 All members are encouraged to wear acceptable square dance apparel at any Club dance or activity. The standard of Club dress will be reviewed at Annual Meetings.

9.3 All members are encouraged to share in the organization equally and assist in carrying out the functions of the Club.

Section 10 - General

10.1 This Constitution may be amended at a special or annual general membership meeting (minimum 60% of members in attendance) by a two-thirds (2/3) majority vote of the members present.

10.2 In the event of wind-up or dissolution of the Club, a meeting of the remaining members shall be convened by a member of the last Executive to decide on the disposition for remaining Club property or funds. If agreement cannot be reached, the remaining club property and funds shall be turned over to a like-minded local or provincial Association to dispose of as that Association sees fit.

10.3 The following interpretations shall apply to this constitution:

- a) "Notice of Motion" shall be distributed at least one week in advance of meetings;
- b) "should" is to be construed as being informative only;
- c) "may" is to be construed as permissive;
- d) "shall" is to be construed as imperative;
- e) words in the singular referring to an Executive Office held by an individual and partner jointly shall include the plural as necessary;
- f) after having attended three dance nights, visitors shall be expected to establish a more permanent membership relationship with the Club. Individual cases may be reviewed with the Executive Committee as required.

NOTE: It is not obligatory that all the preceding be adopted. Clubs should adapt as deemed advisable.

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THE ONTARIO SQUARE AND ROUND DANCE FEDERATION INC.

Friendship Set to Music

Issue Date: May 4, 2012

Compl. Copyright Act

Page I-CC 1 of 2 pages

Information Sheets Compliance with the Canada Copyright Act

Background

1. The Canada Copyright Act authorizes the Society of Composers, Authors, and Music Publishers (SOCAN) to grant licenses on behalf of its 40,000 members for public performance of music at dances, conventions, receptions, fashion shows, and other similar events. Such licenses are issued to "operators of premises" who in turn collect the appropriate tariff from users of their premises, in the same manner as merchants collect sales taxes on good they sell.

2. "Public use" of music refers to any performance "outside of a person's home". Operators of premises, such as community centres, dance halls, malls, schools when in public use, etc., have to obtain "permission" i.e. a licence, prior to allowing such performances to avoid infringement of the Copyright Act. All fees collected are distributed to SOCAN's members after deducting administrative expenses.

3. Prior to 1991, there were two licensing agencies, the Composers, Actors, and Publishers Association of Canada (CAPAC) and the Performing Rights Organization of Canada (PROCAN). In the fall of 1990, the Canada Copyright Board announced in the Canada Gazette that the combination of these two organizations to form SOCAN, which, effective January 1, 1991, would be responsible for issuing licences and collecting tariffs. SOCAN began immediately pursuing their responsibility vigorously.

4. The Canada Gazette Supplement Number 1 of the Copyright Board of Canada identifies 20 tariff categories, each of which covers a specific activity such as:

- a. Tariff Number 1 - Radio;
- b. Tariff Number 2 - Television;
- c. etc.

5. SOCAN has so related the square dancing activity to Tariff number 8 - Clubs. The tariffs due for this category are *amended periodically, and* for the average club would add about \$1.00 to \$2.00 per night per dancer.

Ontario Federation Action

6. Because the responsibility was national in scope, the Ontario Federation wrote to the Canadian Square and Round Dance Society in June 1991 to solicit their help in solving what could be a real problem for the movement. The Ontario Federation feared there would be imminent enforcement of the tariffs by SOCAN. Failing any reply by the Society, the Ontario Federation set up an Ad Hoc Committee of Don Pearson, Bob Pereira, and Ron Roe of the Eastern Ontario Area, and Martin Mallard of Saskatoon from the Saskatchewan Federation. Callerlab, Roundalab, and the Saskatchewan Federation quickly agreed to support this project, which allowed a national solution to be put in place.

Ad Hoc Committee Results

7. Don Pearson's initial contact with SOCAN provided the key to solving the problem. Following further research and a meeting with the Secretary of the Copyright Board in Ottawa, a satisfactory resolution of the potential problem was obtained. A letter was received from the Director of SOCAN's licensing department, stating that:

"SOCAN will not seek to collect licensing fees from square dance performances using gramophone records. However, tapes, CDs, live music, and "other devices" will not be exempt from payment of fees".

8. However, after subsequent discussions between representatives of the Canadian Square and Round Dance Society and SOCAN, square and round dancing was no longer exempt from paying annual royalty fees to SOCAN. Annual fees must be paid by either the Caller/Cuer or by the Club for normal Club dancing, and an additional fee for all special dances.

Suggested Action by Clubs or Event Organizers

9. In the event that an owner of premises requests payment of the tariff by a Club or an event connected with the square dance movement, a licence can be obtained from SOCAN.

10. Should a square dance club or event organizer still have difficulty, they should contact their Association for assistance.

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THE ONTARIO SQUARE AND ROUND DANCE FEDERATION INC.

Friendship Set to Music

Issue Date: May 4, 2012 **Corporate Compliance in Ontario** Page I-CCO 1 of 2 pages

Information Sheets Corporate Compliance in Ontario

General

1. If a non-profit organization wishes to become incorporated under the laws of Ontario, the following procedures apply:

a) an application for “Incorporation for a Corporation Without Share Capital” on the appropriate form is made to the Minister of Consumer and Commercial Relations. This includes:

- i) the names of all the executives and directors who are applying on behalf of the organization for a charter to be issued by Letters Patent.
- ii) the objectives of the organization;
- iii) the Head Office of the organization.

2. The Ministry issues a charter with an Ontario Corporation number. Among the conditions is one that states that the “Corporation shall be carried on without the purpose of gain for its members, and any profits other than accretions to the Corporation shall be used for promoting its objectives.”

Reporting Requirements

3. Ontario Form 07200 which lists all current executives and directors of the organization must be filed with the Ministry:

- a) within 60 days of the date of incorporation;
- b) as a Notice of Change to be filed within 10 days after a change or changes has taken place in the information previously filed.

4. If an organization wishes to move its “Head Office”, a special resolution and initial notice of change must be filed with the Ministry of Consumer and Commercial Relations. The resolution is published in the Ontario Gazette and subsequently consented to by the Directors and two-thirds (2/3) of the membership.

Information and Addresses

5. Copies of the Corporation Information Act may be obtained from the Ontario Government Bookstore, 880 Bay St. Toronto, ON M7A 2N8

6. The Notice of Change, Form 07200, should be mailed to:
The Compliance Section, Companies Branch
Ministry of Consumer and Commercial Relations
393 University Ave.
Toronto, ON M 7A 2H6

7. For other information regarding incorporation, contact:
Ministry of Consumer and Commercial Relations, Companies Branch
Box 1018, Station B
Toronto, ON M5T 3E6

Disclaimer - Information Sheets

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THE ONTARIO SQUARE AND ROUND DANCE FEDERATION INC.

Friendship Set to Music

Issue Date: May 4, 2012

Incorp. Nonprofit Org

Page I-INO 1 of 3 pages

Information Sheets Incorporation of Nonprofit Organizations

General

1. There are three main types of business organizations: sole proprietorships; partnerships; and corporations. Square and round dance organizations fit within these types. Each of these three types has its advantages and disadvantages.
2. The proprietorship is the easiest to set up, but it puts the owner fully at risk. In the event of a business failure or accident where the owner is at fault, the owner's personal property can be used to settle the debts of the business. It is like a caller or cuer- run club.
3. Partnerships are joint undertakings by more than one person. They can run all the way from simple family businesses to complex lawyer partnerships. Responsibility is spread among the partners in the same ratio as their ownership of the business. Personal property of a partner can be used to settle debts of partnership. Partnerships for running clubs, dance music companies, and clinics are examples from the square dance movement.
4. Corporations are legal persons and may be profit or nonprofit. Profit corporations are set up to raise capital and limit the liability of the corporate owners. A major advantage of incorporating is that earnings can be retained (like savings for an individual) into the next year instead of being divided up at year end as is the case with proprietorships and partnerships. The owners of a corporation are called shareholders, each of whom owns one or more shares. Private and public corporations can be set up by one or more shareholders. Public corporations have publicly trade shares on a stock exchange. Corporations may have individuals or other corporations as shareholders. Shareholders are only liable to the extent of their share's value. Nonprofit corporations follow the same rules as profit corporations, except the affairs must be carried on without the purpose of gain for its members, and any profits other than growth to the Corporation must be used for promoting its objectives. Some nonprofits, such as churches, universities, etc. have huge budgets and own vast amounts of property.

Letters Patent, Articles, By-Laws, and Regulations

5. A corporation is established by something called "letters patent". This is a numbered document issued by a government that states, among other things, the objectives of the corporation, the head office location, and the founding directors. Changing letters patent requires a major effort. The "articles of incorporation" and "by-laws" are also put in place at the time of incorporation. Articles give in broad form the structure and operation of the corporation, while the by-laws provide more detail on how the organization is to be run and generally include definitions of members, duties of officers, meetings, etc. Regulations are documents put in place by a organization or a board after incorporation to guide its day-by-day conduct of business.

Incorporation of a Nonprofit Square Dance Organization

6. Square dance associations, federations, and the national Society are incorporated under the laws of the provinces or of Canada as not-for-profit or nonprofit corporations. There is no difference in the structure or the method of operation of a profit or nonprofit corporation. The shareholders of a profit corporation are replaced by members of a not-for-profit organization.

7. Again, the main advantage of incorporating a square dance organization is to limit the liability of members. This is especially true for larger clubs, area associations, provincial federations, and the national Society. If something goes wrong in a non-incorporated organizations, the personal possessions of those in charge of the organizations can be use to settle any debts. It would be extremely rare to extend the liability to dancers in a nonleadership role. Liability insurance provides another level of protection for dancers and organizations, and reduces the possibility of a complete loss of possessions.

8. A logical second question about incorporation is how much does it cost. If an organization hires a lawyer, incorporation either under the Federal or provincial laws costs about \$1,000. It is quite possible for individuals to do the incorporation work and reduce the cost to under \$300. There are ample guides and help to do the incorporation. In particular, the Self-Counsel do-it-yourself Series contains all the information needed to do an incorporation. It is called "Forming and Managing A Non-Profit Organization in Canada" by Flora MacLeod. It is available from bookstores in paperback form for about \$15. Their address is International Self-Counsel Press Ltd, 1481 Charlotte Rd, North Vancouver, BC V7J 1H1.

9. As far as objectives, articles, and bylaws are concerned, the best plan is to request sets from like-minded organizations and pattern a new set on these. Generally, governments have general purpose sets that can be adapted to a wide variety of organizations. Usually existing square dance organization will gladly provide their objectives, articles, and bylaws for information.

10. Choosing whether to incorporate under provincial laws or the laws of Canada can be based on whether an organization carries on business in more than one province. The Society naturally must have Federal incorporation. Most provincial federations, area associations, and clubs would choose provincial incorporation, although clubs in a border city, or associations such as the Border Booster Association operating in Quebec, Ontario, and New York State would choose Federal incorporation.

