

A PRACTICAL GUIDE OF DUTIES FOR NATIONAL AND REGIONAL LEADERS OF THE COLLEGE ORCHESTRA DIRECTORS ASSOCIATION

To the Members of the College Orchestra Directors Association:

During many years of service on the elected officer team of the College Orchestra Directors Association (CODA), we consistently tracked the “day-to-day” expectations of each office, documenting responsibilities that extend beyond what is detailed in the CODA By-Laws and Constitution.

When members are considering running for an elected leadership position, it is essential to have a realistic understanding of the commitment. A comprehensive resource detailing the expected duties across the full commitment period has historically been unavailable. We believe that providing this information ensures the membership is better informed to make decisions regarding service.

The included list of duties is intended to serve as practical guidelines for future office holders, acknowledging that no list is ever truly exhaustive. This list, initiated by Past President Marguerite Richardson and completed with the collaboration of the 2025-2026 national leaders in consultation with the National Board, aims to give the entire membership helpful guidance.

For all of us, the years of service have been highly rewarding and have provided deep insight into our unique organization. We strongly encourage you to consider running for the National and Regional Offices! Your participation will be invaluable to CODA and richly rewarding to you personally.

Sincerely,

Dr. Marguerite Richardson - Past President (2023–2024)

Dr. Chris Dobbins - Immediate Past President (2024–2025)

Dr. Luis Viquez - National President (2025–2026)

Dr. Patrick Reynolds - National President-Elect (2025–2026)

Dr. Larry Spell - National Vice President (2025–2026)

For Reference: College Orchestra Directors Association Bylaws

Article I: Duties for National Officers

President: It shall be the duty of the President to organize the National Conference and to preside at all general meetings thereof. The President shall appoint a parliamentarian to each business session. It shall be the duty of the President to represent CODA at other conferences or appoint one or more representatives in their place when CODA is invited to send a delegate. It shall, furthermore, be the duty of the President to administer and coordinate the activities of the National Committees, both standing and ad hoc.

President-Elect: It shall be the duty of the President-Elect to assume the duties of the President in their absence. It shall, furthermore, be the duty of the President-Elect to assist the President in the administration and coordination of the activities of the National Committees, both standing and ad hoc.

Vice President: It shall be the duty of the Vice President to assume the duties of the President in the absence of the President and the President-Elect. It shall, furthermore, be the duty of the Vice President to coordinate membership activities.

Immediate Past President: It shall be the duty of the Past President to chair the nominating committee for National Elections and serve as a liaison between the executive committee and the regions regarding regional elections.

Note: All elected and appointed officers are expected to attend each national CODA conference and leadership retreat in person. Virtual attendance can be requested from the National President. These are the only times in the year when all officers serving on the national board can meet in person to address the crucial aspects of governance of the organization.

DUTIES & EXPECTATIONS FOR THE NATIONAL VICE PRESIDENT OF CODA

Conducting Workshop Management

- Revise Conducting Workshop Student application and distribute via email—to be done in the summer/fall before national conference or as scheduled by the executive committee.
- Be in contact with guest conducting clinician (masterclass) regarding repertoire for class (depends on orchestra selected for masterclass); add repertoire to Conducting Workshop application when possible.
- Assemble committee from the membership to review Conducting Workshop application videos and forms.
- Notify all applicants of status (accepted and not accepted) in a timely manner.
- Arrange to meet with clinician and student conductors at the conference prior to the masterclass (approximately one hour of time with the clinician).
- Serve on the nominating committee for the new Vice President election.
- 2–3 weeks before conference, touch base with student conductors to:
 - Confirm that they have hotel accommodations (CODA rates or their own plans).
 - Confirm that they have registered for the conference (student rate).
 - Confirm details of meet-up with the clinician prior to the master class.

Masterclass Logistics (Coordinated with Executive Administrator)

- Arrange - in coordination with the Executive Administrator - the video recording of the conducting masterclass.
- Arrange for stipend checks for student conductors to be presented at conference (coordinated with the treasurer). Note: The Executive Administrator does not present checks to student conductors; this is done by the National VP.
- Certificates/Plaques (Executive Administrator creates and carries certificates for masterclass participants and carries the certificates and plaques until the day of the masterclass).

