

# Woodworkers and Modelmakers Guild Operations Manual

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## Acknowledgments

The Woodworkers and Modelmakers (WWMM) Guild of Sun City Hilton Head (SCHH) would like to express their appreciation to the Sun City Hilton Head Community Association for the excellent facilities and equipment provided. The Guild is grateful to the founding members for the very professional way they first organized the Guild as a club. Additional thanks to current and former Board members as well as special committee members who have given so much time and assistance.

Thanks also to the many other volunteers who are continuing to volunteer and enabling us to have a functioning workshop.

## Operations Manual Purpose

The purpose of this Operations Manual is to provide the Guild's membership with a central reference document containing the policies, rules and procedures that guide the Guild and the workshop in day-to-day operations.

This manual is based on the Community Association's (CA) latest "Chartered Club Rules and Procedures" and the WWMM Guild's current By-Laws (CA and Membership approved). If there is a conflict between this manual and the CA documents, the CA documents will prevail. This manual will be reviewed annually by the Vice President with the support of all WWMM Board of Directors (BOD) members to assure that the information contained herein is current, complete, and accurate. Any changes to the manual will be reported to the membership. Updating and summarizing changes under the revisions section should be completed by the end of the 1<sup>st</sup> quarter and whenever they occur during the calendar year. (See BOD annual calendar requirements at the end of this document). A paper copy of this manual is in two binders (Binder 1 contains the main text and Binder 2 contains the Appendices) in the Resource Center. Each new member is directed to the New Member Webpage (<https://wwmmg.org/>) and is encouraged to read all information, especially the Guild By-Laws and this Operations Manual. A copy is available on the Sun City Woodworkers Guild web page (<http://www.suncityhiltonhead.org/>). **It is the responsibility of every member to read and be familiar with its contents.**

## Woodworkers and Modelmakers Guild Mission Statement

The mission of the SCHH Woodworkers and Modelmakers Guild is to provide an organization that represents an array of interests that relate to woodworking and modelmaking. Such interests include but are not limited to model railroading, wood carving, wood finishing, model construction, wood turning, intarsia, furniture building and repair, tools and equipment operation and other related projects and activities. The Guild provides general membership meetings and training classes that relate to these common interests, and a wide variety of training classes in all levels of craftsmanship as well as safe operations and practices.

A major part of this mission is to provide a safe environment where members can have fun and learn the creative art and skill of fine woodworking and model making. Safety management is a significant focus of the Guild and is integral to all training and daily operation of all tools and operating procedures. The Guild's mission also includes providing useful products and services to Sun City residents and the CA, and performing repair or other services requested by the Sun City community as well as undertaking approved projects outside of the Sun City community. Each activity (i.e., furniture repair, bench refurbishment, mailbox repair, etc., and any known outside activity), will be assigned to the appropriate board member and a committee will be named and a lead member identified. Each committee lead will identify team members as needed and will suggest alternative leaders/members for continuity as required.

# CHAPTER 1: Organization of the Guild

## 1.1 Board of Directors

Executive Board is the primary governing body of the Woodworkers and Modelmakers Guild. The Executive Board (EB) consists of the President, Vice President, Secretary, and Treasurer. The EB represents the officers of the Guild. An additional 5 members are elected as Members-at-Large (MAL) herein referred to as "Directors." The Board of Directors (BOD) comprise the Executive Board and the five Directors. The BOD serves January 1 to December 31 each year.

The entire BOD should not change every year. If they desire, BOD members can be re-elected by being re-nominated by the nominating committee. Each year the BOD is ideally composed of 6-8 returning members and 2-4 new members. This low turnover in BOD members maintains continuity in the Guild's policies and operations.

At the beginning of each new year the responsibilities for the functional areas within the Guild are assigned by the President to each BOD member and/or to a responsible member outside the BOD as an administrator. The President should consider input from other BOD members during this process. For administrator appointments, the BOD follows Robert's Rules in voting on these leadership positions currently including Shop, Safety, Maintenance and Guild/Community Relations Administrators. Since the Guild is an all-volunteer organization, the assignment and the acceptance of these duties and responsibilities is a negotiation. The EB retains the right to modify functional areas as the need arises.

BOD member responsibilities should be reviewed and updated under the revisions section at the January BOD meeting each year. (See BOD annual calendar requirements at the end of this document).

## 1.2 Functional Areas of the Guild

This lists the functional areas of the Guild. Job description details are listed in Section 7.

Title	Duties
Advanced Training Director	7.2.2
Advanced Training Instructors	7.2.5
Assistant Shop Manager	7.3.3
Board of Directors (BOD)	7.0.2, 7.0.3
Cluster Activities Coordinator	7.6.11
Cluster Instructor	7.2.3
Cluster & Practicum Training Director	7.2.1
Equipment & Supplies Director	7.4.1
Front Desk & Concessions Director	7.5.1
Front Office Coordinator & Assistant	7.5.2
Furniture Repair	7.5.3
Guild Community Relations Administrator	7.1.4
Guild Calendar Administrator	7.6.10
Guild Product Sales	7.5.4
Immediate Past President	7.0.8
Lathe Mentor	7.3.5
Locker/Drawer Rental Manager	7.5.6
Lumber Room Management	7.4.5
Lumber Sales Accountant	7.6.14

Title	Duties
Maintenance Administrator	7.1.3
Maintenance Mechanic	7.1.3.1
Manager & Mentor Director	7.3.1
Member-at-Large	7.0.9
Mentor	7.3.4
New Membership Registration	7.6.8
Nominating Committee	7.6.5
Plank Editor	7.6.7
Practicum Instructors	7.2.4
Practicum Student Scheduling	7.6.10
Privilege Card (P-Card) Creator	7.6.13
President	7.0.4
Resource Center Manager	7.6.6
Rules & Safety Committee	7.6.1
Safety Administrator	7.1.1
Secretary	7.0.6
Security Manager	7.6.3
Shop Administrator	7.1.2
Shop Manager	7.3.2
Special Interest Group	7.6.4
Special Projects Manager	7.5.5
Systems Manager	7.6.2
Tool Room Manager	7.4.2
Tool Room Monitor	7.4.3
Tool Room Supplies Manager	7.4.4
Treasurer	7.0.7
Vice President	7.0.5
Web Page Master Duties	7.6.9

This is a comprehensive list of the volunteers who work for our membership, assisting in supporting a safe, clean, well-maintained shop and the day-to-day operation of our Guild. Most of the required actions are spelled out in the remainder of this manual. A list of primary members responsible for these functions is published in the Woodworkers and Modelmakers Guild newsletter "The Plank." The names of the members responsible for those functions are posted on the wall of the resource room, on the main website (<http://www.suncityhiltonhead.org>), and on the New Member website (<http://www.wvmmg.org>). Refer to Appendix 1.

### 1.3 General Rules

The day-to-day operation of the Guild, as with many other organizations, is regulated by the decisions of those who have been elected to the BOD by the members. These board members serve at the behest of the membership. The BOD encourages all inputs, so it can establish policies, procedures and rules that are in the best interest of the Guild.

The following are the general rules Guild members shall all follow:

1. No member shall enter a contract with any person or business enterprise on behalf of the Guild. This function is the exclusive responsibility of the BOD and the Community Association. Only the CA can contract for services.
2. No member may make purchases on behalf of the Guild without first obtaining prior authorization from the responsible Board member, who will identify a purchase limit for the member. When purchases are made with personal funds, the purchasing member will submit their expense



reimbursement request to the responsible BOD member. The responsible BOD member will approve and forward to the Treasurer for payment.

3. Equipment in the shop may not be rearranged, repaired, or modified by anyone other than the maintenance group. Major shop configuration is the exclusive responsibility of the BOD and the Shop Administrator.
4. Any member encountering a maintenance issue shall report it to the Shop Manager/Assistant Shop Manager. Corrective action will be taken as soon as possible by the maintenance group.
5. Shop Managers will take deficient equipment out of service by locking it out and will not try to make repairs. They will complete the prescribed form reporting the observed deficiencies. Forms are in the rack on the door to the maintenance room.
6. All contacts with any Pulte or CA office on behalf of the Guild or concerning Guild business must be made through the EB, or through their authorized representative, such as the Shop Administrator.
7. Any action a member would like to see taken should be presented to the Shop Administrator or BOD, either in written form or in person at a BOD meeting. If you wish to present an issue to the BOD, contact the President and request a slot on the next meeting's agenda. A member shall not lobby other members to attempt to influence the operations, policies, or rules of the Guild. Regular meetings of the BOD are open to all members, subject to space availability. You can observe the proceedings as a spectator only by request to the President prior to the meeting. You may not bring up issues or address the BOD without their prior agreement. Meetings are generally held at 9:00 a.m. on the third Thursday of each month. The date is published in the BOD meeting minutes section of The Plank each month. Check with any BOD member or the club calendar to confirm the date. Occasionally a portion of the meeting will be in Executive Session and non-EB members will be excused from the meeting.
8. Any communications distributed throughout the Guild membership disparaging other member(s) are considered counterproductive and will not be tolerated. Any member receiving such a communication should bring it to the attention of a BOD member for action.
9. If you do not have a close and personal friendship/relationship with another member and you have not been invited, KEEP YOUR HANDS TO YOURSELF. Do not assume that even casual contact is acceptable. What may seem innocent to you may not be to the recipient.
10. All members of the Guild will be treated with respect at all times. Jokes, cartoon depictions and/or language that would normally be considered offensive to others will not be tolerated.
11. All members are expected to adhere to all rules and safety advisories posted in the shop office and work areas. These rules are to benefit the members and are posted with their best interests in mind.
12. All members are advised that the taking of Guild and Personal property without authorization is stealing and will not be tolerated. Members who violate this rule will be brought before the Rules and Safety Committee.
13. Personal Music in the Shop is permitted using earbuds in the assembly area only.

Any incident violating these rules should be brought to the attention of the BOD, Shop Administrator or Shop Manager on duty. The CA document titled "Chartered Club Rules and Procedures" further addresses resident behavior rules and describes the process for enforcement.

General Membership meetings may be held quarterly with a minimum of two meetings required during the year. Special meetings may be called by the Board of Directors. All meetings require either written or electronic notice to all members at least two weeks prior to the meeting.

The meeting notices are published through the listserv, in The Plank and postings at the shop. The only business conducted at the General Meetings requiring voting is:

- approving next year's budget (4<sup>th</sup> Quarter)
- approving changes in the dues (any Meeting)

- approving nominations to next year's BOD (4<sup>th</sup> Quarter)
- electing next year's BOD (4<sup>th</sup> Quarter)
- changes to the By-Laws from time-to-time.

As required by the Guild's By-Laws, notification of a General Meeting must be provided in writing via a Guild listserv email to all current members at least 14 days prior to the scheduled meeting date. If an item of business arises that requires a meeting and vote by the membership, a notice will be sent to the membership at least 14 days prior to the vote. General Membership meetings will generally be held as in-person/group meeting at the Woodworkers and Modelmakers Facility at 841 Red Dam Road, Bluffton, SC and are usually held as part of the monthly coffee, generally the last Friday of a month. These meetings can be held via an electronic/virtual meeting service if required. A General Membership meeting may be held in any month, with 14 days' notification in any Community Association building/location, as required.

**\*\*CALENDAR EVENT REQUIREMENT** - At least 14 days prior to the General Meeting date, an email will be sent to all registered members as well as a notice posted at the entrance of the Guild's building noting time and place of General Meeting.

Due to the requirement to complete the Basic Orientation and Safety class (BOS), Cluster and Practicum training sessions prior to using tools in the shop, complimentary memberships/guests are not allowed. However, supervised visitation is welcome to view the woodshop.

## CHAPTER 2: General Workshop Operations

### 2.1 Staffing and Volunteer Requirements

It is important that all the positions contained in this manual be fully staffed. It is expected that all members, will volunteer their time to provide needed supervision in the workshop. It is the responsibility of all members to volunteer their time, so the workshop can function properly.

The shop will not open or remain open without a Shop Manager. The Shop Manager will be available for the entire shift and will wear a yellow apron, vest, or badge. The Assistant Shop Manager will assist the Shop Manager and will also wear a yellow apron, vest, or badge. The Mentor wears a maroon apron, vest, or badge and may be assigned the Assistant Shop Manager position for a particular shift (if qualified) in the absence of an Assistant. The Tool Room Monitor should be available for the entire shift and will wear a green apron, vest, or badge. The Front Office Assistant should be available for the entire shift and will be positioned at the desk. Lathe Mentors monitor the Lathe area from 10-2 on Monday, Wednesday, Friday, and Saturday. The Lathe mentor will wear a light blue apron, vest or badge. Shop Managers can close the shop if they feel there is not adequate staff available to operate the shop safely.

If a Board of Directors office becomes vacant, the interim appointment to fill the unexpired term will be made by the President with the approval of the Guild Board of Directors (BOD). (Outlined in Chapter 1 and in the Guild's By-Laws, Article III Section G) to manage the operation of all aspects of the Guild. Each person will provide information to the BOD concerning their function. This information should include, but not be limited to budget needs, purchase requests, problems to be addressed, operating rules and procedures.

Each staff position is controlled by a Coordinator who will arrange for the cadre of volunteers to serve in those positions and manage their scheduling. The scheduling goal is to have a posted schedule for each position at least two weeks in advance. When vacancies occur in this two-week period the Coordinator will act to remedy the problem as soon as possible.

### 2.2 Name Badge System

The Guild uses a colored name badge system to assist in management of operations, safety, and training. Badges may or may not include equipment/tool qualification designations. Refer to listing at the manager's podium for detailed information. Refer to Appendix 43 activities #3 and #5, for badge creation. Every member is required to wear his/her name badge and safety glasses when entering any portion of the machine room or assembly area. The Guild badge must be clearly visible on the upper torso at all times upon entry into any part of the shop, once leaving the Front Office area. Generally, a member should enter the building via the front door, sign in via the computer and then enter the shop. If for any reason a member enters via a door other than the front door, the member must be wearing their badge and safety glasses and report directly to the front office to sign in to the membership activity tracking system. Entering via the front door is encouraged. A brief description of the system follows.

#### 2.2.1 White Name Badges

At the start of the BOS (Basic Orientation and Safety) class, a new member is issued a white name badge. All persons must complete all cluster classes and the practicum and be awarded a Gold Badge before working on their own with any equipment in the shop. The Shop Manager as well as others holding P-Card Name Badges (BOD members, mentors, and instructors) present in the shop will enforce this rule.

**The only exception will be for remedial training of the White Badge holder because of lack of proficiency shown during a cluster or practicum class. This remedial training must be conducted by an instructor who is a P-Card holder as agreed upon by the Training Director. All**

**efforts must be made with student and instructor's schedules to conduct this training outside of general membership open shop hours. In some unusual circumstances however, the training may occur during general membership open shop hours, again as agreed upon by the Training Director.**

SIG members that choose not to attend cluster classes will be issued a special Light Blue badge indicating they can participate in SIG activities only. SIG members with a Light Blue badge have full access to the shop but can only use the equipment/tools pertaining to their SIG for which they are qualified.

### **2.2.2 Gold Name Badges**

After a person has successfully completed all the required cluster classes, he or she will be given a Gold Name Badge. This badge will allow the member to operate any of the equipment in the shop except for the lathes and tools requiring authorization. The Gold Name Badge is a prerequisite for all the advanced classes offered by the Guild.

### **2.2.3 Board of Directors (BOD) Name Badges**

BOD name badges contain the designation "Board of Directors" and are a color designated by the BOD.

### **2.2.4 P-Card Name Badges**

Members who hold a Gold Card and contribute significantly and consistently to the operation of the shop may be awarded a colored name badge called a Privilege Card (P-Card).

To qualify for a P-Card, an individual must:

Possess a Gold Card; AND

Have a minimum of 48 hours of annual volunteer activity with at least 24 of those hours from participating as Manager, Assistant Manager, Mentor, Instructor, or Board Member; AND

Attend and successfully complete the "Red Apron" Training class; AND

Comply with other requirements articulated in the P-Card Application.

- OR -

Possess a Gold Card; AND

Be recognized by the Board of Directors as having special skills or providing a special service to benefit the Guild, AND

Attend and successfully complete the "Red Apron" Training class; AND

Comply with other requirements articulated in the P-Card Application.

Volunteer hours include hours accumulated and reported during the previous four quarters (as opposed to a calendar year). The P-Card Committee may also consider those volunteer hours a member commits to provide during the next four quarters.

See Section 7.6.14 for additional information.

### **2.2.5 Mentor Name Badges**

Mentors are a special subset of P-Card holders who are identified distinctly due to their particular role in the shop. These are individuals who have been vetted by the BOD to have levels of woodworking skill and experience sufficient to be considered trusted advisors to the general membership. Whether on duty or not, members with Mentor badges are expected to provide assistance to members seeking it. Members should seek the on-duty Mentor first if one is available. Mentor name badges will have a color distinctive of all other badge types.

### **2.2.6 Limited Use Name Badges (Orange)**

Orange Limited Use name badges are issued to individuals who have personal impairments that prevent them from using one or more pieces of equipment around the shop. They may not be able to physically use that equipment as prescribed or may have conditions that do not allow them to operate equipment safely. A Limited Use badge includes the specific conditions under which the member can use the shop, what he or she may or may not do, and what supervision he or she may need while in the shop. Shop managers should be aware that the member is in the shop and ensure the limitations of his or her use are enforced.

These badges are issued by the Rules & Safety Committee (RSC) after reviewing the details of a member's perceived limitations and discussing them with the member. Shop managers, mentors, or instructors report concerns they may have about the member's ability to perform certain functions or to do so safely. After the first report to the RSC, the member will be placed under more focused observation, with further input from shop leaders, to confirm concerns. This additional information will be evaluated by the RSC to determine if formal limitations may be necessary. If so, the RSC will meet with the member and a family member, if possible, to discuss concerns and obtain the member's agreement to the limitations the RSC believes are appropriate. The RSC then issues the badge to the member and informs members of the BOD. BOD members are expected to inform members in their area of responsibility who need to know. The RSC will inform the Secretary or Treasurer of the issuance so that the master member database can be updated to reflect the limited use.

Please reference Section 4.7 "Policy on Aging and Safe Shop Usage" for more information.

## **2.3 Hours of Operation**

The Guild's Board of Directors (BOD) may change the hours of operation open to the general membership at any time. Changes in these times will be posted as early as possible to alert the members.

1. For general membership, on Mondays, Wednesdays, and Fridays the hours of operation are 9am to 5pm. Saturday hours are 10am to 4pm.
2. Tuesdays and Thursdays are typically reserved for training from 8am till 5pm. See Section 2.3.1 rules for P-Card access during training activities.
3. Gold, BOD, and P-Card members are permitted shop usage on cluster training days under the following guidelines:
  - Gold card members volunteering on special projects, Guild products, furniture repair, etc. on cluster training days may be in the shop accompanied by a P-Card member.
  - P-Card members are permitted access to the shop on cluster training days. However, they must request and receive permission from the appropriate advanced training instructor(s) to use the specific equipment and/or shop space when there may be a conflict.
  - There will be no member usage during Saturday morning maintenance.

### 2.3.1 P-Cards Access to Shop during OFF Hours

Below is a table of the number P-Cards needed at the shop.

Event	# of P-Cards Required	# of Gold Card Required
Cluster Classes	2	
P-Card Day (Shop closed to Gold Cards)	2	
Advance Classes	1*	1
SIG Meetings	1*	1
Social Event – No Equipment running	1	1
Other Board Issued P-Card Activity	1*	1

\* Prefer 2 P-cards in the shop during these events or at any other time. If only 1 P-Card, then a Gold Card must be identified at the beginning of the event by the P-Card member for emergency purposes, if the P-Card becomes disabled. The Gold Card is to dial 911 and to contact a board member. The board member is then to come in and shut down the shop. If no board member is available, a P-Card from the membership list should be called to come in and shut down the shop.

## 2.4 Eligibility and Entry Requirements

All the following requirements must be met prior to being allowed access to use the workshop:

1. Members must have satisfactorily completed the Guild Basic Orientation and Safety Course.
2. Members must possess a valid Sun City Hilton Head Community Association (CA) card.
3. Member must have paid the current year Guild dues. It shall be the responsibility of the individual to display the proper qualifications prior to using any equipment.
4. All members must sign in at the Front Office computer using the QR code on their Shop Badge at first entrance of the day. The member should have their CA card available if it is needed to confirm their identity to the Office Assistant for admittance. If a member enters the shop additional times on the same day, they may need to sign in again if their purpose for entering the shop has changed. Example: Saturday morning maintenance to Saturday “Just using the shop.”
5. All members must wear ANSI approved safety glasses when entering the shop from the Front Office, resource room, and any other entry point to the shop (i.e., garage door and side doors).
6. The member’s Guild badge must be clearly visible on their upper torso upon entry into any part of the shop beyond the Front Office area.
7. All members must wear closed toed shoes to protect their feet. No sandals allowed.
8. Members must wear short-sleeved shirts or have their shirts rolled up above the elbow.
9. Membership and appropriate training entitle a member to use the workshop per the schedule and availability.
10. Since all positions in the Guild are voluntary and serve without compensation, it is the responsibility of every member to volunteer their services as often as individual schedules will permit. The Guild cannot function without such volunteers.

### 2.4.1 Retraining Policy

Past members who wish to rejoin the Guild may be required to be retrained depending on how long their membership has lapsed.

1. **Non-dues paying “Gold Card” member for up to two consecutive calendar years.**  
No retraining is required. A year is defined as a calendar year, i.e., January 1 - December 31.
2. **Non-dues paying “Gold Card” member for 2 years but less than 3 consecutive years.**

Member must retake the BOS and all Cluster training classes before gaining full use of the shop. No payment of BOS or Cluster class fees required. Member surrenders their Gold card for a White training badge. This member follows the rules of a White card holder until obtaining a Gold card after taking Cluster classes and completion of the Practicum classes.

**3. Non-dues paying member for 3 or more consecutive years.**

The member will be treated the same as a new member. They must complete a new member application and pay for and complete the BOS, Cluster and Practicum class training.

## 2.5 Front Office Operation

The Front Office is the primary entry point for members and guests. It is important that this area be kept clean and orderly. The Front Office Assistant oversees this entry point and must enforce the rules for access to the shop areas. A Front Office Assistant should be present at this position any time the shop is open to the general membership. In the event the front office assistant position is not filled for a shift, the shop manager may request members to temporarily fill the position until a front desk assistant becomes available.

Members entering the shop through other doors will check in at the Front Office prior to beginning work or assuming volunteer duties, such as Shop Manager, Front Office Assistant, Tool Room Monitor, Instructor, Mentor, Student, or Maintenance. This check in is also required during periods that the shop is not open to the general membership.

There is a **Front Office Operations Manual** with which the assistant will become knowledgeable. These instructions address the computer, the telephone, and the basic duties of the person on duty. Additionally, there is a list of members who have paid their current dues, members who are not current in their dues and home telephone numbers, emergency contact numbers and names for all current members. New Front Office Assistants will go through an orientation session with the Front Office Coordinator or another knowledgeable member.

## 2.6 Tool Room Operation

Small tools will be checked out of the Tool Room to members in accordance with the Guild system. Members will surrender their CAM card to the Front Office Assistant in exchange for five (5) tool chits. The card will be returned when all tool chits are returned. The following rules apply:

1. Members checking out tools should examine each tool closely noting any nicks, dents, scratches, or other defects. Appropriate entries should be made on a check-out sheet.
2. Members must clean their tools before returning them to the Tool Room and wall. The Tool Room Monitor will verify that. Damage to returning tools, noted by the Tool Room Monitor, other than normally expected wear and tear such as tiny nicks in router bits, may result in the cost of the tool being billed to the member. In cases of dispute over billing, the on-duty Shop Manager will make the final determination.
3. The refusal of a member to pay for damaged tools or equipment will be referred to the RSC for further review and possible disciplinary action.
4. Tools may not be removed from the workshop except by maintenance staff or special projects approved by the BOD (i.e., Mailbox Installation/Repair)
5. Members can bring their own hand tools but corded powered tools must be inspected and approved by the Shop Manager before use.
6. If the Tool Room Monitor position is not filled for a shift, the tool room shall remain locked, and tools will not be available. The Shop Manager may request members to temporarily fill the position until a Tool Room Monitor becomes available.

## 2.7 Assembly Room Operation

1. The assembly area is to be used for assembly of projects and use of hand and power hand tools. The areas around the work benches and bench tops are to be cleaned/cleared/swept after use by a member. The figure below illustrates a cleaned work bench. Bench tops should be cleared off every day -- the shop managers will check for compliance at the end. The materials could be removed at any time that a violation is identified. All bench tops are community property and are not owned by an individual. All materials left on the benches will be moved to a designated storage area. The Shop Administrator is responsible for this process.
2. The policy for large projects requires the Member to gain permission from the Shop Administrator prior to project start as follows:

- a. A Large Project is one that is or will be 24" x 48" or larger.
- b. Unless you have prior written authorization from the Shop Administrator, large projects must be removed from the workbenches every night. The shop administrator will provide the individual with a 'permit' for the large project that should contain the name of the individual and the date the permit is valid – this should be printed on easily recognizable paper and be secured to the project.
- c. Member must be prepared to work on the Large Project every open shop day until the project is removed from the shop. The Shop Administrator is responsible for enforcing compliance.



**Example of a Clean Workbench**

3. Refer to Section 4.6 for VOC (Volatile Organic Compounds) usage in the Assembly Area
4. Due to floor space limitations in the shop, the finishing of large items such as desks, entertainment centers, special projects or similarly large projects **MUST** have the Shop Administrator approval prior to beginning any large project.
5. Both clamps and space are limited in the shop. Clamped projects may be left in the drying area until the next open shop day, but they may be removed after 24 hours. The member's clamped work **MUST be labeled with name, date, and time put in the drying area**. The Tool Room Monitor has the responsibility to periodically check during their shift, the dates and times on the clamped projects and is authorized by the BOD to remove clamps that have been in place for more than 24 hours. Projects without all the required information are subject to having the clamps removed. All materials left for more than a week will be moved by the tool room monitor to a designated storage area.
6. Sanding of materials is limited to 'light hand sanding' in this area. Significant sanding by power hand sanders is limited to the Sanding Table in the Quiet Room. Light hand sanding, power hand drilling, countersinking, nailing and biscuit joining may be completed in the assembly area if appropriate dust mitigation measures are taken.
7. The consumption of food is not allowed in the assembly room. Beverages with a resealable cap are permitted in the assembly room if the resealable cap is secured when the beverage is not in use.
8. Carts are not to be used for member storage of in-process material and are to be cleaned and returned to the cart storage area at the end of the day.