Ontario Not-for-Profit Incorporation and Compliance

11. If a square dance organization wishes to become incorporated under the laws of Ontario, an application for "Incorporation for a Corporation Without Share Capital" on the appropriate form is made to the Minister of Consumer and Commercial Relations. The application covers:

- a) the names of all the executive and directors who are applying on behalf of the organization for a charter to be issued by Letters Patent;
- b) the objectives of the organization;
- c) the Head Office of the organization.

12. If approved, the Ministry issues a not-for-profit charter with an Ontario Corporation number.
 13. Copies of the Corporation Information Act may be obtained from the Ontario Government Bookstore, 880 Bay St., Toronto, ON M7A 2N8. Other information regarding incorporation can be obtained from Ministry of Consumer and Commercial Relations, Companies Branch, Box 1018, Station B, Toronto, ON M5T 3E6.
 14. After incorporation, there are rules to be followed. In particular, the objectives of the organization must be not be changed. As well, a change of head office requires considerable effort. All provinces require update information if a change is made to the directors of the organization.
 15. The Ontario Notice of Change Form 07200 lists all current executives and directors of the organization. It must be filed with the Ministry within 60 days of the date of incorporation; and within 10 days after a change has taken place in the information previously filed. The Notice of Change, Form 07200, should be mailed to Compliance Section, Companies Branch, Ministry of Consumer and Commercial Relations, 393 University Ave, Toronto, ON M7A 2H6.
- Federal Not-for-Profit Incorporation and Compliance**
16. For Federal incorporation in Canada, the general procedure outlined above is followed. An excellent set of guides is available from Corporations Branch, Industry Canada, Place du Portage, Hull, PQ K1A 0C9.
 17. For Federal compliance, Form 22 is sent out annually by Industry Canada. It must be filled out and submitted with the required annual fee, currently \$50.00. Changes in directors are listed on the form. Other questions must be filled in to ensure changes have not been made to the objectives of the organization.

NOTE: Changes are indicated in italics.

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THE ONTARIO SQUARE AND ROUND DANCE FEDERATION INC.

Friendship Set to Music

Issue Date: May 4, 2012

Insurance Information Sheet

Page I-INS 1 of 6

Information Sheets Insurance

Coverage:

For details of the Insurance coverage in place as a member of the Ontario Square & Round Dance Federation and the Canadian Square & Round Dance Society, please see and follow the following links for: Details of the Statement of Insurance Coverage or Certificate of Insurance

(see www.csrds.ca/)

Information on:

Third Party Liability Insurance;

Directors & Officers Liability Insurance Coverage;

What to Do in Event of an Accident; Frequently Asked Questions; HIRD

Format for Club Membership List; New Dancers & Their Coverage

(see www.csrds.ca/)

Note: The Policy for 2004 does not cover normal wear and tear of floor only sudden or accidental damage or Hired Auto coverage. "Sudden and Accidental" refers to an action which occurs without prior knowledge of that action occurring" (dragging of chairs, tables, furniture, etc. over floors is not sudden or accidental.) Cloggers should inform the owners of the facility they are dancing in that they are wearing taps on their shoes, particularly if it is a wooden floor.

** Please read the CSRDS web site on floor care.* (see www.csrds.ca/)*

Introduction

1. Third party liability insurance has been a part of the square and round dance movement for many years, starting first in clubs, then in associations, and finally in federations and the national Society. It paralleled the growth pattern of the activity. Like it or not, it is an essential part of the square and round dance movement.

2. Since we live and operate in a society where consumer and corporate legal rights exist, it is essential business practice to obtain protection in the form of commercial liability insurance. The cost is remarkably low considering the scope of the protection obtained, typically under \$1 per year per person. Typically as well, the membership fee is included in the membership dues of a Club, Association, Federation, or the Society. For reasons of security and peace of mind, every individual or organization in the movement should obtain this protection. In particular, persons in positions of responsibility in Clubs, Associations, Federations, or the Society should have third party liability insurance as they are the most at risk.

What is Third Party Liability Insurance?

3. If there is a "third party", it would seem reasonable that there must be a first and second party. There is. The first party is us, the dancers or dance organizations that make up the movement. We are called the "insured". The second party is the insuring company, which most likely is referred to as the "insurer".

4. "Third party" means someone else outside the our dancing organization or the insurance company. Typically, it is the corporate or individual owner of a hall or a building which we rent for dancing. It could also mean someone or some organization we deal with to buy something, or obtain some service from, or provide some service to.

5. As well we have "cross liability" included in our insurance policies, so that someone within the square and round dance movement can take legal action against someone else within the movement.

6. One important point when considering the third party liability insurance is that it is business insurance, and usually our insurance policies are standard commercial business policies. At first glance, it may appear that we do not fit easily into this type of insurance, but we do. What is our business? Our business is dancing. We tend to treat it as a hobby or recreation, but take the viewpoint that we spend money to dance, and that we spend a lot of time practising (weekly dances) in order to perform publicly (demos) to sell our product (dancing for fun, health, recreation, etc).

The Insurance Policy

7. Although each policy may appear different, in actual fact policies are very similar. The standard words used to describe this type of insurance are "commercial general liability insurance", although the words "business insurance" and "commercial insurance" are used as well.

8. There is one big important note here. It is not like health insurance or accident insurance where you collect if something happens. Again it is third party liability insurance. Payment is only made when legal liability has been proven, and usually this is as a result of a legal action.

9. One of the first important facts about the insurance is the limit of the liability. *Please see the current Insurance Certificate for current details of coverage.*

10. Deductibles are what you have to pay first in the case of an insurance claim. *Please see the current Insurance Certificate for current details of coverage.*

11. Automobiles - *not included* - *see the current Insurance Certificate for current details of coverage.*

Who is Protected?

12. The words "named insured" are used to describe who is insured. In 1986 some standard wording was introduced by the Society, and since that time the named insured wording has been similar. The format is:

The organization (e.g. Society, Federation, Association, etc.), its directors, members, employees;
and/or,

All member organizations (Federations, Associations, etc.), their directors, members, and employees;
and/or,

All member Clubs, their directors, members, and employees; and/or,

All member callers, cuers, leaders, instructors; and/or,

All dancers who are members.

What About New Dancers?

13. *All new Clubs and new dancers starting involvement in the activity are to pay Society (CSRDS) membership fees for the current calendar year. This is because they benefit from the Society programs for the year. Membership renewals are due by October 31st for the following year. However, insurance coverage for the following calendar year is only available prior to December 15th as the insuring company closes the policy on that date.*

14. Note how many times the word "member" is used above. "Member" has a specific meaning of legally belonging to. The state of membership is usually associated with the paying of some fee, and it is usual as well to have membership time dated. That means a fee must be paid daily, weekly, monthly, etc. When the fee has been paid and all other conditions of membership met, the term "member in good standing" is usually applied. The reason for this close monitoring of membership is, for example, someone who danced in a Club ten years ago and is no longer a member would not be covered. This is an extension of the limiting aspect again. Insurance companies want to know who is insured, and in taking out insurance, organizations have to state how many members are being insured.

Establishing Membership

15. We need is to establish two facts in the case of any action that involves insurance:

- a) Establish if the person was a member of the Federation at the time of the accident or incident;
- b) Establish that the accident or incident occurred while the person was engaged in the activity covered by the insurance.

16. For insurance purposes under paragraph 15, there are two types of records required: membership lists, and attendance records. Clubs are responsible for maintaining a membership list of individuals. Club and dance executives are responsible for maintaining a record of individuals attending a dancing activity. A dated sign-in book, dated sign-in sheet, or a dated attendance book provides an acceptable method for Club activities. For open dances or other similar activities, a dated sign-in sheet, sign-in book, or guest book is an acceptable method.

17. The first questions that will be asked by the Federation to a Club executive will be to get the answers to the questions in paragraph 15. And it must be a clear straight answer. The only way to establish that is by keeping good records.

What to do in the Event of an Accident

18. In the event of an accident or incident, members should render first aid and assistance as considered practical in the situation. If warranted, emergency services should be contacted. Immediately, or at the first available opportunity, have the incident reported to Susan Fedyck (contact person for the Society's Insurance Agent), and a copy to the Director responsible for Membership Mathieu Lapointe & Stephanie Charters (514)538-3135 584 O'Connell, Dorval, QC H9P 1E5smlapdance@gmail.com). Notification should also be given by phone to the person handling the membership duties of the Federation. It should be followed up in writing providing the details of the accident or incident as follows:

- a. Time of the incident;
- b. Location or place of incident;
- c. Description of incident with all relevant details;
- d. Name(s) and address(es) of any injured person(s); and
- e. Names and addresses of all available witnesses.

(Make notes of the incident to assist in any resulting inquiry. Try to answer "who", "where", "what", "when", "why", and "how".)

19. In the event a claim is made or action brought against a member, the member must:

- a) provide prompt notification to the Federation's membership person of demands, notices, summonses, or legal papers received in connection with the claim or action;
- b) authorize the insurance company to obtain necessary records and information; and,
- c) cooperate with the investigation and assist with the settlement.

20. Generally, members should render all reasonable assistance possible for the protection of life and property, then at the first available opportunity, make notes of what happened. Notes greatly assist any resulting legal inquiry. The best guide for the notes are "who", "where", "what", "when", "why", and "how".

What to Expect in a Legal Process

21. The legal process is called "litigation" and although it sounds complicated, it is usually straight forward. We are lucky that square and round dancing is a safe activity. We have had national and provincial insurance in place since 1978, and have had very few cases that involved insurance.

However,

there have been around 30 cases, such as:

Walking into a glass window; Falling off a ladder while decorating a hall;

Falling off a float in a parade; and Slipping and falling while dancing.

22. Even though we are a "safe" activity, accidents do happen. That is why we insure. And we get our insurance at such a low rate because we are a low risk activity.

23. The legal process is sure, but slow. Someone claims that someone else is responsible for something and demands damages. Both sides hire lawyers. Most of the time an out of court settlement is made as this is the quickest method for all concerned. There have been cases in square dancing when the insurer paid for some minor breakage rather than go through the legal proceedings. For a large claim, there will be a "discovery" prior to any trial when evidence is given, and each side weighs its chances. Settlements often occur here. If no settlement is reached, the case goes to trial. It takes at least one year for even minor cases to go to court. If there are appeals, then it drags on and on. If you follow Supreme Court decisions, they are usually giving a judgement on something that occurred five or more years ago.

24. Legal fees are also a consideration here. Lawyers bill by the hour, and \$300 to \$500 per hour is not unusual. However, if you have liability insurance, then the insuring company covers all the costs. It still takes time, but at least someone else pays the bills.

