



### **GENERAL DEFINITIONS**

**The Corporation:** AMC is a member-managed Arizona charitable corporation, registered with the Arizona Corporation Commission and the Internal Revenue Service. All volunteer choristers in good standing are voting members of the corporation.

**By-Laws:** The governing document describing how the corporation operates, including the powers and duties of members, directors, officers, contract positions,

**Strategic Plan:** A statement of AMC's strategic purpose, goals for the next three to five years, and the activities necessary to reach those goals.

- **NEW: Identify AMC products:** What AMC delivers to the community (concerts, outreach events, workshops, contract engagements, merch, etc.).
- Identify the **strategic objectives** to shape our future and help us fulfill our mission in the next 3 to 5 years.
- Identify **success factors** (key elements of the objective), measurable **performance targets**, and **game plans** (activities to reach the targets).
- Execute game plans using technology, staff, and volunteer resources; track performance.
- Update the strategic plan as needed.

**Tangible Products:** What AMC delivers to the community, currently and in the future, through performances and outreach. (An essential part of "Running it like a business.")

- Concert: Traditional performance event for a paying audience
- Outreach Visit: Appearance at an education or community partner venue.
- Contracted Service: Paid engagement of full or partial Chorale.
- Collaboration: Event-specific, sharing artistic direction, costs, and revenue (e.g., Messiah Sing-Along) conducted under the terms of an MOU.

**Intangible Products:** Fulfilling our mission "To inspire and enrich our community through the power of choral music," through "The AMC Experience: the sheer beauty of sound and poetry" in our performances and outreach.

- We are dedicated to delivering exceptional performances that captivate, uplift, and engage audiences of all ages and backgrounds.
- With a commitment to artistic excellence, we strive to explore a diverse repertoire that spans different genres, time periods, and cultures, showcasing the beauty and versatility of choral music.
- Through our passionate performances, we seek to foster a deep appreciation for the art form and create musical experiences that leave a lasting impact on our listeners.
- As ambassadors of harmony and unity, we aim to promote inclusivity, collaboration, and cultural exchange among our singers and within the broader community.
- By nurturing the talents of our members and providing a platform for growth, we aspire to be a catalyst for personal and artistic development, fostering a lifelong love and commitment to choral singing.



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- Together, we aim to create transcendent moments of musical expression, connecting hearts, minds, and souls through the shared language of music.

**Program/Artistic Activities:** Activities directly connected to AMC’s artistic mission (e.g., engaging staff and featured artists, rehearsal and performance venues, event advertising and logistics, sheet music acquisition, etc.)

**Operational Activities:** All other general business and non-program activities (e.g., fundraising, liability insurance, mailbox rental, website and other technology, general marketing and advertising, government and membership fees, etc.)

**Memorandum of Understanding (MOU):** A document that summarizes the expectations, gives, and gets of all parties in a collaboration or partnership, approved by the board or other responsible party representing each participant. An MOU expresses the good faith intentions of all but is not an enforceable contract.

**Artistic Agreement:** A legally binding contract between AMC and an individual or other organization (e.g., staff, featured artists, venues, service providers, etc.) specifying terms and conditions for delivery of products or services.



### **FINANCIAL**

**AMC Financial Procedures Manual:** A document published in 2020 that describes the corporation fiscal and accounting policies and procedures to ensure that assets are safeguarded; wishes of grant-makers and donors are complied with; and finances are managed with accuracy, efficiency, and transparency.

**Wells Fargo Checking Account:** AMC's account of record with a chartered bank. AMC officers can access online banking, write paper checks, use company debit cards in person or online, or set up automated transactions using the account.