## 2.8 Machine Room Operation

1. Posted story board safety practices MUST be followed at all times.
2. Machine use will remain flexible, but during periods of heavy use of the workshop facilities, the Shop Manager may set time limits of use by individuals on specific machines. Machine use should be limited to no more than 30 minutes when other members are waiting. Sign-up boards may be utilized to manage time assignments.
3. Unapproved materials will not be machined in the workshop. Root stock, logs, driftwood, desert debris or salvaged wood from construction sites may be machined if meticulously cleaned of all nails, cement, stones, sand, gravel, imbedded glass, and other contaminants. The Shop Manager must inspect such materials before any machining is allowed to proceed. The member machining such material is not relieved of the responsibility for any damage to equipment, sanding disks or belts, saw blades, router bits or any other items belonging to the workshop. Such damage will be billed to the member.
4. A member will be charged for damage to machinery due to the member's negligence and may also be referred to the RSC for further review and possible disciplinary action.
5. When operating a lathe, follow the posted storyboard safety practices. The storyboards display turn and drilling speed charts, when face shields must be worn in the down position and when turning guards must be used, per the approved safety practices.
6. The consumption of food is not permitted in the machine room. The consumption of beverages is not permitted in the machine room.
7. Guild products and/or classroom preparation material should not be made during Open Shop time on Monday, Wednesday, Friday, and Saturday to reduce the tying up of machinery for extended periods, without the Shop Manager's approval. If they are produced on these days, the Guild member has priority to use the equipment over the member making the Guild product. Guild products should be done on the appropriate off hours that do not conflict with daily shop operation and training.

## 2.9 Maintenance and Repair

1. Equipment deemed unsafe to operate or inoperable will be locked out for maintenance, and a maintenance ticket will be completed.
2. Repairs and maintenance of tools and equipment will be done as soon as possible depending on the availability of parts and maintenance personnel. Most major repairs and preventative maintenance will be done on Saturday mornings.
3. No internal adjustments or component replacement will be made on any stationary machine except when performed by Maintenance personnel. The exceptions are as noted in Sections 4 through 7 below.
4. Only authorized personnel will do replacement of band saw blades.
5. Routine changing of saw blades and dado heads on table saws may be done under the supervision of an authorized Mentor and/or Shop Manager.
6. Operators may change scroll saw blades.
7. Changing spindles on the spindle sander may be done by the operator.
8. In all cases, the power switch will be off, and the machine unplugged from the power source when any maintenance work, or changing of components, is being done. This includes portable and bench tools.
9. All outside repair work must be approved by the BOD. The Maintenance Administrator will obtain an estimate for the work, submit it to the President and Equipment & Supply Director and upon approval, have the work done. Normal finance procedures and limits will be observed.
10. Commercial vendors may do repetitive work, such as the sharpening of saw blades.

## 2.10 Resource Center

The Resource Center is organized and supervised by the Resource Room Manager. Use of the room for meetings and other uses requiring reserved access must be communicated to the Guild Calendar Administrator for incorporation on the shop calendar. This should be accomplished no later than 24 hours before the time needed.

The Resource Center is maintained for the use of Guild members and contains materials such as books, magazines, pamphlets, videos, plans and the like and are the property of the Guild. Members are encouraged to avail themselves of the materials in the center to further their knowledge of the craft. It also functions as the training room. Members have access to the Resource Center during workshop operating hours unless the room is otherwise in use.

1. Members are encouraged to donate appropriate books and other non-magazine materials pertaining to woodworking activities. We accept DVDs but no longer accept magazines.
2. The materials are arranged by activity and under that by magazine name and issue dates, books alphabetically by title and plans alphabetically by project name. Videos are arranged alphabetically by title.
3. All materials should be returned to their original location.
4. Members may check out books and videos on the honor system and return them within two weeks.
5. The Resource Center is also the training room. Its neatness and cleanliness are important to the proper use of the facility.
6. For a fee, Members may request the Front Office Assistant to copy pages. Do not remove pages from Guild books or magazines.
7. Members may use the Resource Center's computer and are expected to return it to the state that it was in prior to use. Members are not allowed to upload programs onto the computer. If a member has a program or is aware of a program that would serve the interests of our Guild, inform the Computer Systems Contact, in writing of the name, costs, and benefits for assessment.
8. Members may store files in a folder with their name on the resource computer. They may also bring their own personal USB "thumb" drives to store their personal files while using shop computers.

## 2.11 Equipment Security

Tools, equipment, or other property of the Guild may **NOT** be removed from the workshop with the following exceptions:

1. As necessary for sharpening, maintenance, or repair. The Maintenance Administrator or the Supply Manager will handle all such transactions.
2. For use on approved special projects taking place at locations outside the workshop.

## 2.12 Lumber Room

The lumber room is used to stock quantities of select hardwoods and sheet goods. Commonly used species will be routinely stocked for purchase. The following rules apply:

1. The Lumber Room Manager will operate the lumber room.
2. The Shop Manager or Assistant Shop Manager will open and monitor the lumber room during open shop hours. The Red Apron Shop Manager will perform these duties during off hours.
3. Other members may assist each other in the selection and purchase of lumber.
4. Lumber sales may be made only to Guild members.
5. Lumber will be sold by the linear inch at the rate posted in the pricing board posted on the wall outside the Lumber Room and in the Woodroom Pricing.xlsx excel file located on OneDrive > Woodroom. Minimum purchase is 4" wide by 1 foot in length. Member may crosscut any board provided at least 4 feet is returned to the Lumber Room (i.e., 7-foot board is crosscut (across grain), member purchases 3 foot and returns the 4-foot piece). Member may rip (lengthwise with grain) a

board and returns the balance provided there is at least 4 inches of width and 4 feet in length remaining (i.e., Member selects a board 7 inches wide, rips 3 inches and returns balance). The member may not cut out the good sections out of the centers of long boards and put the “end garbage” back in the Lumber Room. If there is any question as to how the member wishes to cut a board, they ask the Shop Managers or Mentor.

6. Sheet goods (4 ft x 8 ft) will be sold by the half sheet (4 ft x 4 ft only) or whole sheet (4 ft x 8 ft), or as directed by the Lumber Room or Shop Manager. The 60” x 60” Russian plywood will only be sold as a full sheet. See the pricing board posted on the wall outside of the Lumber Room for the latest information on what sheet goods may be cut.
7. Lumber measurements are rounded down to the lower inch for lengths or widths  $\frac{1}{4}$ ” longer or wider. Lumber measurements are rounded up to the next higher inch for lengths or widths  $\frac{1}{4}$ ” or greater longer or wider.

Recording of lumber purchases is performed using the computer next to the Shop Manager’s podium. Member selects 4/4 or 8/4 lumber, sheet goods, or miscellaneous items, wood species, length, width, and quantity. Member furnishes their CAM number. Data is checked by the Shop Manager or his designee. The purchase will be charged to the member’s CAM number. A confirming email will be sent to the purchaser. If a member wishes to pay via check, cash or gift certificate, record the method of purchase in the comments section on the screen when entering the purchase and place the payment in the Treasurer’s mail slot identifying the payment for lumber purchase.

### **2.13 Storage Units**

Storage space is provided only for short term storage of projects underway but not yet assembled. Space is severely limited; therefore, the time allowed for storage is similarly limited. The following apply:

1. The Shop Administrator, based upon the number of ongoing projects and the bulk of the materials being stored, will establish the specific time periods for construction and removal. See Section 2.7 for additional procedures regarding large projects.
2. The Woodshop offers storage units in the form of lockers, bins, drawers, and cubbies which are available for rental by our members on a yearly basis. They are given out on a “request basis” subject to availability by the Locker Rental Manager (LRM). To request and retain a storage unit a member must meet certain criteria which includes:
  - a. A member must be in good standing. Dues must be paid up and current. Rental fees must be paid up and current.
  - b. A member must show reasonable usage of the shop yearly (calendar) to warrant obtaining and/or retaining a storage unit. Without cause or explanation of non-usage, a member may forfeit the storage unit, or lose their place on the waitlist. This would be at the discretion of the (LRM) and/or the Concessions Director.
  - c. All members’ requests for a storage unit must be directed to the (LRM). The LRM will determine availability. If necessary, member will be placed on a waitlist and will be called upon when the desired storage unit becomes available. To be awarded the storage unit, a member must meet the criteria outlined above.

### **2.14 Procedures for Special Interest Groups (SIG)**

The purpose of these procedures is to harmonize the diverse operating practices that can exist among SIGs within the Guild. This allows the SIGs to operate within the same framework.

1. Any group of 10 or more Guild members seeking to become a SIG within the Guild requires approval of the Guild's BOD.
2. The organization of a SIG should be determined by its members. This allows SIGs i.e., the Woodcarvers, Railroaders, Wood Turners, WoodChicks, Technology and future groups to function within the Guild without imposing undue organizational restrictions upon the SIG.
3. SIGs may have their own executive board, treasury, and accounting procedures. They shall report accounts and status updates to the Guild Vice President upon reasonable notice. A SIG's accounting cycle should correspond with that of the Guild so the CA requirements can be met. The Guild's By-Laws and policies shall prevail over those of the SIG.
4. The SIG's Board and General Meeting minutes shall be published in the Plank.
5. The SIGs shall be able to hold fundraisers to support their activities. All fundraisers shall be presented to the Guild BOD for approval. The presentation shall include the purpose, articles for sale, program dates, resources required and locations. All SIG dues and assessments shall remain with the SIG.
6. Members of a SIG engaged in the making and selling of items for their own benefit shall be subject to the rules defined in Section 5.5.
7. Money raised by a SIG from training of Guild members shall remain with the SIG.
8. SIGs and their members shall purchase their own tools and equipment as needed. They are also expected to purchase all the consumables required by the SIG. However, specific items submitted and approved for the Guild budget will be purchased by the Guild for use by the SIG. Items purchased by the Guild remain the property of the CA.
9. All material loaned to the SIG remains the property of the lender. Engines and rolling stock run on the model railroad are property of the railroad members. The SIGs shall maintain all of their equipment and an inventory of all significant assets in the Guild shop. Inventory will be provided to the Guild's BOD when requested.

## 2.15 Off Shop Hours Procedures

The term "first person" is defined as the first P-Card individual not teaching.

Off-hours operation is only open to P-Card members who are required to maintain a safe and clean operation during such usage.

The following guidelines are required for off-hours usage:

1. The first P-Card member entering the shop will take on the duties of Red Apron Shop Manager and will wear the red apron. They must follow the shop opening procedures and fill out the Shop Opening Report. These responsibilities include: turning on the lights, answering the phone, checking the sawdust collection barrel, making sure all equipment that is not locked out of service, is operational. The Red Apron Shop Manager assumes the same responsibilities of a regular shop manager such as checking lumber purchases and requiring compliance with safety and cleanliness procedures.
2. When leaving the shop, the Red Apron Shop Manager is to pass the red apron and duties to another P-Card holder. At the end of the day, or as otherwise needed, the Red Apron Shop Manager is to empty the barrel, if needed, make sure the shop is clean, turn off main air supply, complete the Shop Closing Report, turn off the lights and make sure the shop is locked and secure. Instructors who are teaching a class are not to assume the duty of Red Apron Shop Manager. However, if they are the first or last person in the shop, they are required to complete the Shop Opening/Closing Reports, respectively. If while teaching a class and they are the Red Apron Shop Manager, another P-Card holder comes into the shop, the new P-Card holder will take on the Red Apron Shop Manager role, allowing them to get back to being just the instructor.

## 2.16 Guild Disciplinary Policy and Internal Intervention Procedures

### A. GUILD POLICY

All Members of the Woodworkers and Model Makers Guild are required to comply with all Woodshop and Community Association rules, policies, and procedures herein referred to as “rules.” The Guild and Association Guidance Documents (AGDs) include but are not limited to the following:

- Woodworker & Model Makers Guild: By-Laws, Operations Manual Safety Procedures
- Chartered Clubs Rules & Procedures (CCR&P)
- Codes of Conduct, Other Rules Policies and Procedures approved by the Board of Directors, and Community Association.

Violations of Guild and Community Association rules, policies, procedures, and codes of conduct by members will result in the incident being investigated by the Guild’s Rules and Safety Committee (RSC).

### B. INTERNAL INTERVENTION PROCEDURES

**ALL GUILD DISCIPLINARY AND INTERNAL INTERVENTION  
INVESTIGATIONS, HEARINGS AND DOCUMENTS ARE CONFIDENTIAL**

#### **RULES AND SAFETY COMMITTEE INCIDENT INVESTIGATION AND HEARING**

1. The RSC will conduct a confidential incident investigation of the rules violation by the member.
2. If the RSC determines the violation merits a hearing, the member will be informed they are to appear before the RSC and the hearing scheduled.
3. If the member accepts the RSC hearing’s ruling, it will be final and the remediations implemented. (Refer to 2.17 Guild Disciplinary Application Policy)
4. If a member refuses to appear at the hearing, then the RSC will:
  - a. Document the refusal to appear.
  - b. Conduct the hearing without the member present and rule on the case.
  - c. Inform the member of the ruling and any remediation/suspensions will be enforced.
  - d. Submit a summary report to the Executive Board (see #6 below).
5. If the member disputes the RSC hearing’s ruling, the RSC Chairperson will inform the member of the steps to request an Executive Board Appeal hearing on the ruling. The member may only appeal the RSC ruling.
6. The RSC will submit a summary report to the Executive Board on the investigation and the hearing. The report should include the information such as the material findings of facts, conclusions, and details of the RSC’s ruling to conduct the Executive Board Confidential Appeal Hearing if requested.
7. To initiate a Guild Executive Board Confidential Appeal Hearing, the member:
  - a. Must submit a written request for an Appeal Hearing to the Guild’s Executive Board within 72 hours after being notified of the RSC ruling.
  - b. Within 72 hours prior to the hearing the member:
    - i. Must submit a written request to the Executive Board to include any individual(s) they wish at the hearing besides the RSC chairperson.
    - ii. May bring any individual who has direct, first-hand knowledge of the incident and relevant information to add to the hearing.
    - iii. Must state in the request the name of the individual(s) they would like to be included in the Hearing and the reason the member feels they are relevant to the hearing.

#### **EXECUTIVE BOARD CONFIDENTIAL APPEAL HEARING**

1. The Confidential Appeal Hearing will be heard in about one (1) week of the request or as soon as scheduling the Hearing is possible.

2. The ruling made by the Executive Board in any Appeal Hearing is final.
3. If the Executive Board Appeal Hearing fails to resolve the member's issue/concern, the next step is a Confidential Intervention Hearing with the Community Association.

**COMMUNITY ASSOCIATION CONFIDENTIAL INTERVENTION HEARING**

The following procedure should be followed to request a Confidential Intervention Hearing with the Community Association.

1. All issues should first be discussed with the Executive Board prior to submitting the complaint form.
2. The Executive Board or a Club Board Member is to submit a written complaint using form **CA 3195 - Request for Chartered Club Problem Resolution**, to address a club issue that needs to be resolved.
3. This form is to be completed and returned to Lifestyle Services.

## 2.17 Guild Disciplinary Application Policy

The Guild has established a policy for administering disciplinary action rulings for violations of Guild and Community rules.

There are two important considerations that drive the disciplinary actions:

1. The severity, significance, and impact of the incident.
2. The number of times a member has been disciplined prior to and including the current incident.

The RSC has the charter to apply the disciplinary actions in an unbiased, consistent, and uniform manner based on the facts.

The Severity/Significance/Impact (SSI) Matrix below serves as the vertical axis and the number of member incidents as the horizontal axis.

<b>Severity/Significance/Impact Matrix</b>				
<b>SSI LEVEL</b>	<b>Description</b>	<b>First Incident</b>	<b>Second Incident</b>	<b>Third (+) Incident</b>
<b>LOW</b>	<ul style="list-style-type: none"> <li>• Minor infraction of non-safety Guild rule or practice</li> <li>• Crude, off-color conversation other members find offensive</li> <li>• Minor safety infraction of Guild safety rule or practice resulting in minor equipment damage, no physical harm to anyone</li> </ul>	Written Warning <sup>1</sup> or 14 days <sup>2</sup>	30-60 days	60-90 days
<b>MEDIUM</b>	<ul style="list-style-type: none"> <li>• Non-Compliance of Guild Rules or practices</li> <li>• Moderate infraction of non-safety Guild rule or practice</li> <li>• Minor violation of Community code of conduct or other Community rules</li> <li>• Inappropriate language or verbal abuse of another Guild member</li> <li>• Theft of Guild or Guild member's property valued at \$75 or less</li> </ul>	30-60 days	60-90 days	90-180 days

<b>HIGH</b>	<ul style="list-style-type: none"> <li>• Safety infraction resulting in notable equipment or facility damage or injury to any member (including self)</li> <li>• Willful or negligent act that results in damage to Guild or other Guild member's property</li> <li>• Any action harming self or other member in a non-medical way</li> <li>• Any actions that disrupt the operation of the Guild or the shop</li> <li>• Major infraction of non-safety Guild rule or practice</li> <li>• Major violation of Community code of conduct or other Community rules</li> <li>• Theft of Guild or Guild member's property valued at greater than \$75 to \$250</li> <li>• Repeated Non-Compliance of Guild Rules or Practices</li> </ul>	60-90 days	90-180 days	180-365 days
<b>EXTREME</b>	<ul style="list-style-type: none"> <li>• Flagrant violation of any Guild and/or Community rules</li> <li>• Sexual harassment, or verbal or physical assault of another Guild member or visitor</li> <li>• Theft of Guild or Guild member's property greater than \$250</li> <li>• Willful Non-Compliance of Guild Rules or Practices</li> </ul>	90-180 days	180-365 days	365+ days

Notes:

1. Written Warnings are only applicable for a first time Low SSI level infraction. A member can only receive one written warning and only for their first low level incident.
2. Number of days listed in any column/row is the number of days suspended from any Woodshop activity

The process for applying this table will be to first determine the incident SSI and then the disciplinary action duration based on the number of incidents for the offending member to-date over the past three years.

The final application of the remedies, fines, and conditions of return will be determined after the completion of a full evaluation of the circumstances specific to the incident by the RSC. The disciplinary actions can be adjusted as appropriate by the RSC upon full evaluation of the circumstances and possible mitigating or aggravating factors (such as developing physical and/or mental capacity of the offender, etc.).

The Guild's objective is to work through member difficulties with the aim of helping them enjoy using the shop safely as positive Guild and Community citizens but with the understanding there are consequences.

## CHAPTER 3: Training

### 3.1 General Requirements

An ongoing training program provides an ever-increasing level of skill and expertise in Guild members. The Training Directors manage and supervise the training programs, which consist of the following elements, programs, and procedures:

1. All members must complete the Basic Orientation and Safety (BOS) training. This is the initial training received by all members and must be successfully completed before a member may take any Cluster class.
2. BOS, Cluster and Practicum classes are scheduled well in advance pending demand from applications for Guild membership. Members are expected to attend their scheduled classes or reschedule within 48 hours prior to their scheduled class. Make up classes will be rescheduled when class space permits.
3. All members must successfully complete all Clusters and the Practicum classes before they can use any tool or operate any machine in the shop. A member completing all Clusters/Practicum classes will then be allowed to operate all the machines and tools in the shop except for the lathes and Tech SIG equipment without further required training.
4. Advanced training classes are provided beyond the Clusters/Practicum training in various areas as determined by the Advanced Training Director based on the needs or desires of the Guild membership.

### 3.2 BOS, Cluster and Practicum Class Registration

The Treasurer performs BOS, Cluster and Practicum Class registration for all new members. See Treasurer's Duty Details in Appendix 8 of this document.

#### 3.2.1 Costs

There is a nominal fee for all classes. Payment is required before the member is considered registered for any class. The Treasurer will review payment amount and options at the time the BOS/Cluster Class schedule is established. Currently, the Practicum class is provided at no additional cost to members.

#### 3.2.2 Attendance policy

BOS and Cluster Classes are scheduled well in advance depending on the demand from new Guild members. Members are expected to attend their scheduled classes or reschedule up to a week in advance of their scheduled BOS class. Rescheduling within a week prior to their BOS class may be subject to a fee. The Training Directors may recognize some exceptions for illness or other emergencies.

### 3.3 Basic Orientation and Safety Course (BOS)

The BOS Course must be satisfactorily completed before a member may take any further classes or use the shop in any way. This course will be taught at regularly scheduled intervals throughout the year consistent with the quantity of new members requiring training. The course comprises the following:

1. Guild rules and procedures including information on eligibility to use the shop, a review of what is in each room, shop hours, the various staff positions and responsibilities, training programs, and volunteer opportunities/expectations.
2. Safety information including a discussion of general safety rules. Participants are given a pair of safety glasses during the class.



### 3.4 Cluster Training Courses

Cluster classes acquaint new members with the major power tools in the shop with an emphasis on their safe operation. Successful completion of a cluster class means being able to demonstrate the safe operation of the specific equipment and tools as requested by the instructor and receiving the instructor's signature on the training record form. Instructors must withhold approval of any cluster class participant who does not satisfactorily complete the demonstration tasks assigned to all students. Such students may be rescheduled for the same cluster class at another date without additional cost. New members are required to successfully complete all clusters and practicum classes to receive their Gold Card. New members will be given remediation, if possible, to remain with their cohort group or rescheduled to a later month in the event they fail to safely demonstrate knowledge of the tool. Each of the cluster classes is a one- or two-hour class providing hands-on experience or video with the tool groups as listed in Appendix 8: (BOS/Cluster: No-Shows are subject to a cancellation fee).

### 3.5 Practicum

Upon completion of the BOS and Cluster classes each new member must pass two Practicum classes. One Practicum is a 4-hour class that makes a simple project such as a one-piece cutting board. The other Practicum consists of 3 separate 2-hour sessions and the student makes a multi-piece cheese cutting board. Student is evaluated at the end of each day. Any student not successfully completing the Practicum will be given remedial work during normal shop hours. The student will be accompanied by an instructor/mentor who will determine when success is attained. Upon successful completion of both Practicums, each student is awarded a gold badge. Refer to Appendix 2 for further information.

**Practicum No-Shows are subject to a fee.**

### 3.6 Advanced Training Classes

Optional courses beyond the Clusters and Practicum are offered regularly and include, but are not limited to, subjects such as woodturning, routers, wood carving, bandsaw boxes, and picture frames. These classes teach woodworking techniques and/or coach participants through completing a specific project such as complex cutting boards.

All advanced classes are described in the "Green Book," found in the Resource Room, and listed in the Guild's Training system (currently Eventbrite). Anyone may register for any class, on a first come, first served basis, provided they:

1. Are in good standing in the Guild.
2. Meet all class prerequisites listed in the class description.

Instructors will schedule classes together with the Advanced Training Director as far into the future as is feasible for the instructor. This scheduling is also done on a first come, first served basis. If there is space remaining for a given class, instructors or the Advanced Training Director may open participation to the membership at large on short notice via the listserv mail distribution.

Once scheduled for a given class, participants are expected to attend that class. There are no refunds within a 21-day window, except in cases of catastrophic events. The Advanced Training Director will determine if a refund is warranted. Outside the 21-day window refunds will be allowed, to the extent possible in the Guild's Training system. If a class needs to be cancelled caused by instructor illness or Guild shutdown, full refunds will be provided.

The instructor and the Advanced Training Director will review class performance and feedback and discuss with the instructors any class adjustment, as needed.

Members may suggest a new class at any time. The steps in developing a new class are as follows:

- The member completes the *Creating a New Class* document that is available on OneDrive in the Advanced Training Public -> Instructor materials area and forwards it to the Advanced Training Director for consideration. This form enables the description of the resources and costs required.
- The Advanced Training Director determines the viability of the proposed class and finds a suitable instructor or instructors as appropriate.
- The Advanced Training Director and the instructor establish class syllabus, lesson plan, time and material requirements, maximum and minimum class size, and prerequisites.
- The Advanced Training Director will define the costs, while working with the instructor to focus the class on new tools and techniques for the student while keeping costs low.
- The instructor and the Advanced Training Director establish class times and dates and have these posted in the Guild Calendar and the Guild class scheduling tool.

After the course is set up, it is publicized through periodic emails, the website, The Plank, and announcements at monthly meetings as appropriate.

### **3.6.1 Lathe Training, Classes & Qualification Flowchart**

Lathes are a unique tool in the woodshop. It is where the cutting tool is pushed into the wood to cut it rather than the wood moved into the cutter like a table saw or band saw. Subsequently, the Guild has elected to teach lathe turning separately from the basic woodworking machine tools done in Clusters to provide the specific attention needed to learn how to turn safely. A prerequisite for taking lathe classes is three months as a Gold Card member. Please refer to the flow chart in Appendix 3 showing the lathe class flow and prerequisites. There is also an Accelerated Lathe Qualification Program for experienced turners subject to the procedure outlined in Appendix 3.

## **3.7 Mentoring**

Mentoring is provided during most open shop hours, since not all training takes place in the classroom. Mentors provide informal instruction to assist members (usually one-on-one) to learn specific skills or processes needed for their project. A mentor could help an individual learn how to make a dado joint, cut a special rabbet, hinge a cabinet door, determine the best joints to use, or assist in planning the project steps and process.

Any member may request the help of a mentor. Mentors will consult, advise, and demonstrate appropriate operations. Mentoring is informal and provided without charge. It is not to take the place of formal classes, but the mentoring may relate to a specific skill taught in past or future classes.

Mentoring must not interfere with normal shop operation. The mentor is only to assist in what is being requested. If it's machine setup or jig use, no more than a few minutes (10 minutes max) should be needed to help. Doing the entire job of what was requested by the Guild member does not help the Guild member learn.

## CHAPTER 4: Safety

### 4.1 General

It is the duty and responsibility of all members, when in the workshop, to conduct themselves in a manner conducive to the safety of themselves and others. Anyone who displays questionable behavior may be asked by the Shop Manager to leave the premises.

### 4.2 Rules

Everyone using the shop will abide by the following rules:

1. The workshop is a **NON-SMOKING** facility. No smoking or vaping in the building or within 25 feet of an entrance.
2. Food and drink are not permitted in the Equipment Area or Quiet Room. Drinks in closed, non-spill containers are allowed in the Assembly Area. Exceptions are allowed during BOD approved special functions.
3. Only wood, acrylic or polycarbonate can be handled in the shop unless you have permission from the Shop Manager.
  - a. To minimize potential damage to shop equipment, ALL salvaged lumber, logs, or similar type wood materials intended to be used on the woodshop power equipment, must be approved by Shop Manager/Assistant Manager or the Red Apron Shop Manager before it can be used in the shop. The member will visually inspect the surface for foreign or imbedded debris materials (e.g., metal, and other debris like small rocks, glass, or similar hard materials that a metal detector will not detect) AND will use a metal detector to scan all surfaces of the material for metal debris below the surface. The Shop Manager will determine if the material is approved to be used in the shop. If the material is unacceptable, the material will not be allowed to be used in the woodshop and should be immediately taken out of the woodshop. The Shop Manager's decision is final.
  - b. **NO** pressure treated wood is allowed in the shop, with the exception of BOD approved tasks that are performed by Shop volunteers such as the Mailbox replacement team.
  - c. **NO** Pine, chip board and particle board are allowed on any power sanding equipment.
  - d. **NO** pallet divider/load separator wood is allowed to be processed on any shop equipment.
4. Small quantities of flammable finishes, solvents and epoxies are permitted as defined in the VOCs policy. They must be stored in a flammable liquids storage cabinet.
5. All safety rules as taught in the BOS Course must be followed.
6. Loose clothing such as bulky jackets, baggy shirts, large neckerchiefs, and the like are NOT permitted while operating any machine. These clothing items must be removed prior to operating any machine. Long necklaces, beads, loose bracelets, or any other items that could get caught in equipment must not be worn in the Equipment Area. Long hair must be secured. Short sleeves are preferred and recommended. Long sleeve shirts may be worn if the sleeves are rolled or pushed up above the elbows and do not pose a potential safety hazard. Tight fitting sleeves and hand splints are allowed.
7. Only Shop provided gloves are allowed in the shop. Disposable nitrile gloves can be used in all areas. Shop provided protective gloves are permitted for lumber unloading. Member provided task specific gloves are permitted for wood carving.
8. Sandals and open toed shoes are forbidden for members in the shop.
9. Safety glasses must be worn at all times in the shop. Eye protection is not required in the office or Resource Room.
  - a. Prior to entering the shop from the front lobby or the Resource Room, members must be wearing their safety glasses.
  - b. Personal Prescription safety glasses with side shields may be worn as long as they meet ANSI designations Z87 or Z87.1.