Frequently Asked Questions About Insurance

a) Why do I need insurance protection? Accidents happen. You need insurance today to protect yourself in the event you are the cause of an accident. We spill a cup of coffee and someone slips. We sit on someone's glasses. We drop the caller's record player. We are not "lawsuit happy" in Canada, but we do have lawsuits from time to time, and we need to protect ourselves. The Federation's policy offers that protection.

b) Who is the most at risk? Club executives, callers, cuers, and leaders are the most at risk. If anything goes wrong, they are the first to get blamed.

c) How much do I get if I break a leg? The short answer is nothing. It is not like health insurance. It is third party liability protection insurance, and only comes into effect when you are sued by someone. Payments are only made as the result of a legal decision. If you break a leg, and you think it is the fault of someone, you must take legal action to collect damages.

d) Can I sue another Club member? The policy has a provision called "cross liability", which means that each member is treated as though a separate policy was in place. Members can sue other members. It makes no difference whether the member is an individual or an organization.

e) What is a dancing related activity? Anything that is done during the course of dancing is a dancing related activity. Dancing during regular club dances, or dancing at open dances are the most common examples. However, it may also be demonstration dancing in a mall, dancing for seniors in a health care facility, dancing on a float in a parade, decorating a hall for a dance, participating in a club barbecue or picnic, preparing dance flyers, taking tickets at the door, preparing coffee in the kitchen, sweeping the floor, carrying in equipment, blowing up balloons, etc.

f) What happens if I am sued by another dancer? If you are named in a lawsuit, you would notify the club executive, who in turn would notify the Federation's membership administrator, who would notify the insurance company. The insurance company assumes your defence, and if the case is lost, it pays the damages and legal costs. Right or wrong, the insurance company is on your side to fight your battles. That is called peace of mind. And it costs less than a cup of coffee for a whole year.

g) What is meant by "Operations" in the Insurance Policy? The policy is a standard third party liability protection policy. It is business insurance. Our business is dancing. Dancing is treated just like we were running a store, or a restaurant, or selling cars, etc. For example, dancing is the basic operation in clubs. But related operations are taking tickets, serving refreshments, holding executive meetings, putting out or picking up chairs and tables, holding a Christmas party, etc.

h) Am I covered if I dance in the States?

The insurance policy provides World-wide protection. The only stipulation is that law suits must be brought against you in Canada. So if you are dancing in Arizona, for example, and you are responsible for an accident and are sued, the suit must be laid in Canada. This is common to liability protection insurance around the World.

i) Is food poisoning covered? Serving refreshments is part of our standard operations. If you are sued by someone because of food poisoning, the insurance protection under the policy is in effect.

j) Do we have many insurance claims? We do not have "claims" as such. We have settlements as the result of some legal action. Since 1978 in Canada, we have had only a dozen or so insurance involved accidents. The most serious of these was an unfortunate accident involving a dancer who was cut badly when she walked into a glass partition next to a door. We don't have many, and that is why our premiums are so low.

k) What is a "named insured"? "Named insured" is a buzz word in the insurance industry. It is used to establish who is covered and who is not. For the Society and the Federation, the named insured are:

- i) The Ontario Square and Round Dance Federation, its directors, members, and employees, and/or;
- ii) All member regional associations or equivalent organizations, their directors, members, and employees, and/or;
- iii) All member incorporated or non-incorporated clubs, their directors, members, and employees, and/or;
- iv) All member callers, leaders, instructors, or cuers, and/or;
- v) All dancers who are members.

1) What should I do as a Club president? The most important task you can perform for your Club and its members is for you and your Club to become members of the Federation. If you do not become a member, then you and your Club are at risk in case of an accident. More importantly, your Club executive and caller, cuer, or leader are also protected. But you have to act. It is not automatic. It cannot be retroactive after an accident has happened. The Federation has to have your Club names and appropriate dues before any coverage is active. Membership dues are for the calendar year, and must be received before January 1 to become effective on January 1. Ensure by December 1 that you send in your dues to your local association or if you do not have a local association, to the Federation. Since 2002, the Federation has participated in the Canadian Square & Round Dance Society's additional insurance coverage for Director's and Officers' Liability Insurance. This covers all member executives and officers of the Federation Board of Directors, Associations' and their member Clubs. They are insured against legal action taken against them for "wrongful acts".

Wrongful acts are generally errors, misstatements or misleading statements, acts or omissions, neglect or breach of duty, and other matters relating to the position of director or officer. The insurance policy is intended to protect the financial assets of the individual directors and officers if not indemnified, and subsequent to indemnification, the financial assets of the corporation. This liability insurance is also on a **Claims Made** basis. This means the policy responds only to claims first made against the directors or officers during the policy period and reported to the insurer during the policy period. It does not provide coverage for bodily injury or property damage, libel and slander, nor income security

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Issued September 1995 Updated: 2001, 2002, 2003, 2007, May 2012
Amendments are indicated in italics



THE ONTARIO SQUARE AND ROUND DANCE FEDERATION INC.

Friendship Set to Music

Issue Date May 4, 2012

NPO - Legal Obligations

Page I-LO 1 of 3 pages

Information Sheets

Non-Profit Organizations - Legal Obligations of Boards of Directors

Boards of Directors for incorporated non-profit organizations have legal responsibility for the accountability and management of the organization. This does not mean that board members will be sued for every debt, problem, or error in judgement. Board members, who endeavour to act responsibly and maintain the interests of the organization, are unlikely to be found negligent in the event that mistakes are made. Incorporation protects individual board members from personal liability provided that reasonable decisions are made and the organization is financially viable.

The Board is also governed by the Corporation's Charter (Articles of Incorporation) and By-Laws. In the event of a contradiction between the Act and the Corporation's Charter or By-Laws, the legislation always takes precedence.

Board members may be held responsible if they knowingly contravene corporation legislation, or any other relevant legislation, or mishandle finances to the extent that the organization cannot meet its financial obligations. Board members may also be held responsible for contraventions of which they were unaware because of neglect.

Directors must conduct the affairs of the Corporation for the objects for which it was set up (in the Articles of Incorporation) and not engage in any activities beyond its objects or powers.

Financial Obligations

Board members of a non-profit Board are, of course, expected to act honestly, and in the best interests of the organization. The finances of the organization should be managed by the Board members in a responsible manner to ensure that the organization as a whole will benefit.

Conflict of Interest

Each director needs to ensure that he/she will not gain personally as a result of his/her actions as a Board member. If an individual Board member could profit personally from a decision made by the Board, that member must declare a "conflict of interest" and withdraw from the decision-making process.

Fraud or Embezzlement

Obviously, Board members who abuse access to the organization's funds and commit fraud or embezzle money are not meeting their financial obligations. These are criminal acts and charges may be laid by the police.

Bankruptcy

Boards of directors are legally responsible to follow basic management principles. These include:

- a) setting up adequate controls requiring regular financial reports;
- b) establishing spending and fee collection policies;
- c) reviewing financial reports;
- d) seeking professional advice on legal or accounting issues.

Financial difficulties, even bankruptcy may still occur, however, individual Board members will not be considered financially responsible if the above management principles have been followed.

Negligence

A board of directors might be considered negligent because it failed to consider available information, failed to set necessary policies or took action that was contradictory to available information.

Corporations Act

The Ontario Corporations Act and the Co-operative Corporations Act both state that boards of directors are legally responsible for carrying out and maintaining the incorporation process.

Meeting Legal Obligations

There are steps that Board members can take which will greatly reduce their liability:

- a) know the By-laws of the organization;
- b) attend meetings regularly;
- c) disclose any possible financial interests;
- d) retain professional legal and accounting counsel;
- e) review all reports and correspondence.

Indemnification

Under the Ontario Corporations Act, incorporated organizations are allowed to protect individual Board members from personal liability while carrying out their responsibilities. This must be agreed to by the members of the organization and included in the By-laws. Indemnification clauses are not valid if the Board member is guilty of deliberate neglect or criminal actions. The organization must cover the costs of protecting Board members, so indemnification is limited by the organization's ability to pay.

Board of Directors Liability Insurance

Board of Directors Liability Insurance is available to better protect both individual members and the corporation itself. This type of insurance would cover the costs of indemnification if legal action were taken against one of the Board members. The costs of such coverage, however, may be prohibitive. Further information may be obtained from:

Companies Branch,
Ministry of Consumer & Commercial Relations,
393 University Avenue, 2nd Floor,
Toronto, Ontario M7A 2H6

Sources: Not-For-Profit Incorporator's Handbook

Publications Ontario
50 Grosvenor Street
Toronto, Ontario M7A 1N8
Telephone: 1-800-668-9938

Child Care Management Guide
OCBCC
297 St. George Street
Toronto, Ontario M5R 2P8

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THE ONTARIO SQUARE AND ROUND DANCE FEDERATION INC.

Friendship Set to Music

Issue Date: February 1996 **Promoting S&R Dancing** Page I-PR 1 of 4 pages

Information Guideline Promoting Square/Round Dancing

Media Coverage/FAX

Obtaining coverage of your square/round dancing can be done by regularly sending your local media articles on your Club's activities, new dancer classes, special dances, etc. This can be done using hard copy, or by using a FAX or e-mail. "Fax" local media information about ALL square dancing activities. Easy to do and very cheap - local calls are free. Make a list of local media numbers and make a format like the following suggestion or develop your own:

"To the Community Announcements Editor - Please Publish or Broadcast,

GENERAL NEWS RELEASE SUMMER SQUARE DANCE - SUDBURY SATURDAY 4TH JULY, 201X.

On Saturday 4th July, 201X there will be a **SUMMER SQUARE DANCE** presented by the **SNOW FLAKE SQUARES OF SUDBURY**, to be held in the **CANISIUS HALL** at the **UNIVERSITY OF SUDBURY**, (on the Campus of Laurentian University). The afternoon session commences at 2.00 p.m. and runs to 4.30 p.m. the "Level" will be 'Plus with Advanced-1 Tips' and the evening session commences at 8.00 p.m. and runs to 10.30 p.m., and the "Level" will be 'Plus with Advanced-1 & Advanced-2 Tips'. The price of admission is \$20.00 per couple for both sessions or \$12.00 for a single session.

Mr. Al Calhoun of Hillsdale, Ontario, will be calling. Al Calhoun is a one of Canada's most experienced internationally recognized professional callers. He is noted for his powerful singing voice, and great sense of humour. He is always popular where ever he is calling. He is currently on a cross Canada tour and will be visiting Sudbury on his way to the National Square Dance Convention in Winnipeg.

An invitation is extended to all square dancers to enjoy a day of fine dancing. Out of town square dancers can stay at the **VENTURE INN, REGENT STREET, SUDBURY**, (phone 1-800-387 3933), special rates have been arranged.

PLEASE help by promoting this event. It promises to be an event in the best traditions of **MODERN SQUARE DANCING**. For further information please contact me (522-3886 or 675-1151 ext. 2256) at any time.

Modern Square Dancing is for both the "not so young" as well as the young, as it is a wonderful recreational activity that all can enjoy. It has a country flavour of course, and callers like **Al Calhoun** are great to listen to, and terrific to dance to. There is no alcohol at any square dance, and smoking is discouraged! All that's left is good old fashioned clean fun and friendship.

