



# National Charter and Operating Policies

## Welcome to the L.I.F.E. National Charter and Operating Policies Statement.

Since being established in 2003, the L.I.F.E. organization has grown considerably. We are now represented by dozens of Chapters and it is a substantial music group in the United States. Given our continued growth it is necessary to establish a National Charter and Operating Policies so that the L.I.F.E. organization can operate at a cohesive, organized and consistent level. The following National Charter and Operating Policies represent the governing of the L.I.F.E. organization, L.I.F.E. officers and L.I.F.E. Chapters that set forth the operational processes, regulations, and policies necessary to run the growing L.I.F.E. organization.

Should you have specific questions on the L.I.F.E. National Charter and Operating Policies, please contact Frank West, Lowrey Marketing Manager by email at: [frankw@lowrey.com](mailto:frankw@lowrey.com), or by phone at: 1.800.451.5939.

**August 1, 2012** - This LIFE National Charter supersedes any other previously issued charter documents issued by Lowrey.

The L.I.F.E. Team



# Table of Contents

Preamble .....	3
Article I. Mission Statement.....	3
Article II. Governance .....	3
i. Membership .....	3
ii. Trademark License .....	4
Article III. L.I.F.E. Chapter Officers Operating Policy .....	4
i. National L.I.F.E. Consultants/Volunteers.....	4
ii. Local Chapter Officers .....	6
Article IV. Membership Management .....	8
i. Database Management .....	8
ii. New Member Applications .....	8
iii. New Member and Current Member Packages .....	9
iv. Once a Week Reporting .....	9
Article V. Reporting .....	9
i. New Memberships.....	9
ii. Drop-out Memberships .....	9
iii. Chapter Changes.....	9
iv. Membership Changes .....	9
v. Fiscal Reporting.....	9
vi. L.I.F.E. Program Reporting.....	9
Article VI. Chapter Membership .....	10
i. Chapter Responsibility .....	10
ii. Membership Termination .....	10
Article VII. Chapter Operating Policies .....	10
i. Rescission and Termination of Sponsorship.....	10
ii. Dues/Not-For-Profit Status .....	10
iii. Membership .....	11
Article VIII. Member, Chapter Disclaimer .....	11

## **Preamble**

The Lowrey Is Fun and Easy<sup>™</sup> group (L.I.F.E.<sup>™</sup>) is an organization founded and sponsored by Lowrey Organ Company<sup>™</sup>. The group was established to offer music making benefits and services to Lowrey enthusiasts throughout the world, and to develop a close relationship between the Lowrey owner, the Lowrey dealer and Lowrey Organ Company. The opportunity to start an independent Chapter affiliated with the L.I.F.E. group is offered to bring Members together for the common interest of promoting music making activities. The goal of each Chapter is to generate an increased level of enthusiasm for the music making lifestyle and for playing Lowrey product(s). The Chapter will be a not-for-profit organization.

## **Article I – Mission Statement**

L.I.F.E. (Lowrey Is Fun and Easy) is a music making lifestyle club that brings together people who share the desire to make music, meet new people, make new friends, and become part of the fun-filled Lowrey music making lifestyle. L.I.F.E. Members promote and raise awareness of the recreational music making lifestyle through community events and playing for others. Membership in L.I.F.E. is open to all who wish to join, from the experienced music maker to the person that always wished they could play.

## **Article II – Governance**

The Lowrey Organ Company is the governing body for the L.I.F.E. organization and all its policies, operating procedures, guidelines, rules and procedures, branding, fiscal determinations and regulations, database management, offerings, national programs, promotions, vendors, Chapters, and staffing. The Lowrey Company has final authority on programs, issues, determinations and all functions of the L.I.F.E. program, including National officer and Chapter roles and responsibilities.

Each L.I.F.E. Member, affiliated Chapter, sponsoring Dealer, Lowrey vendor, and Lowrey/L.I.F.E. staff must adhere to these Charter and Operating Policies. Should L.I.F.E. determine, in its sole discretion, that any one of the above is not adhering to the policies set forth, L.I.F.E. may rescind its recognition of the group and individual(s) at any time.

### **i. Membership**

L.I.F.E. is open to all music makers, whether they play/own a Lowrey brand instrument or not. All L.I.F.E. Members are eligible to join any affiliated L.I.F.E. Chapter, if membership requirements are met.