10. Hearing protection while operating machines is encouraged but optional.
11. Persons under the influence of alcohol, prescription drugs or medications that cause drowsiness, irritability or loss of alertness shall not enter the workshop building. This situation is reported to the RSC for review and potential disciplinary action to be recommended to the BOD. The BOD, may at its discretion, suspend the membership of an offender and may further request the offender's membership be terminated by the Community Association.
12. Possession of illegal drugs in the workshop or being under the influence of the same will constitute cause for the BOD to summarily suspend and recommend the termination of the membership of the offender.
13. Each tool and machine must be operated in accordance with the rules taught in the Cluster Training Courses and as defined on machine storyboards.
14. All special safety and operations notices posted must be observed. Members will respect the yellow safety zone around all tools so marked. Only the tool operator should be in the safety zone.
15. If a tool or machine being used malfunctions, is damaged during use, or seems unsafe, it must be shut down immediately and the Shop Manager, Assistant Shop Manager, or Red Apron Shop Manager notified. The Shop Manager/Asst. Shop Manager or the Red Apron Shop Manager will place an "Awaiting Maintenance" sign on the machine and place a maintenance lock out on the machine.
16. All injuries that may require medical attention must be reported immediately to the Shop Manager, Assistant Shop Manager, or the Red Apron Shop Manager.
17. First Aid kits for the treatment of minor injuries are available at clearly marked locations around the workshop.
18. No machine which has an "Awaiting Maintenance" sign on it may be operated.
19. No running machine or machine coasting to a stop shall be left unattended.
20. Members may help other members with handling large panels or long planks.
21. A clean shop is a safer shop. Every member, when finished with a machine or an area where sawdust, shavings or other debris have collected, must clean up the immediate vicinity prior to leaving the location.
22. All work will cease 15 minutes before shop closing time for cleanup. All tools must be returned to the tool room.
23. No loaded firearms are allowed in the workshop. All ammunition must be removed, and the firearm rendered incapable of firing. They must be shown to the Shop Manager when they are brought into the shop.
24. Shop Jigs and Personal Jigs: A Shop Jig is one that has been approved for general shop use. Examples of shop jigs are sleds, stop blocks, taper jigs, feather boards, and push sticks. Commercially made jigs (e.g., Incra, Mag Switch) can be purchased and used. All shop-made jigs require approval. Shop jigs are the property of the shop. They are stored in the shop, and accessible for general member use. They are marked as shop jigs.  
A Personal Jig is everything else. Personal jigs, if stored at the shop, must be in a personal locker, not on the benches, tables, or walls. They are permitted as any personal tool is permitted. If a personal jig is loaned to another member, the owner is responsible for instructing the user on the proper care and use and assumes any liability for its use. Personal jigs cannot be used as part of any formal training program (cluster, advanced or mentor) without special approval. The Shop Manager may disallow the use of a personal jig.
25. All tools have at least one camera focused on the tools' cutting features and a view of how the tool is being used. These cameras are installed to assist with the safe operation of the shop and to aid in the investigation of any incident.
26. Headphones or Ear Buds may not be used for listening to personal music or podcasts when operating any power equipment.

### **4.3 Emergency Power Disconnect**

The shop is equipped with two emergency power disconnect switches to be used in the event of a condition that threatens the life or limb of one or more members, or in the case of fire and/or the sprinkler system has activated. Each of the two switches are large, red, push-button type, mounted at about five feet above the floor: one next to the mid-shop restroom door, and the other behind the downdraft table next to the “out” door in the quiet room. The activation of either switch will immediately disconnect all power to the building, so they should only be used when absolutely necessary. When the power is disconnected for any reason, emergency lights will come on for safe egress.

#### **4.3.1 The Disconnect Process**

1. When a member is caught in an extraordinary situation and is at immediate risk of being maimed, injured, or possibly killed, the determination is made to push one of the two emergency power disconnect switches.
2. While moving to push one of these switches, members should be instructed to prepare for power disconnect. Members should immediately move away from cutting elements as best they can while maintaining control of their work.
3. When either of these two switches is pushed, the main breakers for the three primary distribution panels (P2, P3, and P4) are all immediately tripped, removing all power from the shop, and plunging the entire shop into darkness. All lights go out, all outlets lose power, the phones and computers go down.
4. The medical/safety issue prompting the power disconnect will need to be investigated and addressed with all appropriate dispatch in parallel with all the steps that follow.
5. Table saws and band saws will continue to coast for some time to a stop. Members who are engaged in cutting on those saws at the time may be put at risk if they have not been able to extricate themselves prior to the power disconnect. They should freeze in-place until they can see well enough to do so. The decision to initiate a power disconnect should consider that doing so may create exposures to risks that may together be nearly as consequential as the primary motive for considering the action in the first place. Observe and think this through quickly before deciding to act.
6. Emergency exit and shop lights come on to help members move around the shop. Unfortunately, most of these lights are somewhat dim and do not help navigation in the shop until the eyes are fully adjusted to the lighting changes.
7. All occupants should move to the nearest exit as quickly as possible as soon as they can see well enough to do so safely, in accordance with the published shop evacuation plan. Block doors open if there is daylight outside and it will help illuminate the exits.

#### **4.3.2 The Recovery Process**

1. Ensure that the evacuation of all members is complete. No one is to re-enter the shop, unless specifically invited to assist, until this recovery process is complete.
2. Using battery-operated flashlights and lanterns available around the shop, each machine needs to be inspected to confirm that its power switch is off, unplugged, and all work is cleared from its cutting area. Unplug machine work lights. Lathes should also be set to shop powered-down settings.
3. Turn off all wall switches/overhead lights.

4. Once all have been confirmed complete, the breaker in each power distribution panel needs to be reset. Each breaker will be in the “tripped” (neutral) position. They are very heavy-duty switches and may require significant strength to set them. Push each down until it is fully off, and then pull up until it is fully on. Do this for the breakers in panels P2, P3, and P4.
5. Once the distribution panels are all back online, turn on the overhead lights and inspect the shop to ensure everything is clear and in place, aisles are clear, and the shop is ready for members to return.
6. All incident investigation and medical treatment actions must be completed before re-opening the shop.
7. Invite members to return in an orderly fashion and return the shop to normal operation.
8. Confirm that shop is operating normally. Complete incident reports and document any residual issues per applicable processes.

#### 4.4 Serious Accident/Injury Procedure

These procedures are to be performed or directed by the Manager, Instructor, or other Person in Charge (PIC).

These procedures are summarized on the one-page ***Accident Procedure with Contact List and Evacuation Plan*** posted in the shop.

Refer to the Accident Investigation Kit located in the Manager’s podium for additional aids and instructions.

**Important:** Notify a Guild Board member at the earliest opportunity if any of the following procedures are initiated. Call until you speak with one of them.

#### 1. SERIOUS INJURY AND HEALTH PROCEDURE

The shop manager (Person in Charge) or their designee is responsible for ensuring the following takes place when an accident occurs inside the shop:

- a. Call 911 for serious injuries or health issues.  
 Shop address is **841 Red Dam Road in Sun City**  
**Mandatory call to 911 if the member loses consciousness.**  
 Shop manager (PIC) has discretion for minor injury/illness.
- b. PIC to ask another member to find a Guild member with a red cross on badge or a member listed as first aid volunteer in the qualified members listing located on the shop managers podium..
- c. Perform emergency first aid and stop serious bleeding.
- d. Secure the accident scene, including locations where thrown items/materials have bounced or landed during the accident.
- e. Use yellow tape from accident kit.
- f. Do not move anything. Shop manager (PIC) or designated person must keep others from the area. **Do not clean up until instructed by an RSC member.**
- g. Refer to accident investigation kit and investigation manual for further procedural instructions. A full accident report is required.
- h. Identify any witnesses who may have seen the accident happen and document their statements.
- i. Shop manager (PIC), assistant shop manager or designated person shall:
  - Ensure first aid continues until EMS arrives and takes over.
  - Station someone in the parking lot and rear door to direct emergency personnel.

- j. When EMS is called for any incident in the Shop, the shop manager (PIC) will order the shutdown of all machines.
- k. In the event of an extreme accident, the shop manager (PIC) will close the entire shop until reopened by the attending RSC member.

**2. LESSER INJURIES OR ACCIDENTS.**

- a. If medical treatment is required, such as stitches, severe contusion, or fractured finger, call 911 if in Shop Manager's (PIC) judgment EMT may be needed.
- b. Shut down equipment involved in the accident and secure the area. If EMS is called shut down all machines. See 1i above.

**3. WHAT TO DO IF A SICK OR INJURED MEMBER WANTS TO DRIVE THEMSELVES HOME**

- a. Insist that the member call someone to come get the person.
- b. If the member still refuses, document this on the incident report page 1 only and get names of witnesses who confirm the member's refusal.
- c. The Guild does not encourage Guild members driving other Guild members, who may be sick or injured, to their home or to a medical facility. A Guild member intending on providing such transport shall advise the shop manager (PIC) and shall understand that they will do so as a personal act under their own liability and not acting on the behalf of the Guild. In any event, the shop manager (PIC) shall document when and how a sick or injured Guild member is transported from the shop and whether it is to the member's home or to a medical facility.

**4. NEAR MISSES - WHERE AN INCIDENT OCCURS THAT COULD HAVE CAUSED AN INJURY TO ANOTHER MEMBER BUT THERE WAS NO INJURY**

- a. Secure the scene.
- b. Use yellow tape from accident kit.
- c. Do not move knobs, dials, or other components.
- d. Shop manager (PIC): refer to accident investigation kit and investigation manual for further procedure instructions. A full accident report is required.
- e. Identify any witnesses who may have seen the accident happen and get statements.

**5. INCIDENT WHERE MEMBER IS ASKED TO LEAVE THE BUILDING**

- a. Shop Manager (PIC) may instruct a member to leave the shop if the member has behaved in an unsafe or inappropriate manner.
- b. If member refuses, immediately call Securitas 843-705-4240 or 843-705-4083.
- c. Do not engage but stay with member until Securitas arrives. Provide any information required.
- d. After the member has left the building call and speak to one of the BOD members.
- e. Write up an incident report. This report should be comprehensive enough to fully describe on its own, all relevant details of the incident. Page 1 only.

**6. IDENTIFICATION OF THE PERSON WHO MUST ASSUME THE RESPONSIBILITY OF THE SHOP MANAGER (PIC), RED APRON, DURING OPERATION OUTSIDE OPEN SHOP TIMES IN THE EVENT OF AN ACCIDENT**

- a. Cluster days with Advanced Classes - Advanced Instructor during the day, then it is the Advanced Instructor who closes the shop; however, the Red Apron Shop Manager is the first P-Carder to walk in the shop that is not instructing.
- b. Cluster days without Advanced Classes - Cluster Instructor during the day, then it is the Cluster Instructor who closes the shop; however, the Red Apron Shop Manager is the first P-Carder to walk in the shop that is not instructing.

- c. Non-Cluster days with Advanced Training and Red Apron Shop Manager - Red Apron Shop Manager is the first P-Carder to walk in the shop that is not instructing. The last Red Apron Shop Manager closes the shop.
- d. Non-Cluster days with Advanced Training Classes and no Red Apron Shop Manager – The Advanced Instructor during the day becomes the Red Apron Shop Manager who closes the shop.
- e. Non-Cluster days with no Advanced Training Classes and a Red Apron Shop Manager – The Red Apron Shop Manager during the day is who closes the shop.

## **7. MISCELLANEOUS**

Call EMS if a member requests the Shop manager (PIC) to do so. Have the member sit in a chair in the front office or Resource Room while waiting for EMS.

## **8. MEDICAL OR AGE-RELATED SAFE USE OF SHOP REPORT**

When any of the shop staff observes a Guild member having difficulty performing their work safely and the behavior may be related to physical or mental deficits, the Manager, Assistant Manager, or Mentor should complete the Medical or Age-Related Safe Use of Shop Report form and leave it in the Safety Administrators front office inbox.

## **9. EVACUATION PLAN (The Plan and map are shown in detail in the EVACUATION PLAN Posting Doc.)**

Shop manager (PIC) will initiate the following actions when the fire alarm sounds or any event where evacuation of the building is warranted.

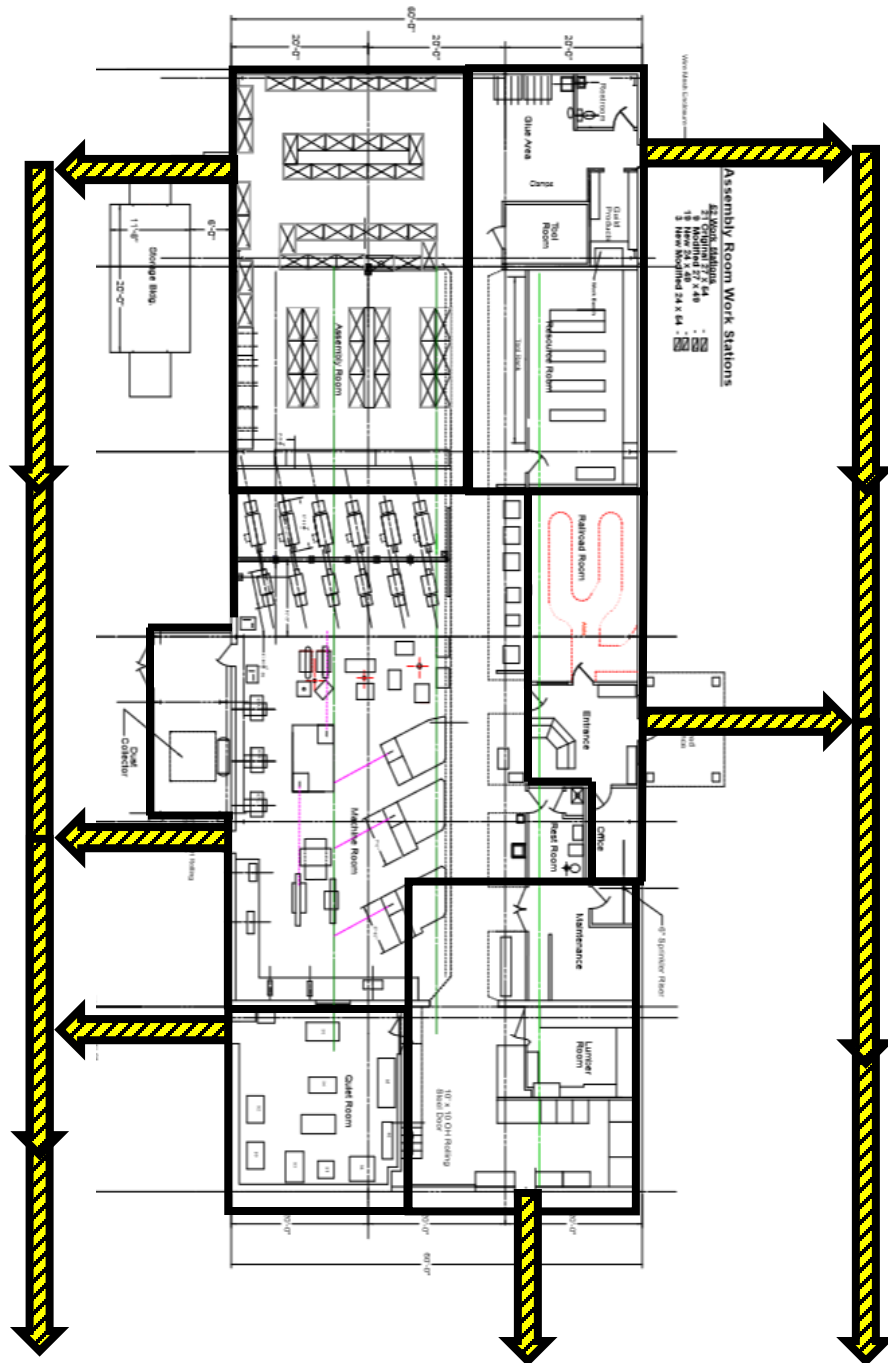
- PIC will announce the evacuation using the loudspeaker system.
- Members must leave the building when instructed, using the nearest exit.
- After exiting the building, please congregate along the dog park fence.
- PIC will instruct someone to call 911 and report the incident.
- No Guild member will re-enter the building until Sun City Security, or the Fire Department gives permission to re-enter.

Shop personnel will verify the building has been evacuated and report to the PIC and provide the evacuation status of their areas in the shop:

- Assistant Manager: front restroom, machine area, quiet room, maintenance and lumber room areas.
- Mentor: lathe and assembly areas.
- Tool Room Monitor- back restroom, resource room, and glue areas.
- Front Desk Attendant – railroad and Office areas.
- No re-entry until cleared by the Shop Manager (PIC) or Safety Administrator.



# Woodshop Emergency Exits & Evacuation Routes



#### **4.4.1 General Serious Accident/Injury Procedures**

1. In case of serious injury, the on-duty Shop Manager or the Red Apron Shop Manager on days closed to general membership, will ensure first aid is rendered. If emergency medical treatment is required, he will instruct individuals to call 911 requesting an ambulance, to notify Security and to notify the member's emergency contact. Follow Shop Emergency policy posted above the first aid kit.
2. Members should never transport an injured person anywhere in a private vehicle. Serious additional injury or hastening the onset of shock may result from non-professional handling and may result in substantial personal liability.
3. The Shop Manager will make sure that all machinery in the workshop is shut down immediately and all persons except witnesses or persons involved in the incident, directed to leave the area (including the building if circumstances dictate). Witnesses are admonished to refrain from discussing the incident until after they have been interviewed by the official shop investigators.
4. The Shop manager shall direct that the scene of the incident be secured and that no persons be allowed into the area except for those actively rendering first aid and authorized investigators.
5. The Shop Manager, as soon as practical, will begin to gather facts, including taking photographs if appropriate, surrounding the incident. Do not allow witnesses or persons involved in the incident to leave the workshop until their statements have been taken
6. If a machine was involved, secure it from further use until it has been examined to determine whether it was properly set up, guards and other devices were in use, etc.
7. Notify the Safety Administrator as soon as possible or in his absence, the Shop Administrator. The Safety Administrator, or in his absence the Shop Administrator, will, upon arrival, assume command of the investigation. The on-duty Shop Manager will assist as needed.
8. As a courtesy, the President, or in his absence the Vice President, shall contact the family to determine if the Guild can provide any additional assistance.
9. As soon as possible, the on-the-scene Guild Officer will provide an online report to Lifestyle Services. This incident report should be provided within 48 hours if possible.
10. Accident reports together with all photographs, statements, diagrams, etc. shall be submitted to the RSC within five days.
11. The RSC concludes an investigation, formalizes the report for the Community and the BOD along with the recommended further actions. The BOD will review and act further as they deem necessary.

#### **4.5 Accident Investigation Manual and Kit**

An Accident Investigation Manual is available for all Shop Managers, Red Apron Shop Managers and Guild BOD Members. This manual contains the procedures used to conduct an accident investigation and develop a report. A copy of that manual is located on the wall next to the first aid kit. It has five goals:

1. Provide guidance for personnel investigating accidents occurring in the woodshop.
2. Develop an awareness to add new or to modify existing safety devices, procedures or undertake additional training.
3. Prepare a complete analysis of what occurred, the people involved, proximate cause of the injury, equipment damage and finally, the responsible person.
4. Identify and properly preserve all physical evidence.
5. Submit properly prepared accident report(s) where needed.

The Accident Investigation Kit contains the supplies and forms to conduct an investigation and to complete an accident report to be submitted to the Community Association (CA).

## 4.6 Shop Volatile Organic Compounds (VOC) Policy

No application of wood finishes, strippers, flammable solvents, or epoxies are allowed in the shop, with the following exceptions: Please email the Safety Administrator if you wish to add a task involving VOCs to this list of exceptions.

**Note - Spray cans of finishes are not allowed in the shop except for Guild staff performing Guild projects approved by a Board member. If you wish to use spray cans, please perform the work outside with the shop doors closed.**

### Exceptions -

- Staff working on Guild sponsored projects, such as furniture repair, mailboxes, or classes, may use approved paints and solvents in the shop as needed.
- The use of wipe-on or brush-on finishes are allowed on small items, in the lathe, assembly and furniture repair areas.
- Small amounts (< 1 oz. per task) of solvents may be used to wipe projects. Contaminated rags, paper towels etc. must be disposed of in the red steel can located by the library room door.
- Small pump spray bottles (<4 oz.) of adhesives or accelerator may be used.
- Small uses of epoxy adhesives or fillers (< 2 oz. container) are allowed.
- Epoxy resin systems that are low toxicity, low VOCs, and non-flammable (flash point > 195° F.) may be used in the assembly and furniture repair areas. Approved for use in the shop are:
  - Approved Epoxy Systems: West System 105, Alumilite systems and EcoPoxy FlowCast Epoxy Resin
- Other tasks approved by the Shop Manager may be performed at the time they are approved. If the task needs to be done more frequently, please have it approved by the Safety Administrator and included on this exceptions list.

## 4.7 Policy on Aging and Safe Shop Usage

The BOD understands that aging causes some inability to function as we once could. The BOD also takes seriously safety as our primary goal. Sometimes these two collide. To that end we have created and instituted a policy to weave these two together allowing one to continue as a functioning member of the Guild.

The Guild relies heavily on its management staff to apply all safety standards written and implied for the benefit of and for all members. Managers, Assistant Managers and Mentors will have the responsibility to alert the Safety Administrator of any member whom they see repeatedly having difficulty safely using the woodshop due to what may appear to be age and/or medical-related issues. Please use form EB 07: Medical or Age-Related Safe Use of Shop Report.

The Safety Administrator accompanied by the Shop Administrator shall meet with the member to discuss these reported issues. Shop use restrictions may be possible to allow the member's continued participation in a safe manner. It is hoped the member would recognize and agree with the Safety Administrator and Shop Administrator and partake in setting such restrictions. Should the member not agree or resist, it shall be turned over to the Rules and Safety Committee (RSC) for more formal action, and where necessary, appealed to the BOD and Lifestyle Services.

A member who is placed in a limited use status within the shop will be issued an orange "Limited Use" badge in place of their normal badge. The badge will state the specific terms of the member's restrictions.

## 4.8 First Aid Volunteer Team

The *Woodshop First Aid Volunteer Team* was developed with the goal of assisting Shop managers in providing fast, competent first aid during shop medical emergencies.

1. The Team Chair is the Safety Administrator who reports to BOD President.
2. The Team operates under Good Samaritan Laws.
3. Each team member makes the final interpretation of how the laws apply to them.
4. Providing first aid is always voluntary.
5. Joining this team implies the member wishes to be asked to assist, not that the team member is required to provide first aid.
6. Nothing that may require an MD approval is authorized.
7. Team members are not running the emergency response. Team members are supporting the Emergency Response procedure and Shop Manager.
8. Team members wear a red cross on their badge so they can be identified.
9. The shop management team during open hours is not to transport an ill or injured member to a hospital or urgent care facility. If EMS is contacted, upon arrival of EMS, shop personnel shall defer further action and allow EMS to follow its protocols. If the ill or injured member refuses an EMS recommendation to transport via EMS, or if EMS was not called, then any Guild member, (other than the on-duty shop management team), significant other, or family member may transport the ill or injured member to another location.

## 4.9 Hot Work Permit

All Oxy-Acetylene open flames require a Hot Work Permit as shown below.

Hot Work Permit	
<small>Sun City Woodworkers' and Modelmakers' Guild</small>	
<small>All temporary operations, outside of a designated fire safe area, involving Oxy-Acetylene open flames require this Hot Work Permit.</small>	
<p>Date _____</p> <p>Location _____</p> <p>Description of hot work _____</p> <p>Name of person doing hot work _____</p> <p><small>The above location has been examined, the precautions checked on the HW checklist have been taken to prevent fire, and permission is authorized for this work.</small></p> <p>_____ Permit Authorized Individual (PAI) <small>signed</small></p> <p>_____ Person doing work <small>signed</small></p> <p>_____ Fire watch <small>signed</small></p> <p>Work Started: _____</p> <p>Work Completed: _____</p>	<p style="text-align: center;"><b>Hot Work Checklist</b></p> <p><input type="checkbox"/> Sprinkler system is operational.</p> <p><input type="checkbox"/> Hot work equipment is in good repair.</p> <p><input type="checkbox"/> Fire extinguisher is on location.</p> <p><input type="checkbox"/> Dust collector is turned off and locked out.</p> <p style="text-align: center;"><b>WITHIN 35' of work:</b></p> <p><input type="checkbox"/> Dust, debris and flammable liquids are removed</p> <p><input type="checkbox"/> Explosive atmosphere is eliminated</p> <p><input type="checkbox"/> Flammable and combustable material is removed or protected if practical.</p> <p style="text-align: center;"><b>Fire Watch:</b></p> <p><input type="checkbox"/> Fire watch will be provided during and 30 minutes after work is done.</p> <p><input type="checkbox"/> Fire watch is supplied with suitable fire extinguisher and familiar with its use.</p> <p><input type="checkbox"/> Fire watch is familiar with location of fire alarm.</p>

## CHAPTER 5: Special Projects and Events

Purpose - Special Projects and Events are undertaken by the Guild to improve community relations, inside and outside Sun City, to further the development of individual skills, and to generate income to help defray the expenses of the Guild. Special Projects and Events are divided into four categories: Special Projects, Guild Products, Special Services and Special Events.

The BOD approved the following policy on Special Projects (excluding mailboxes) in May 2017:

Sun City projects:

- Resident projects – The Guild does not perform any on-site work other than mailbox repair.
- Sun City and Facilities projects – The Guild will perform on-site work but does not compete with outside companies.

Outside Sun City Community Service projects – the Guild does not perform any on-site work and the Guild does not compete with outside companies.

### 5.1 Special Projects

A special project will be any project requested by a resident, a Sun City Club or Organization, or an organization outside of the Sun City community. For resident projects, the Guild does not perform any on-site work other than mailbox repair.