During the National Conference

- Meet with student conductors.
- Meet with orchestra director/s of workshop orchestra/s (depends if one or more orchestras are participating in the masterclass).
- Invite the student conductors to attend the conference banquet as guests of CODA.

During Masterclass Session

- Introduce guest clinician and workshop orchestra/s (and orchestra/s' director/s).

- Keep time for each student conductor during the workshop.
- Video record each student conductor during his/her session (camera or phone).
- Follow up with each student conductor and clinician after the session.
- Present CODA appreciation plaques to clinician and orchestra director/s.

Future Planning

- Begin process of deciding dates, venue, and possible interaction with local orchestra for announcing at the national conference full membership meeting (two years in advance).
- Attend National Officers' retreat (fall, year before conference).
- At the national conference, announce location and dates of future conference during his/her year as president.

DUTIES & EXPECTATIONS FOR THE NATIONAL PRESIDENT-ELECT OF CODA

Guest Orchestra Selection

- Revise application for Guest Orchestra application/set due dates—to be done summer prior to the national conference or as scheduled by the executive committee.
- Assemble committee from the membership for reviewing Guest Orchestra applications and videos of orchestras.
- Meet with the committee to select up to three guest orchestras for the following year's national conference.
- Notify all applicants of status (accepted and not accepted) in a timely manner.

Conference Coordination (Coordinated with Executive Administrator)

- Coordinate with selected orchestras' directors for performances at the national conference, including stage needs, instruments that may need to be borrowed (piano/large percussion, etc.), and program submission for the conference program.
- Ensure concert information from guest orchestras is provided for the conference booklet created by the Executive Administrator.
- Select one of the guest orchestras to serve as the orchestra for the Conductor Workshop masterclass: Share repertoire with the Vice President and the President so that student conductors and clinician are advised. In some instances, two orchestras have shared this duty, usually based upon the repertoire the orchestras plan to bring to the conference.
- Plaques: The Executive Administrator carries guest orchestra plaques until the day of the performance. At that time, plaques are to be presented by the National President-Elect

Transition & Future Planning

- Prepare “reveal” announcement of dates and location, and other information available (PowerPoint) of the following year’s conference to be presented at the full membership meeting during the conference (one year in advance).
- Continue the process of planning and coordination for their corresponding national conference.
- Assemble agenda for the Full Board Meeting on the last day of conference (as new president).
- Attend National Officers’ retreat.

At the National Conference

- Coordinate warm up times/logistics, performances of guest orchestras, welcome orchestras and directors at their concerts, and present CODA appreciation plaques to directors.
- Preside over the Full Board Meeting on the final day of the conference (“passing of the gavel”).

DUTIES & EXPECTATIONS FOR THE NATIONAL PRESIDENT OF CODA

I. Leadership Retreat

- Select dates for retreat (upon sending a poll to attendees).
- Contact hotel for group rate (three months prior to retreat)/sign contract.
- Make necessary hospitality and reception arrangements with hotel food service.
- If needed, make A/V arrangements with a hotel or associated A/V company (for WiFi, virtual attendance, etc.).
- Contact national and regional leadership to invite them to retreat.
- Provide agendas for retreat.
- Make arrangements with the treasurer to pay invoices (CODA portion).

II. Organization of the CODA National Conference

Dates & Venue

- Select dates for the conference (done two years in advance).
- Select the host school for the conference (done two years in advance).
- Make contact with the host city orchestra (done one-two years in advance).
- ANNOUNCE conference at national conference two years prior to your year (as Vice President).

- REVEAL conference details at national conference one year prior to your year (as President-elect).

Key Personnel

- Choose the featured speaker for Keynote Address (minimum one year in advance).
- Choose clinician for Student Conductor's Workshop Master Class—share with the Vice President for application (one year in advance).

Programming

- Call for sessions for the conference: goes out three months before conference; deadline to submit is two months before conference or as decided upon by the Executive Board.
- Form committee to review the sessions submitted for the conference.
- Fully schedule the conference.