Non square dancers are welcome to come and watch.

Thanking you in anticipation....."

Internet

Use Internet or WWW (World Wide Web) (if you know someone who knows how!!!!) to list dates of dances and square dance events, as well as general communication.

Demo's & Teaches

Participate in "demonstrations" or teaches at high schools, or with the "younger set" - they will sooner or later be in a position to join a club - maybe consider starting a teen club! Lots of exposure.

Cheap Advertising!!

Use inexpensive high volume advertising by distributing flyers or brochures around local motels/hotels, drug stores, doctor's offices etc. Consider using fluorescent coloured paper so it stands out as being different. Cut a deal with a chain of whatever!!!! Maybe have items such as place mats specially printed for use and distributed in restaurants. These are available from the South Western Square & Round Dancing Association.

Young People

Let young people (even children!!) see how adults can have fun - they will grow up with positive views of square dancing. Try to get square dancing as part of the curriculum in public and high schools. (Square Dancing is part of a course in the Physical Health Education Program at Laurentian University). A square dance could also be a feature at a college/university frosh week/fun week event.

Singles

Make single people welcome - **especially square dancers who have recently lost their partner.**

Marketing

Develop a marketing strategy for a region or the province - raise the necessary funds and work the strategy for all it's worth. The strategy should include planning ahead perhaps by using an annual marketing cycle that can be followed or adapted year to year.

January	Teaches to High Schools & Universities
February	FAXes to Media re: Valentine's Dance.
March	Demo in Mall
etc.	

When possible, tie in with a company that may be a sponsor of your club (prizes etc.).

Image

Stress the healthy aspects of square dancing with no age limits - especially for the young. **Avoid saying that square dancing is cheap and good for retired people - this limits the scope of the market and creates the impression that only those two elements are important. Promote FUN, FRIENDSHIP.**

Word of Mouth

Enthusiastic dancers who promote the activity to their friends and acquaintances are the best and most effective advertising and producers of new dancers. **80% of new dancers come from personal contact.** Encourage dancers to wear 'T' shirts, sweat shirts or buttons with square dance logos to help them start a conversation.

Open House

Host open house evenings for newcomers to come out and have some fun with the club member.

Media Coverage

Invite local media to cover major events. This will result in FREE news coverage. Send them regular news items on club dance activities, especially with the names of local people.

General Notes

In recruiting new dancers, the combined use of a wide variety of promotional strategies (synergy) must be employed simultaneously. It is important to try and continually employ promotional strategies from year to year as the impact on people is not always immediate - can take up to three years.

For clubs considering the development of a marketing and promotion program a subscription to '**The Club Leadership Journal**' would be an extremely valuable resource. This is available from: Club Leadership Journal, Box 766, Plover, WI, 54467-0766 - cost of \$30.00 for 1 year and \$50.00 for 2 years (US funds).

Other useful aids available from **LEGACY** are:

Leadership Manual \$7.00

Bakers Dozen Display Ads \$6.95

Promo-Pac Marketing Kit \$5.00

City Entrance/Directional Signs (15"x22") 1-\$32.50, 2- \$50.00

Note: Prices are in US funds and include shipping & handling.

The mailing address is: Legacy International 1100 Revere Dr., Oconomowoc, WI, 53066

Advertising posters and material should be colourful and as professional looking as possible to create a good impression.

Promotional etc.:

The following is what can be included in flyers etc.

"CHALLENGE - TRAVEL - ACTIVITY - PEOPLE - LEARNING -MUSIC ~~~~~ SOUND INVESTMENT OF LEISURE TIME ~~~~~

Modern Western Square Dancing has all of the above and more. All it takes is a little time and commitment.

CHALLENGE It is with a sense of accomplishment that you, along with seven other people in your "square" manage to perform all the correct moves choreographed by the caller.

PEOPLE The fun and enjoyment of meeting people from all walks of life in a non-competitive healthy environment.

TRAVEL The best way to enjoy modern square dancing is to travel to various dances and conventions - locally or far afield. Travel costs are minimized by travelling as a group with other couples and staying over night in Bed & Breakfast places -normally first class.

LEARNING Modern square dancing requires some learning which means lessons - attention and effort. Are you up to it?

ACTIVITY If you seek dynamic exercise that is good for both your heart and spirit - then you're ready.

MUSIC The music you dance to includes everything from western to modern contemporary - always tasteful.

SOUND INVESTMENT OF LEISURE TIME Modern square dancing requires an investment of your time and effort. You will enjoy this as a couple in a healthy atmosphere with many friends. Of course, you may wish to purchase the necessary attire - as with all worthwhile activities. However, you will appreciate the aesthetic value of colourful, stylish and comfortable clothing.

HOW TO GET STARTED The first level of modern square dancing is called "Basic". This involves learning and practising about fifty calls. This takes six months of weekly lessons and practice of about three hours in duration. Additional time is required for "your level" dances.

HOW ARE YOU TAUGHT? You learn from tape recordings made by recognized professional callers with the help and instruction from experienced dancers. All the material is in accordance with the internationally accepted standards of the "Caller Lab" (the international governing body of square dancing).

WHEN DO YOU GET STARTED? **** A new beginners class will begin on.....

COST???? The full cost of the basic level course is only \$150 per couple. This includes the lessons, membership in the Ontario Square & Round Dance Federation Association (with a newsletter - "Topics"), an international directory of Square Dancing and **at least one full Square Dance with a recognized professional caller."**

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THE ONTARIO SQUARE AND ROUND DANCE FEDERATION INC.

Friendship Set to Music

Issue Date: May 4, 2012 **Public Rel. Program Information Sheet** I-PRP 1 of 9 Pages

Information Sheets Public Relations Program

A PUBLIC RELATIONS PROGRAM FOR THE ONTARIO SQUARE AND ROUND DANCE FEDERATION

Submitted by: Robert E Milks July 7, 1987

Public Relations, EOSARDA

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PUBLIC RELATIONS - A PROBLEM WITH WORDS

Whenever two or more people get together, there are two or more definitions of Public Relations. This is compounded by the fact that the use of the word 'Communications' has been becoming increasingly popular. Recently the IN word has been 'Marketing'.

'A rose by any other name smells as sweet'. This may not be 100% correct as a quote, but it is correct in terms of our telling the Square and Round Dance story to people - both dancers and non-dancers. Public Relations is a good word as long as we agree on what it means to us.

In any language, we can only communicate if we use common definitions. To eliminate many problems when we talk about Public Relations, we need to accept a common definition. Here is a proposed definition for Public Relations for use in Square and Round Dancing.

PUBLIC RELATIONS

Public Relations is a key management function which evaluates public attitudes, identifies Square and Round Dancing with the public interest, and executes a planned program of communication designed to earn public understanding and support.

KEY MANAGEMENT FUNCTION

There are several levels of organization in Square and Round Dancing in Canada. It is a non-profit organization and, like any such organization, it must use sound management functions, if it is to meet the needs of people in Canadian communities.

Records, finance, programs, training - these are important functions. However, everything we do requires some degree of public understanding and support. To help get this support, Public Relations should be a key management function, and Public Relations personnel should sit on our executive committees.

EVALUATES PUBLIC ATTITUDES

There are many publics in Square and Round dancing - the national Society, provincial Federations, local Associations, Clubs, dancers, callers and cuers, non-dancers, governments, school boards, churches, recreation centres, young adults, teens, senior citizens - the list can be expanded.

Dancers will only support any level if they feel that it is serving them in a useful way. They have to be told or shown how any aspect benefits them.

Governments can be supportive of our operations or they can become roadblocks - it depends on how they see us.

Specific age groups may, or may not, join dancing - it depends on their image of us. Seniors may feel that clogging (Tommy Hunter show) is too strenuous for them, and not join because that is their image of our dancing. Teens may relate our dancing to what they took in school - not always a good experience.

To recruit new members or to initiate a new program, we need to find out how we are seen by those who may be involved. To increase the odds of recruitment, we should focus on the group that has the greatest potential for us. The biggest bulge (numbers) in the population of Canada is around age 40 - the post-war baby boomers! If we could find out how they see us, we could direct a program to them that should result in a significant increase in members.

IDENTIFIES SQUARE AND ROUND DANCING WITH THE PUBLIC INTEREST

Today there is a big emphasis on personal fitness - one has only to look at the number of people involved in jogging or in other fitness programs. Look at the numbers of stores now selling sports clothing and exercise clothing. Once you simply bought tennis shoes or sneakers. Today there are dozens of special shoes on the shelves.

It may be that we need to stress the fitness benefits of dancing so that we are seen as meeting the needs of people in our communities.

PLANNED PROGRAM OF COMMUNICATION

It is much easier if a Public Relations program is planned. Otherwise, one can be so busy checking into opportunities that little actually gets done. This is not to reject opportunity when it knocks. But experience shows that we can do better if we create our own opportunities.

PUBLIC UNDERSTANDING AND SUPPORT

Clubs cannot continue to operate unless there is a steady influx of new dancers. This will only happen when people understand what Square and Round Dancing are, see them as relating to their needs and feel positive enough about them to want to try one out.

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We will get support from governments and other bodies, when they know that our activity is helping to keep people fit - both mentally and physically.

CHECKLIST FOR 'WHO' DOES 'WHAT'

This is a partial listing. It is intended as a guideline. For instance, a Club in a small town may be part of an Association and still have to contact a radio station in that town.

YES - major responsibility of publicity/pr person at that level.

yes - minor responsibility only.

NO - action would be a duplication of effort.

What	Clubs	Local Association	Provincial Federation	National Society
Association Sponsored Dances	NO	YES	NO	NO
Bulletin/Magazine	NO	YES	NO	YES
Cablevision	NO	YES	NO	NO
Club Dance	YES	NO	NO	NO
Community Associations	NO	YES	NO	NO
Daily Papers	NO	YES	yes	yes
Dance Flyers	YES	yes	NO	NO
Fact Sheets	NO	yes	yes	YES
Federal Government	NO	NO	NO	YES
House Organs/Company Newsletters	yes	YES	NO	NO
Line Art/Repros	NO	NO	NO	YES
Local Government	NO	YES	NO	NO
Mall Displays	yes	YES	NO	NO
National Associations	NO	NO	NO	YES
National Conventions	NO	NO	NO	YES
National Magazines	NO	NO	NO	YES
Open House/Fun Night	YES	yes	NO	NO
Pamphlets	yes	yes	yes	YES
Posters	yes	NO	NO	YES
PR Training	NO	NO	YES	yes
Provincial Associations	NO	NO	YES	NO
Provincial Government	NO	NO	YES	NO
Radio	NO	YES	NO	yes

Store Windows	YES	NO	NO	NO
Television	NO	YES	NO	yes
Trillium Award	NO	yes	YES	NO
Weeklies	YES	yes	NO	NO

Job Description for Federation Public Relations Chairman

1. CONCEPT

The public relations chairman is responsible to the president of the Ontario Square and Round Dance Federation as the principal adviser on public relations and advertising matters. He/she is responsible for providing policy guidance, counselling, planning, public relations training in the Federation.