All requests for Special Projects are referred to the Special Projects Manager. After review and his/her concurrence, an estimate will be prepared. All projects more than \$300 or which are “Not for Profit” shall be submitted to the BOD for approval.

### 5.2 Special Services

Residents will bring to the shop various projects on open shop days that they cannot do at their home and want them done by the shop. These consist of, but are not limited to – cutting of lumber, repair of household items, and fabrication of small household items. The Guild will not sell lumber to non-members. For most resident requests, a special projects form will be filled out. The Special Projects Manager will review and give an estimate. If a price is agreed to, work will be completed and advised for pick up. The minimum charge is \$5 for a single activity (cut a board, drill a hole, etc.).

Residents may request repair or replacement of their mailbox. A Mailbox Repair form should be completed with the resident's name, address, phone number, and brief description of the request. The Mailbox Repair form should then be placed in the Treasurer's mail slot in the front office. The designated mailbox coordinator will contact the resident, perform the repair, collect the appropriate funds, and turn them in to the Treasurer.

Residents may request repair of furniture items to be performed in the shop. At no time will a repair be performed off premises. It is the responsibility of the resident to transport the item to and from the shop. A Special Projects Form will be completed by the Front Office Assistant. All communications with the resident must be recorded on the form. Repairs will begin when an agreed upon price has been established. Upon completion, the Front Office Assistant will contact the resident for a timely pickup. At the time of pickup, the Front Office Assistant will collect the fee and turn it in to the Treasurer.

The membership does not compete with vendors located outside of Sun City. The focus of our membership is on projects for themselves and their neighbors. From time-to-time, we provide BOD approved service-oriented activities for our community e.g., repair of park benches for CA and mailbox repair services for residents.

## 5.3 Guild Products

The Guild maintains an inventory of readymade Guild Products that are for sale. These items include, but are not limited to, convenience items for the home: hot water heater bases, stretch boards and gaming items like card and domino holders; as well as functional items like cheese boards and bird houses. These Guild Products are made by the members of the Guild. Guild products currently for sale are listed in the Guild Products Catalog. The Guild Products Catalog is maintained at the Front Desk and can be viewed on the Guild website. Many of these products are on display and for sale in the Front Office.

Some of these items listed in the Catalog are made to-order. Members have agreed to make certain items on an as-requested basis. As these items are sold and there is a request for the item, the Guild members that make these items are contacted and asked to replenish the inventory. These items are listed in the Catalog as **Special-Order** items.

Other items for sale in the Front Office include one-of-a-kind specialty items that are made and donated by our members. As these items are unique, they are not necessarily replenishable. If a request is made to replenish the item, it is at the discretion of the member to make it or not. These items are listed in the Catalog as **One-of-a-Kind** items.

**"Make One for the Shop" Program** is an opportunity for members to contribute to our Guild inventory of items to sell. It is strongly suggested that members make and donate one item per year as part of their membership responsibility. This can be accomplished in one of two ways:

**Independently:** a member can make and donate an item of their choice at any time during the calendar year. When making a project, the member will make one extra and donate it to the shop. A record of their donation will be kept by the Guild Products Coordinator. The member will be recognized for the contribution.

**Teamwork:** volunteering to work on Guild products and/or specialty items to be sold at the Open House and Holiday Bazaar. Members will work with a team producing these products. The benefits of teamwork include material expense paid for by the shop and the member is awarded volunteer hours. This is also a great way to build confidence and camaraderie with other members.

The inventory levels and the pricing of all Guild products are controlled by the Guild Products Coordinator and the Front Desk and Concessions Director. The price list is maintained in the Front Office.

## 5.4 Special Events

The primary special events held by the Guild are the **Open House/Sidewalk Sale** and the **Spring Sidewalk Sale**. With the addition of the Sidewalk sale to the **Open House** event, this will still be planned on being held in the fall each year, generally on a Saturday. The Woodshop also has the option of scheduling the Spring Sidewalk Sale in the 2<sup>nd</sup> Quarter. The Open House is open to all residents of Sun City and is a showcase for the Woodworkers and Modelmakers facilities and the talents of its members. This event and its timing are a prime time to sign up new members after they have viewed the facilities. Other events may also be scheduled by the BOD, and these events would follow the same planning and setup processes.

On display, and in some cases for sale, during the Open House, are crafts, furniture and numerous items made by the members of the Guild and SIGs. Several aspects of the training provided by the Guild are also on display.

The Vice President or designee oversees Special Events. It is the VP's responsibility to assemble an event project team, develop and execute the project plan and coordinate all aspects of the event. If a member is interested in selling products at a Guild Special Event, or any other Guild sponsored function, the criteria are stated in Chapter 5.5 below – Selling Personal Products at Guild Functions.

## 5.5 Selling Personal Products at Guild Functions

The following are the criteria to be able to sell personal products at any Guild function including the Open House:

1. The member must be a member in good standing.
2. The member must have demonstrated volunteerism at the shop.
3. If gross revenue is less than \$500, the member may keep 100% of the revenue.
4. If the gross revenue is more, the member must remit 4% of the gross over \$500.00 to the Guild. Delivered items and back orders are included. Couples that are members are considered one entity for the purpose of this policy.
5. In all cases, whether sales are less than or greater than \$500, member must pay the Guild the sales tax for the total sales unless the member can demonstrate that they have their own tax number and will be paying taxes directly to the State and other taxing authorities.
  - a. Members that are selling personal products at the Open House shall provide the Guild Treasurer with the amount of total sales of their products made in the shop along with a check for sales tax. They will also provide the Guild Treasurer the table fee, venue fee, and project share. Refer to the Charter Club Rules and Procedures Section 4.5 for treatment of sales tax during resale activities. The Treasurer will then write a check to CA for the total amount due.
  - b. In addition, if a member's sales are \$500.00 plus, remit a separate check for the 4% of all sales in excess of \$500.00 at the same time. See Appendix 4 for specific policy details.

## 5.6 Tour Policy

The Guild is proud of our woodworking facility and the skill of our members. We encourage tours for members, residents, residents' family and friends and prospective members.

The shop has many machines that have potential to harm. The following policy is intended to permit guests to tour the shop and ensure their safety.

### **General Rules**

1. All tours (including member sponsored tours) must begin at the Front Office.
2. Safety glasses, supplied by the Guild, must be worn.
3. No children under 40" tall are permitted (including children in arms).
4. Young children touring the shop must be held by the hand at all times.

### **Responsibilities**

#### **Front Office Assistant**

1. Have guests sign in.
2. Provide guest a Visitor Information trifold.
3. If a resident is interested in joining the Guild, provide a New Member packet.
4. Issue safety glasses to all guests touring shop. Collect the safety glasses at the conclusion of the tour.
5. Provide "Visitor" badge to be visibly worn on upper torso area of visitor.

6. Notify Shop Manager of tour request.

**Shop Manager**

1. Assign a tour guide. The Shop Manager, Assistant Shop Manager, or Mentor on duty is not to act as a tour guide. Any tour guide trained member can be a tour guide as confirmed by the Shop Manager, provided they are not currently on-duty volunteers.
2. Determine if the activity level in the assembly area permits full access to the tour to the assembly area. Advise tour guide to either follow the full tour or abbreviated tour path.

**Tour Guide**

1. Railroad tours are to be conducted by members of the Railroad SIG if available.
2. Keep the tour group together when in the shop.
3. Follow the Tour Talking Points document as provided at the front desk along with the sample cutting board which is not a gift for the tour group.
4. Tour Guides must restrict visitors within the yellow/black taped area unless otherwise indicated.
5. Return to Front Office area. Collect glasses and return props to front desk attendant.



## **CHAPTER 6: Guild Policies**

### **6.1 Community Relations**

The Guild/Community Relations Administrator is the Guild representative to the Community and to other organizations within the Towns of Bluffton and Hardeeville. It is the policy of the Guild that we play a positive role in our dealings with Sun City Hilton Head residents and with the surrounding communities and their citizens. In furtherance of this policy, the following goals are established:

1. To meet the needs of the other Clubs in Sun City Hilton Head regarding their Special Project requests.
2. To accord the same desire to accommodate charitable organizations' requests from Sun City Hilton Head and the local area.

### **6.2 New Policies Adopted by the Board of Directors**

Through the years the Guild has grown, needs have changed, and the physical shop has changed dramatically. During this period, all the BODs have had to address many issues and make decisions that promote the best interest of the members. These decisions have been recorded in BOD meeting minutes and incorporated into the rules and procedures of this manual and printed in The Plank.

Additionally, the Community Association (CA) and the SCHH Board of Directors have taken actions that affected our By-laws and this manual. Our two primary source documents are the existing CA club rules and our By-laws.

## **CHAPTER 7: Job Descriptions/Duty Statements/Responsibilities**

### **7.0 Guild Leadership** – *General Overview, Board of Directors, President, Vice President, Secretary, Treasurer, Members-at-Large*

#### **7.0.1 General Overview**

The Guild operates most effectively when it approaches challenges as a team. In today's rapidly changing world, individuals must blend their various responsibilities at home, at other clubs and at the Guild. While the responsibilities of an individual club officer and other leaders may be demanding, the members of the Board of Directors must accept the responsibility to share challenges, ideas and perspectives with fellow BOD Members and other leaders as appropriate to the successful completion of all tasks to the best of their ability. The Guild leadership team concept fosters collaboration and provides a shared focus and approach to club administration.

The Guild President, in addition to supervising overall operations, is responsible for developing team strategies, coaching, and motivating the team members, and monitoring overall performance of the team. This team approach extends to all other leadership positions in Training, Safety, Shop Managers, Shop Administrator, Committee Chairs, and all other volunteer positions.

This collaborative team approach not only can improve Guild administration, but it also enables each leader to be more confident and effective. Collaboration ensures more effective use of individual talents. No individual Guild BOD member or other leader possesses all the knowledge, skills and experience required to effectively operate a club alone. By working together, the effectiveness of the BOD Members and other volunteers can be maximized as they take advantage of the special knowledge and skills of each person. Communications between all leadership functions and the general membership is bi-directional unless a discussion requires an Executive Session of the EB where these meetings are to be held in confidence.

Every BOD member is responsible for the development of a list of members that show a heightened interest in the club and may be candidates for future leadership roles. At a minimum, someone should be identified as a possible replacement for all committee leadership positions. The list is for internal BOD/Committee Chair use and should not be published in The Plank nor in the BOD minutes. Additional strategies should be developed in the management of this list with time and experience.

The Guild's BOD members and other leaders are assigned and accept specific responsibilities and tasks for which they are accountable.

#### **7.0.2 Executive Board (EB)**

The Executive Board (EB) is the Governing body of the Guild. The Executive Board is comprised of the President, Vice President, Secretary, and Treasurer

The Executive Board is the primary interface with the Community Association (CA). The Executive Board can make decisions that affect the Guild including but not limited to policy strategies, decisions on confidential matters, and crucial decisions that need to be made quickly.

#### **7.0.3 Board of Directors (BOD)**

The BOD are the administrators of the Guild. The BOD consists of the EB and five Members-at-Large (MAL) herein referred to as Directors. The President assigns the roles and responsibilities to the

Directors. The Executive Board and the five Directors are herein referred to as the Board of Directors (BOD). The Directors have the administrative authority as defined in the Guild's By-Laws. For example, all administrative practices, safety procedures, budgetary considerations, appointment of committee chairs etc., are the responsibility of the BOD. Members of the BOD should be year-round residents of Sun City, demonstrate a high interest in the Club through participation in leadership roles prior to and after election to the BOD, be recognized as demonstrating communication and leadership skills in volunteering activities e.g., Committee Chairs, Shop Management, Training, Mentoring, etc. BOD members should have knowledge of and use of email, Word, and Excel.

The Guild president, and other BOD members, and appointed leaders, have no absolute authority. Authority to act must come from directives of the Executive Board the club's latest approved By-laws and Operations Manual. In all situations where a procedure need updating or a safety practice is changed or added, they must be addressed through a motion by a BOD member following Robert's Rules of Order. Once a new or updated procedure is approved, a date is set for the implementation, the membership is notified of the change and the Operations Manual is updated by the Vice President. The fact that the update was completed will be noted in the minutes of BOD meetings within 60 days of the update procedure.

Each BOD member has the authority to spend up to \$300 on a single project (which includes all ancillary costs such as shipping, handling, taxes, etc.) in their area of control without approval from the Board of Directors. Each Board member may designate purchases within their area of responsibility to other Guild members with a corresponding spending limit. Examples of these members are:

<b>Designated Guild Member</b>	<b>Pre-Approved Purchase Limit</b>
Maintenance Administrator	\$2,000
Safety Administrator	\$200
Equipment & Supplies Director	\$500
Shop Administrator	\$200
Lumber Room Manager	\$5,000
Tool Room Supply Manager	\$200 (exclusive of sandpaper)
Guild Products Coordinator	\$200
Special Projects Coordinator	\$200
Systems and Security Manager	\$200
Advanced Training Director	\$200
Front Desk Coordinator	\$100

Reimbursement request for purchases under the above pre-approved purchase limits should be submitted directly to the Treasurer for reimbursement. Any planned purchases by an above Guild member over the pre-approved purchase limit will be discussed with the responsible BOD member who in turn must obtain approval from the BOD if the amount is over \$300. After approval is obtained, reimbursement request for purchases over the pre-approved purchase limit will be submitted to the responsible BOD member who will then approve the expense reimbursement request and forward to the Treasurer for payment.

When a Guild member other than the members designated above is given the authority to purchase material for the Guild, the responsible BOD member will identify the purchase limit for each designee. To assure control, these designated Guild members will submit their expense reimbursement request to the responsible BOD member. The responsible BOD member will approve and forward to the Treasurer for payment.

For an urgent change to an operating or safety practice as recommended by the Safety Administrator, the Shop Administrator, BOD member or a Guild member, the BOD implements the change at the direction of the Executive Board. The BOD will administer a change or update to existing operating and safety practices that requires immediate attention, that is sooner than the next BOD meeting. An email or other electronic process will be used, when possible, to resolve any immediate issue. The email or other electronic process allows for a BOD vote as long as there is majority approval by all BOD members that are present. If any BOD member is in dissent, a BOD meeting is required so a discussion can be held. In any situation, the Robert's Rules of Order must be followed.

### **7.0.4 President**

Per the Guild By-Laws, the President shall preside at all meetings and consult with other members of the BOD and/or the membership on all matters of concern to the Guild. The President may assign one or more major responsibilities to the Directors or any other member of the BOD. The President may also appoint Administrators for key Guild operations including but not limited to Shop Operations, Safety and Maintenance that sit on the Board as non-voting members. The President has the sole authority to shut down the shop.

See Appendix 5 for additional Job Description Details.

### **7.0.5 Vice President**

The office of Vice President is a highly flexible position which is extremely valuable to the Guild as long as the Vice President and President work together to ensure the value of the office. The Vice President must be as knowledgeable about all club activities as the President, including both the administration of the club and the club programs. This allows the Vice President to step into the office when the president is absent or unable to serve.

See Appendix 6 for additional Vice President Duty details.

### **7.0.6 Secretary**

The secretary should have general knowledge of the functions and the purpose of each general membership and BOD meeting and be familiar with Robert's Rules of Order as relates to the recording of motions, attendance, start time and end time, etc., of each meeting.

See Appendix 7 for additional job description details.

### **7.0.7 Treasurer**

The Treasurer is responsible for controlling the funds being received and spent on behalf of the Woodworkers Guild. The Treasurer is responsible for financial and other reports requested by the Community Association. The Treasurer should attend every BOD meeting and general membership meeting to provide a report of funds activities. Whenever the Treasurer is not available for a BOD or general membership meeting, the Treasurer or his designee must prepare the appropriate financial statements for presentation by the President or other BOD member. Treasurer compiles the annual budget. The Treasurer is responsible for control of all Guild equipment and assets.

See Appendix 8 for additional job description details.

### **7.0.8 Immediate Past President**

Effective with the approval of the new By-Laws in February 2023, the position of the Immediate Past President is abolished. The Immediate Past President previously acted as an advisor to the BOD and performed other duties which may be assigned to him or her from time to time by the President. Over

the recent years, the other duties took on more of a support role to other members of the board in managing community and Guild relations. In the future it is fully understood that the President can appoint an individual to serve as an advisor to themselves and the board as needed. Those myriads of other duties were of sufficient complexity to warrant a new administrator position to gather and perform the duties. That position was established in February 2023 and is entitled Guild/Community Relations Administrator.

Refer to Section 7.1.4 for additional job description details.

### **7.0.9 Member-at-Large (MAL)/Directors**

Members-at-Large/Directors on the BOD are assigned responsibilities by the President at the beginning of each year. The BOD has five main Director roles that are assigned by the President each year including but not limited to Cluster Training Director, Advanced Training Director, Equipment & Supplies Director, Shop Manager & Mentor Director and Front Desk & Concessions Director. Each Director will be assigned one or more responsibilities that may have one or more committee chairs or coordinators reporting to them. These committees are critical to the success of the club's daily operations and usage.

## **7.1 Administrators – Safety, Shop, Maintenance, Guild/Community Relations**

### **7.1.1 Safety Administrator Duty Statement**

The management and supervision of the safety program is the responsibility of the Safety Administrator. The Safety Administrator is appointed by the President and is approved by the BOD and reports to the President.

See Appendix 9 for additional job description details.

### **7.1.2 Shop Administrator Duty Statement**

To qualify for the position of Shop Administrator, the individual must be a full-time resident. The individual must have been a Guild member for at least three consecutive years and have been a shop volunteer for a minimum of fifty (50) hours each of the three years. Additionally, the individual must have participated in each of the shop positions, i.e., shop manager, front office assistant, tool room monitor, at least once. Experience as a teacher or mentor, working on special Guild projects and providing leadership in other areas, enhances and strengthens his or her qualifications.

The Shop Administrator is appointed by the President and approved by the BOD. The Shop Administrator reports directly to the President. As such, the Shop Administrator has the responsibility to implement and enforce the policies and rules dictated by the President; the BOD; Guild's By-Laws, the Operations Manual and the Community Association documents.

See Appendix 10 for additional job description details.

### **7.1.3 Maintenance Administrator Duty Statement**

To qualify for the position of Maintenance Administrator, the individual must be a full-time resident. The Maintenance Administrator's prime goal is the proper operation of all equipment and tools within safe operating limits.

The Maintenance Administrator is appointed by the President and approved by the BOD. The Maintenance Administrator reports directly to the President. As such, Maintenance Administrator has the responsibility to implement and enforce the policies and rules dictated by the President, the BOD, Guild's By-Laws, the Operations Manual and the Community Association documents.

See Appendix 11 for additional job description details.

### **7.1.3.1 Maintenance Mechanic Duty Statement**

The Maintenance Mechanic is the primary position for the repair and maintenance of workshop tools and equipment. This position is supervised by the Maintenance Administrator.

See Appendix 12 for additional job description details.

### **7.1.4 Guild/Community Relations Administrator**

The person occupying the Guild/Community Relations Administrator position has the following general duty statement – To stay abreast of community guidelines and rules.

See Appendix 13 for additional job description details.

## **7.2 Training Staff – Cluster & Practicum Training Director, Advanced Training Director, Cluster Instructor, Practicum Instructor, Advanced Training Instructors**

Training Directors are responsible for the management and supervision of all aspects of the Cluster, Practicum and Advance Training programs including but not limited to instructors, students, scheduling, recruitment, lesson plans and associated paperwork, documentation, and media. Currently, the Training Director position is divided into two directors, one for Cluster and Practicum training and another for Advanced training. The term ‘Training Director’ applies to the BOD members responsible for training. The Training Directors are members of the BOD appointed by the President and approved by the BOD.

### **7.2.1 Cluster & Practicum Director Duty Statement**

The Cluster and Practicum Director is responsible for training new members on most clamps, hand tools, and power tools.

See Appendix 14 for additional job description details.

### **7.2.2 Advanced Training Director Duty Statement**

The Advanced Training Director creates and schedules advance classes for members to take along with establishing prerequisites for these classes.

A key role of this Director is to coordinate the quarterly publication of the advanced classes in EventBrite, enabling Guild members to sign-up, purchase and attend classes. The role includes providing regular updates of the vacancies available to interested Guild members via listserv.

See Appendix 15 for additional job description details.

1. Schedules classes around other Guild activities i.e., SIG meetings, Practicum, and other advanced courses.
2. Determines need for instruction beyond the cluster and practicum levels. Seeks out interest in all woodworking spectrums, i.e., wood turning, intarsia, raised panel cabinetry, joinery, etc.
3. Identifies instructors willing to teach for each class.
4. Requests synopsis of instruction and shop resource usage from each instructor.
5. Places synopsis of each potential class in the “Green” Advanced Training book as well as the Guild Training online storage area.
6. Reviews interest status periodically and then works with instructors to set a date for each class.
7. Periodically reviews the relationship between materials cost, time utilization and student cost.

8. Aids a student and the instructor in finding a substitute for a class.
9. Determines whether a missed class should be refunded or not pending on the specific circumstances.

### **7.2.3 Cluster Instructors Duty Statement**

The Cluster instructor is the primary means to impart knowledge and skill to members through training courses and classes. Instructors will report to the Cluster Training Director.

See Appendix 16 for additional job description details.

### **7.2.4 Practicum Instructors Duty Statement**

The Practicum instructor is the primary and last means to impart knowledge and skill to members through training courses and classes.

See Appendix 17 for additional job description details.

### **7.2.5 Advanced Training Instructors Duty Statement**

The Advanced instructor is the primary means to impart advanced knowledge and skill to members through training courses and classes.

See Appendix 18 for additional job description details.

## **7.3 Shop Management – *Manager & Mentor Director, Shop Manager, Assistant Shop Manager, Mentor, Lathe Mentor***

Shop management staff includes all the positions for open shop day shift operation. The Manager & Mentor Director manages the positions of Shop Manager, Assistant Shop Manager, and Mentor. Currently, Lathe Mentors are managed by the Turners Action Committee (TAC) chair who reports to the Vice President.

### **7.3.1 Manager & Mentor Director Duty Statement**

The Manager & Mentor Director manages the key positions of the shop staff that coordinates shift operation during open shop hours of operation. These positions include: Shop Manager, Assistant Shop Manager, and Mentor.

See Appendix 19 for additional job description details.

### **7.3.2 Shop Manager Duty Statement**

The Shop Manager is responsible for the supervision of all operations and activities in the workshop. The position reports to the Manager & Mentor Director. The Shop Manager has ultimate authority in the shop during open shop operation. The Shop Manager is provided and wears a Yellow Shop Manager Apron/Vest during their shift to make the Shop Manager easily identifiable in the Woodshop.

See Appendix 20 for additional job description details.

### ***7.3.3 Assistant Shop Manager Duty Statement***

The Assistant Shop Manager is under the direct supervision of the Shop Manager and the position reports to the Manager & Mentor Director. To be clear, the Shop Manager has ultimate authority in the shop during open shop operation and the Assistant Shop Manager takes direction from the Shop Manager on all operation details. If the Shop Manager is incapacitated for any reason, the Assistant Shop Manager will assume Shop Manager authority. The Assistant Shop Manager is provided and wears a Yellow Assistant Shop Manager Shop Apron/Vest during their shift to make the Assistant Shop Manager easily identifiable in the Woodshop.

See Appendix 21 for additional job description details.

### ***7.3.4 Mentor Duty Statement***

The mentor is under the direct supervision of the Shop Manager and the position reports to the Manager & Mentor Director. The Mentor is provided and wears a Maroon Mentor Shop Apron during their shift to make the Mentor easily identifiable in the Woodshop.

See Appendix 22 for additional job description details.

### ***7.3.5 Lathe Mentor Duty Statement***

The Lathe Mentor program is to provide an additional level of guidance, training, and oversight in the lathe area. The Lathe Mentor will be an experienced lathe turner mentoring other turners on Monday, Wednesday, Friday, and Saturday from 10-2 PM. This represents the busiest time during the Open Shop days of the week and provides overlapping coverage for both shifts.

The Lathe Mentor program reports to the TAC chair who reports to the Vice President. The Lathe Mentor has a separate schedule manager that sits on the TAC and will submit the Lathe Mentor schedule to Woodshop Scheduler to be incorporated into the master schedule.

This Lathe Mentor program for turners is modeled after the Shop Mentor program currently in use. The Lathe Mentor shall be available to casually observe the turner activities taking place during their shift. The Lathe Mentor will be available to help with setup, technique, and accessories, and to intervene when unsafe turning is being done.

Lathe Mentors will be allowed to do their own turning projects while casually observing other lathe turners. Ideally, they would be able to set up their work at either the far Jet lathe or the near Powermatic lathe where the entire lathe area can be observed. Lathe Mentors will wear a tan turning smock with an identification stitched on it. Due to the importance of this role, Lathe Mentors are granted a P-Card status like Shop Mentors. Lathe Mentors are provided and wear a Light Blue Shop Lathe Mentor Apron/Vest during their shift to make the Lathe Mentor easily identifiable in the Woodshop.

See Appendix 23 for a list of responsibilities and duties.



## **7.4 Equipment & Supplies Staff** – *Equipment and Supplies Director, Tool Room Manager, Tool Room Monitor, Tool Room Supplies Manager, Lumber Room Manager*

### **7.4.1 Equipment & Supplies Director (ES) Duty Statement**

This Board Member at large is responsible for the Equipment and Supplies Managers including Tool Room Manager, Tool Room Supplies Manager, and Lumber Room Manager (henceforth referred to as the ES Managers). Also, Board Member at large is the chair of the Equipment Committee with the VP, Maintenance Administrator and Shop Administrator to define future shop equipment needs and purchases.

Key is providing the strategic direction for the equipment and supplies that the Guild uses with input from the BOD. The ES Director and individual ES Managers decide the execution of this strategy with input from the Shop Administrator and Safety Administrator. The ES Managers are responsible for the daily operation of their respective areas and work specific issues with the ES Director for direction and/or approval from the BOD.

See Appendix 24 for a list of responsibilities and duties.

### **7.4.2 Tool Room Manager Duty Statement**

The Tool Room Manager will determine the small tools required by the Guild and how the Tool Room and Tool Board are allocated and organized to support these tools. This includes defining the tools to be purchased and replaced as well as the backups required to keep the Guild operational. The Tool Room Manager will inform the Treasurer and the Equipment & Supply Director when the Manager purchases a new tool (providing manufacturer, model number, serial number, amount, and cost) as well as when a tool is removed from daily operation. The tool serial number and the calendar date the tool is placed into service will be marked using a permanent marker. Further, the Manager will coordinate and organize new tools and jigs added to the Tool Room and Tool Board.

See Appendix 25 for a list of responsibilities and duties.

### **7.4.3 Tool Room Monitor Duty Statement**

The Tool Room Monitor is provided and wears a Green Shop Tool Room Monitor Apron during their shift to make Tool Room Monitor easily identifiable in the Woodshop. They monitor, organize, check operability, and insure cleanliness of all tools.

See Appendix 26 for a list of responsibilities and duties.