Logistics & Administration (Coordinated with Executive Administrator)

- Hotel arrangements: make arrangements for group rate/sign contract; do onsite walk-through of facilities, if possible. Needs: Conference room Wednesday night, Thursday morning, Sunday morning; Bar/restaurant/breakfast arrangements; Arrange hospitality for the Sunday morning Board Meeting or whenever scheduled.
- Conference facilities: make arrangements for banquet and other hospitality needs; make arrangements for classroom/conference space for sessions; make arrangements for WiFi connectivity during conference; involve administration of college/department/university (meet and greet, welcome, etc.).
- Arrange for bus transportation, as necessary.
- Request checks for Student Conductors (stipends)—coordinate with the Vice President.
- Setting the conference rates on the CODA website and communicating them to the Executive Administrator who will update the online payment system (Stripe) and inform the website manager to update the appropriate links.
- Review clinician certificates created by the Executive Administrator for conference. The Executive Administrator will print and bring to the National President the day they are needed.

Conference Materials (Coordinated with Executive Administrator)

- Compile conference program information and send it to the Executive Administrator to include the items below. Will also need to proofread and make edits to the program alongside the Executive Administrator:
 - Welcome Message and Special Thanks
 - Timeline of Events at Conference

- Biographies of Keynote speaker, Masterclass Clinician
- Conference Presenters: photo, title of presentation, short abstract of session (150 words or less), and biography (150 words or less).
- Guest Orchestra programs
- CODA Leadership and Lifetime Achievement Award Lists
- Other information which may be pertinent to the conference
- The Executive Administrator will prepare the Conference Program Book (electronic) and arrange for nametags/lanyards as part of online conference registration to be distributed at the conference registration table.
- Welcome folders and university/city information is optional (can reduce paper/waste), but nice to have if available. See if the host institution can provide folders, campus maps, places to eat near campus, pens, swag, and other items for free. CODA can provide a basic schedule to include in the folder (created by Executive Administrator) and possibly build a list of places to eat near campus.
- Work with the Executive Administrator on creating plaques for guest/host orchestra, keynote speaker, guest clinician, outgoing president, Lifetime achievement awards, and others as needed. The Executive Administrator will place order, receive the order, and will carry and distribute to the appropriate officers throughout the conference.
- The CODA Pop-up banner Executive Administrator can transport this item to and from the conference.

Other Conference Activities

- Make arrangements for group tickets for members to attend the city symphony performance.

III. Miscellaneous Duties for the National President

- Preside over Board meeting at conference of presidency transition (before “passing of the gavel”).
- Welcome message on the website.
- Welcome message in the conference program.
- Answer questions as submitted on the website (via Executive Administrator). Questions submitted through the website will be routed first through the Executive Administrator and determined who should receive them if an answer is not apparently clear. The National President can either answer directly or through the Executive Administrator.
- Interact with social media.
- Instigate virtual social opportunities during the year (Zoom Happy Hours).
- Monthly contributions to the CODA Matters Newsletter.
- Revise welcome message to new CODA Members which will be sent by the Executive Administrator.

- The Executive Administrator provides weekly updates on the number of members registered for the conference.
- Consult and convey financial information between the treasurer, the executive team, and the national board.

DUTIES & EXPECTATIONS FOR THE IMMEDIATE PAST PRESIDENT OF CODA

I. Coordinate the Election of the New National Vice President

(Late fall–January before National Conference)

- Obtain a list from the Executive Administrator of members who are eligible to run for the office of National Vice President (see By-Laws, Article II). The Executive Administrator provides the CODA Membership list for those who are eligible on a monthly basis, but it can also be requested at any time. The Executive Administrator does track conference attendance, membership history, length of time at each membership level, and other minor details.
- Establish the election committee which consists of the Past President, President, President-Elect, and Vice President plus one member at large (anyone not on the list of candidates).
- The committee chooses 3-5 possible candidates, with "ranking"—typically, preference is given to those who have attended conferences and/or shown significant CODA activity in the past 2-3 years.
- Chair (Immediate Past President) assigns candidates to each committee member for reaching out to assess interest, starting with top 3-4 candidates. Have an "above the line" mind-set (i.e., only candidates who are active in CODA activities are above the line).
- After finding 2-3 interested candidates that the committee approves, get a CV and Vision Statement from each.
- Post the above to membership for review as candidates for the election.
- Create a ballot (electronic) and proceed with the vote. Per the By-Laws, the election shall be completed at least two weeks and not more than four weeks prior to the termination of the National Conference.
- Announce the new Vice President at the full membership meeting during the National Conference.