#### **QuickBooks Online, Advanced version (QBO):**

- AMC's principal accounting platform, where we "keep the books."
- Includes a defined set of bank accounts (Wells Fargo Checking, PayPal, Petty Cash, etc.), plus a Chart of Accounts, a list of Products and Services, and other standard accounting structures.
- Includes all vendors (who AMC sends money to: staff, featured artists, product and service providers, etc.) and customers (who AMC receives money from: ticket buyers, grant makers, donors, etc.).
- Supports tracking and reporting of revenue and expense by account, product, and Class (event code).
- AMC officers have access rights to configure the account and execute transactions; as members of the corporation, choristers can have reporting-only access set up on request.
- Annual discounted subscription (currently \$160/year) paid to Intuit, Inc. (obtained through TechSoup.org)

**PayPal (Bank):** An online payment system that AMC uses for sending and receiving cash, maintained as a separate bank account in QBO. Linked to Wells Fargo checking, it normally maintains a zero balance.

**Petty Cash Bank:** An account maintained in QuickBooks Online to track occasional cash withdrawals and payments for AMC usage, such as box office bank for making change. Transactions are recorded as transfers; normally maintains a zero balance.

**Automated Clearing House (ACH):** An industry standard system AMC uses for sending and receiving cash, directly connected to AMC's Wells Fargo checking account. ACH transactions are usually initiated within QBO, such as bill payments, etc.

**Zelle:** An online payment system AMC uses for sending and receiving cash, directly connected to AMC's Wells Fargo checking account.

**Venmo:** An online payment system AMC uses for sending cash. As currently set up, individuals with access to the Wells Fargo online banking

**Stripe:** A general-purpose payment processor used by AMC for online transactions (e.g., ticket and merchandise sale).

**Platform/Platform Fee:** A service that provides buyer access to online sales or donations and charges a percentage or fixed fee on any transaction made using the platform such as Ticketstripe, Mightycause, Kindful, etc.



**Transaction Processor/Transaction Fee:** A service that executes the actual credit card transaction and charges a percentage or fixed fee per transaction (e.g., Stripe).

**Payment Card Industry (PCI) Compliance:** The security standard for credit card transactions, developed and managed by the PCI Security Standards Council. (NOTE: All credit card transactions involving AMC are handled by other parties, such as Stripe, Wells Fargo, PayPal, etc., that maintain PCI compliance, a Very Big Deal. Because AMC never knows or records card info, we do not need to obtain PCI Compliance certification.)

### **FUNDRAISING MECHANISMS**

**Grants:** General operations or targeted funding from grant makers, including governments, corporations, foundations, or philanthropic organizations. In recent seasons, AMC's primary source of grants has been the Arizona Commission on the Arts, the Phoenix Office of Arts and Culture, and the Kroger Foundation (Fry's).

**Personal Donations:** AMC has an ongoing "Make Music Better" campaign online using Kindful, and occasional limited-term campaigns like "Hamiltons for Handel" and concert-related donations. A few choristers have anonymously contributed nearly \$10,000 per season in recent years.

**Sponsorships:** A significant opportunity for business and wealthy individual contributions. Identified online as underwriting of specific costs, from individual featured artists (\$250) to whole concert and season sponsorships (\$5,000 to \$15,000). No significant impact to date.

**General Operation Support (GOS) Grants and Donations:** Funding that may be used for any purpose by the receiving organization, within general terms set by the grant maker.

**Targeted Grants and Donations:** Funding that may only be used for a specific purpose by the receiving organization (e.g., project or event-specific use).

#### **Advertising Sales:**

- **Program Ads:** Printed in concert programs (none have been sold in recent seasons).
- **Website Ads:** Similar to program ads or logos on AMC's home page. A few logo ads for \$250 per season have been obtained through ZipSprout.com.

**Fundraising Events:** Other than online campaigns, AMC has not held a fundraising event (gala, auction, etc.) in recent years.



### **ORGANIZATIONS**

**Arizona Corporation Commission (ACC) and Arizona Secretary of State (AZSOS):**

AMC's corporate status, trade name, and trademark records are filed with these bodies. An annual corporate report is filed with the ACC.