### **7.4.4 Tool Room Supplies Manager Duty Statement**

The duties of the Tool Room Supplies Manager are to provide the following to Guild members:

- Consumables (like sandpaper, screws, glue, etc.)
- Tool Service and Repair
- Clamps, Jigs and Presses

See Appendix 27 for a list of responsibilities and duties.

### **7.4.5 Lumber Room Manager Duty Statement**

The Lumber Room Manager provides lumber to the Guild for members to purchase and for the Guild to purchase for products, classes, and special projects. This includes, but is not limited to Hardwoods, Pressure-Treated (Yellowwood), MDF, and Plywood.

See Appendix 28 for a list of responsibilities and duties.

## **7.5 Front Desk & Concessions – *Front Desk & Concessions Director, Front Office Coordinator and Assistant, Furniture Repair Manager, Guild Products Coordinator, Special Projects Manager, Locker/Drawer Rental Manager, Mailbox Repair Manager.***

### **7.5.1 Front Desk & Concessions (FDC) Director Duty Statement**

The Front Desk & Concessions (FDC) Director is responsible for the management and supervision of all aspects of the Front Desk Operations and Concessions of the Guild, including Furniture Repair, Guild Products, Special Projects, Mailbox Repair and Locker/Drawer Rentals. The FDC Director provides support to the managers, coordinators, and assistants in these areas. See Appendices 30-35 for responsibilities of the committee chairs, managers, or coordinators reporting to the Front Desk & Concessions Director.

See Appendix 29 for a list of responsibilities and duties.

### **7.5.2 Front Office Coordinator and Assistant Duty Statement**

The Front Office Coordinator is responsible for overseeing the personnel and the smooth operation of all activities associated with the Front Office. The Front Office Coordinator is appointed by the FDC Director and is approved by the BOD.

The Front Office Assistant is responsible for the operation and activities of the Front Desk/Office. The Assistant reports to the Coordinator of the Front Office. During their shift, they report to the on-duty Shop Manager.

See Appendix 30 for a list of responsibilities and duties.

### **7.5.3 Furniture Repair Manager Duty Statement**

The Furniture Repair Manager is responsible for overseeing the team of repairmen in their duties concerning all aspects of furniture repair. Repairs are performed for residents of the community only. At NO time will a repairman go to a resident's home to perform a repair. All aspects of a repair are performed in the shop only. The Furniture Repair Manager is appointed by the FDC Director and approved by the BOD. This position reports to the assigned BOD member.

See Appendix 31 for a list of responsibilities and duties.

### **7.5.4 Guild Products Coordinator Duty Statement**

The Guild Products Coordinator is appointed by the FDC Director and approved by the BOD. This position's primary responsibility (along with the FDC Director) is to determine which Guild Products will be made and sold by the Guild. The sale of Guild Products generates income for the Guild that offsets operating expenses. This position reports to the directly to the FDC Director.

See Appendix 32 for a list of responsibilities and duties.

### **7.5.5 Special Projects Manager Duty Statement**

The Special Project Manager is responsible for those woodworking activities which are outside the basic purpose of the Guild. The Special Project Manager is appointed by the FDC Director with BOD approval. This position reports to the FDC Director.

See Appendix 33 for a list of responsibilities and duties.

### **7.5.6 Locker/Drawer Rental Manager Duty Statement**

The Locker/Drawer Rental Manager is responsible for renting all available lockers/drawers and for keeping accurate records of availability. The Manager is appointed by the Director with BOD approval. This position reports to the FDC Director.

See Appendix 34 for a list of responsibilities and duties.

### **7.5.7 Mailbox Repair Manager Duty Statement**

The Mailbox Repair Manager is responsible for overseeing all aspects of repairing and replacing resident's mailboxes. The Mailbox Repair Manager is appointed by the FDC Director with BOD approval. The position reports to the FDC Director.

See Appendix 35 for a list of responsibilities and duties.

## **7.6 Miscellaneous Roles – *Rules and Safety Committee, Computer Systems Manager, Security Systems, Special Interest Groups, Nominating Committee, Resource Center Manager, Plank Editor, New Member Registration, Web Page Master, Guild Calendar Administrator, Cluster Activities Coordinator, P-Card Badge Creator, Lumber Sales Accountant***

### **7.6.1 Rules & Safety Committee (RSC) Duty Statement**

The RSC consists of Shop Administrator (chair) Safety Administrator (co-chair) and a minimum of three members in good standing.

The RSC must have a minimum of three committee members to conduct an Incident Hearing.

The RSC is tasked to investigate, and document reported violations by a member(s) of the rules, policies, procedures listed in Section 2.16 Guild's Disciplinary Policy and Internal Intervention Procedures.

See Appendix 36 for a list of responsibilities and duties.

### **7.6.2 Systems Manager Duty Statement**

The management of the Woodshop's information system is the responsibility of the Systems Manager. The Systems Manager is appointed by the Vice President and approved by the BOD.

See Appendix 37 for a list of responsibilities and duties.

### **7.6.3 Security Manager Duty Statement**

The camera security system is the responsibility of the Security Manager. The Security Manager is appointed by the Vice President and approved by the BOD.

See Appendix 38 for a list of responsibilities and duties.

### **7.6.4 Special Interest Groups (SIG) Duty Statement**

Any subgroup within the Guild structure that wishes to form a SIG must comply with the rules listed in CCR&P Section 2.2 (C) Charter.

**CURRENTLY CHARTERED SIGs** – See VP's Duties as SIG Liaison in Appendix 11.

1. **Model Railroaders** – This is the modelmaker SIG of the Guild. They build and run two (2) railroads – the HO scale Palmetto Southern inside the Guild building that runs and the larger G scale Red Dam Express outside the building that according to the schedule posted at the front desk. They hold monthly meetings as posted on the Shop calendar and in The Plank.
2. **Woodcarvers** – This SIG's mission is to develop wood carving skills – both with hand and power tools. They meet weekly as posted on the Shop calendar and in The Plank.
3. **Woodturners** – This SIG represents the wood turners of the Guild and is affiliated with the American Association of Woodturners (AAW) as a sanctioned organization. The SIG mission is to share turners' projects; to address members' questions and needs; and to demonstrate new skills and projects. They meet monthly on the second Monday at 6pm (except July, August, or December) as posted on the Shop calendar and in The Plank. The SIG has a program to purchase turner supplies from Craft Supplies at a discount for SIG members only and has their own supply store for common items used regularly by SIG members. Further, they have tools and equipment specifically purchased for use by SIG members only – for example hollowing tools, a vacuum chuck and an electric chain saw.
4. **WoodChicks** – This SIG's mission is to foster greater comfort and confidence in using the woodshop and to encourage camaraderie among members. While primarily set up for women, all members are invited. They do projects together for personal use and club fundraising. Essentially, these projects build repetition of woodshop skills with the involvement of others to build confidence and provide individual resources for future personal woodworking projects and activities. The SIG monthly as posted on the Shop calendar and in The Plank.
5. **Technology** – This is the newest SIG created in 2020. The SIG is open to anyone with a shared interest in CNC, 3D Printing, Laser Engraving and Microelectronics. The mission of this SIG is to share learnings, projects, and new technology coming out; teach how to use the hardware and software; and explore how to bring these technologies into the woodshop. They meet monthly as posted on the Shop calendar and in The Plank.

### **7.6.5 Nominating Committee Duty Statement**

A nominating committee consisting of no fewer than three Guild members including a committee chair shall be appointed by the President.

See Appendix 39 for a list of responsibilities and duties.

### **7.6.6 Resource Center Manager (Librarian) Duty Statement**

The Resource Center Manager is appointed by the President with BOD approval. This position reports to the Guild/Community Relations Administrator. The Resource Center Manager is responsible for the maintenance of the resource materials i.e., books, magazines, pamphlets, videos, plans, etc.

See Appendix 40 for a list of responsibilities and duties.

### **7.6.7 Plank Editor Duty Statement**

The Plank is the primary online communications tool for the Guild. The Editor collects articles from the BOD members, committee chairs and SIGs, for inclusion in the next Plank by the 25 of each month. The editor distributes The Plank electronically via listserv to all members, currently a monthly activity with a target of a new issue at the beginning of each month.

### **7.6.8 New Member Registration Duty Statement**

New member applications are received different ways (paper or on-line) and are currently processed by the Treasurer.

See Appendix 41 for a list of responsibilities and duties.

### **7.6.9 Web Page Master Duty Statement**

**(User must be an assigned Moderator. Contact Sun City IT)**

The Webmaster is responsible for maintaining the Woodworker Guild web page and the New Member Web Site. This position reports to the President.

See Appendix 42 for a list of responsibilities and duties.

### **7.6.10 Practicum Student Scheduling**

(This process is currently being handled by the Treasurer)

Since the Practicum is now mandatory, this scheduling occurs when initial cluster scheduling occurs. Successful completion of the Practicum is required for a new member to receive a Gold Badge.

See Treasurer Work Instruction WI-001 in Appendix 8

### **7.6.11 Guild Calendar Administrator Duty Statement**

(This activity is currently being performed by the Treasurer)

The calendar contains all activities at the woodshop. Members use the calendar to determine dates and times of events. P-Card members use the calendar to determine when they can work during closed general membership shop times.

See Appendix 43 for a list of responsibilities and duties.

### **7.6.12 Cluster Activities Coordinator Duty Statement**

Cluster and practicum training are offered throughout the year, occasionally with the summer months off. In preparation for Students arriving, the Cluster Activities Coordinator, currently the Treasurer, is responsible for scheduling new student Practicum and Cluster training and advising students of their schedules.

See Appendix 44 for a list of responsibilities and duties.

### **7.6.13 Checkbook Reconciliation**

Transactions in the checkbook, currently on Quicken, and handled by the Treasurer should be reconciled electronically thru Quicken software with bank activity every Saturday.

See Appendix 45 for a list of steps.

### ***7.6.14 Privilege Card (P-Card) Badge Creator***

The Guild awards members who volunteer in certain roles and for performing certain tasks as identified in 2.2.4. This section details the process for creating P-Card badges.

See Appendix 46 for a list of steps.

### ***7.6.15 Lumber Sales Accountant***

The Guild lumber purchase system (2.12 Lumber Room) records lumber sales to members for personal use and Guild use which is currently handled by the Treasurer.

See Appendix 47 for a list of steps.

### ***7.6.16 Shutterfly Web Site Administration***

(This process is currently being handled by the Treasurer).

See Appendix 8, Work Instruction WI-050.

### ***7.6.17 Guild Information Technology Tools – File Sharing, Eventbrite, WoodRoom, Front Desk Check-in***

(This process is currently being handled by the IT Director).

See Appendix 48,

### ***7.6.17 Covid-19 Pandemic Policies and Procedures***

These policies and procedures were used during the Covid-19 pandemic and can be used as a baseline should another pandemic arises.

See Appendix 49.

# Annual Calendar of Required Activities by BOD and Committees

## PROPOSED KEY DATES for the BOARD of DIRECTORS WORKING COPY

#	EVENT DESCRIPTION	2024	NOTES
1	New Year's Day (Shop Closed)	Monday, January 1, 2024	P-Cards Only
2	Board of Directors Meeting	Thursday, January 18, 2024	
3	Annual Refresher Training (Shop Closed in AM 1/2 day)	Thursday, January 25, 2024	Pinckney Hall Dance Floor, May River Room, Colleton Room, Broad River Room
4	Coffee	Friday, January 26, 2024	Not doing this year as date is too close to Training
5	Board of Directors Meeting	Thursday, February 15, 2024	
6	Coffee & General Meeting #1	Friday, February 2, 2024	Pinckney Hall Dance Floor
7	Board of Directors Meeting	Thursday, March 14, 2024	
8	Coffee	Friday, March 29, 2024	
9	Shop Cleaning #1 (Shop Closed 1/2 day)	Monday, March 25, 2024	
10	Board of Directors Meeting	Thursday, April 18, 2024	
12	Volunteer Appreciation Dinner (Pavilion)	Friday, April 19, 2024	The Pavillion
11	Coffee	Friday, April 26, 2024	
13	Spring Sidewalk Sale #1 (Shop Closed)	Saturday, May 11, 2024	Ice Cart and Ice provided by Lifestyles (Does the shop need to be closed?)
14	Board of Directors Meeting	Thursday, May 16, 2024	
15	Coffee	Friday, May 31, 2024	
16	Board of Directors Meeting	Thursday, June 20, 2024	
17	Coffee	Friday, June 28, 2024	
18	4 <sup>th</sup> Of July (Shop Closed)	Thursday, July 4, 2024	P-Cards Only
19	Board of Directors Meeting	Thursday, July 18, 2024	
20	Coffee	Friday, July 26, 2024	
21	Board of Directors Meeting	Thursday, August 15, 2024	
22	Coffee	Friday, August 30, 2024	
23	Board of Directors Meeting	Thursday, September 19, 2024	
24	Coffee	Friday, September 27, 2024	
25	Board of Directors Meeting	Thursday, October 17, 2024	
26	Coffee and General Meeting # 2	Monday, October 14, 2024	Pinckney Hall Dance Floor (We may change to a Friday in the Shop)
27	Shop Blow Down & Cleaning (Shop Closed)	Wednesday, October 30, 2024	
28	Shop Cleaning (Shop Closed)	Thursday, October 31, 2024	
29	Setup Open House/Sidewalk Sale (Shop Closed)	Friday, November 1, 2024	
30	Open House/Sidewalk Sale (Shop Closed)	Saturday, November 2, 2024	
31	Electronic Voting for Officers/Budget	Thursday, November 21, 2024	
32	Board of Directors Meeting	Thursday, November 21, 2024	
33	Coffee	Friday, November 29, 2024	
34	Thanksgiving (Shop Closed)	Thursday, November 28, 2024	P-Cards Only
35	Board of Directors Meeting	Thursday, December 19, 2024	
36	Christmas (Shop Closed)	Wednesday, December 25, 2024	P-Cards Only
37	New Year's Day (Shop Closed)	Wednesday, January 1, 2025	P-Cards Only

### INFLUENCES ON CALENDAR

Election completed by Nov 30

Election 30 days after slate and budget presented

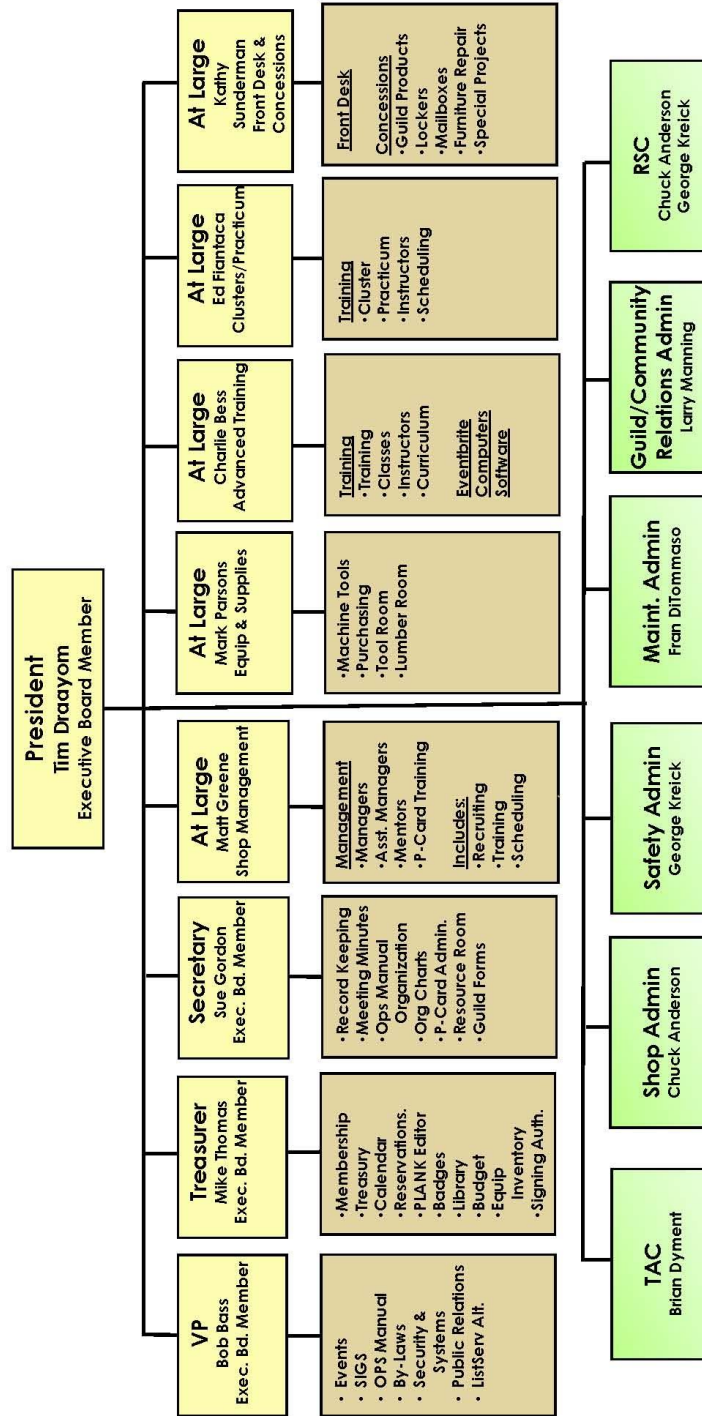
Board of Directors meeting are scheduled for the third Thursday of the month

Revised 09/16/2023

# Appendix 1: Guild Organization Charts

## Guild Board of Directors - 2024 Organization Chart

# Board of Directors



01-01-2024



## Appendix 2: The Practicum

Webster's: A practicum is a graduate level course, often in a specialized field of study that is designed to give students supervised practical application of a previously or concurrently studied theory. Practicums are common for education and social work majors. Sometimes, the practicum may be a part-time student teaching placement that occurs the semester before a student's full-time student teaching placement.

The first Practicum is a 2-day two hr./day course in which you will use most of the machines in the Woodshop to create a 9" x 14" Cheeseboard. You will be guided by experienced instructors each step of the way to give you the confidence to tackle projects on your own. After taking the practicum, you will have a considerably higher level of Woodshop usage and participation. Many use the plans provided to produce additional cheeseboards on their own after graduation.



The second Practicum is a 4-hour class where you make a simple project such as a one-piece cutting board or charcuterie board.

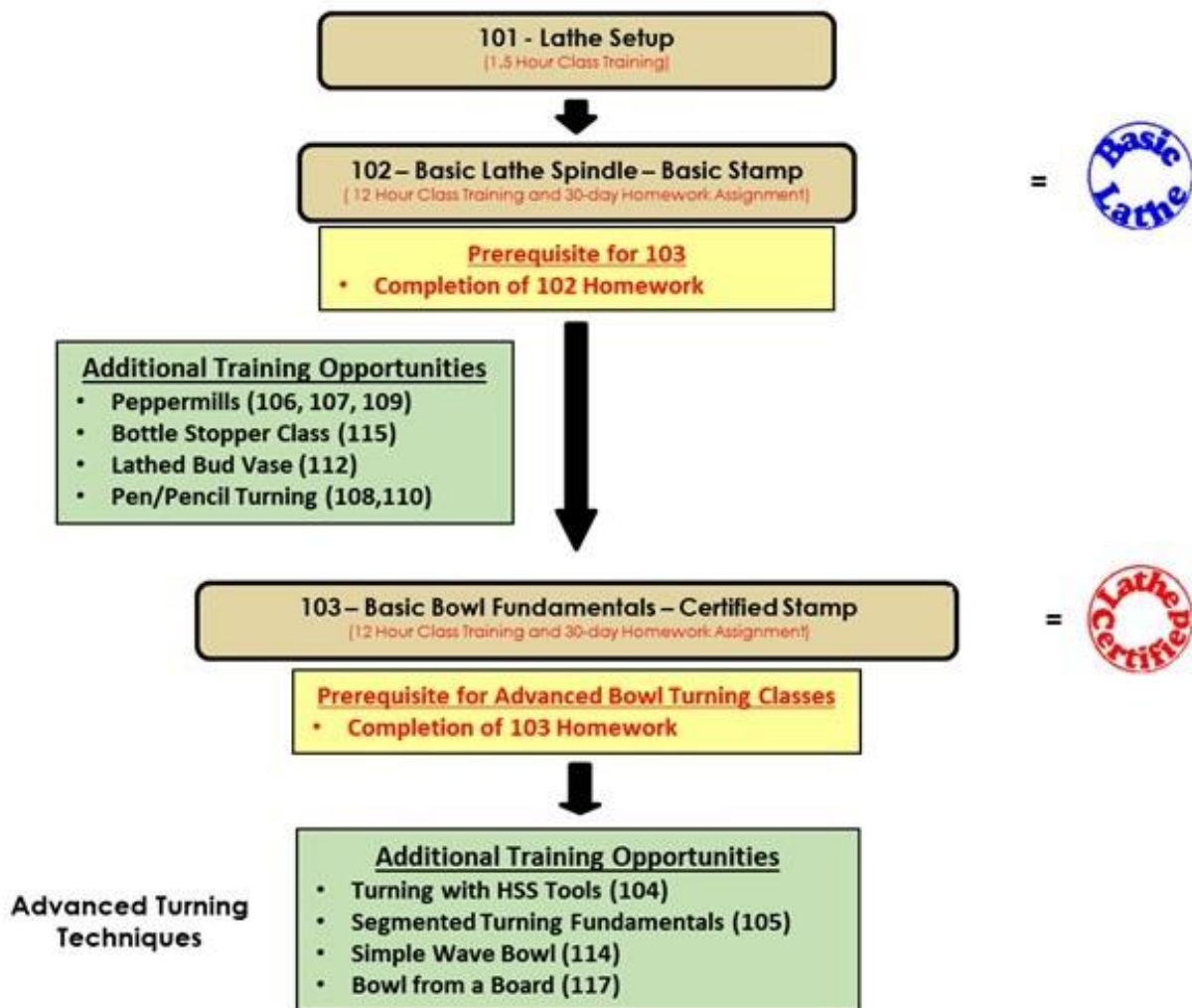


You must complete ALL cluster and practicum classes and will be given a GOLD Card at the successful completion of the practicum classes.

# Appendix 3: Lathe Qualification Flowchart and Accelerated Lathe Qualification Process

## Lathe Qualification

Must have a minimum of **3 months** shop experience and be familiar with band saws prior to the Lathe Setup class



## The Accelerated Lathe Qualification Program

From time to time an experienced turner joins the Guild but must wait at least 6 months to start Lathe classes to get lathe qualified. This is due to the high demand for lathe classes required for qualification. It is in our interests to accelerate lathe qualification where warranted;

- More experienced turners would reduce the load on lathe mentors, and make more mentors available.
- Experienced turners would likely join the turners SIG, where all turners would benefit from their expertise and demonstrations.
- This acceleration would free up classes that they would otherwise be occupying, opening slots for the much-demanded lathe qualification courses.
- These turners want to use the shop and should be able to. It is our obligation to accommodate them if we are able.

The accelerated lathe qualification program would be structured as follows:

1. Periodically we would invite members to apply.
2. Applicants would submit a resume for review.
3. Applicants would submit two spindle turnings and two cross grain turnings for review.
4. Applicants may have to submit to an interview.
5. Applicants would be required to attend a one-hour class dealing with Guild rules regarding Lathes. (We may want to charge for this to offset the fees lost with the lathe qualification classes they would no longer be required to take).

The TAC will administer this program.

The BOD has the final approval on those recommended for "acceleration."

## Appendix 4: Sale of Goods by Guild Members

In August 2009, the SCWWMM Guild published a policy regarding “Business and Commercial Use of the Woodshop.” It centers on two different but related issues.

1. The necessity of members to collect applicable taxes on goods sold outside of a community facility or sanctioned community event, be it inventory or finished goods; and
2. The requirement of the member to reimburse the Guild and CA for use of the facility in the **production of goods produced for eventual sale.**

Refer to the latest Charter Club Rules and Procedures, currently section 4.5, for treatment of sales tax during resale activities.

Our Guild Operation Manual (section 5.5) clearly identifies the policy related to members selling product at Guild-sponsored functions. Please be aware of the prevailing requirements for other independent (“casual”) sales outside the chartered clubs operating within SCHH.

The same policy referenced above also requires the Chartered Club to establish a policy whereby the club receives compensation from the member(s) for use of the facility in the production of goods offered for sale for personal profit. The 2009 policy announcement contained five (5) specific expectations for members using the facility for the purpose of creating goods for resale.

- Refrain from tying up machine tools for excessive lengths of time – permit member usage as demand dictates.
- Utilize equipment during off-peak periods whenever possible.
- Volunteer a minimum of four (4) hours monthly in some capacity.
- Donate a portion of revenues for goods sold to offset shop maintenance and operating expense (see below\*).
- Purchase as much project material as possible from the club.

**\*\$3.00 per half-day shop use is set as a fair and equitable amount for value received. If desired, a “tiered” usage fee can be arranged for those members wishing to consider an alternate approach - a hobbyist seller @ \$100.00/year, 2) artisan seller @ \$400.00/year, or 3) commercial seller @ \$1,000.00/year, all payable quarterly.**

We are not, nor do we intend to become, a policing agency; this policy is intended operate upon an “honor system” approach. The majority of our membership utilizes the shop facility for personal enjoyment, and it is unfair for those members to be subsidizing the few who utilize the facility for personal gain activities. Continued violations and/or ongoing non-compliance can jeopardize a member’s shop privileges and cause CA to become involved.

## Appendix 5: President Duty Details

### **Day-to-Day**

1. Upholds the By-Laws of the Guild.
2. Works to achieve the purpose of the Guild.
3. Attends regular BOD meetings.
4. Makes decisions and takes actions that are in the best interest of the Guild.
5. Assigns duties and responsibilities as needed to BOD members.

### **Monthly Duties**

1. Arranges monthly BOD meetings on appointed day of the month.
2. Prepares and publishes the proposed agenda prior to the meeting (usually no later than the Monday prior to the meeting).
3. Accepts input from expected attendees regarding revisions to the agenda and republishes again prior to the meeting. The agenda is approved at the beginning of the BOD meeting.
4. Conducts BOD meeting following the approved agenda. Facilitates the discussion of agenda topics and voting by BOD members on related resolutions. Votes only to break ties in BOD voting.
5. Oversees the preparation for, and conducts, the monthly coffee held the last Friday of each month.
6. Writes President's message for The Plank.
7. Editor of the **SawDust Newsletter** and coordinates with the BOD members brief news articles. **SawDust** is designed to present brief and concise and important information to the Guild. Published on an as needed basis.
8. Reviews monthly bank statements and provides a confirming signature to the Treasurer.
9. Participate in the BOS session initiating the new-member cluster training —each month (except during the summer).
10. Ensures that all Chartered Club forms and reports are completed and sent to Community Association Management and others making such requests.

### **Quarterly Duties**

1. Oversees the preparation for special, and general membership meetings
2. Conducts general membership meetings.
3. Reconfirms general membership meeting times and venues as required.