The PR chairman is not responsible for activities and events unless they are organized and planned as communication or community relations ventures.

2. QUALIFICATIONS

The Federation public relations chairman should be a qualified public relations practitioner with a strong background in Square and/or Round dancing. He/she must have the ability to recruit high calibre associates. A background in advertising, marketing, public relations or sales promotion is desirable.

3. PRINCIPAL RESPONSIBILITIES OF CHAIRMAN

- Organizes the public relations committee to best serve the needs of the Federation, recruiting qualified personnel to fill committee spots.
- Develops a system to review the Federations public relations profile or plan, and provides advice and counsel to the Federation.
- Coordinates public relations activities in the province and stimulates and encourages the formation of local Association public relations committees.
- Supervises the preparation of the Federations master public relations plan, ensuring that the plan is tied to the Federation's yearly program.
- Analyses, studies and initiates two-way communication with public relations personnel at the Association and National Society levels.
- Coordinates and assists with province-wide promotions.

4. FUNCTIONS OF FEDERATION PUBLIC RELATIONS CHAIRMAN

Relationships

Provincial PR personnel should:

- maintain contact with association public relations personnel
- work closely with national Society PR personnel
- work closely with the provincial Federation's Executive Committee
- develop and maintain good relations with media
- develop and maintain good relations with other provincial bodies, government and other groups who may help promote dancing in the province.

Responsibilities

The Federation Public Relations Chairman should:

1. Prepare releases for media re Federation events and activities - e.g. Trillium Awards.
2. Prepare appropriate Fact Sheets on the Federation, the Trillium Award, and other relevant subjects. These would be distributed to Association Public Relations personnel and editors of Association magazines.
3. Have bios and photos of federation officers for use by media.
4. Submit Federation reports to other Square and round dance publications.
5. Encourage Associations to help Clubs plan and run open houses or fun nights to encourage new members.
6. Provide simple pamphlets/flyers on subjects such as the Federation and Trillium Award.
7. Conduct PR workshops for Association PR Chairmen.
8. Research provincial programs where funding or promotion may be obtained for Square and Round Dancing - e.g. use of dancing to promote fitness among older population.

Job Description for Club Publicity Couple

1. CONCEPT

The club publicity couple are responsible to the president/caller for publicity and advertising.

2. QUALIFICATIONS

The club publicity couple should be knowledgeable about publicity and promotion, with a strong background in Square and/or Round dancing. He/she must have the ability to produce articles, flyers, posters and displays - as required.

3. PRINCIPAL RESPONSIBILITIES OF PUBLICITY COUPLE

- Advises the club executive, caller or leader on the promotion of club events, activities and projects.
- Keep people in the community informed about the activities and projects of the club.
- Encourages participation in demonstrations or other promotional events organized by the local Association.
- Submits items on club events to appropriate people.

FUNCTIONS OF CLUB PUBLICITY COUPLE

RELATIONSHIPS

To be effective in their job, the Publicity couple will find the following relationships both necessary and useful.

- contact with Club Caller or Leaders
- contact with the Club executive
- contact with the next level PR couple
- contact with the editors of weekly newspapers in the community served by the Club
- contact with the editor of the Association newsletter
- contact with local stores re window displays/notices on bulletin boards.

RESPONSIBILITIES

The Club Publicity couple should:

1. Advise the Club executive, Caller or Leader on the promotion of Club events, activities and projects.
2. Advise and assist in the design of flyers and bulletins to promote Club activities and events.
3. Encourage the Club, if appropriate, to hold open nights - inviting people in the community to join in an evening of dancing and fun. (Consider use of coupon)
4. Encourage members of the Club to participate in demonstrations at shopping malls or other events organized by the Association.
5. Submit material on Club activities, projects and events to the Editor of the Associations newsletter or bulletin.
6. Submit items to the Association PR couple for potential use in media - radio, TV and daily papers.
7. Submit articles on Club activities, projects and events to weekly papers in the community.
8. Work with Association PR couple in promoting participation in Association activities, displays, projects and events.
9. Use local store windows and bulletin boards to promote Club activities.
10. Keep an album or scrapbook of Club activities.

**Job Description for
Local Association Public Relations Chairman**

1. CONCEPT

The public relations chairman is responsible to the president of the local Square and Round Dance Association as the principal adviser on public relations and advertising matters. He/she is responsible for providing policy guidance, counseling, planning, public relations training in the Association.

The PR chairman is not responsible for activities and events unless they are organized and planned as communication or community relations ventures.

2. QUALIFICATIONS

The Association public relations chairman should be a qualified public relations practitioner with a strong background in Square and/or Round dancing. He/she must have the ability to recruit high calibre associates. A background in advertising, marketing, public relations or sales promotion is desirable.

3. PRINCIPAL RESPONSIBILITIES OF CHAIRMAN

- Organizes the public relations committee to best serve the needs of the Association, recruiting qualified personnel to fill committee spots.
- Develops a system to review the Association's public relations profile or plan, and provides advice and counsel to the Association.
- Coordinates public relations activities in the community served by the Association and stimulates and encourages the role of club publicity couples.
- Supervises the preparation of the Association's master public relations plan, ensuring that the plan is tied to the Association's yearly program.
- Analyses, studies and initiates two-way communication with public relations personnel at the Federation level.
- Coordinates and assists with community-wide promotions.

Job Description for National Society Public Relations Chairman

1. CONCEPT

The public relations chairman is responsible to the president of the Canadian Square and Round Dance Society as the principal adviser on public relations and advertising matters. He/she is responsible for providing policy guidance, counselling, planning, public relations training in the Society.

The PR chairman is not responsible for activities and events unless they are organized and planned as communication or community relations ventures.

2. QUALIFICATIONS

The Society public relations chairman should be a qualified public relations practitioner with a strong background in Square and/or Round dancing. He/she must have the ability to recruit high calibre associates. A background in advertising, marketing, public relations or sales promotion is desirable.

3. PRINCIPAL RESPONSIBILITIES OF CHAIRMAN

- Organizes the public relations committee to best serve the needs of the Society, recruiting qualified personnel to fill committee spots.
- Develops a system to review the Society's public relations profile or plan, and provides advice and counsel to the Society.
- Coordinates public relations activities in Canada and stimulates and encourages the formation of provincial Federation public relations committees.
- Supervises the preparation of the Society's master public relations plan, ensuring that the plan is tied to the Society's yearly program.

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- Analyses, studies and initiates two-way communication with public relations personnel at the Federation level.
- Coordinates and assists with nation-wide promotions.

FUNCTIONS OF NATIONAL SOCIETY PUBLIC RELATIONS CHAIRMAN

National PR personnel should:

- maintain contact with Provincial public relations personnel.
- work closely with the National Society's Executive Committee
- develop and maintain good relations with national media.
- develop and maintain good relations with other
- federal groups, government agencies and those who
- may help promote dancing in Canada.

Responsibilities

The Society PR Chairman should:

1. Maintain liaison with the editor of other square and round dance publications, providing advice as required and perhaps addressing articles to Federation and Association PR Chairmen.
2. Put out press releases on items of national importance.
3. Produce fact sheets on the society and its operations.
4. Maintain liaison with bodies such as 'Fitness and Amateur Sport' re use of dancers in ad campaigns.
5. Produce updated line art and repros for use in bulletins and flyers.
6. See about placing articles in house organs of national associations - e.g. En Route of Air Canada.
7. Support PR operation at national conventions.
8. Try to place articles in national magazines.
9. Develop national posters.
10. Work with Association PR chairmen re development of training courses.
11. Seek out opportunities for national media coverage.

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Issued: February 7, 2004

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THE ONTARIO SQUARE AND ROUND DANCE FEDERATION INC.

Friendship Set to Music

Issue Date: May 4, 2012

Abbr. Rules of Order

Page I-RO 1 of 4 pages

Information Sheets Abbreviated Rules of Order for Meetings

General

1. Rules of Order for any meeting are designed to ensure an orderly meeting in which the minority have the right to be heard, and the majority have the right to make decisions. Because volunteer organizations are not debating societies, they have followed more relaxed meeting rules than are found in rules of order books. Most books on rules of order run into hundreds of pages and cover rules for many obscure situations that do not occur in volunteer organization meetings. In general, as well, there are very few people who know anything about formal rules, but throughout tradition, courtesy, and common sense, rules of conduct for meetings have grown, and are in widespread use. The purpose of this set of rules is to make available common sense meeting rules appropriate to the volunteer organizations.

Chair

2. Every meeting shall have a Chairperson who shall act as impartial moderator of the meeting. If regular officers of the organization are not available, the meeting shall elect a Chair. The Chair shall not engage in any debate, nor shall move or second motions. In the event that a discussion has not examined all information on a subject, the Chair may provide information to ensure a full and complete discussion of the subject at hand.

3. In the event that the Chair wishes to enter into debate on a motion, the meeting shall be turned over to another person who shall act as the Chair. If the regular Chair vacates the Chair position to enter a debate, he or she shall not return to the Chair position until after the motion has been disposed of.

Secretary

4. Every meeting shall have a Secretary to record minutes of the meeting. If regular officers of the organization are not available, the meeting shall elect a Secretary. Tape recordings of a meeting shall not be used to replace a Secretary, although they may be used to aid in recording the process of the meeting. The Secretary may enter into any discussion, and may move, second, or vote on motions, providing he or she is entitled to vote by the by-laws or constitution of the organization.

Agenda

5. For orderly conduct of business, each meeting shall have an agenda, which gives the purpose of the meeting and the items to be examined. Normally the agenda should be prepared, printed, and circulated ahead of time, although it may be decided verbally by members at the meeting. The Chair should ensure that the minimum meeting agenda item requirements are met. The Chair may also include items upon which the Chair, or other members of a directing board, desire discussion and action. The meeting shall adopt an agenda by motion. Any agenda prepared ahead of time may be changed as desired by the meeting.

6. As a minimum, an agenda shall have the following items:
 - a) Declaration of a quorum by the chair;
 - b) Adoption of an agenda;
 - c) Approval of the minutes of the last meeting;
 - d) Business arising from the minutes;
 - e) New Business;
 - f) Adjournment

Motions and Discussion

7. The three main purposes of a meeting are to make decisions on the running of the organization, to provide information about the affairs of the organization, and to provide an opportunity for members to raise questions of concern about past or future events in the organization. Every person attending a meeting shall have the right to hear information and to raise matters of concern. Only members have a right to make decisions about the organization.

8. A motion is a decision making tool of a meeting. All motions under these rules require a mover and a seconder. There are four stages of a motion: forming a motion where the desired decision is put into words; stating by the Chair of the actual motion; discussion of the motion; and finally, acceptance or rejection of the motion by voting.