II. Liaison and Ceremony

- Serve as a liaison between the executive committee and the regions regarding regional elections (April/May).
- Offer a toast at the banquet during the National Conference honoring all past Presidents in attendance.

DUTIES & EXPECTATIONS FOR THE REGIONAL PRESIDENT, PRESIDENT-ELECT & VICE PRESIDENT

Regional leadership within the College Orchestra Directors Association (CODA) is essential for advancing a collegiate conducting career, serving as a dual engine for professional development and academic promotion. Beyond fostering local artistic collaboration and networking, this hands-on service—managing committees, coordinating complex events, and leading recruitment—directly satisfies the vital "service to the profession" criteria demanded for tenure and promotion.

I. Regional President Duties

The Regional President is responsible for leading the team, facilitating elections, and overseeing communication and event planning.

Regional Vice President Election Management

The Regional President is responsible for organizing and running the annual Regional Vice Presidential Election. This process must be completed according to the Bylaws:

1. **Select a Nominating Committee:** Select a nominating committee of at least three members consisting of the current President, President-Elect, and Vice President. (Additional members can be appointed at the discretion of the current Regional President.)
2. **Committee Submission:** Ensure the committee submits two names for the office of Regional Vice President.
 - *Note: Candidates must be nominated or self-nominated from the membership within the corresponding region and are required to have attended one national conference before being considered for nomination.*
3. **Conduct the Election:** Ensure the election is done by secret ballot circulated to all active regional members during the months of March and/or April of each calendar year.
4. **Transition:** The newly elected Regional Vice President shall assume office on May 1st of each calendar year (as stipulated in the original bylaws provided in the prompt's context) or upon the conclusion of the National Conference (as stipulated in the second provided document).
5. **Serve as Liaison:** Be available to help the Regional President-Elect and Vice President carry out their duties.

Communication and Meetings

- Convene two online regional general meetings (via Zoom) each academic year (Fall and Spring).

- Convene two online meetings (via Zoom) of regional leadership each academic year (Fall and Spring).
- Direct any questions regarding conference or funding procedures to the National President.

Event Planning and Funding

- Lead the team to create and implement regional conferences (either in person or virtual) that foster professional development, networking, and artistic collaboration for members.
- Lead the team to create their own promotional materials for regional events, which should be shared promptly with the CODA social media team.
- Lead the application for the CODA Regional Virtual/In-Person Conference Fund (up to \$200 once per fiscal year).
- Lead the application for the CODA Regional Event Fund (up to \$2,000 annually).

Membership Recruitment & Outreach

- By August 15 each year: Upon dividing efforts evenly among the regional leaders, the President will participate in reaching out via individualized emails to orchestra directors who are non-CODA members, inviting them to join or renew their membership.
- By September 30 each year: Provide a brief report to the CODA Chair of Membership & Chair of Development on the findings from this recruitment campaign.
- Reach out to university orchestra director nonmembers with a unified message and unified branding.
- Participate in creating and maintaining a catalogue of university orchestras in the region.
- Mention the CODA affiliation when teaching masterclasses or doing any outreach work.

II. Regional President-Elect Duties

The Regional President-Elect is primarily responsible for recruiting prospective CODA members and supporting the election process.

Membership Recruitment (Prospective Members)

- Contact prospective members (non-members) in the region, usually in the fall.
- Market CODA membership and the annual conference to them.
- By August 15 each year: Upon dividing efforts evenly among the regional leaders, the President-Elect will participate in reaching out via individualized emails to orchestra directors who are non-CODA members, inviting them to join or renew their membership.

- *Note: Please include the CODA Executive Administrator in any personalized emails sent to former members who have not yet renewed.*
- By September 30 each year: Provide a brief report to the CODA Chair of Membership & Chair of Development on the findings from this recruitment campaign.

Regional Vice President Election Support

- Serve on the nominating committee for the Regional Vice President elections.

General Duties

- Participate in creating and maintaining a catalogue of university orchestras in the region.
- Participate in reaching out to university orchestra director nonmembers with a unified message and unified branding.

III. Regional Vice President Duties

The Regional Vice President focuses on current member engagement, database integrity, and also supports the election process.