### **As Needed**

1. Assigns duties and responsibilities as needed to BOD members.
2. Administers Guild listserv as needed. Reviews and approves messages before releasing them for distribution. May disapprove/reject messages that are inappropriate or not suitable for the entire Guild membership.
3. Convenes special EB meetings when needed to discuss urgent matters and actions the EB elects to take.
4. Facilitates BOD discussion via email of issues/concerns that arise between BOD meetings; coordinates the statement of resolutions and moderates email voting by BOD members. Makes assignments to members as appropriate.

5. Attends Chartered Club meetings as scheduled by Lifestyles Services and facilitates the implementation of new directives, rules, policies, etc. or changes needed to such to bring the Guild into compliance with them.
6. Takes emails and phone calls from community residents, Guild members, and individuals from outside Sun City, with questions regarding the Guild and its shop activities, and arranges to provide requested information.
7. Consults with Shop, Maintenance, Guild/Community Relations, and Safety Administrator when needed to address minor operational or safety issues that don't need review or action from the full BOD.
8. Consults with individual BOD members when needed regarding their respective assignments and respective areas of responsibility.
9. Coordinates with Treasurer during extended periods the Treasurer is away from the Guild. Writes necessary checks for payment of goods or services using instructions provided by the Treasurer.
10. Coordinates with BOD members who are away from the Guild for extended periods of time to ensure that they have designated and provided sufficient training to BOD member who will act in their stead while they are away.
11. Represents the Guild to the community as needed/requested.
12. Addresses issues as they arise with appropriate members and Community Association Management personnel when necessary. Oversees the identification of needed resolution actions and makes assignments as needed to complete them.
13. The President has the sole authority to shut down the shop.

#### ***External Contacts***

1. Works with CA Executive Director, regarding matters for which he has personally become involved.
2. Works with CA Lifestyles Director, regarding Guild governance and any issues that may arise with Guild members or Guild operating policies, practices, etc.
3. Works with CA Facilities Director, regarding remaining workshop expansion issues and actions; as well as other ongoing facilities matters.
4. Form cc-100 (Donations received or made by club) - Form must be completed and forwarded to Treasurer every time there is a donation received by the club. The RR-SIG may recap annually any money collected as donations and submit form cc-100 with form cc-90. Donations made by the club must also have form cc-100 filled out for each occurrence.
5. The Secretary maintains the Key Manager Calendar. This is to keep the BOD informed of all times that the key leaders of the shop are not available. This includes BOD members, administrators, and key managers throughout the shop.

## Appendix 6: Vice President Duty Details

The Vice President assumes the lead in maintaining a list of members that show a heightened interest in the club and may be candidates for future leadership roles. The VP is encouraged to enlist the assistance of other BOD members and Chairs of the standing committees in the ongoing evolution of the list. At a minimum, someone should be identified as a possible replacement for all committee leadership positions. The list is for internal BOD/Committee Chair use and should not be published in The Plank or in the BOD minutes.

The Vice President may be assigned to provide direction/leadership to one or more of the appointed committees. A key role of the VP is to review and revise the By-Laws and Ops Manual to be consistent with Guild operations and the community rules and regulations. The By-Laws are to be completed and approved by the first quarter of each year. The Ops Manual should be updated by the second quarter of each year. Revisions can also be made throughout the year as deemed necessary by the BOD and Guild membership.

- **Guild By-Laws and Ops Manual Maintenance**

Every year the Guild By-Laws and Ops Manual are to be reviewed and updated accordingly.

The By-Laws update is mainly driven by changes in Community club rules and significant policy changes made by the Guild. This is the controlling document of the Guild that defines the fundamental policy pillars from which the Operations Manual defines how the By-Laws are implemented. The By-Laws document is kept to simple statements of policy. At a minimum, it should not be allowed to go more than 5 years without an update. The By-Laws update should be immediately drafted early January; reviewed and approved by the Guild BOD at the February meeting; approved by the members at the General Meeting held in the 1<sup>st</sup> Quarter, and approved by the Lifestyles Director by early March.

The Ops Manual Update is a yearly event. The Ops Manual update is driven by new activities, operations, and policies that occur in the prior year. Ideally, the key items requiring updating are identified by the VP and responsibilities established for completing them in the November Guild BOD meeting. In addition, all BOD members are responsible for reviewing and editing their specific Ops Manual sections to make sure they are current for the coming New Year. The sequence of events is that the identified updates and edits must be submitted to the VP by the date requested by the VP for inclusion in the Ops Manual. The final draft is then completed by the VP for review and approval by the Guild BOD in the BOD meeting. They are then reviewed by the VP and approved by the membership in a general membership meeting.

- **Special Interest Groups (SIG) Liaison**

The VP is the liaison with the SIG leadership for policy, budget needs, and general questions. The VP is also responsible for setting up new SIGs per the direction of the Guild BOD. Guidelines for SIGs are defined in Section 2.14. Recent SIGs added to the Guild in the past year has been the Technology SIG. A description of the Guild's current SIGs are presented in section 7.6.4 Special Interest Groups (SIG).

The concept here is to identify all calendar items that require some form of BOD or committee action at some time or times during the year. Once these activities are fully identified, order them by dates and by responsible BOD or committee leaders.

## **Security and Systems**

The management of the workshop information system is the responsibility of the Systems Manager, and the camera security system is the responsibility of the Security Manager. Sometimes, these 2 roles are managed by one person depending on skill levels and available volunteers.

The Systems & Security Managers are appointed by the Vice President and approved by the BOD. The VP provides strategic direction to these managers for them to assess and implement accordingly. The VP also gains approval from the BOD for any capital or resources these managers need.

- **Financial Transaction Auditing**

At the beginning of each month, all the past month's purchase invoices for the woodshop accounted by the Treasurer are presented to the Vice President for audit and approval. The primary focus of the audit is the following: all checks provided to members to cover invoice expenses over \$500 are countersigned by another Board member; and all checks provided to Board members to cover invoice expenses are countersigned by another Board member. If they are not, the VP signs on the check copy and indicates this action was taken to the Treasurer. At the end of this audit, the VP is to sign the front summary page with Reviewed and Approved, name and date.

- **Public Relations Coordinator**

- a. **SunSations Monthly Article** – Essentially every month, an article describing general Guild information is written and submitted to the SunSations staff for inclusion in the next month's SunSations magazine. This article details the Guild name, location, President and Vice President and general information about the Guild. For the most part, each month's content does not change except for the month of Dec/Jan to detail the new Board members, and the 2 months preceding the Open House to announce its date. The general information of the article is not to exceed 100 words. The word count allowed for the SunSations December/January Double Issue is 140 words and is due in October. It is sent to the following email address: [sunsations@schhca.com](mailto:sunsations@schhca.com). The SIG leaders are responsible for a similar article that is limited to 50 words. The VP is to inform new SIG leaders of this responsibility. Examples of the Guild and a SIG article are shown below:

*Guild SunSations Article* – must fit the format below:

### **WOODWORKERS AND MODELMAKERS GUILD**

841 Red Dam Road (843) 705-2968

Hours: 9am – 5pm Mon, Wed, Fri;

10am - 4pm Sat.

(*President's Name*), President



(President's Email Address)  
(Vice President's Name), Vice President  
(Vice President's Email Address)

The Guild has over 900 members and is growing (19% are women). The Guild provides safe operating instructions to all members. Our 9,000 square-foot facility contains state-of-the-art equipment and tools. We provide many services for Sun City residents and clubs including mailbox repair & replacement, furniture repair, and creating your special projects. Residents and guests are welcomed to see our products. Get a guided tour of the Woodshop during the times listed.

Follow us on Facebook.

<https://www.facebook.com/schhwmq>

New-Member Application:

<https://tinyurl.com/yjhx26h>

**SIG SunSations Article** – must fit format below (can include other officers):

#### **WOODTURNERS SIG**

Fran DiTomasso, president  
843-705-5871  
[frandito@gmail.com](mailto:frandito@gmail.com)

We are dedicated to turning wood. Through the use of a lathe, we create articles of art, craft, and utility. We meet at 6 p.m. the 2nd Monday at the Guild shop (no meetings in July, August, or December). Each meeting features a turning demonstration. All residents are welcome.

- b. **Club News** – There is a new Club News opportunity that needs to be defined for the Guild by the VP. This will be added as it becomes an active part of the VP's role.
- **Turners Advisory Committee (TAC) Liaison**

The TAC chair reports to the VP as long as the VP is an experienced turner otherwise another Board member with that experience should be chosen. The mission of the TAC committee is to regularly review the needs of the lathe community from a safety, rules, and equipment basis. They make recommendations to the Board for approval through the

VP. The committee meets whenever needed or requested by the Board. The Committee chair will sit on the RSC whenever a safety incident occurs in the lathe area.

- **Committee Chair**

- a. **Space** – This Committee oversees how space is utilized in the shop. It is made up of the VP, Shop Administrator and a second Board Director. At various times, members who have been asked to lead a space project will sit on the Committee, so they get the support and resources needed to finish the project.
- b. **P-Card** – This Committee defines who receives a P-Card based on volunteering 48 hours per year with 24 of these hours from the critical roles of Manager, Shop Manager, Mentor, Lathe Mentor, and/or Instructors (Clusters/Advanced). The Committee is made up of the VP, Treasurer, Secretary, and Manager/Mentor Director. The Committee meets every quarter to assure progress is being made by all P-Card holders relative to the volunteer hour requirement. If not, they will remind those falling short of the requirements and the outcome of potentially losing their P-Card. They also oversee special P-Card holders that were granted by the Board such as Furniture Repair, Tool Room Manager, SIG Leaders, Video Team, etc. to assure they are still meeting the requirements of their specified roles.

- **Event Management**

- a. **Volunteer Appreciation Dinner (VAD)** – The VP is responsible for leading and planning the VAD. This entails:
  - i. gaining approval for a date from the Community Association (CA) via an event room request after July the prior year. The date is usually planned for late April every year. This includes the tables, chairs, audio/video equipment, ice bins, and arrangement of said items.
  - ii. announcing the VAD date to the membership starting in February at Coffee meetings, and in Plank articles.
  - iii. making arrangements with the CA Approved Food Vendor – Get the current list of approved vendors from CA.
  - iv. defining the list of volunteers who can attend. This is usually about 170 volunteers (including significant others) and is determined by the volunteer hours list compiled by the P-Card Committee.
  - v. purchasing the supplies needed for the VAD including candies, balloons, center pieces, dispensing utensils, table covers, etc.
  - vi. coordinating the setup of the VAD at the Pavilion with the BOD members prior to the dinner.
  - vii. making sure the President has what he needs for the main presentation including a rolling video of the shop activities during the year and the VOM recognition.
  - viii. being the Master of Ceremonies at the VAD.
  - ix. coordinating the VAD clean-up with BOD members.
  - x. arranging transport of the VAD leftovers to a local charity organization.
- b. **Open House**– The VP is responsible for leading the volunteer teams that make the Fall Open House happen. Typically, the Open House occurs in the 4<sup>th</sup> Quarter of the year. The leadership role entails:
  - i. Gaining approval for a date from the CA via an event room request after July the prior year. The date is usually planned for late October/early

- November every year. This includes the tables, chairs, canopies, grills, and ice bins.
- ii. Establish the leaders of the volunteer project teams and provide the resources to meet their needs. These volunteer teams are described in the Open House Team List Making
  - iii. Guild announcements and reminders about the Open House.
  - iv. Creating a flyer for sending to the neighborhoods announcing the Open House.
  - v. Announcing the Open House in a SunSations Guild article and in the CA Club News the month before. This includes hanging a poster on the Club News bulletin board.
  - vi. Contacting Sun City TV, 30-45 days in advance of the event to create announcement and materials to promote the event on SCTV and to cover the event live.
  - vii. Setting up the “Guess the Pieces” woodworking projects for which gift cards are awarded to the closest answer.
  - viii. Arranging for an Open House photographer from either the Photography club or a Guild member with photography skills. This includes taking pictures of the display setup the day before as well as the actual day of the Open House.
  - ix. Being the master of ceremonies making sure all the activities during the day progress smoothly and addressing issues as they arise.
  - x. Arranging for a person to manage the microphone and make drawing announcements and to provide information of the activities taking place during the Open House.
  - xi. Laying out the flow of the visitors through the shop to reduce the bottleneck between the drill press area and the lathe wall. This will entail making flow adjustments via a gate release valve managed by the Open House Ambassadors. The current best visitor flow is laid out in the Shop Flow Map.
- c. **Sidewalk Sales** –The VP is responsible for leading the volunteers that make the Spring and Fall Sidewalk Sale events happen typically in April or May for the Spring event. The Fall Sidewalk Sale will be incorporated into the Open House Event scheduled in the 4<sup>th</sup> Quarter of the year, generally in November/December. The **Sidewalk Sales** are planned to be outdoor events set up in the Woodshop’s parking lots. This allows for more effective use of space in the Woodshop for displays and minimizes the congestion in the Woodshop and other activities to be determined. In event of inclement weather, the Spring event normally does not have a rain date scheduled and the event would be canceled. If inclement weather occurs for the Fall Sidewalk Sale, it would be relocated inside the Woodshop. The Leadership role includes the following assuming it coincides with the Open House:
- i. Gaining approval for a date from the CA via an event room request after July the prior year. The date is usually planned for late October/early November every year. This includes the tables, chairs, canopies, grills, and ice bins.
  - ii. establish the leaders of the volunteer teams and provide the resources to meet their needs. These volunteer teams are described in the Open House Team List.
  - iii. Making Guild announcements and reminders about the Sidewalk Sales/Open House.

- iv. Creating a flyer for sending to the neighborhoods announcing the /Open House.
- v. Announcing the Sidewalk Sale/Open House in a SunSations Guild article and in the CA Club News the month before. This includes hanging a poster on the Club News bulletin board.
- vi. Contacting Sun City TV, 30-45 days in advance of the event to create announcement and materials to promote the event on SCTV and to cover the event live.
- vii. Arranging for a photographer from either the Photography Club or a Guild member with photography skills to photograph the events. This includes taking photos of the display setup the day before as well as the actual day of the Sidewalk Sale/Open House.
- viii. Laying out the flow of the visitors through the shop to reduce the bottleneck between the drill press area and the lathe wall. This will entail making flow adjustments via a gate release valve managed by the Sidewalk Sale/Open House Ambassadors. The current best visitor flow is laid out in the Shop Flow Map.
- ix. Barrier rope lines with signage to be set up to direct and/or restrict the visitor to unauthorized areas. Rope Barriers are designated as Black Dotted Lines

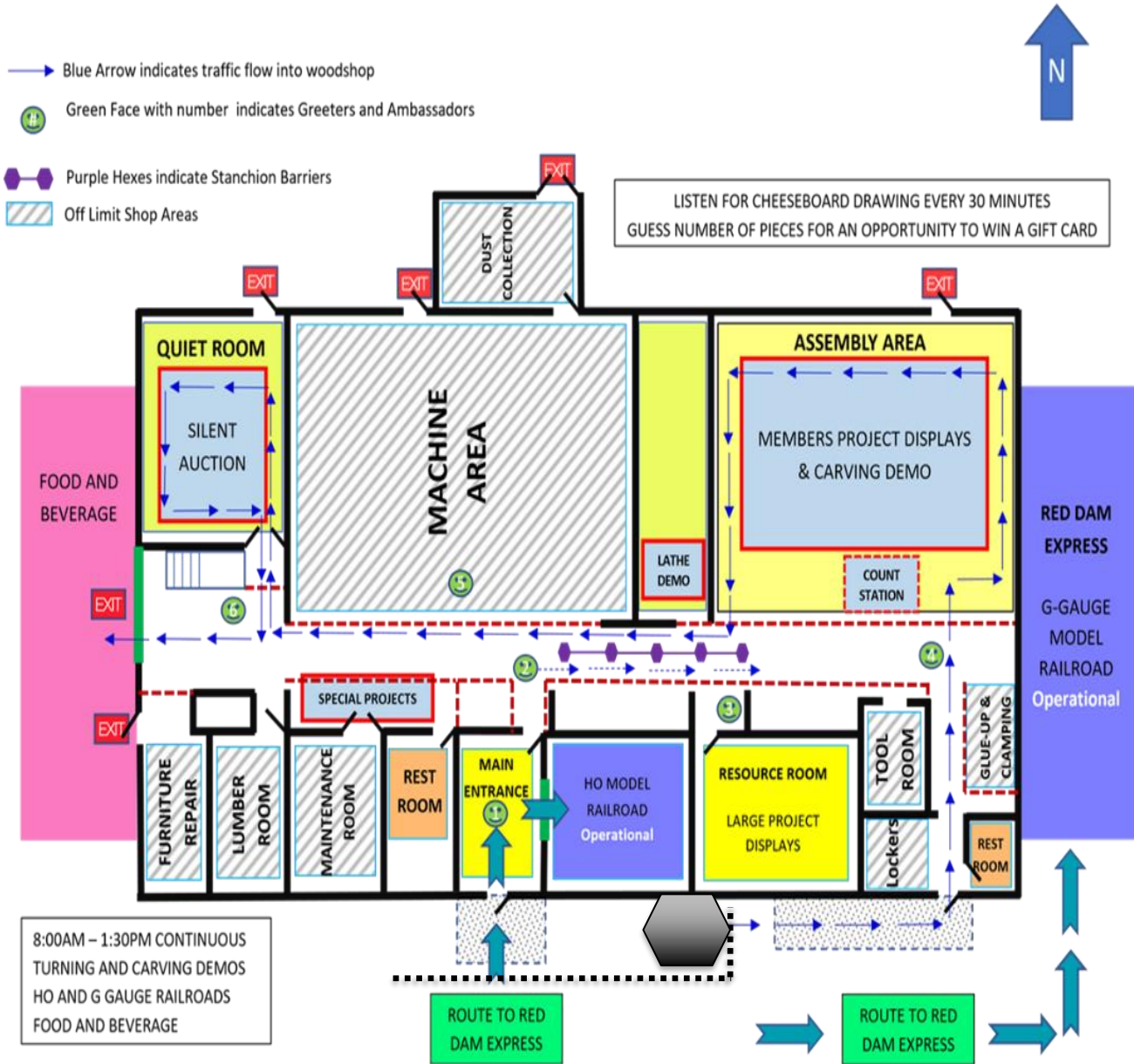
### **Woodshop Open House Map – Visitor Flow Diagram**

The Event Team will create Visitor Flow Diagram for both the Spring Sidewalk Sale and develop two plans for the combination Open House/Sidewalk Sale, **Plan A** for the Sidewalk Sale outside and **Plan B** for inclement weather and the event moved inside the woodshop.

The blue lines on the **Plan A Visitor Flow Diagram** show the visitor pathway. No equipment moves other than the Powermatic Lathe for the Lathe Demonstration as required in Plan A. Special Projects/Furniture Repair tables are set up outside with Guild Sales. The Carving Demonstration is set up outside. The Silent Auction is held in the Quiet Room. The flow moves from the eastside door to the Members' Project displays, back by the lathe demonstration, to the Resource Room (if used), on to the Guessing Game located on the Table Saw, then to the Quiet Room for the Silent Auction and out to the food concessions.

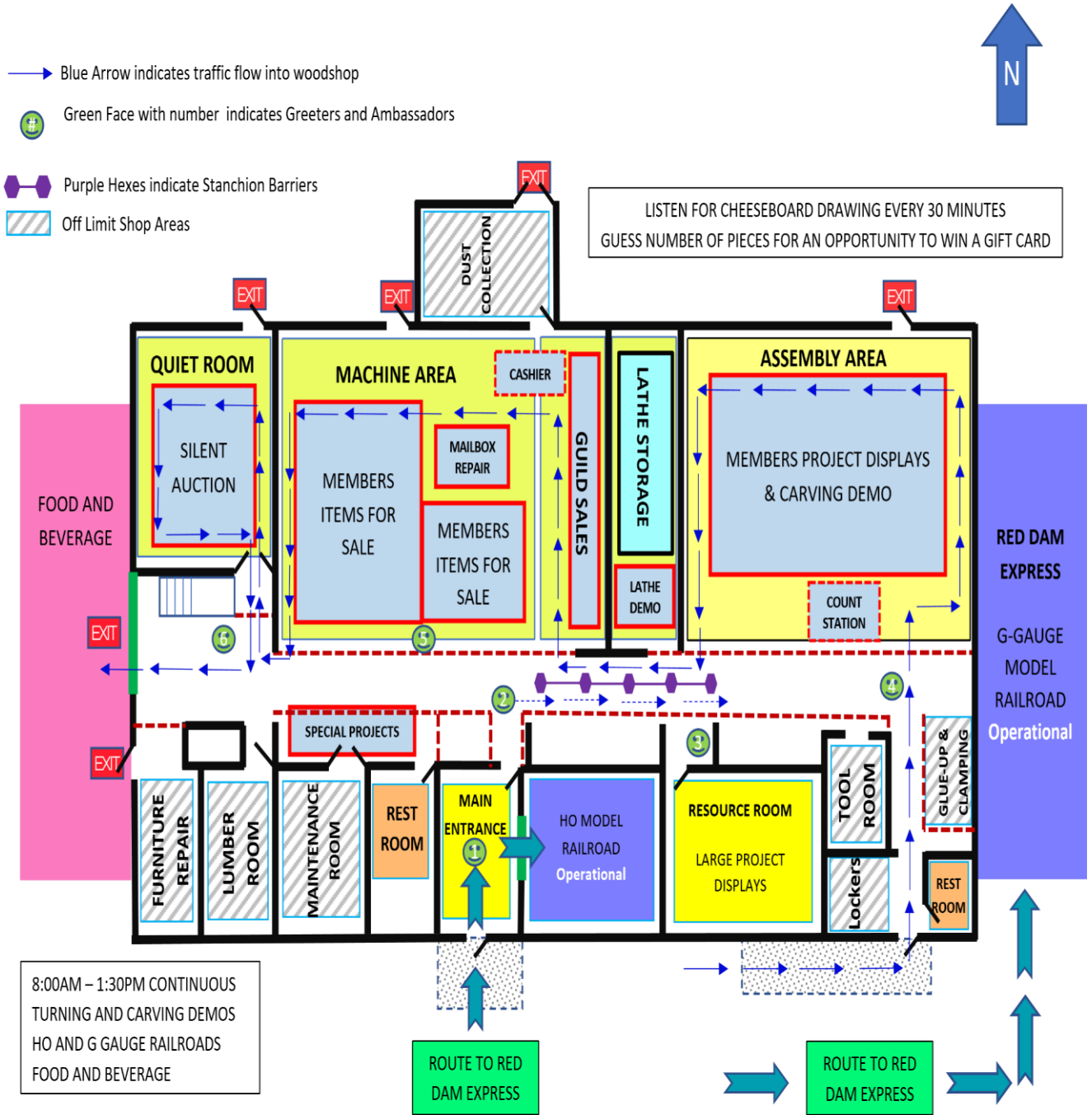
**Plan A (Good Weather Plan)**

**PLAN A – WOODSHOP OPEN HOUSE & SIDEWALK SALE**



# PLAN B (INCLEMENT WEATHER)

Plan B is based on the 2019 Visitor Flow Diagram

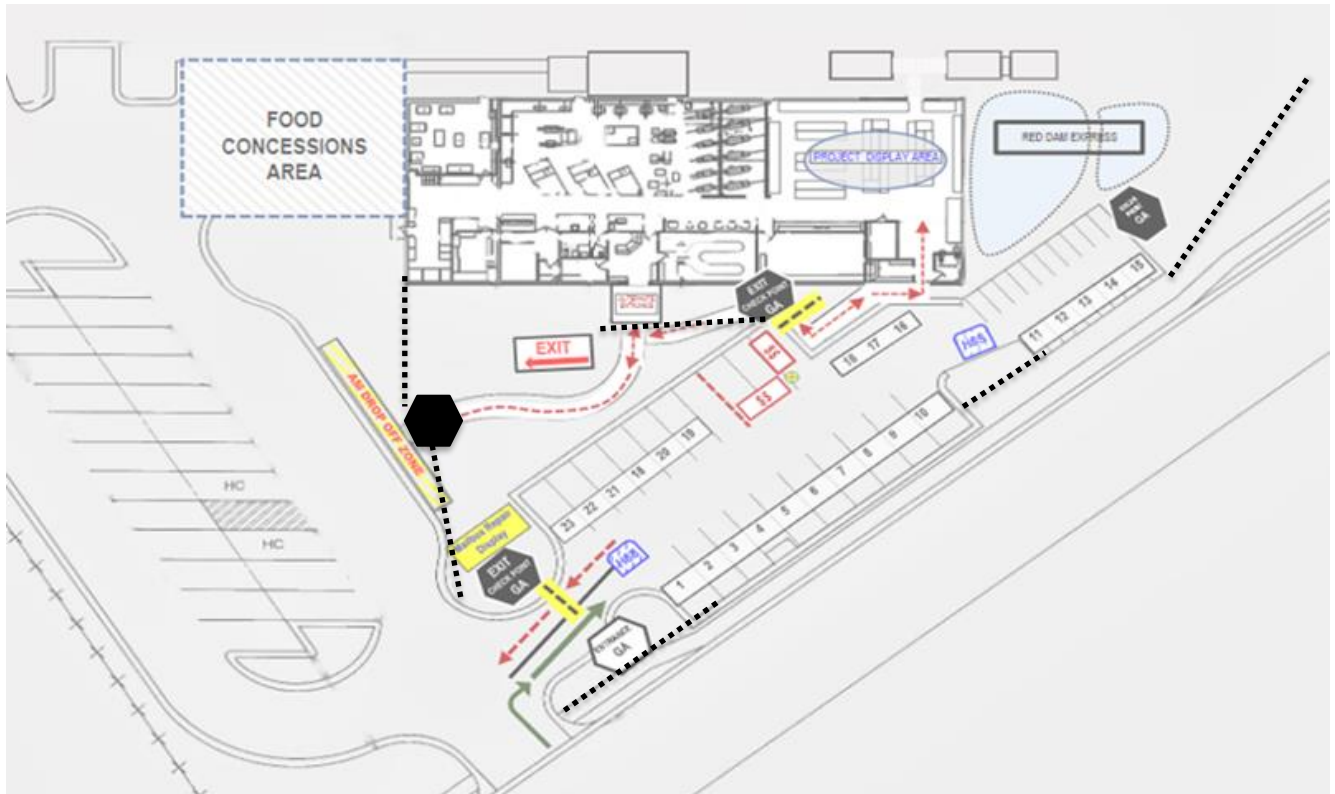


1-Front Office, 2-Shop, 3-Resource, 4-Assembly, 5-Machine Room, 6-Quiet Room

## **SIDEWALK SALE DIAGRAM**

The following diagram is the layout for the Sidewalk Sale is based on the 2021 Sidewalk Sale Dates.

The table assignments are determined by the Event Committee. The Rope Barriers are represented by black dotted lines. Position of the Rope Barriers are representative and may be adjusted by the Event Committee



### **Open House/Sidewalk Sale Volunteer Teams**

The Open House/Sidewalk Sale Volunteer Teams are listed below. These are the teams that are necessary to accomplish the Open House in a timely and quality manner. Each team needs a leader who is responsible for leading the activities necessary to complete the task. In most cases, the primary contacts will lead the next year's efforts or there will be those who have taken a lead role in that particular area that can fulfill the need. The VP will set the sequence dates of these events based on the established Open House/Sidewalk Sale date.