### **ii. Trademark License**

The trademarks L.I.F.E.<sup>™</sup>, Lowrey Is Fun and Easy<sup>™</sup>, Lowrey<sup>™</sup>, and Bringing People Together With Music<sup>™</sup> along with the following logos (the L.I.F.E. trademarks) are among the many registered trademarks of the Lowrey Organ Company. These trademarks may not be altered in

anyway and cannot be used in combination with any other words or graphics.



Chapters may use the L.I.F.E. and Lowrey logos and trademarks in conjunction with their official Chapter name, and in conjunction with material relating to Chapter activities, including but not limited to: t-shirts, vests, pins, banners, flyers etc.

### **Article III – L.I.F.E. Chapter Officers Operating Policy**

The duties and responsibilities of officers in L.I.F.E. shall be as follows:

- i. The duties of the **National L.I.F.E. Consultants/Volunteers** shall be to support all L.I.F.E. Chapters by communicating directly with L.I.F.E. Chapters and Members on Chapter issues or questions, activities, reporting issues back to the L.I.F.E. Team in a timely manner.
  1. The National L.I.F.E. Consultants/Volunteers shall be fully knowledgeable on all L.I.F.E. programs, all materials, processes and procedures so as to fully assist all Members with questions and issues via phone or in person. The National L.I.F.E. Volunteers shall work to resolve issues as quickly as possible either on their own or with the assistance of the L.I.F.E. Team.
  2. The National L.I.F.E. Volunteers shall compose and distribute the Chapter Update via email on a timely, monthly basis. Lowrey and the L.I.F.E. Team will provide input from Chapters for the Chapter Update content. The National L.I.F.E. Volunteers submit a rough draft of Chapter Update to Lowrey Marketing Manager for review and approval prior to distribution. The National L.I.F.E. Volunteers update and maintain the email distribution list.
  3. National L.I.F.E. Volunteers will also represent the L.I.F.E. organization at functions such as Home Organ Holiday, Annual Chapter Officer Meeting, national volunteer events, etc., and be responsible for promoting Membership and the music making lifestyle throughout the year. The role of the National L.I.F.E. Volunteers will be to support, encourage, and advise all Chapter development as needed.
  4. There shall be no outside club expenditures incurred, including but not limited to: mailing, office, phone expenses and travel, without prior consent of Lowrey Organ Co. Marketing Manager. The National L.I.F.E. Volunteers will be provided with a phone line and email account funded by Lowrey for the term of service.

5. The National L.I.F.E. Volunteers are not responsible for any fiscal transactions or fiscal database input and transactions of the L.I.F.E. Membership. The Lowrey Company manages all financial matters.
  6. Updates received by the National L.I.F.E. Volunteers are reported to the Lowrey Organ Co. Marketing Manager and the Lowrey Organ Co. Marketing Associate on a weekly basis. Maintenance of the database is performed by the Marketing Associate.
- ii. The purpose of **L.I.F.E. local Chapter Officers** shall be to promote and support L.I.F.E. music making activities for L.I.F.E. Members by conducting Chapter activities and encouraging participation in other L.I.F.E. events. They will work to promote Membership and the music making lifestyle throughout their term.
1. Affiliated Chapters shall have the following primary officers: President, Secretary/Vice President, Reporter and Treasurer. Other discretionary officers may be appointed as needed by the individual Chapter. The duties and responsibilities of the primary Chapter Officers shall be as follows:
    - a. **President:** The President is responsible for helping to organize and promote the meetings to all Members. The President also presides at all meetings of the Chapter. He or she helps guide the meetings (keeping meetings on track, asking for actions and commitments, and putting forth issues up for a vote.) Additionally, the President is responsible for any dues collected by the group. (If the Chapter has elected a Treasurer, the Chapter President must be provided with an itemized monthly statement of the Chapter's finances.) The President's position is a volunteer position.
    - b. **Secretary/Vice President:** The Chapter Secretary/Vice President helps to co-lead meetings, as well as take the meeting notes. As Vice President, this person will help organize, promote and run the meetings along with the President or preside over meetings in the President's absence. The Secretary/Vice President position is a volunteer position.
    - c. **Reporter:** The Chapter Reporter provides the National L.I.F.E. Team with content (stories and photos) for the *L.I.F.E.Style* newsletter and Chapter Update. The Chapter Reporter is asked to send in articles of interest on events and photos of Chapter activities and Members to the National L.I.F.E. Headquarters on a **regular monthly basis**. The Reporter position is a volunteer position.