9. Because it is essential that members know what they are voting for or against; it is the duty of the Chair to make sure the motion is clear. If the motion is unclear, the Chair may ask that it be re-worded, or may suggest re-wording to make it clear, bearing in mind the original intent of the motion. Any person attending the meeting may request clarification of a motion.

10. Motions may be formed before or after discussion of a report. In large meetings it is usual to have a motion on the floor and then discussion. In small meetings, it is typical to have some discussion with a motion being formed from the result of the discussion. In the event of discussion before a motion is formed, the Chair shall monitor the discussion and ask for a motion to be formed. If no motion is formed, the Chair may rule that the meeting move on to the next item of business.

11. All remarks should be directed to the Chair, although in small meetings this rule may be relaxed somewhat, with the provision that every person present should be able to hear clearly any discussion taking place.

12. With the approval of the mover and seconder, a motion under discussion may be changed, in which case, it shall be re-stated by the Chair. A motion may be withdrawn by the mover with the agreement of the seconder at any time. If the seconder does not agree, the motion shall stand for discussion and a vote.

13. Except for a motion of appeal which takes precedence over all matters, only one motion shall be open for discussion at any one time. Only one amendment to the main motion under discussion shall be open at any one time. An amendment must be voted upon or withdrawn before the main motion question is put. Even if the amendment is passed, the main motion must be voted upon or withdrawn.

14. A motion to reconsider a matter already decided upon at a meeting requires the approval of two-thirds of the members present.

Voting

15. Except where required by the governing rules of the organization, all motions shall be decided by a majority vote of members or delegates eligible to vote. Although non-members or non-delegates may speak at a meeting, they shall not vote.

16. There shall be no proxy voting or alternate delegates, unless authorized in the constitution or by-laws of an organization.

17. Before any question is voted upon, the Chair shall ask the meeting it is ready for the question. If there is no further discussion, the Chair shall ask how many are for the motion, and then how many are against the motion. If necessary, the Chair may require an actual count to be made to determine the outcome.

18. Voting shall be by a show of hands, or if the matter warrants, such as elections of persons to positions where a choice has to be made, by secret ballot. If the voting is by a show of hands, the Chair shall vote only in the event of a tie vote, or the equivalent for motions that require more than a majority vote. If the voting is by secret ballot, the Chair, with no exceptions permitted, shall vote at the same time as the other members.

Appeal of Chair Rulings

19. Every ruling by the Chair can be appealed. Any member or delegate disagreeing with a ruling of the Chair has the right to move immediately a motion of appeal of a ruling. The appeal must be seconded. Debate on the appeal motion is allowed, and if the Chair wishes to enter into the debate, he or she must vacate the chair as outlined above. A majority vote for the motion of appeal defeats the Chair's ruling. If the motion is defeated, the Chair position is supported. If the Chair's ruling is defeated, the Chair must return the matter under discussion before the ruling was made.

Point of Order

20. At any time during the meeting, a person may raise a point of order stating what rule of order of business is being violated. The Chair shall immediately make any corrections required, or shall rule that the procedure in question is acceptable. Any such ruling is appealable.

Minutes

21. The Secretary shall prepare and sign a written set of minutes which shall contain a summary of what took place and the decision and at a meeting. Verbatim minutes shall not be made. The minutes may be posted or circulated as is required or customary in an organization. At the next meeting of the organization, the Chair shall request a motion of acceptance of the minutes of the last meeting. After the motion has been moved and seconded, the Chair shall then ask if there are any errors or omissions in the minutes. If there are, they shall be recorded by the Secretary in the current meeting's minutes. When there are no further corrections, the Chair shall put the question. No further business of the current meeting shall be done unless the minutes of the previous meeting are accepted, or accepted with corrections. After the motion of acceptance has been passed, the Chair shall sign and date the minutes of the last meeting with the notation of "Accepted", or "Accepted with corrections".

Matters not Covered by Rules

22. The meeting shall decide by majority vote on any matter or procedure not covered by these rules of order, such decisions shall be only valid for the meeting making the decision.

Note: Changes are indicated in italics

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THE ONTARIO SQUARE AND ROUND DANCE FEDERATION INC.

Friendship Set to Music

Issue Date: May 4, 2014

Tape Club

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Information Sheets Tips for Running A Tape Club

Introduction

So your caller is moving away, or is retiring and there is no-one to replace him/her. Does this mean the end of square dancing in your community? Or perhaps there is a group of eager beginners just waiting for the opportunity to learn, and there is no caller available. Successful and exciting square dance clubs can be established with no caller, by using a variety of available instructional tapes and dance tapes. Running a tape club requires careful planning, however, and particular attention must be given to the equipment used, the material, the qualities of the leader, and the support of "angels".

The location of the club is one of the fundamental items which will serve to establish the "territory" for a new club, and will invariably determine the potential market for that club. A planned venue in a city core is unlikely to attract rural or suburban participants if there is no parking. A permanent location is a must in order to create stability. It must be cost effective, suitable (flooring, etc.), the right size and be accessible with appropriate amenities (special needs, washrooms etc.). A broad range of possibilities may exist including classrooms and gyms in schools, community centres, church halls, private basements, board rooms, shopping malls after hours and many others.

Equipment

With new technology, such as MP3s, hard disk drives etc. the following can easily be duplicated at a reasonable price and with much more portable equipment:

Visit several computer/audio-video stores for advice and recommendations. Contact several well-established Callers for their recommendations. Good karioke-type players are becoming readily available. An auxiliary amplifier and speaker system is recommended.

A microphone is useful in getting new dancers used to the learning medium. It also is easier on the instructor and it is almost essential for demos and larger crowds.

Material

Instructional/teach recordings are available for purchase, either for beginners or more advanced levels. Look for professional tapes prepared by well-respected callers, such as Lee Kopman. Good teaching tapes have the advantage of covering all the moves in a particular level in a logical sequence, and provide plenty of practice and review of all previously learned material. It is also helpful to have on hand a manual, such as "The Caller Teacher Manual for Basic & Mainstream & American Square Dancing by Bob Osgood published by Square Dancing Magazine 'Sets in Order'", which can give extra hints to the leader on explaining a particular concept to the dancers, and will provide a ready reference of definitions. Also, from the same source - "The Illustrated Basic & Mainstream Movements of Square Dancing" is useful for the leader and for dancers.

Classes would soon become rather monotonous if only teach tapes were used. It is important to utilize other material as well. Dance tapes may be purchased from reliable sources, but many callers allow taping of their dances, if the tapes made are to be used to assist tape clubs with their programs

A repertoire of useful material can be accumulated over time in this way. Thus the dancers are learning their level from teaching tapes, and honing their skills by dancing to the taped material of a variety of callers, all with different styles and different voices. Dancers who learn from tapes usually find themselves very well prepared when they travel and encounter a diversity of callers at a convention.

It is important, however, to always review material before presenting it to a class. Callers do make errors and it is more helpful, especially to a new Club, to be aware of these in advance rather than have be surprises. Reviewing tapes also allow the opportunity to time the recording(s) so that organizers know how much time to allow for the playing of that night's session.

Teach tapes etc. are available from a variety of sources including:

Lee Kopman (caller), 2965 Cambell Ave., Wantagh, New York 11793. (519) 221-5028.

Ron Libby (caller), 80 Leighton Road, West Falmouth, Maine, 04105. (207) 797-6810.

Ed Foote (caller), 140 McCandless Pl., Wexford, PA 15090

Callers and Associations that can help when setting up a program:

Tim Crawford (caller), 2154 Hunt Crescent, Burlington, Ontario. L7M 2P3.

Caller groups of various Associations (SWOSDA, T&D, EOSARDA)

For printed materials:- Sets in Order, American Square Dance Society,
462 North Robertson Blvd., Los Angeles, Calif., 90048.

Leader

It is very important to choose a competent leader for the club. He/she should be very familiar with the level of dance being taught, and should feel comfortable operating the equipment. The leader must ensure that he/she has current Callerlab lists, and if the teach tapes are not quite up to date, he/she must ensure that the dancers are aware of any changes. The leader must do more than simply play the tapes. He/she must be prepared to take time to plan a program that will balance the learning of new moves with more relaxing fun. The program needs to be flexible so that the leader can switch from the planned curriculum to meet the needs of the dancers in any particular session. (i.e. the leader must have a rapport with the dancers, to sense frustration, for example, or a desire to progress more quickly). The leader, of course, needs to have plenty of patience and to remember that the dancers are there TO HAVE FUN.

It is a good idea to have a back-up leader so that the club may still meet even when the leader is unavailable (this is an advantage that some caller-led clubs may not have).

Angels

As with a caller-lead club, the success of the tape club may depend in part on the dedication of angels who are willing to give their time to support the new and upcoming dancers. Angels demonstrating a move being described on tape provide a valuable visual teaching aid. They can also give the dancers confidence and encouragement, thus increasing their enjoyment of the activity. If possible, it is a good idea to have a tip of higher level dancing either at the end of the session or during a break, to give the Angels an opportunity to dance at their own level. As with any club, it is most important to recognize and acknowledge the contribution made by the angels who come out to help on a regular basis.

General

FEES: It is wise to collect annual fees up front at the beginning of the class year. Charging a fee that is similar to other recreational activities ensures that you are "entering" a market range - that is if curling costs \$200 a year, people willing to spend \$200 may be attracted to square dancing. The price up front gives the activity "value" \$100 or \$200 is the "value" of the activity. Charging only \$5 a week lowers the value to only that amount. Alternatively, a club may choose to set up a sessional fee - for example September to December, and January to April/May.

Fees are used for a variety of purposes to sustain a viable club. There is the constant need to purchase new material, rent facilities, pay affiliation fees, and hire callers. Surpluses offset the cost of special events, advertising and equipment purchases to mention but a few.

New dancers (and the old ones!) should be encouraged to associate as much as possible with the square dance clubs and associations. Promote and encourage attendance at conventions and special events, and even organize excursions to visit other clubs. Organize dances to involve as many dancers as possible rather than just the highest level.

Disclaimer - Information Sheets

This Ontario Federation Information Sheet was prepared and approved by the Board of Directors of the Ontario Square and Round Dance Federation. It is intended only as a guide and for the assistance for dancers and club executives. The information was considered correct at the time of publication. Suggestions or changes are welcomed by the Federation and should be sent to the Secretary. This Information Sheet is made available by the Federation to members and other interested parties on the clear understanding that neither the Federation, its Board of Directors, or its staff can be held responsible for the consequences arising from the use of this information.



THE ONTARIO SQUARE AND ROUND DANCE FEDERATION INC.

Friendship Set to Music

Issue Date: May 4, 2014 **Trillium Award Evaluation Criteria** Page I-TA-1 1 of 1 pages

Information Sheet Trillium Award Evaluation Criteria

Trillium Merit Award

Presented to those who have made an outstanding contribution **beyond the scope** of their regular activities (more than their home club)

Whose accomplishments reflect extraordinary contributions of an innovative or improving nature.