Membership Engagement (Current Members)

- Contact current CODA members in the region, usually in the fall.
- Prompt current members to update their information in the website directory.
- Market the annual conference to current members.
- *Note: Current membership lists can be requested from the Executive Administrator.*
- By August 15 each year: Upon dividing efforts evenly among the regional leaders, the Vice President will participate in reaching out via individualized emails to orchestra directors who are non-CODA members, inviting them to join or renew their membership.
 - *Note: Please include the CODA Executive Administrator in any personalized emails sent to former members who have not yet renewed.*
- By September 30 each year: Provide a brief report to the CODA Chair of Membership & Chair of Development on the findings from this recruitment campaign.

Regional Vice President Election Support

- Serve on the nominating committee for the Regional Vice President elections.

General Duties

- Participate in creating and maintaining a catalogue of university orchestras in the region.

- Participate in reaching out to university orchestra director nonmembers with a unified message and unified branding.
- Contact their general membership to encourage attendance at the national conference.
- When possible, maintain a yearly presence at All-State and other state-level School Band and Orchestra Association conferences (e.g., SCSBOA) as an informational hub.

DUTIES & EXPECTATIONS FOR THE APPOINTED LEADERS AND APPOINTED POSITIONS OF THE COLLEGE ORCHESTRA DIRECTORS ASSOCIATION

CODA Secretary

- Carry out the core responsibilities of a recording secretary, including key administrative and governance tasks that support efficient and well-run meetings.
- Record, prepare, and distribute clear and accurate minutes of all National Board meetings to the full Board.
- Support effective communication among the Board, executive leadership, and stakeholders, ensuring meeting practices align with the Constitution and Bylaws of CODA.

CODA Treasurer

- Serve as the official custodian of all CODA funds and assets.
- Financial Records: Oversee the establishment and maintenance of accurate records of all income, expenses, and disbursements.
- Bank Accounts: Establish and maintain bank accounts in the name of the Association.
- Disbursements: Authorize the deposit of money and the payment of expenditures. In many organizations, requests for payment are also authorized by the President or the National Board as applicable.
- Regular Reporting: Prepare and present a report of the financial standing at all Board meetings. This includes providing the board with an understanding of financial statements, and CODA's overall fiscal health.
- Annual Report: Present an annual financial report, which is typically distributed to all Association members.
- Ensure that tax forms and financial records are conducted as required with the corresponding forms to be filed in a timely manner.

CODA Historian

The historian's role is centered on providing a historical context for CODA in carrying out its mission. Specific duties often include:

- Collecting, preserving, and organizing official records, documents, photographs, and artifacts related to CODA's history, conferences, and activities. The Historian will collaborate with the institutional location of the CODA Historical Archives (currently at Washington and Lee University) for these purposes.
- Maintaining an archive of past leadership, award recipients, and significant organizational milestones.
- Researching and documenting the founding and evolution of the organization.
- Presenting historical information to the board or membership as needed, to help inform current decisions and future planning.

Chair of Membership and Chair of Development

These roles will jointly take the lead in organizing the Regional Leaders to gather information and execute membership recruitment efforts, in coordination with the Executive Administrator.

Membership Recruitment Strategy

- Collaborate to create and maintain a comprehensive, up-to-date database of orchestra directors across the country to assist CODA in recruiting or renewing new and past members.
- Determine whether directors at institutions with orchestral programs are CODA members or not.
- Timeline & Deadlines (By June 1st each year): Contact each region's leaders (Vice President, President-Elect, and President) and organize the process of gathering information.
- Feedback & Reporting: Report on recruitment efforts as part of their regular reports during National Board meetings.
- Administration: Assist with managing and distributing the updated member list, working in conjunction with the Executive Administrator.

CODA Facebook Administrator Responsibilities

- Responsibly handle sensitive information by safeguarding and protecting CODA's data systems.
- Execute timely management of requested outflow content.
- Manage content creation of requested announcements.
- Determine and post content that will be of value and in line with CODA's mission.
- Promote upcoming events.
- Share requested announcements from other CODA members.
- Photograph and post content from in-person CODA events, when possible.
- Monitor and respond to comments and questions within posts and in Messenger.
- Send CODA email announcements as needed.
- Work closely with existing social media team members.

- Proofread and edit content for accuracy.