2. Chapter Officers will represent their Members at the Annual National L.I.F.E. Chapter Officers Meeting and be responsible for sharing and implementing the information received to their Chapter Members for the purpose of promoting Membership and the music making lifestyle.
3. Chapter Officers will conduct Chapter meetings and coordinate Chapter responsibilities and activities, which include collection of funds, reporting of meeting minutes, and compliance with L.I.F.E. Charter and Operating Policies.
4. Chapter activities and operations shall be conducted in a manner consistent with a family-oriented, not-for-profit philosophy.
5. The sponsoring Chapter dealer may assume any, or all, officer position(s) including their respective responsibilities and may remove any officer from office at the dealer's sole discretion. The sponsoring dealer may determine how Chapter officers are selected and the length of their terms in office.
6. The sponsoring dealer has the authority to require the Chapter to perform to the sponsoring dealer's standards and is to assure L.I.F.E. that the Chapter abides by these Charter and Operating Policies.
7. Chapter By-laws, if needed, are to be determined by the Chapter and may not replace, supersede or conflict with this Charter and L.I.F.E. Operating Policies. The sponsoring dealer and the Lowrey/L.I.F.E. office must approve Chapter By-laws prior to publication or implementation. Once adopted, a copy of the Chapter By-laws must be furnished to the sponsoring dealer, the Lowrey/L.I.F.E. office, and must be available to all Chapter Members.
8. Length of Service: The length of service of local Chapter Officers shall be for a one (1) term. Officers can be reelected as determined by the Chapter and/or the sponsoring Dealer. Timing of elections and or appointments can be held as determined by the Chapter and/or Dealer itself.

## **Article IV - Membership Management**

- i. **Database Management:** Management of L.I.F.E. Membership and affiliated Chapters resides with the Lowrey/L.I.F.E. Team. There shall be one (1) main Membership database and one (1) main Chapter Officer database. Both databases shall be owned and maintained solely by

Lowrey, this includes database entry and database management. Any additions or changes to the database shall be relayed directly to the Lowrey Organ Co. Marketing Associate in a timely manner, so that changes can be made.

- ii. **New Member Applications:** All new Member and applications are to be sent to L.I.F.E. headquarters.

Lowrey/L.I.F.E.  
Attn: Jacqueline Mavros  
989 Aec Drive  
Wood Dale, IL 60191

Any new Membership application going to the National L.I.F.E. Consultants/Volunteers must be forwarded immediately upon receipt to the L.I.F.E. Marketing Associate.

- iii. **New and Current Member Packages:** shall be received by the New or Current Member from Lowrey within a 8-10 week period from the post-date of the Membership application. Delay in mailing will result if Membership applications are not sent directly to Lowrey (see above item ii.)
- iv. **Once a Week Reporting:** All information, issues, materials collected by the National L.I.F.E. Volunteers shall be delivered to the L.I.F.E. Team on a timely once a week basis, unless an immediate response is required.

## Article V – Reporting

Membership/Chapter reporting is requested on a monthly basis. Lowrey will provide report forms.

- i. New Membership

On a monthly basis a report of all New Member activity, New Member materials disbursed, and any club expenditures shall be reported to Lowrey Organ Co. Marketing Manager.

- ii. Drop-out Memberships

On a monthly basis a report of all Drop-Out Member activity shall be reported to Lowrey Organ Co. Marketing Associate.

- iii. Chapter Changes

On a monthly basis a report of all Chapter changes such as new/dropped officers, contact information, and/or issues that have come up shall be reported to Lowrey Organ Co. Marketing Associate.