#### **Pre-Cleaning – Shop Area and Front Office**

Shop/Front Office Touchup

#### **Flyer Distribution**

Distribute Flyers for all the Sun City Neighborhoods

#### **Shop Blowdown – Shop Administrator - schedules & coordinates**

Contract Cleaning Service may be used

**Shop Cleanup – Shop Administrator – schedules & coordinates**

Contract Cleaning Service may be used for the Final Shop Wipe Down

**Power Washing - Shop Administrator - schedules & coordinates**

Cleaning sidewalks, driveway, and trash cans

**Setup – Shop Administrator – schedules & coordinates**

Bring in Your Projects for Display and/or Sale

**Sidewalk Sale Set Up – Equipment & Supplies Director**

Coordinates the setup/teardown of the equipment and the area cleanup activities.

**Guild Product Sales – Concessions Director coordinates**

Help with Guild Product Sales and Setup

**Silent Auction and Raffle – Concessions Director coordinates**

Help Conduct the Auction and the Raffle and Setup

**Food Concessions – Master Chef coordinates**

Work with the Master Chef

**Greeters and Ambassadors – Team Leaders Coordinate**

Help Direct Guest Traffic and Provide Information

In previous events, all the volunteer activities were listed in the BIG GREEN BOOK in the Resource Room for Guild member sign-up. The Guild has the option of using an electronic version of the “**BIG RED BOOK**” for members to sign up for various volunteer positions. The Guild and the Board are counting on all the members to make each year a banner year for our Open House.

• **Secondary Interface Roles**

- a. **Community Association and Back-up to President** – This is a role that is defined by the President as needed or when the President is incapacitated. In most cases, the Guild/Community Relations Administrator is involved in Community Association interactions along with the VP being involved as needed such as in Expansion plans, as part of being ready for becoming the next President.
- b. **Approval of Pending Listserv Messages** – The President and Treasurer are the lead approvers of the listserv requests. The Vice President is back-up when the other two are incapacitated or out-of-town.
- c. **New BOD Member Orientation (Alternate to Past President)** – A role of the Past President is to provide new BOD member orientation. If the Past President is incapacitated or does not sit on the BOD, this role is passed on to the Vice President.

**Wipe-down Plan and Procedures:**

**Basics**

- A crew of 25-35 volunteers
- 9:00am to 1:00pm on the Thursday before the Open House & Sale
- Safety glasses are optional.
- Face masks are recommended.
- Anyone standing on a ladder or elevated surface must have a spotter.

**Wipe-down Coordinator Role:**

- Develop an email distribution list of the volunteers together with phone numbers to communicate and remind volunteers of the date, time, and tasks.
- Recruit 5 zone leaders from the list of volunteers at least a week before the wipe-down



- Organize a Zone leader training meeting the Wednesday evening prior to wipe-down.
  - Explain Zone leader role.
  - Bring out cleaning materials for zone leaders to share Thursday morning and how they are to be used in various parts of the wipe-down tasks.
  - Have Woodshop Safety Coordinator discuss safety procedures, potential hazards, and safety equipment and procedures.
  - Describe the unique wipe-down procedures for each zone.
- Inventory current list of cleaning supplies versus what is needed and acquire any additional cleaning supplies needed. Bring all supplies out to a table saw for the Wednesday evening Zone leader training session.
- Bring or arrange for a board member to bring coffee and donuts for the Thursday morning wipe-down.
- Greet the volunteers as they arrive on Thursday morning:
  - Assure they sign in as “other volunteer” & check-off their name on the wipe-down roster.
  - Assign volunteers to a zone & introduce them to the zone leader.
- During wipe-down monitor progress, participate wherever needed, redistribute workers as they complete tasks in their zone.

**Process:**

- Wipe-down follows the morning after the “blow-down” the previous afternoon.
- Wipe-down basically starts from the height of walls, fixtures, pipes, lights, cabinets, machines, tools and shelves that can be reached from the floor and ends with sweeping the floors and carpets.
- All zones are to ensure that all equipment is unplugged or locked out.
- The work is organized by Zones with each zone having a volunteer zone leader and an appropriate portion of the volunteers:
  - Zone 1 (5%): Bathrooms & Shop sinks
  - Zone 2 (15%): Lobby & Conference Room
  - Zone 3 (25%): Quiet Room & Hall from Lumber area to roll door.
  - Zone 4 (30%): Machine Area (Saws, Sanders, Lathes & Drill Presses)
  - Zone 5 (25%): Assembly Area & Tool Room
- **Unique Zone Tasks:**
  - **Zone 1:** Cleaning supplies as needed for bathrooms and sinks. Mop floors in bathrooms
  - **Zone 2:** In the Lobby remove materials displayed on high shelves, clean materials, dust shelves, return display materials to the shelves. Clean glass on windows and doors. Clean handprints and dirt from the doors. Sweep carpets, broom clean floors. Put away and straighten materials on the lobby desk. Collapse and stack tables in the conference room. Clean-up materials on C/R counter tops. Put things away and/or into bookshelves.
  - **Zone 3:** Remove glass panel between the quiet room and chop saws on the inside the quiet room; clean glass and dust between inside and outside panes. Dust and organize materials on the peg board and elsewhere in the quiet room. Dust walls and ceiling. Dust equipment, tables, and shelves. Remove pushers and loose tools and put them in a short trashcan in the machine shop for safekeeping. Sweep floors in the quiet room and from the lumber area to the exit doors.

- **Zone 4:** Clean walls from the 45-degree chamfer down. Remove any remaining pushers, feather boards, and hand brooms to the short trashcan in the machine shop for safekeeping. Dust shelves and jigs under the table saws. Clean the expansion tubes of the various vacuum hoses on and around the equipment. DO NOT get anything wet on the metal surfaces of the equipment – only paste wax as needed. Put opaque tape across the master switches on the sides of table saws. Sweep the floors throughout the machine area. Clean glass panels in the machine area.
- **Zone 5:** Gently scrape glue deposits from tabletops. Clean walls from the 45-degree chamfer down. Organize the tools on the tool walls as needed. Dust the tools and shelves in the tool room. Unclamp and remove any remaining materials from the glue-up drying area. Dust the storage cabinets under the assembly tables. Apply a light coat of mineral oil to the tabletops in the assembly area (not on the counter tops along the walls). Sweep the floors throughout the assembly area to the restroom and exit.

**Supplies Recommended (materials in two tubs in the shed, cleaning closet, and bathroom cabinet)**

- 1 gallon of mineral oil
- 2 dozen microfiber clothes
- 3 dozen Swiffer duster refills
- 10 short handles for Swiffer dusters
- 6 long double-headed extension handles for Swiffer dusters.
- 4 long fixed head dusters
- 4 cans of dusting spray
- 6 spray bottles of cleaning fluid (1 gallon of refill)
- 2 spray bottles of glass cleaner (1 gallon of glass cleaner refill)
- 2 containers of wet floor wipes (useful to clean corrugated vacuum hoses)
- 1 bottle of toilet bowl cleaner.
- Scouring powder
- 6 magic eraser sponges
- 3 dozen facemasks
- 6 rolls paper towels

## Appendix 7: Secretary Duty Details

### ***Day-to-Day***

The secretary should have general knowledge of the functions and the purpose of each General Membership and BOD meeting and be familiar with Robert's Rules as relates to the recording of motions, attendance, start time and end time, etc., of each meeting.

1. Check the Secretary's inbox for various documents.
2. Maintain all club records including correspondence to/from BOD members and Committee Chairs to any outside group.
3. Record and keep minutes of all General and BOD meetings and provide copies of the minutes to the BOD.
4. Maintain all club correspondence for a period as determined by the BOD.
5. Record member attendance records to establish if a quorum is present at all meetings where any motions are to be made.
6. Serve as an active member of the BOD.
7. Coordinate the assignment of forms and assist volunteers handling this task.

### ***Quarterly Duties***

Gather and track volunteer hours from front desk check-in of Managers, Mentors, Front Office, Tool Room Monitor, Instructors, Maintenance, Class Preparation, Special Projects, and Other Volunteers to prepare quarterly volunteer hours report.

### ***Annual Duties***

Prepare annual list of volunteer hours by volunteer activity to determine P-Card eligibility. Distribute P-Cards after list approved by BOD.

### ***As Needed Duties***

1. Email notifications of General Membership meetings, monthly coffees, etc. This is a function of the Secretary unless the President elects or directs these duties to another member. This is currently being done by the Guild/Community Relations Administrator, but may be done by the Secretary.
2. When received from Treasurer, file hard copy of the following forms.
  - a. Current new member and renewal forms
  - b. Lathe qualification and Tormek stamps.
  - c. P-Card Applications

## Appendix 8: Treasurer Duty Details

### Scope of Work

The Treasurer is responsible for controlling and reporting on the funds being received and spent on behalf of the Woodworkers Guild.

The Treasurer is also responsible for maintaining a Guild equipment inventory listing.

Treasurer passwords are included in the Guild KeePass file.

Daily or As Needed

Process new member applications – Hard Copy and On-line. [See Work Instructions - 001](#)

Check Treasurer's in box for member charges, CAM slips/checks from sales, invoices for purchases, member purchase reimbursements, new member applications, etc.

Write reimbursement checks to members for authorized expenses incurred on behalf of the club.

[See Work Instructions - 002](#)

Write checks for vendor invoices. [See Work Instructions - 003](#)

Check the USPS curbside mailbox at the woodshop for incoming mail. If any material is for 850 Red Dam Road, take the material to the golf maintenance building front office.

Process renewal member applications. [See Work Instructions – 004](#)

Update listing of members that have not renewed. [See Work Instructions - 005](#)

Prepare and deposit of cash and checks. [See Work Instructions - 009](#)

Advise BOD of any CD that is maturing at BOD meeting prior to the mature date. Rollover or cash in CD's based on motion made at the BOD meeting. [See Work Instructions – 011](#)

Update Capital Equipment listing for new and retired equipment. [See Work Instructions – 012](#)

Scan Capital Equipment invoices and place in OneDrive>Treasurer>Board of Directors>Capital Equipment>Equipment Purchase Documents for any new large equipment purchased.

Maintain records of lathe certification (Setup class, Basic class, and Advanced class). [See Work Instructions - 013](#)

Collect locker rental payments from members. [See Work Instructions - 014](#)

Collect Copier Sales & Lumber Cash Sales and include in deposit. [See Work Instructions - 015](#)

Approve listserv messages. [See Work Instructions - 016](#)

Process listserv unsubscribe request. [See Work Instructions - 010](#)

Attend the general membership meeting. Present financial data update as directed by President.

Obtain postage stamps.

Update member record in Access database. [See Work Instructions - 017](#)

Print member badges. [See Work Instructions - 019](#)

Process P-Card applications. [See Work Instructions - 020](#)

Update Woodworkers Google calendar as necessary. [See Work Instructions - 021](#)

Attend Treasurer's workshop and Officer's Orientation meetings given by CA.

Process Form CC-100 (Donations received or made by club). [See Work Instructions - 022](#)

Coordinate with President during short periods when the Treasurer is away from the Guild. [See Work Instructions 030.](#)

Attend Chartered Club meetings as called by Lifestyles services.

Attend Guild open house and Christmas Bazaar or any function where the Guild sells items to capture credit card sales and other Treasurer functions. [See Work Instructions - 023](#)

Prepare Guild General Membership Meeting slides – [See Work Instructions - 025](#)

Record payment for Guild software – [See Work Instructions – 018](#)

Gift Certificate control and sales – [See Work Instructions - 026](#)

Redeeming Gift Certificate – [See Work Instructions – 027](#)

Print Shop Calendars for the Office each time there is a change in the current month or the following 2 months. – [See Work Instructions - 033](#)

Guild Open House pictures are taken showing activity and member projects displayed. They can be uploaded to the Guild Shutterfly web page

URL for the web site is <https://schhwmgopenhouse.shutterfly.com/>

Owner of the Shutterfly web site is Mike Thomas

Username – [mike.mtconsulting@gmail.com](mailto:mike.mtconsulting@gmail.com)

Password – Toni0076\$

See [Work Instructions - 050](#)

## Weekly

Saturday morning –

Copy Membership Access DB to Excel OneDrive. [See Work Instructions – 006](#)

Generate YTD Cash Flow PDF file. [See Work Instructions – 007](#)

Sync Quicken checking account data with Truist Bank website. [See Work Instructions – 008](#)

Import lumber transactions from the woodroom computer. [See Work Instructions - 028](#)

## Monthly

Day 1 – Generate YTD cash flow in Quicken. Save as PDF on OneDrive. [See Work Instructions - 029](#)

Day 1 – Generate current year membership listing from Access DB. Save as Excel workbook on OneDrive. Print listing for office use. Generate non renewing membership list, print for office use.

[See Work Instructions - 031.](#)

Day 1 – Copy Access DB to Excel and save on OneDrive. [See Work Instructions – 006](#)

Day 1 – Generate all SIG membership listings (RR, Carver, Turner, Tech, WoodChicks) and save on OneDrive. [See Work Instructions - 031.](#)

Day 1 – Generate First Aid membership, tour guide membership, P-Card members, lathe class graduates' listings and save on OneDrive. [See Work Instructions - 032.](#)

Day 1 – Print current month and 2 following months calendars. Provide to office for posting on bulletin board. Save PDF file in OneDrive>guild communication public>DisplayedInShop folder.

[See Work Instructions - 033.](#)

Day 1 – Generate concessions report. [See Work Instructions - 034.](#)

Day 1 – Get shop usage for previous month. [See Work Instructions - 035.](#)

Day 1 – Generate Woodworker Guild Financial Status data and send to BOD members. [See Work Instructions - 036.](#)

Day 1 – Generate check transaction report for prior month. Provide to Vice President for audit. [See Work Instruction - 037.](#)

Day 2 – Send the following month's cluster students an initial reminder email. [See Work Instructions – 044.](#)

When Checking Account Bank Statement is received, balance Quicken to Bank Statement – [See Work Instructions – 048.](#)

Day 13 – Prepare Treasurer's report and other requested information for the BOD monthly meeting.

Day 15 – Email the following month's cluster students a reminder email. [See Work Instructions - 043.](#)

Day 25 – Record lumber transactions in Quicken and CAM reimbursement request workbook. [See Work Instruction - 038a and 038b.](#)

Day 25 – Compile CAM reimbursement worksheet. Send to Lifestyles. Write entry into Quicken for monthly activity. [See Work Instruction - 039.](#)

Day 25 – Write Treasurer's financial article for Plank newsletter.

Day 25 – Receive Eventbrite (advance training fees) activity from Eventbrite Administrator, write accrual entry into Quicken. [See Work Instruction - 040.](#)

Day 25 – If applicable write reimbursement checks to RR-SIG and Turner-SIG. [See Work Instruction - 041.](#)

Friday before BOS – Call all students in the following month’s cluster classes to remind them of the date/time of their first class – BOS. Compile class schedules, badges, etc. for Director of New Member Training. [See Work Instruction - 045.](#)

Enter new member email address in Guild Listserv database. [See Work Instruction – 051.](#)

## Quarterly

1<sup>st</sup> business day of the quarter – Determine South Carolina sales tax rate in the woodroom computer used to calculate lumber sales tax. If change is required update the rate in OneDrive>woodroom woodroom pricing.xlsx file – lookup tab.

5<sup>th</sup> business day of the quarter - Calculate state sales and use tax report. Submit report and check to Lifestyle Services. Obtain total purchases made by RR SIG, Turners SIG, and Carvers SIG from SIG representatives for inclusion in report. [See Work Instructions - 024](#)

Prepare quarterly budget performance – present to BOD at first meeting after end of the quarter. Publish in Plank. Present to general members at the next general membership meeting.

## January

If appropriate, go to the bank holding the Guild checking account and any other bank that holds Guild funds and change the authorization signatures on the account when there is a change in Treasurer and/or President.

If appropriate, authorize new listserv moderators and remove old moderators. [See Work Instruction - 042.](#)

5<sup>th</sup> business day of the quarter - Calculate state sales and use tax report. Submit report and check to Lifestyle Services. Obtain total purchases made by RR SIG, Turners SIG, and Carvers SIG from SIG representatives for inclusion in report. [See Work Instructions - 024](#)

By 1/10 submit 1099 Info Form CC-92 to Lifestyle services. (Nothing to Report not required).

Receive all SIGs form CC90 data by the 15<sup>th</sup> of the month.

By 1/31 gather form CC-90 information from woodworker SIGs and submit consolidated form to Lifestyle Services. [See Work Instruction – 046.](#)

Prepare final prior year budget performance (actual vs. budget) report for BOD and submit to The Plank.

## February

If scheduled attend CA audit of Guild's annual financial activity - form CC-90. This audit is held periodically, usually in February. See schedule from Lifestyles.

Pack financial information for period 2 years earlier (i.e., if in 2017, pack 2015) in Bankers Box and store in woodshop – Upper shelf over bar clamps. Some records over original restroom.

## March

By the 15<sup>th</sup> of the month, send email to reminding RR and Turners SIGs of due date of 5<sup>th</sup> workday in April to provide state sales tax data.

## April

5<sup>th</sup> business day of the quarter - Calculate state sales and use tax report. Submit report and check to Lifestyle Services. Obtain total purchases made by RR SIG, Turners SIG, and Carvers SIG from SIG representatives for inclusion in report. [See Work Instructions - 024](#)

By the 10<sup>th</sup> of the month, prepare current year budget 1<sup>st</sup> quarter performance (actual vs. budget) report for BOD and submit in The Plank.

## May

By 5/1 provide Lifestyle Services a listing of our membership – Last Name, First Name, CAM Number, address. [See Work Instructions – 047](#).

## June

By the 15<sup>th</sup> of the month, send email to remind RR and Turners SIGs of due date of 5<sup>th</sup> workday in July to provide state sales tax data.

## July

5<sup>th</sup> business day of the quarter - Calculate state sales and use tax report. Submit report and check to Lifestyle Services. Obtain total purchases made by RR SIG, Turners SIG, and Carvers SIG from SIG representatives for inclusion in report. [See Work Instructions - 024](#)

Prepare 2<sup>nd</sup> quarter budget performance (actual vs. budget) report for BOD and submit to The Plank.

Begin creating the following year plan revenue and spending.

## August

With shop administrator and ES Director, take a physical inventory of all equipment. Reconcile and compare to latest equipment inventory spreadsheet. Report results to the Board of Directors. Coordinate with RR, Turner, and Carver SIG physical inventory. Update file OneDrive>Treasurer>Board of Directors>Capital Equipment>"Guild Equipment Inventory.xlsx"

Present 1<sup>st</sup> draft of the upcoming year plan revenue and spending to the board of directors. Discuss budget at the board of directors meeting. Make changes as directed for final BOD approval in October. Present to the general membership at the October general membership meeting, obtain approval from the general membership at the November general membership meeting.

## September

By 9/30, submit form CC-95 to CA (Inventory, additions, and deletions for the preceding 12 months) to Lifestyle Services at CA. Include RR, Turners, and Carver SIG inventories. File OneDrive>Treasurer>Board of Directors>Capital Equipment>"Guild Equipment Inventory.xlsx."

Present 2<sup>nd</sup> draft of the upcoming year budget to the board of directors. Discuss budget at the board of directors meeting. Make changes as directed for final BOD approval in October, presentation to the general membership at the October general membership meeting, and approval from the general membership at the November general membership meeting.

By the 15<sup>th</sup> of the month, send email to remind RR and Turners SIGs of due date of 5<sup>th</sup> workday in October to provide state sales tax data.

Day 15 thru 20 - Update online membership renewal google form for the upcoming year. Begin using in October. Update manual renewal forms as well. Renewal Google Forms form is located online at <https://drive.google.com/drive/my-drive> (User [suncitywoodworkers@gmail.com](mailto:suncitywoodworkers@gmail.com), password = Toni0076\$)

## October

5<sup>th</sup> business day of the quarter - Calculate state sales and use tax report. Submit report and check to Lifestyle Services. Obtain total purchases made by RR SIG, Turners SIG, and Carvers SIG from SIG representatives for inclusion in report. **See Work Instructions - 024**

During the first few days of the month, obtain enough CA charge slips from Lifestyles for use at the club fair and Christmas Bazaar. Coordinate printing of upcoming year renewal applications.

Prepare renewal documents (see prior year documents at OneDrive>Treasurer>Board of Directors>Club Fair folder). Attend club fair. Collect, process renewal, and new member dues.

Prepare 3<sup>rd</sup> quarter budget performance (actual vs. budget) report for BOD and submit to the Plank.

Present the revised next year budget to board of directors. Obtain BOD approval of the budget in the October Board meeting. Present next year budget to members at October General Meeting. Submit upcoming budget in the November Plank.

After the club fair, obtain new and renewal members for RR, Turners, and Carver SIGs. Provide number of renewal members vs. prior year to the board.

Before open house (if held) remind members who are selling personal merchandise that they need to follow Open House Sales agreement form. Give 1 copy to member and retain 1 copy for control.

Attend Open House and process credit card payments.

After open house, collect sales tax payments and booth rental from members selling personal merchandise. Reimburse members selling personal merchandise where payment collected via credit card.

Write article in November Plank reminding members to pay their membership dues, locker and lumber bin fees or vacate their locker and turn in their keys by 12/31/Current Year.

## November

By 11/10, Send email to all SIGs reminding them of the following:

Final expense reimbursement requests due 12/20

Form CC-90 (Financial Report) for current year due 15th of January of next year

Write article in December Plank reminding members to pay their membership dues, locker, and lumber bin fees or vacate their locker and turn in their keys by 12/31/Current Year.

## December

Breakout upcoming year budget by quarters.

Post approved budget at woodshop.

Send reminder email to all Woodworker SIGs to prepare their CC90 for the year and submit by 15th of January of the new year.

By the 15th of the month, send reminder email to all members that have not renewed.

By the 15th of the month, send email to all members reminding them to pay locker and lumber bin rental.

By the 15th of the month, send email to remind RR and Turners SIGs of due date of 5<sup>th</sup> workday in January to provide state sales tax data.



By the 15<sup>th</sup> of the month work with RR-SIG to determine the amount rebate for SIG members that do not use the woodshop. The Guild normally rebates all but \$5 of each RR-SIG member's dues for those RR-SIG members that do not use the shop. Verify shop usage by looking at check-in data.

Write article in January Plank reminding members to pay their membership dues, locker and lumber bin fees.

# Work Instructions

## Treasurer

### WI-001 – Process new member application

This activity is currently being performed by the Treasurer.

#### On-Line Google Form

In February 2023, the Guild instituted an on-line Google form to capture new member application activity. The form is in the [Suncitywoodworkers@gmail.com](mailto:suncitywoodworkers@gmail.com) (PW – Toni0076\$).

Residents access the form using the following link:

<https://docs.google.com/forms/d/e/1FAIpQLSd7HMeoCLoQZPUuJ3ndUSZaLFrN04DkItP50ViWDGh01RxEsA/viewform>

When a resident enters their new member registration data in the form and clicks SUBMIT, the data is stored in a Google sheets workbook in the above users drive area. The resident will receive a email with the data that they entered.

The Gmail account will receive a notification as shown below.

Your form, Sun City Woodworkers Guild - Membership Application , ha...



Google Forms <forms-receipts-noreply@google.com>

To suncitywoodworkers@gmail.com



Sun 6:19 PM

If there are problems with how this message is displayed, click here to view it in a web browser.

# Google Forms

1 new response

Hi,

Your form [Sun City Woodworkers Guild - Membership Application](#) has a new response.

[View Response: mike.mtconsulting@gmail.com](#)

[VIEW SUMMARY](#)



The Treasurer monitors this email account. When the notification is received, the Treasurer opens the Google Sheets workbook and copies the recently added row.

The Treasurer then opens the Excel file OneDrive/Treasurer/Online New Membership Application.xlsx. Paste the above copied row between the 2 red rows in the Raw tab of the workbook overwriting any data that is there.

The action of pasting the data generates a hard copy of the data in the normally used New Member Application form in the Application Tab.

Print the data in the Application Tab. Staple the two pages together.

The hard copy of the application is then treated just like any other hard copy application.

#### Hard Copy

Open “xxxx Cluster class Registration.xlsx” where xxxx is the current year. File is located in OneDrive>treasurer>board of directors>registration

Determine next available cluster class opening.

Call new member.

Working with new member determine cluster class dates that work with their schedule

Review new member application for completeness and confirm data accuracy on application.

Based on cluster class dates, Guild dues is prorated. Prorated amount is shown in column A for each month.

Inform new member prorated dues amount, \$10 BOS fee (member gets a pair of safety glasses), \$80 cluster fee for the set of 10 cluster classes, and when they pass the cluster classes - \$0 for the 3 practicum classes where the new member proves to us that they can operate the machinery safely by constructing cutting boards in 3 classes.

If the new member selected the RR-SIG, there is a \$20 dues charge. (After the club fair, the \$20 dues apply to the following year. The Carvers-SIG and WoodChicks SIG have no dues. Turners SIG collects \$20 dues for first year only. Tech SIG dues are \$20. All females automatically join the WoodChicks.

Calculate the total fees to be collected. Offer new member the option to write a check and mail or drop off at the shop or a CAM charge payment. If payment method is “check” note on application. If payment method is CAM charge, complete the CAM charge (**exhibit 7**) and enter CAM ticket number on application.

Record the new member’s information in the “xxxx Cluster class Registration.xlsx” file.

If the new member is joining the RR-SIG enter data into “SIG Reimbursements” tab of the “xxxx Membership.xlsx” where xxxx is the current year. See work instructions XXX for processing this data.

Notify RR-SIG (Theron Drenckhahn - [mrmel48@aol.com](mailto:mrmel48@aol.com)) and Carvers-SIG (Mark Parsons - [RPFDEMT@GMAIL.COM](mailto:RPFDEMT@GMAIL.COM)) via email of new member where applicable. Provide the following information

CAM number

New member name

New member address

New member phone number

New member email address

Date new member will complete BOS

Using the 2<sup>nd</sup> tab on the Excel file (Member Class Schedule), generate a new member class schedule. Save a PDF of that schedule in OneDrive>treasurer>board of directors>registration>class schedule using the member’s name as the PDF file name.

Inform new member that they will receive 3 emails

Enter new member email in listserv – generates 1<sup>st</sup> email. See work instruction 051. **exhibit 1**

Second email comes from person processing the new member application. A copy of the most recent Plank newsletter should be attached. See **exhibit 2**

Third email comes from person processing the new member application (**exhibit 3**). A copy of the cluster class schedule, Guild welcome letter (**exhibit 4**), WoodChicks welcome letter (**exhibit 5**) if applicable, Carvers welcome letter (**exhibit 6**) if applicable. Note RR-SIG welcome letter comes from RR-SIG

Enter new member in “xxxx Membership.xlsx” where xxxx is the current year. Select the “xxxx Members” tab where xxxx is the current year. The file is on OneDrive>treasurer>board of directors>membership. Renewing members are on the left side and new members are on the right side of the worksheet.