The following suggestions may be useful when thinking of nominating an individual or couple:

Must be active in Square and Round Dancing for not less than 5 years.

e.g. Association Executive, Federation Representative, Club Executive, Camping Association

List dates and positions held

Involvements in other dance related committees

e.g. Caller's Clinic involvement – positions, dates, # of years, etc

Participation at Frosh Dances - other involvements

Volunteer participant in demonstrations

Locations – Hospitals, Malls, Nursing Homes, Festivals, etc

Actively promoting the Square & Round Dance movement

Promotion of dancing in public places

Recruitment of new dancers – Duty as angels

Special Advertising – innovative new methods

Include some family history

Significant items of personal life

When did they start dancing

Activities in other clubs, churches, organizations, etc

Children, Grand children

Hobbies

Nominees may be current or no-longer-active Dancers, Callers, or Leaders

Nominations for posthumous awards will also be accepted

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THE ONTARIO SQUARE AND ROUND DANCE FEDERATION INC.

Friendship Set to Music

Issue Date: May 4, 2014

Travel Industry Act

Page I-TIA 1 of 3 pages

Information Sheets The Travel Industry Act (Ontario)

General

1. The legislation governing travel agents, travel tours, accommodation, and transportation in Ontario, generally referred to as the travel industry, is contained in the:

TRAVEL INDUSTRY ACT
Revised Statutes of Ontario, 1990
Chapter T.19
and Regulation 1085 of the act

2. As far as can be ascertained no other Ontario Provincial legislation exists governing the travel industry in Ontario.

3. The Ontario S&RD Federation has a copy of this Act which can be referred to on request. Copies of the Act (a 16 page bi-lingual document) can be obtained from Ontario Government offices. Should any Club or individual have difficulty in obtaining a copy, the Federation will mail them a copy and bill the recipient for the costs involved, probably around \$8.00. On the other hand, extracts can be mailed or faxed to clubs on request.

Definitions

4. Definition of terms used in this Information Sheet:

travel agent: a person or company which sells to consumers travel services provided by another person or company.

wholesaler: a person or company which acquires rights to a travel service for the purpose of re-sale to a travel agent or who carries on the business of dealing with travel agents or other travel wholesalers for the sale of such services.

consumer: the member of the public who purchases travel services.

travel services: means transportation, sleeping accommodation or other service for the use of a traveller, tourist, or sightseer.

Applicability to the Square and Round Movement

5. In Ontario (similar legislation in Quebec is of particular interest to those living in the National Capital Region and in the vicinity of the Quebec border) all travel business must be conducted through an accredited Travel Agent or wholesaler, unless they are exempt through regulations covered by this Act. All persons or Companies organizing tour, accommodation and transportation services must be accredited travel agents or wholesalers. They and the consumer of such services are bound by this legislation.

6. It is very strongly recommended that all square and round dancers, clubs or groups carefully follow the requirements of the law, otherwise they run the risk of incurring financial loss through not qualifying for compensation from the Compensation Fund, and through not having legal recourse to protection from unscrupulous persons offering their services illegally to square dancers. It is not claimed that all such offers are made with intent to defraud or offer inadequate services. Many are offered simply as an easier and perhaps cheaper way of organizing an event.

7. The key sections of the Travel Industry Act are listed below:

- a) SECTION 25 page 15. The consequences of a person's acting or holding himself/herself/itself available to act as a travel agent or wholesaler without being registered with the authorities.
- b) SECTION 13 page 6. The liability of a travel agent or wholesaler who receives money from a client on account of a travel service to reimburse such money should the client be entitled to refund.
- c) SECTION 14 page 7. False advertising.
- d) SECTION 17 page 8. Handling of complaints by the authorities about the services given by agents and wholesalers.
- e) SECTION 20 page 10. The rules of confidentiality to be respected by agents about the business of their clients.
- f) SECTION 21 page 11. The procedures which are followed when a travel agent or wholesaler seeks protection under the bankruptcy legislation.
- g) SECTION 27 page 16. The regulations exempting certain classes of persons from the requirements of the Act.

8. The key Sections of Regulation 1085 (pages R.1.1 to R1.9) are listed below:

- a) SECTION 1 page R1.1. The classes of exemption from the Act are listed, e.g.,
 - i) a public carrier while providing one day tours.
 - ii) a corporation incorporated without share capital whose objectives are solely of an educational value.
- b) SECTION 5 page R1.1. The minimum age for travel agents and wholesalers (18 years).
- c) SECTION 8 page R1.2. The provision of receipts by travel agents to consumers.
- d) SECTIONS 12 & 13 pages R1.2 & R1.3. Requirements in connection with trust funds and the placing of deposits received from consumers, etc.
- e) SECTION 28.6 page R1.4. The advertising of "previous" prices paid by consumers and their having been made available to the public within the previous 60 days.
- f) SECTIONS 14 to 24 pages R1.5 to R1.9. The Compensation Fund regulations covering the:
 - i) contributions made to the fund by member agents and wholesalers.
 - ii) the payment of claims to consumers.

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THE ONTARIO SQUARE AND ROUND DANCE FEDERATION INC.

Friendship Set to Music

Issue Date: May 4, 2012 **Work Permit Information Sheet** Page I-WPC 1 of 7 pages

Information Sheets Work Permits for Callers, Cuers and Leaders Entering Canada

The information on Work Permits is now located in one place, on the Canadian Square & Round Dance Society website at www.csrds.ca/ The following is a copy of that information.

Overview

The two countries of Canada and the United States have established rules and process for people from other countries to work for remuneration in their country. This affects our activity. The applicable legislation is clearly set out, and the penalties and consequences for non-compliance can be severe. Over the past 10+ years attempts have been made to streamline the requirements in both Canada and the United States. To date these have been unsuccessful. The Ontario Square & Round Dance Federation initially prepared two excellent Information Sheets on these subjects. These are now being maintained updated and managed by the CSRDS.

If you are a Club or organization contemplating hiring a caller/cuer/leader from the US to work in Canada, it would be to your benefit to review the Information Guideline on "Work Permits for Callers/Cuers/Leaders Entering Canada". See the Citizenship & Immigration Canada website at: <http://www.cic.gc.ca/english/applications/work.html> and review at least the following pdf files

- * Guide [IMM 5487]
- * Application for Work Permit [IMM 1295]
- * Document Checklist [IMM 5488]

See the Human Resources website at <http://www.drhc.gc.ca/hrrib/lmd-dmt/fw-te/common/intro.shtml> and review for information

- * 'If you are an employer' and
- * their 'Application Forms'

If you are a caller/cuer/leader contemplating entry into the US for work in this capacity at a dance/convention, it is recommended you review the Information Guideline on "Work Permits for Entering the United States".

Work Permits for Callers/Cuers/Leaders Entering Canada

Background

1. Since the mid-1980s, a number of attempts have been made to work out a "cultural exchange" program to give more freedom to both Canadian and American callers/cuers/leaders to cross the border and entertain dancers. Callerlab in the U.S. and the Canadian Square and Round Dance Society in Canada have worked jointly on the problem, but so far without success. In the meantime, most of the Associations in Canada which hold large annual conventions (e.g. T&D, MASDA, Lakehead, Manitoba, etc.) have accepted the need to treat each convention as a separate event, and to follow Government regulations for hiring nonresident callers/cuers/leaders.

2. Clubs or Associations wishing to hire American callers/cuers/leaders for local dance conventions or Club teaching programs should not consider that hiring can be done without following Government rules. The square dance movement and callers/cuers/leaders have no exemptions from Government requirements. Both the person hired and the hiring organization may be subject to prosecution and severe penalties, if the rules are not followed, and if any complaint should be laid by any individual concerning the event.

Hiring a Nonresident Caller/Cuer/Leader for a Special Event

3. Nonresident callers/cuers/leaders coming to Canada to call or cue for pay must ultimately obtain work permits under Section 18(1) of the Immigration Regulations, issued by the Canada Immigration Centre of Citizenship and Immigration Canada. However, initial contact and application is made with local office of Human Resources Development Canada. Once the employment validation/application has been approved, Immigration Canada processes the Work Permit.

4. Entry into Canada for a caller/cuer/leader can be aided greatly by advance preparation by the hiring organization and working closely with the office of Human Resources Development Canada closest to the site of the dance or convention. Typically this involves advanced warning with the particulars of the incoming caller/cuer/leader and the employing organization, and obtaining the details of the requirements for an application for an employment validation. There is nothing that smoothes the way as much as personal contact with the Human Resources Centre. All information should be honest and above board. All information required and questions asked should be answered honestly.

5. Once a Confirmation of Employment has been obtained, as a general rule, the following steps are necessary:

- a) A contract with the hired person should be formalized in writing. The hired person should have a copy of the contract when he or she arrives at the border, plus a copy of the Confirmation of Employment from Immigration Canada;
- b) The hiring organization should notify Immigration Canada of the name and address of the hired person, the port of entry, and the time (or intended time) of arrival. The hiring organization should note that the person is being employed to call/cue/lead at a dance and specify the date and location of the dance. A copy of the contract with the hired person should be provided to Immigration Canada. The hiring organization should also state that it is a **nonprofit organization** incorporated under the laws of Ontario (or other province) as a Club, Association, or Federation (the Organization Registration Number may have to be provided). If the dance organization is not incorporated, it may be necessary to involve an Association or the Federation in the process to provide an incorporated protection umbrella;
- c) Upon arrival at the border, the hired person should present a copy of the contract and copies of any covering correspondence sent to Immigration Canada by the hiring organization. The hired person should pay the entry fee (\$75.00 or \$100.00), obtain a work permit, sign it, and proceed to their destination. The hiring organization and the hired person should agree upon who ultimately pays the entry fee.

Hiring a Nonresident Caller/Cuer/Leader for a Season

6) The procedure for hiring a nonresident caller/cuer/leader for a season is somewhat more elaborate. Human Resources Development Canada must be satisfied that no Canadian is qualified and available to do the job. Verification of these points usually requires the support of the area Association.

7. The recommended procedure is as follows:

- a) Meet with Human Resources staff to find out what their requirements are, and to outline what you are planning and why - see below
- b) Establish Club requirements for the caller/cuer/leader, i.e. selection criteria;

- c) Contact callers/cuers/leaders in the local Association and beyond, as appropriate, to determine which callers/cuers/leaders are available to call/cue/lead on a regular basis or for specific dates;
 - d) Advertise, receive, and evaluate replies and come to a decision as to the caller/cuer/leader desired and the reasons or rational why.
 - e) Complete the Information Sheet and meet with Human Resources staff with the information and request an employment validation and a visa/work permit be issued;
 - f) Human Resources staff may request a letter from the local association stating that there are no Canadian callers/cuers/leaders available and that they have no objection to hiring an American person. A similar letter from the local caller's/cuer's association (if any) may also be required.
 - g) It may be decided not to process the application until close to the beginning of the period, in case a Canadian should become available. The Club may have to emphasize the need for advertising and planning in advance, issuing flyers, and schedules, etc. to have the visa application processed in the spring or summer;
 - h) When the visa is issued, a copy should be given to the American caller/cuer/leader who must present it to the Immigration Centre office and pay the required fee. It may be desirable to have the visa issued for a full year to cover special events beyond regular dances, e.g. "up to five hours per week for fifty weeks"; and,
 - i) A separate visa is required for each year, and must be substantiated the same way as the first application.
-

The following is an excerpt of material obtained from Human Resources Development Canada in August, 1998

Foreign Worker Request / Assessment of Job Offer General Information

The information required is to enable this Department to assess the request for permission to hire a foreign worker. Please ensure that all information is provided as the request will be assessed solely on the information in the submission. Please be advised that the submission of the information does not imply the request will be approved, only that it will be given a fair and impartial assessment. The request may be faxed to our office in order to expedite matters. The average processing time for a response to a request is approx. four (4) weeks from the receipt of all information.