**Internal Revenue Service and Tax Filing:** As a 501(c)(3) charitable corporation (EIN: 86-0405912) with revenue less than \$50,000, AMC files an annual Form 990-N ("postcard") return. AMC does not file a state return.

**Arizona Commission on the Arts:** An agency of Arizona state government that promotes arts activities and provides support to organizations and artists of all types throughout the state.

- Provides GOS and targeted grants of multiple types.
- Over the last decade or more has received zero funding in the annual state budget.
- State funding is by special appropriation year-to year.
- Currently uses a multi-year grant cycle where a full application is required every 2 to 3 years. (AMC will need a full application in 2025.)
- AMC receives regular GOS grants (\$2,500 to \$6,000 depending on the year).

**Arizona Impact for Good:** An advocacy organization for nonprofit support and philanthropy in the state (not arts-specific).

**Arizona Citizens for the Arts:** An advocacy organization for all arts groups in the state. AMC pays annual dues.

**Chorus America:** An educational and advocacy organization for choral groups nationwide. AMC pays annual dues.

**The Arts at Ascension:** An artistic partnership between AMC, the Women's Orchestra of Arizona, and the Ascension Lutheran Congregation, set up via an MOU that is revised occasionally. Has a web presence ([theartsatascension.org](http://theartsatascension.org)) and is the "producer" of the annual Messiah Sing-Along.

**ASCAP (American Society of Composers, Authors, and Publishers):** A non-profit that collects and distributes royalties for songwriters, composers, and music publishers. AMC is required to file a report on all works performed each season and pay a royalty fee based on programs, performances, and audiences. (Our last communication with ASCAP was in 2023 when they told us a new membership form was in preparation, and they would be in touch. To become current would require catching up some previous year fees, at least several hundred to a few thousand dollars.)

**Phoenix Office of Arts and Culture:** An agency of Phoenix city government that promotes arts activities and provides support to organizations and artists of all types in the city.

- Provides GOS and targeted grants of multiple types to Phoenix-based organizations and individuals.
- Receives substantial funding in annual city budgets.
- A full application is required every year.
- AMC receives regular Community Improvement (GOS) grants (\$5,500 to \$10,000 depending on the year) and occasional project (targeted) grants (up to \$2,000).



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**SMU Data Arts:** The National Center for Arts Research at Southern Methodist University.

- Maintains a database of financial, performance, and other data for arts organizations of all types and scales.
- AMC enters data from QBO and other systems (website statistics, event date and attendance records, etc.) to create a Cultural Data Profile (CDP) for each season.
- AMC accesses Data Arts to generate mandatory reports for grant makers based on our CDP information and the grant maker's standardized request. (That is, AMC enters the data once, from which a report for each grant maker can be generated.)

**Guidestar:** An online repository of information about non-profit organizations of all types and scales.

**Outreach Partners:** Organizations where AMC performs artistic and other outreach activities. Important to demonstrate AMC's community outreach in grant applications.

- **Global Academy of Phoenix** (Education partner): A K-8 school in the Alhambra Elementary School District in Phoenix. AMC friend Earl Simmons led a Treble Choir as an afterschool club that collaborated in AMC's 2022 Christmas concert.
- **Circle the City** (Community partner): A community service organization that provides medical care to persons experiencing homelessness. CTC had a choir of patients and staff but is not currently active; AMC performed part of the 2024 Christmas concert at their Phoenix Medical Respite Center.



### **SERVICES, TOOLS, AND TECHNOLOGY AMC USES**

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#### **Namecheap.com:**

- Domain registrar for AMC's internet identity **arizonamasterworks.com**. (Also, arizonamasterworks.org, azmasterworks.com, and azmasterworks.org).
- Host of the AMC website, using the Stellar Business plan. Includes security (SSL), backup, a Content Delivery System (CDS), and various management tools.