Chair of the WAIOC Advisory Committee

- Schedule and lead regular meetings for the WAIOC Advisory Committee to plan, discuss, and implement **annual** goals for organization-wide projects, programs, and sessions at the National Conferences.
- Send out agendas for Advisory Committee meetings, take notes, and send out post-meeting summaries. (Also assisted by the Vice Chair, as needed.)
- With the committee, plan all academic-year-Zoom-session events for the fall and spring semesters (decide upon dates, topics, and guest speakers).
- Send invitations to guest speakers and update the committee about confirmed invitations.
- Send CODA List announcements to invite members to session events.
- Track RSVPs for session events and send Zoom login for sessions.
- Request that the events are added to CODA website calendar.
- Create and publish WAIOC announcements on social media.
- Serve as moderator for academic-year-Zoom-session events. Keep track of attendance.
- Initiate the call for nominations/self-nominations for the Advisor-at-Large and Student Representative positions.
- Send additional CODA List announcements as needed.
- Attend National Conferences as able (in-person or virtually).
- Note: The WAIOC Advisory Committee consists of a Chair, Vice Chair, two Advisor-at-Large members, and a Student Representative.

CODA Website Administrator Responsibilities

- **Maintain Content Currency:** Ensure all publicly accessible information (e.g., leadership contact details, conference dates, mission statement, bylaws) is accurate, up-to-date, and free of broken links.
- **Upload and Publish:** Manage the uploading, formatting, and publication of documents, announcements, and media provided by other CODA leaders (e.g., reports, photo galleries, the CODA Journal, PDF documents, and newsletter archives).
- **Coordinate Programmatic Updates:** Work with the National President to post the Welcome Message and conference program information.
- In coordination with the President, regularly communicate with the Webmaster regarding major requests for the CODA website.

CODA Executive Administrator

The Executive Administrator's role is largely administrative, logistical, and communicative, serving as a central hub for various national officer activities, especially concerning the National Conference and membership.

I. Conference and Logistics Support

- Masterclass Logistics Coordination: Work with the National Vice President to arrange the video recording of the masterclass.
 - *Note: This includes gathering media for the camera and recording the session while the National VP keeps track of time. Students still need to bring an SD card or USB drive for transfer, or they can bring their own camera.*
- Certificates/Plaques: Create and carry the certificates for masterclass participants and carry the certificates and plaques until the day of the masterclass.
- Plaque Management (General):
 - Work with the National President on creating plaques for guest/host orchestra, keynote speaker, guest clinician, outgoing president, Lifetime achievement awards, and others as needed.
 - Place the order, receive the order, and carry/distribute them to the appropriate officers throughout the conference.
 - *Note: The Executive Administrator carries guest orchestra plaques until the day of the performance for the National President-Elect.*
- Conference Program & Materials:
 - Prepare the Conference Program Book (electronic), compiling information sent by the National President.
 - Arrange for nametags/lanyards as part of online conference registration to be distributed at the registration table.
 - Prepare a basic schedule to include in optional welcome folders (if the host institution provides them).
- CODA Pop-up Banner: Transport the CODA Pop-up banner to and from the conference.
- Clinician Certificates Review: The Executive Administrator creates clinician certificates and will print and bring them to the National President the day they are needed.

II. Membership and Administrative Support

- Website/Online System Updates:
 - Update the online payment system (Stripe) with the conference rates set by the National President and inform the website manager to update the appropriate links.
 - In conjunction with the Chair of Membership and Chair of Development, assist with managing and distributing the updated member list.

- Membership Recruitment Support: Collaborate with the Chair of Membership and Chair of Development in organizing Regional Leaders to gather information and execute recruitment efforts.
- Member Tracking: Provide the CODA Membership list for those eligible to run for National Vice President to the Immediate Past President on a monthly basis, or upon request.
 - *Note: The Executive Administrator tracks conference attendance, membership history, length of time at each membership level, and other minor details.*
- New Member Welcome: Send the revised welcome message to new CODA Members provided by the National President.
- Conference Registration Updates: Provide weekly updates to the National President on the number of members registered for the conference.
- General Correspondence: Serve as the initial point of contact for questions submitted through the website, routing them to the appropriate officer (e.g., National President) if the answer is not already clear.
 - The National President can answer directly or through the Executive Administrator.
- Content Currency: Ensure all publicly accessible information (e.g., leadership contact details, conference dates, mission statement, bylaws) is accurate, up-to-date, and free of broken links.

November, 2025