The policy of the federal government is to ensure, to every possible extent, that job and career opportunities are protected for Canadian citizens and permanent residents (Canadians) - 'Canadians First Policy'. Employment validations will be issued only when it will not adversely affect employment and career opportunities of Canadians or when there are significant benefits attached to recruitment of a foreign worker.

Generally, the only acceptable reasons for validating an employment authorization for a foreign worker are:

- when the position is a skilled shortage occupation;
- when the company will utilize the skills and expertise of the foreign worker to provide direct training for employees;
- when the foreign worker will be introducing new skills or technology into the local labour market;
- when the foreign worker will be directly responsible for creating or maintaining jobs for Canadians;
- when the expertise of the foreign worker will improve the ability of a Canadian Company to compete in the international marketplace.

It is the responsibility of the Employer to recruit locally or nationwide for any job vacancy which a Canadian or permanent resident can adequately perform. The Employment Counselor WILL NOT issue an employment validation for a foreign worker for a job vacancy in positions where a Canadian or permanent resident can learn the job adequately in a period of one year or less.

Where advertising is required you have to provide proof of recent recruiting efforts - usually relates to a caller/leader required for a full season. This advertising (to attract Canadians) may be required for a period of up to two months locally (and nationally). The conditions of employment, salary, qualifications may not be reduced for a foreign worker.

An assessment of a job offer must contain in writing:

1. Complete name, address, phone number of the business; also place of work. Attach articles of incorporation, if applicable.
 2. Job Title and complete job description, including the day to day activities of the prospective worker.
 3. Essential qualifications required for the position offered e.g.. education, experience, specialized skills, certification or licensing etc.
 4. Details of work schedule and exact wage or salary offered including any benefits or other methods or remuneration.
 5. Number of employees currently employed in this position and number of employees presently on staff and occupational titles.
 6. Proof of recruiting efforts, both internally and externally. Copies of ads and billings, resumes received, names of applicants and the reasons they may not have been deemed suitable are required. Ads must contain the full job description, the job requirements (qualifications required), the salary and must also request a resume from applicants. They are happy to review proposed ads and advise of any questions before the ads are placed.
 7. Duration of the job, is it temporary or permanent.
 8. Number of employees which will be affected by the hiring of a foreign worker - number to be trained.
 9. Long and short-term benefits derived by both the company and the local labour market by the hiring of a foreign worker. Number of employees hired or trained, financial benefit to the firm, increase in export potential et.
 10. Details of the company's activities e.g.. type of industry, goods manufactured or description of services, etc.
 11. Name, complete home mailing address, date of birth, country of birth of foreign worker as well as the prospective foreign worker's complete resume.
-

Foreign Worker Information Sheet

Employer / Company Name: see attached information on the organization and its executive

Revenue Canada Tax #:

Foreign Worker's Name: _____

Foreign Worker's Home Mailing Address: _____

Sex: _____

Country & Place of Birth: _____

Date of Birth: _____

Job Description:

Job Requirements (Qualifications):

Duration (Dates from .. to ..): _____

Salary: see attached contract(s)

Immigration Processing At:

Point of Arrival to Canada? _____

Flight #: _____

Airline & Terminal #: _____

Date & Time of Arrival: _____

Point of Departure from Canada?

Flight: _____ Airline: _____

Date & Time: _____

SAMPLE LETTER TO HUMAN RESOURCES DEVELOPMENT CANADA

Dear Sirs:

The following is a list of U.S. Citizens for whom we are requesting a Validation of Offer of Employment to a Foreign Worker:

1. List Employee Name

Place and Country of Birth

Social Security #:

Point of Entry Information: (what airport or city, if driving; airline & flight number; date & time)

Point of Departure Information: (similar categories of information as above)

Home Mailing Address:

2. Employee Name

...

Signed by ...

- Attach a list of the group Executive and contracts.

- Also attach a letter setting out something like the following example:

Human Resources Development Canada

Dear Sirs:

Further details regarding our request of Validation of Offer of Employment to a Foreign Worker:

The Employer:

The ... Association or Club is a not-for-profit organization that was formed and established to promote square & round dancing. It provides for ... (the exchange of philosophy and material to improve the quality of dancing, teaching of the dance and all-round enjoyment of dancing and to provide a link to other Districts, National and International Square & Round Dance Associations).

The members currently meet (eg. weekly, once a month, etc) from September to April/May at (location).

The Job:

The callers/leaders being hired from the United States are Square Dance Callers and Round Dance Leaders.

They will be required to prompt the dancers through difficult choreography for both square and round dancing with "split-second" decisions as to what interesting choreography they will use next. The choreography must be smooth and well-timed. Only callers/leaders with years of practice are able to do this very well. The skills required for each event depend solely on the desires of the Employer on behalf of the dancers in each area and we try to hire different callers/leaders each year that will bring the most pleasure to the dancers attending the event. The whole pleasure of the dance is the ability to dance to different callers and round dance leaders and experience their unique presentation of the required dance moves.

These callers/leaders will be receiving (describe the salary) for approximately ... hours work. They will be working at ... (describe the location of the dance), beginning on ... (date and time) and ending on.. (date & time). Their hours of work are interspersed or shared with the use of many "Ontario" callers/leaders who will then be able to obtain experience working at an event of this size. In this way,

visiting dancers from ... to ... might hear our callers/leaders as they improve in their abilities, and may wish to hire them at an event they are presenting in their dance areas.

A different group of callers/leaders from around ... (North America, Ontario, etc.) are hired each year to maximize the dancers enjoyment at this event.

Efforts to Recruit Canadians:

The Association/Club have hired callers/leaders from across Canada, Ontario (or whatever) over a period of ... years. Of course, the number of callers/leaders available and qualified to do the job varies and this year we have hired ... (# hired) Canadians to complement the total staff. We have, of course, taken into consideration other Canadians that we have not hired, but many who were considered this year, and not chosen, will be hired in subsequent years. We look at the individual abilities of each caller/leader and try to bring various "styles" of calling and singing together for each Convention/Dance. Callers/leaders with similar styles hired together would not maximize enjoyment to the dancers.

Benefits to Canada:

More dancer attend our event because we bring in highly qualified callers/leaders to the event. This provides our organization with necessary funds to promote square & round dancing in Ontario/our area; more particularly ... (describe the area). This is the area that our organization draws its membership from.

Dancers from outside the area also come early or stay after the dancing event and Sight-see throughout the area. This provides benefits to our local economy outside of the square & round dance movement.

Sincerely,
... (signature)

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THE ONTARIO SQUARE AND ROUND DANCE FEDERATION INC.

Friendship Set to Music

Issue Date: May 4, 2012

Work Permit Information Sheet

Page I-WPU 1 of 2 pages

Information Sheets

Work Permits for Callers, Cuers and Leaders Entering USA

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Overview

The two countries of Canada and the United States have established rules and process for people from other countries to work for remuneration in their country. This affects our activity. The applicable legislation is clearly set out and the penalties and consequences for non-compliance can be severe. Over the past 10+ years attempts have been made to streamline the requirements in both Canada and the United States. To date these have been unsuccessful. The Ontario Square & Round Dance Federation initially prepared two excellent Information Sheets on these subjects. These are now being maintained updated and managed by the CSRDS.

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See the Citizenship & Immigration Canada website at:

<http://www.cic.gc.ca/english/applications/work.html> and review at least the following pdf files

- * Guide [IMM 5487]

- * Application for Work Permit [IMM 1295]

- * Document Checklist [IMM 5488]

See the Human Resources website at <http://www.drhc.gc.ca/hrib/lmd-dmt/fw-te/common/intro.shtml> and review for information

- * 'If you are an employer' and

- * their 'Application Forms'

If you are a caller/cuer/leader contemplating entry into the US for work in this capacity at a dance/convention, it is recommended you review the Information Guideline on "Work Permits for Entering the United States".

Work Permits for Entering the United States

Background

The United States requires work permits for foreign workers (which includes Canadian callers, cuers, and leaders) to work temporarily in the United States. This is similar to Canadian requirements which require work permits for Americans to work in Canada. A separate Information Sheet deals with hiring American callers, cuers, or leaders to work in Canada. This one deals with Canadians wishing to work in the United States.

There are no special provisions or exemptions for callers, cuers, or leaders wishing to work for pay in the United States. Canadian callers, cuers, or leaders wishing to be employed in the United States must comply with the regulations of the U.S. Immigration and Nationality Act. "Cultural" activities were excluded from the provisions of the North American Free Trade Agreement, so there is no avenue open in that direction.

Obtaining a Temporary Work Permit for the United States

The Embassy of the United States, a United States Information Office, or a United States port of entry are best places for advice and forms for obtaining a temporary work permit for the United States. A typical information paper is attached. The most likely category for the work permit would be "H-2", which states: H-2 for persons who desire to enter the United States temporarily to perform temporary services or labor, if employed persons capable of performing such service of labor cannot be found in the United States.

Note the wording carefully about service or labour for which no American can be found. This is a very tough sell, especially if an American thinks he or she should have the job. It only takes one person to bring down the wrath of the Immigration Authorities. Once a person is caught breaking the United States laws, his or her name is entered into a computer database which is checked regularly for violators. The best advice to Clubs or callers, cuers, or leaders in this matter is to check carefully and make sure all proper documents have been obtained and followed to the letter of the law.

NOTE: For quite detailed information see the "Guide for Canadian Performing Artists Entering the United States", (<http://www.dfait-maeci.gc.ca/travel/consular/16007-e.htm>) by Canada Department of Foreign Affairs & International Trade web site - look under Publications .

Disclaimer - Information Sheets

This Information was prepared initially by the Board of Directors of the Ontario Square and Round Dance Federation and is now being managed by the CSRDS. It is intended only as a guide for dancers, club executives and other organizations to help them "get started" in handling the administrative details of a square dance organization. The information was considered correct at the time of publication. Suggestions or changes are welcomed by the CSRDS and should be sent to the Webmaster. This Information Sheet is made available on the clear understanding that neither the CSRDS, Ontario Federation, or their Boards of Directors, or its staff can be held responsible for the consequences arising from the use of this information. Additions and clarification on these Guidelines are always welcomed.

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