#### **WordPress:**

- “An open-source platform for publishing and sharing anything on the web,” including AMC's website. Uses free and paid plugins to extend functionality.
- AMC uses the Elementor Pro website builder (paid) and related tools (free and paid) to lay out and manage the site.
- Website statistics tracked via Monster Insights, Google Analytics, and Analytify (may be some overkill there!)
- Other plugin tools include All in One SEO, WP Mail SMTP, WP Forms, LiteSpeed Cache.

#### **Bloomerang/Kindful/Giving+/Qgiv:**

- Multi-functional fundraising and donor management system including communications, campaigns, volunteers and membership, etc.
- A significant opportunity to build regular communications program
- A paid subscription underwritten by a donor, about \$500 per year.

#### **MS365 Business:**

- Supports AMC's @arizonamasterworks.com email system, including a few personal ([bob.altizer@amc](mailto:bob.altizer@amc), [karla.allingham@amc](mailto:karla.allingham@amc)) as well as functional (finance@, webmaster@, grant.manager@, media@, etc.) that get forwarded to individuals.
- Provides access to all MS365 enterprise applications and services, including MS Office applications (Word, etc.).
- Licenses obtained FOR FREE through TechSoup.org!

#### **Ticketstripe.com:**

- Ticketing system designed for non-profits, currently used by AMC.
- Supports ordering and payment admission sales and donations online and box office for AMC events.
- Provides event management features include scan to check in, attendee list management, communications, etc.

#### **Constant Contact:**

- Multi-channel online marketing system, including email, events, ads, forms, surveys, etc.
- Currently used for occasional E-newsletter to patrons; chorister newsletter.
- Current contacts: 463 subscribed; 242 “most engaged”
- Monthly discounted subscription (currently \$14/month) paid to Constant Contact (obtained through TechSoup.org)



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**Zoom/Fathom:** Online meeting platform. Most AMC sessions use Bob Altizer's paid business account. Fathom tools support meeting recordings and transcripts.

**Brown Paper Tickets:** A ticketing system previously used by AMC.

**Mightycause:** One of many major nonprofit fundraising platforms. Handles all Giving Tuesday/Giving Day national campaigns. AMC has an account, but the system isn't used for any active campaign.

**Eventbrite:** An event management and ticketing platform previously used by AMC. Expensive; replaced by Ticketstripe

**Google Business:** AMC has a business presence and email address (azmasterworks@gmail.com).

**Music Library Storage:** AMC's library of sheet music is currently stored at Extra Space Storage in Gilbert, close to librarian Cheryl Burton's home. Rent is paid through June, 2025 but will need to be renewed at an expected cost to exceed \$1,200 per year.





### **ADVERTISING AND SOCIAL MEDIA**

This is a major opportunity for AMC to reach out to a larger audience but will require considerable effort to clean up accounts and create and post content.

**Publicist and Advertising:** No current formal program or representation. AMC employed a local publicist in the 2021-2022 season to send press releases and set up other publicity opportunities.

**Audio/Visual Content:** Created by individuals, primarily Kathy Yoder and Bob Altizer, including casual photos and videos at events and archival audio recordings. Major opportunity for improvement with in-action photos, program and human interest video clips, etc.

**Platforms:** AMC has a presence on several social media platforms and calendar apps:

- **Facebook:** Some current content and events, and occasional ad boosting for concerts. AMC has a current page (azmasterworks) and a legacy page (arizonamasterworks) from decades back that need unifying.
- **Instagram:** Limited presence on @azmasterworks.
- **YouTube:** Some content from decades back on a legacy channel. Needs updating in both admin and regular posting of new content.
- **LinkedIn:** AMC has a business account but rarely posts anything here.
- **NextDoor:** Neighborhood-oriented event posting and advertising. AMC posts some events there.
- **Evvnt:** A “platform that helps you sell and promote your events online.” AMC posts some calendar entries there.
- **TikTok:** No presence.
- **X (formerly Twitter):** The lack of credibility of this platform taints any content. AMC doesn’t belong here.