- v. Membership Changes



On a monthly basis a report of all Member changes such as new/dropped, contact information and/or issues that have come up shall be reported to Lowrey Organ Co. Marketing Associate.

vi. Fiscal Reporting

On a monthly basis a report of all L.I.F.E. fiscal activity, shall be reported to Lowrey Organ Co. Marketing Manager by the National L.I.F.E. Volunteers.

vii. L.I.F.E. Program Reporting

On a monthly basis, the Lowrey Organ Co. Marketing Associate shall report all new Membership, Chapter additions, dropout Members, and fiscal reporting to Lowrey Vice President.

## **Article VI – Chapter Membership**

- i. All L.I.F.E. Members are eligible to join any affiliated L.I.F.E. Chapter if membership requirements are met.
- ii. The sponsoring dealer may suspend or terminate a person's Membership in the sponsored Chapter if the sponsoring dealer, in the sponsoring dealer's sole discretion, determines that a Member's conduct is undesirable or contrary to the sponsoring dealer's, the Chapter's, or L.I.F.E.'s best interests.

## **Article VII – Chapter Operating Policies**

- i. **Rescission and Termination of Sponsorship:** In the event a sponsoring dealer decides to terminate or rescind sponsorship of a chartered Chapter and/or Membership:
  1. The sponsoring dealer shall inform the appropriate Lowrey Regional Sales Manager and the Lowrey Organ Co. Marketing Manager of the sponsoring dealer's intent to cancel or terminate sponsorship fifteen days prior to providing the Chapter or Member with written notice of termination or rescission of sponsorship. Such notice shall be afforded by telephone, email, or facsimile transmission.
  2. The sponsoring dealer shall provide the Chapter or Member with written notice that sponsorship is terminated or rescinded, setting forth the reasons for termination or cancellation. Said notice shall be effective fifteen days subsequent to date of delivery of the notice. A copy of the sponsoring dealer's written notice to the Chapter Membership and/or Member shall be sent to the Lowrey Regional Sales Manager and the Lowrey Organ Co. Marketing Manager.
- ii. **Dues/Not-For-Profit Status:** Annual Chapter Membership dues are at the sole discretion of the Chapter. L.I.F.E. Chapters are to be not-for-profit organizations. Annual dues may only come directly from Members and or

sponsoring Dealers. Any Chapter collecting dues or fund-raising from non-L.I.F.E. Members for the benefit of the Chapter will be terminated. For example, collecting money from those for whom the Chapter has entertained. Fund-raising is sanctioned only as a L.I.F.E. sponsored National Volunteer Event, or as a local Dealer and Chapter sponsored charity event. As a Chapter safeguard, moneys collected for any charity shall be recorded and filed for possible audit submission.

L.I.F.E. Chapters seeking and maintaining not-for-profit status do so at their sole expense and responsibility, and agree to hold Lowrey, Sponsor Dealers, National L.I.F.E., officers & employees harmless from any actions resulting from a Chapter's status or operation.

- iii. **Membership:** Membership can be revoked by L.I.F.E. and or the sponsoring dealer for the following: gross misconduct, not adhering to the National Charter and Operational Procedures, not adhering to any Chapter By-laws, acting against the L.I.F.E. program or sponsoring dealer. In order to suspend or revoke a Membership, the sponsoring dealer and/or Lowrey Organ Co. Marketing Manager must do the following:
  - 1. Notify the Member in writing of the cancellation of their Membership. Give the reason for the cancellation in clear, concise terms.
  - 2. Send a copy of the cancellation letter to the appropriate Dealership and Lowrey Regional Sales Manager.

## **Article VIII – Member, Chapter Disclaimer**

While the L.I.F.E. Member and Chapter may be affiliated with L.I.F.E., they remain a separate, independent entity responsible for their actions. All L.I.F.E. Members and their guest(s) participate voluntarily and at their own risk in L.I.F.E. and L.I.F.E. Chapter activities. The sponsoring dealer, L.I.F.E. Team and Lowrey Organ Company, its subsidiaries and distributors, and local Chapter officers are and shall be released and held harmless by the Member/guest for any injury or loss to the Member/guest or to his or her property, which may result from participation in L.I.F.E. and L.I.F.E. Chapter activities. This means that each and every Member of the local Chapter and their guest(s) have no ground for legal action against the sponsoring dealer, L.I.F.E. Team, Lowrey Organ Company, its vendors, distributors and its subsidiaries, the local Chapters and their respective agents and employees for any injury resulting to them or their property.