If member is paying by check hold application until check is received. After check is received and immediately after completing the CAM charge enter the new member data into the Access database “GuildMemberDatabase.accdb.” The Access database is on OneDrive>frontdesk.

To enter a new member record in the Access database, Right click any row in the left most database column (grey in color). A drop-down menu will appear.

Select “New Record” from the menu. The screen will display the last row of the database Enter member data into the record. NOTE – Enter scheduled “BOS Completion Date.” Leave “Gold Card Date” blank. Enter “NEW” in the “Status Lookup” field. If the new member is a female, enter “YES” in the WoodChicks field.

The Comments field may be used to record the date the record was created.

Mark the new member application “PAID.” Mark new member application square indicating new member email added to Listserv. Mark the new member application “IN DATABASE” top right of the application.

Place new member application in shop office Secretary mail slot for filing.

The new member badge will be printed when the member attends BOS/cluster/practicum classes.

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### WI-002 - Write reimbursement checks to members for authorized expenses incurred on behalf of the club

Verify expenditure is valid and math is accurate

Write check

Copy check on expense reimbursement

Post check into Quicken charging proper account. The Quicken database is on OneDrive>treasurer>quicken. File name “WWMMGuild.QDF.” The password is in KeyPass.

If check amount is over \$500 or the check is written to a current board member for any value, have a second board member sign on the memo line of the check. Second signature board member will normally place check or current board member office in their mail slot and return paperwork to the treasurer.

If check is for Guild member, put check in envelope, write member’s name on outside of envelope, and place in office “Member Reimbursement” mail slot.

File paperwork in monthly “Invoices” hanging file.

---

### WI-003 - Write checks for vendor invoices

Vendor invoices are received in several ways. 1) via the US mail. 2) via email addressed to the treasurer. Further some vendors are paid for each invoice, other vendors are paid via statement. Normally members who purchase from vendors that are paid by statement place a copy of the receipt in the treasurer’s office mail slot with no reimbursement request attached. Hold these receipts in the “Pending” hanging file until the statement is received. Current pay from statement vendors are:1) CES electrical.

If the vendor invoice is received via the US mail, verify with ordering Guild member charge is correct. Obtain a copy of a receipt. Clip invoice and receipt together, write a check, enter the check into Quicken, copy the check with the invoice, and file in the monthly "Invoices" hanging file.

When vendor statement is received, remove the receipts from the "Pending" hanging file and match to the statement. Write a check, enter the check into Quicken, copy the check with the receipt, and file in the monthly "Invoices" hanging file. If the check amount is \$500 or more obtain a second BOD member signature. Mail the check to the vendor.

If the vendor submits their invoice via email, print the invoice, match to receipt received earlier, calculate terms discount if applicable, write a check, copy the check on the invoice. If the check amount is \$500 or more obtain a second BOD member signature. Mail the check to the vendor.

For all vendor invoices and statements, ensure proper state sales taxes have been charged. If they have not been, make a copy of the invoice. Remember sales tax is not charged on lumber purchases.

If the proper sales tax is not being charged on an invoice, open the Excel workbook OneDrive>Treasurer>Board of Directors>Sales Tax>YYYY Sales Tax Calculations.xlsx (where YYYY is the current year)

The workbook has 4 tabs, 1 for each quarter.

Click on the appropriate tab for the quarter the invoice is being processed.

Enter the check number being written to pay the invoice and the invoice amount for product (does not include shipping or handling) under the appropriate expense category.

Save your work. This information will be used at month end. **See Work Instructions – 024 for the monthly sales tax activity.**

---

#### WI-004 - Process renewal member applications

Renewal member applications are received starting with the Club Fair (usually early October). This work instruction will concentrate on the normal day to day membership renewals. See WI-xxx for the annual membership renewal activity.

The renewing member will place a renewal application in the treasurer's office mail slot, or the renewing member may just place a CAM charge with membership renewal noted on it in the treasurer's office mail slot.

Record the renewal in the "xxxx Membership.xlsx" file. Select the "xxxx Members" tab where xxxx is the current or renewing year. Before the Club fair, create a new year to record renewals. Copy current membership information in columns b, c, d. The file is on OneDrive>treasurer>board of directors>membership. Renewing members are on the left side and new members are on the right side of the worksheet. Place a 1 in column J when a member renews, place a 1 in column K when the renewing member is female. Place the CAM charge in a folder to be used at the end of the month for reimbursement. Place the check in a file to be deposited in the checking account.

Update the following columns in the Access database "GuildMemberDatabase.accdb." The Access database is on OneDrive>frontdesk.

Membership Year

Shop Access

Status Lookup (set to Renew)

Comments column can be used to record the date

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#### WI-005 - Update listing of members that have not renewed

If renewals are infrequent, when a member renews, manually mark thru that member from the existing non-renewal listing and manually add to the membership listing.

If renewals are frequent, update the "members that have not renewed" listing for the office.

Using the OneDrive>treasurer>board of directors>membership "xxxx Membership.xlsx" file, select the "xxxx Members" tab where xxxx is the current or renewing year. Copy members that have not renewed columns b, c, and d and place them in columns a, b, and c in the "not renewed" tab. Change the as of date to the current date and print for the office volunteer.

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#### WI-006 – Copy Access database to OneDrive

As a precaution I copy the Access database to Excel and save it on OneDrive every Saturday. This provides another level of backup of this data.

Open the Guild Member Access database. The file is located on OneDrive>frontdesk with the file name GuildMemberDatabase.accdb.

Sort the data by member last name (include all years). Highlight and copy all data (columns and rows)

Open a blank Excel workbook. Paste the Access database data into the Excel workbook. Modify all column widths to hold each column data in a single line.

Save the Excel workbook in OneDrive>treasurer>membership> as xx-xx-xx Access DB.xlsx where xx-xx-xx is the month-day-year.

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### WI-007 – Generate YTD Cash Flow PDF file

As a precaution I generate a cash flow PDF file and copy to OneDrive every Saturday. This provides quick access to assist me in answering questions.

Open Quicken.

Select “Reports” from the Menu bar

Select “Banking” from the drop-down menu. A menu will be displayed.

Select “Cash Flow” from the menu that is displayed.

Select “Print” from the Menu bar. The Quicken “Print” menu will be displayed.

In the Quicken “Print” menu change the printer to a PDF printer. I use CutePDF Writer.

“Print” the PDF file to OneDrive>treasurer>board of directors>cash flow using the 1-1-xx thru xx-xx-xx cash flow.PDF where x = date (month, day, year)

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### WI-008 - Sync Quicken checking account data with Truist Bank website

Every Saturday I sync Guild checking account data in Quicken to Truist bank. The result is a checkbook that is reconciled to the bank every week.

Open Quicken.

Select the Guild checking account “WWMMG 2002 Checking” from the “All Transactions” area on the left of the screen. All checks written will be displayed.



Select the “One Step Update” icon just below “Tools” on the menu bar. You will be prompted to enter the Quicken vault password. The Quicken password can be found in the KeyPass system.

Enter the Quicken password. Click the “Update Now” button. Quicken will begin connecting with Truist. A “progress” window will be displayed. The computer will then disconnect from Truist.

Unreconciled transactions will be displayed just below the last check written on the bottom of the screen.

The screenshot shows the Quicken interface with a table of transactions. At the top, there are buttons for 'Update Transactions' and 'Web site'. Below that is a section titled 'Accept cleared transactions into register' with a table containing columns for Status, Date, Num, Payee, Charge, and Payment.

Status	Date	Num	Payee	Charge	Payment
New	3/5/2022		Istandpasket Circulati Sc / 8777068100 SC		48.10

If the Check number and amount agree with the Truist data, the word “Match” will be displayed to the right of the check number.

If all checks display “Match”, click the “Accept All” button and Quicken will mark these checks as reconciled.

Your Quicken balance will be reconciled to the bank balance.

If there is a problem with a check (usually the amount entered in Quicken doesn’t match to the amount of the check, adjust the Quicken entry and save the Quicken transaction.

The “Match” will then be displayed to the right of the check number.

If a check number is missing in Quicken but has processed thru Truist, the check will be shown on the bottom of the screen with “New” in the “Status” column.

Click on that transaction and Quicken will show the check after the last check previously shown. Complete the transaction filling in the "Payee", "Category", and "Amount." Click the "Accept" button. The status will change to "Accepted"  
After all Downloaded Transactions have been either "Accepted" or "Matched", click the "Accept All" button.  
These checks will display a "R" in the "CLR" column and Quicken will be reconciled to Truist.

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### WI-009 - Prepare and deposit of cash and checks (Reviewed 5/2022)

Periodically during the month, cash and checks received by the Guild should be deposited in the checking account. Cash should never come in or be disbursed without going thru the checking account.

Open the file OneDrive>treasurer>board of directors>cash deposit>"Cash Control for Front Office.xlsx." This is a document that the office volunteer uses to record cash received for payment of Guild activities.

Update "Month" field to the current month.

Print the "Cash Control for Front Office.xlsx" file. Take this printout to the woodshop.

Replace the office "Cash Control for Front Office.xlsx" document currently in the office with the one printed in the step above.

Separate deposit material into 1) Cash or 2) Checks.

Open the OneDrive>treasurer>board of directors>Cash Deposit>"Deposit Detail Master.xlsx" file.

"Save As" this file using the naming convention "mm-dd-yy Deposit Detail.xlsx" where this is the date the deposit will be taken to the bank.

Change the date in E1 and F1. Save the file.

Record cash being deposited in proper "amount" field in the file beginning at row 66. If the proper category is not shown, you may use any of the blank category fields or change a field name. **NOTE – changing the field name automatically changes the field name in the recap (rows 3 thru 63).** If this cash receipt is posted on the "Cash Control for Front Office.xlsx" file record the date the cash is being deposited (right most column). If there is no entry for the cash receipt being posted, write in a new record complete with date deposited.

After all cash has been recorded on the "Cash Control for Front Office.xlsx" file, Total the "Cash Control for Front Office.xlsx" postings. Accumulate the cash and record the number of denominations being deposited in B177 thru B182 of the "mm-dd-yy Deposit Detail.xlsx." (Note this area may move relevant to any additions or deletions on the Excel workbook.

The "Cash Control for Front Office.xlsx" file total should equal the totals of the denominations and the Currency and Coin fields. If not, revisit the data and correct. Enter the checks into the proper "mm-dd-yy Deposit Detail.xlsx" field. (Check number and Amount).

In field "Q2" on the "mm-dd-yy Deposit Detail.xlsx" record the amount of each check being deposited. Sum this column of data.



The total in column “Q” should equal the value of “Checks” shown in H177. If not, verify your data.

Print the data in “mm-dd-yy Deposit Detail.xlsx.”

Save “mm-dd-yy Deposit Detail.xlsx”

Verify that each check contains a “Payee” denoting the woodshop and that the numerical value written on the check agrees the check value in words contained on line 2 of the check.

Stamp each check with the “Deposit” stamp.

Create a deposit slip using the data in E177 thru H183.

Copy the front side of all checks and the deposit slip.

Deposit the cash and checks in the bank. Attach the deposit slip received from the bank to the deposit detail records and file.

Utilize the “mm-dd-yy Deposit Detail.xlsx” (rows 2 thru 63) to record the deposit in quicken.

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**WI-010 Process listserv unsubscribe request – NOTE The Treasurer should be the only moderator performing this activity.**

Members have the ability to request to be unsubscribed from the Guild listserv.

As list moderator, you will receive an email message from a member via listserv asking to be unsubscribed.

The message will contain a link to listserv.

<https://lists.islc.net/mailman/admin/db/suncitywm>

Click on the link in the email. The listserv moderator authentication screen will be displayed.

Enter the listserv password – “scwm.admin.” Unsubscription request will be displayed.

The member’s name and email address will be displayed.

Verify that the requesting member is not an active member. If the requesting member is an active member send an email asking if they truly want to be unsubscribed.

If the member is inactive or wants to be unsubscribed, click “Approve” in listserv. An “Unsubscribed” message will be displayed. You will receive an unsubscribe notification email.

If the member does not want to be unsubscribed, click the “Discard” button in listserv.

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**WI-011 - Advise BOD of any CD that is maturing**

The file OneDrive>board of directors>monthly meeting>”xxxx Treasurer Reports.xlsx” where xxxx is the current year contains a recap of the CDs being held by the Guild. Additionally, you will normally receive a letter from the institution holding the CD that the CD will be maturing. Monitor both vehicles and report to the BOD with enough time to make a motion at the monthly BOD meeting to rollover or receive a check for the CD amount at CD mature date.

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### WI-012 - Update Capital Equipment listing for new and retired equipment

A file OneDrive>treasurer>board of directors>capital equipment>guild equipment inventory.xlsx is maintained by the Treasurer to control Guild equipment.

Equipment is assigned a shop ID# / Equipment # when first entered into the workbook. For small hand tools, this # is written on the equipment using a magic marker. For larger woodworking equipment, the maintenance group assigns the number.

An equipment legend is shown in column "Q." Numbers are assigned by the Treasurer within this legend.

When a new piece of equipment is received, check to see if it is replacing an existing piece of equipment.

If an existing piece of equipment is being retired or sold, cut the existing data and paste in the "Additions – Deletions" tab under the proper year Deletions. Note the disposition of the equipment in column "I."

The information for the new piece of equipment can be entered in place of the retiring piece of equipment or on another line at the Treasurer's discretion.

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### WI-013 - Maintain records of lathe certification (Setup class, Basic class, and Advanced class).

The member Access database contains fields for lathe setup, basic, and advanced lathe classes. When a member completes one of these classes the instructor assigns homework to the student. Upon successful completion of the homework, the member is officially passed one of these classes.

The instructor or their designate will inform the Treasurer via email or note when a member successfully passes the class homework.

Open the file "OneDrive>frontdesk>GuildMemberDatabase.accdb"

Navigate to the member's record.

Enter the date supplied by the instructor into either the "Lathe Setup", "101 Intro to Turning", or "104 Bowl Turning Funds."

Save the data.

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### WI-014 - Collect locker rental payments from members

The Guild maintains and rents lockers for member to store their tools.

The rental period is 1 year. There is a Locker Manager that sets locker rental rates and controls locker assignment. This manager works under the direction of the Concessions Board of Directors member.

Each year beginning with the Club Fair event, members renew their membership at the Guild. At this time a member may pay their annual rental for the upcoming year. Additionally, any open locker may be rented to a member anytime of the year.

The file “OneDrive>treasurer>board of directors>xxxx\_Locker-Bin\_Rental\_Record.xlsx” contains record of rental by members for all lockers.

Immediately before the Club Fair, create a new tab in the above file workbook. Name this tab “xxxx Locker Rentals” where xxxx is the upcoming year. Copy current year data into the newly created worksheet. Remove the date paid and method of payment from the upcoming year tab worksheet.

When recording the membership renewal and the member renews their locker, record the payment date and method of payment in the upcoming year tab worksheet. If informed by the renewing member that they will not renew their locker or a member does not renew, inform the Locker Manager and remove the member’s data from the appropriate locker.

During the year, the Locker Manager will advise when a member rents a locker. The Locker Manager usually collects the locker rental at that time. If not, contact the member and collect the rental payment. Record the member information for the newly rented locker.

No refund is given when a member vacates a locker prior to the end of the year.

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### WI-015 - Collect copier money & Lumber Cash Sales and include in deposit

Lumber sales are recorded on the WoodRoom computer located next to the Shop Manager’s podium. Members cut the wood they purchase and occasionally place pieces of unused wood in several storage bins around the woodshop. When a member uses one of these pieces, they may contribute to the Guild. **NOTE – Since this wood has been previously recorded a Lumber Sales there is no need to record the sale of the unused cutoff pieces as all sales taxes has been charged.** There are collection boxes where a member may contribute a donation for these lumber sales. As of 2022 there are 2 grey boxes – 1) at the entrance to the lumber room 2) on the rack behind the panel saw.

Periodically remove the money from these boxes. The keys are located on the inter front office master key board.

Place money in an envelope marked “Lumber Cash Boxes.” When depositing this money, credit the Lumber Cash Box revenue category.

As for Copier money – there is a cup beside the office copier. Periodically remove money, place it in an envelope marked Copier Sales, and deposit in the checking account. Record the sales in Misc. Income-Copies in Quicken.

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### WI-016 - Approve listserv messages

Currently the Treasurer, Vice President, and President are shown as list moderators  
 All members in the listserv database have the ability to initiate a message to the Guild members

The list moderator email addresses. Multiple moderator addresses, each on separate line is okay. [\(Details for moderator\)](#)  
 mike.mtconsulting@gmail.com  
 catvan858@gmail.com  
 tdraayom.schhwg@gmail.com

subject to approval by the list moderator. When a member creates and submits a message to be sent out by listserv, all moderators receive an email from listserv. An example is shown below.

SunCityWM post from garyquinter@yahoo.com requires...

As list administrator, your authorization is requested for the following mailing list posting:

List: [SunCityWM@lists.islc.net](mailto:SunCityWM@lists.islc.net)  
 From: [garyquinter@yahoo.com](mailto:garyquinter@yahoo.com)  
 Subject: Shop House Keeping  
 Reason: Post to moderated list

At your convenience, visit:

<https://lists.islc.net/mailman/admindb/suncitywm>

to approve or deny the request.

List moderators can examine the message that will be sent to Guild members by double clicking it. In this example click “Shop House Keeping.” The proposed message will be displayed. If the message is acceptable, click on the link shown on the email. The Listserv sign on screen will be displayed.

Enter the Listserv password – “scwm.admin.” Then the “Let me in” button. A “posting held for approval screen will be displayed.

The message can again be seen in the message excerpt portion of the window.

**Action:**     **Defer**     **Approve**     **Reject**     **Discard**

There are 3 actions that can be taken as shown above.

If you are unsure what you should do, click the “Defer” button and submit.

If the message is legitimate and you want it to be sent to Guild members click the “Approve” button and submit.

If the message should not be sent to all Guild members (a guild member is using listserv to send a message to a specific member for example) click the “Discard” button and submit.

If the message is for a specific Guild member, send an email to that Guild member and include the message displayed on the original email. Copy the sending member so that they know the message was sent to the specific Guild member.

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#### WI-017 - Update member record in Access database.

Periodically the Guild member’s Access database record must be maintained updated information. Examples are

When a member changes address, phone numbers, ICE phone number, email

When a member earns a Privilege Card, joins a SIG, obtains a Gold Card

When a member completes a controlled training class such as Lathe Setup, 101, and 104.

Open the Guild member Access database. The database is located on OneDrive>front desk>GuildMemberDatabase.accdb.

Update the member’s record as required.

If the member’s CAM number or emergency contact number changes a new member badge must be printed. [See Work Instructions - 019](#)

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#### WI-018 - Record payment for Guild software

Guild software is managed by various BOD members. At renewal date, they are notified and normally use their personal credit card to renew the software.

When presented with a software reimbursement request or with an invoice from a software vendor for payment, open the file OneDrive>Treasurer>Guild Software Control.xlsx. This file contains information for all current software.

Update the appropriate software record with pertinent information.

Write check for payment. If check is for \$500 or more OR the check is written to reimburse a BOD member, have the check countersigned (on the “For” line) by a second BOD member.

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#### WI-019 - Print member badges

Occasionally a member’s badge needs to be printed.

Open the file OneDrive>treasurer>board of directors>P-Card>Gold Badge One Off Printing.xlsx.

Up to 6 badges can be printed at one time

Enter member CAM number, First Name, Last Name, emergency contact number, and shop usage in fields M5 thru P10.

In an internet explorer, open "QRExplore.com." This free software produces a barcode when 99 or less codes are requested. Over 99 codes require a credit card to be used.

Enter all member CAM numbers needed to print badges.

Click on Configurable Options Change the following:

Error Correction Level – Medium-High

Pixels per block – 3

Add filename to image – check this box (when checked the CAM number will appear below the bar code.

Click the "Generate X Codes" button.

Using a screen capture program (I use Hypersnap DX) capture each bar code and paste on the appropriate member's badge. **NOTE – monitor resolution greatly affects this activity. Use highest resolution monitor available.**

Verify member restriction status. If Restricted, print on appropriate color paper.

Verify if member is RR-SIG or Carver only. If so, print on appropriate color paper.

Print badge (up to 6 per sheet) on the appropriate colored paper and appropriate Shop Usage category.

Cut badges

Check member database record and apply appropriate stamp for:

Intermediate or full lathe trained

Tormak sharpener trained

Tour Guide

First Aid Volunteer

Place new badge in office badge box.

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### WI-020 - Process P-Card applications.

P-Cards or Privilege Cards are given to members of the Guild that perform management task (shop manager, assistant shop manager, mentor, instructor, or other BOD appointed activities).

Form OP-11 has been established to identify and track the training of P-Card candidates.

At the completion of the member's training, the form will be submitted to the chairman of the P-Card committee who will approve or decline the application.

The chairman will forward the approved application to the Treasurer who will process the application, make the appropriate entries in the member master record in the Access database, P-Card Award Date field

Enter "Yes" in the appropriate Mentor, Shop Manager, Assistant Shop Manager, Instructor, etc. field

Print a new member P-Card badge. **See Work Instruction WI-019.**

A notification email will be sent to the Guild member as well as all BOD members involved or who will utilize the members P-Card services. **See Exhibit 8.**

Note date of P-Card issuance

Place application in Secretary mail slot in office for filing

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### WI-021 Update Woodworkers Google calendar

The Guild maintains a Google calendar for Guild occasions, training classes, and meetings.

The calendar is located at <https://calendar.google.com/calendar/u/2/r?tab=wc>

The calendar is under the Google user [suncitywoodworkers@gmail.com](mailto:suncitywoodworkers@gmail.com) with a password of “Toni0076\$”

Guild members can view the calendar using <https://goo.gl/xwt16m>

Various Guild members will request an entry into the calendar. Navigate to

<https://calendar.google.com/calendar/u/2/r?tab=wc>

Enter the appropriate information.

If the resource room at the shop is utilized, the entry always begins with LIBRARY followed by start and stop time and description of event. Select “ALL DAY” for event times.

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### WI-022 - Process Form CC-100 (Donations received or made by club)

Form CC-100 was created by Lifestyles to capture donations received or given by the Guild.

Donation received by the Guild

Receiving Guild member fills out the CC-100 form and has person donating (Cash or Physical material).

Receiving Guild member places CC-100 in President’s mail slot for signature

President signs and places in Treasurer’s mail slot.

Treasurer files CC-100 in the annual financial report CC-90 folder.

When compiling the CC-90 data, the Treasurer organizes all CC-100 forms and attaches to CC-90 when it is submitted to Lifestyles.

Donation made by the Guild to another organization

The Guild donates material to other organizations to assist in their fundraising efforts.

Donating Guild member fills out the CC-100 form and records the organization the donation is being given to as well as an estimated value. **NOTE – The Guild vary, vary rarely donates money.**

Receiving Guild member places CC-100 in President’s mail slot for signature

President signs and places in Treasurer’s mail slot.

Treasurer files CC-100 in the annual financial report CC-90 folder.

When compiling the CC-90 data, the Treasurer organizes all CC-100 forms and attaches to CC-90 when it is submitted to Lifestyles.

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### WI-023 – Collect Credit Card Payments at Open House or Holiday Bazaar

Prior to the Guild open house or sidewalk sale get seed cash for cash transactions. 55 - \$1, 25 - \$5, 8 - \$10, 2 - \$20 = \$300 total. The 3 cash boxes are stored at the Treasurer’s

house. 2 cash boxes for sales at open house and sidewalk sale, 1 cash box for food at open house, 1 cash box for Holiday Bazaar due to space limitations.

The Guild maintains a Square Credit Card Sales Account –

Username – [mike.mtconsulting@gmail.com](mailto:mike.mtconsulting@gmail.com)

Password – Toni0076\$

This account is used as a convenience for resident sales at our Open House and the Holiday Bazaar.

The Square card reader is located at the Treasurers' house in one of the cash boxes. Prior to an event where the Square card reader will be used test the connection of the reader. The reader connects to a smart phone or tablet. The phone or tablet must have the Square App installed.

During the event, the Treasurer collects all credit card sales using the reader.

During the event, the app can provide period to date sales at the event.

An email will be sent by Square the following day of the event detailing the sales and will deposit the net funds in the Guild checking account.

A Quicken entry must be manually entered to record the sales and Square charges.

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#### WI-024 – Calculate and Submit State Sales and Use Tax

The Treasurer will examine all vendor invoices to determine if South Carolina sales taxes have been charged.

Sales and Use taxes must be paid quarterly by the 10<sup>th</sup> of the month following a quarter end.

We hold a resale certificate using the Sun City certificate number and have some vendors (primarily lumber vendors) not charging sales tax on invoices. Ignore these vendors as a use tax will be calculated when lumber is sold to members, lumber is used at the woodshop, or when the final sale is made on products containing lumber.

Run a Quicken report “Cash Flow by Tag.”

Using the menu item “Reports” select “Banking” from the dropdown menu. Select “Cash flow by Tag” from the dropdown menu.

In the “Cash Flow by Tag” window

Run the report for each month in the quarter. Modify the “Date Range” to read the correct value to capture all sales in the appropriate month that have been tagged with “Tax.”

Click the “Customize” icon

Click “Tags” in the Customize Cash Flow by Tag” window

Select “Include only transactions with selected tags”

Click the “Clear All” button

Scroll down the choices in the “Select Tags” section until “Tax” is reach and select it.

Click the “OK” button

Quicken will generate a report showing all sales tagged as “Tax.” Additionally, Turner SIG sales will be shown under the expense category.

Both values will be added together.

Print a copy of Sun City Community form CC93.

Open the Excel workbook OneDrive>Treasurer>Board of Directors>Sales Tax>YYYY Sales Tax Calculations.xlsx (where YYYY is the current year)

The workbook has 4 tabs, 1 for each quarter.



Record the sales for each month within the quarter on the “Guild Sales” line under the appropriate month.

The workbook will back out the amount of sales tax included in the gross sales value and report net sales. Add any other sales not recorded such as Open House, etc.

The workbook will drop down the use tax calculated on purchases where the vendor did not charge sales tax. This information was recorded when the Treasurer audited and paid the invoice. The workbook will calculate the sales tax on all above activity.

Record the Gross Proceeds of Sales, Out-of-State Purchases Subject to Use Tax, any deductions, Taxable amount, and calculated sales tax from the workbook to form CC93 for the proper month. Obtain the sales tax calculations and CC93 from the RR-SIG by the 5<sup>th</sup> of the month following a quarter.

Complete all data for the 3 months of the quarter.

Sum all sales taxes owed and write a check to SCHHCA for the total sales tax due.

Obtain a second Guild board member signature if the tax amount is over \$500.

Take Guild CC-93 and RR-SIG CC93 along with the payment check to Lifestyles by the 10<sup>th</sup> of the month following the end of the quarter. Tell them the check is for the Woodworker Guild sales taxes. Lifestyles will forward to the Association’s accounting department who will forward to the state.

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#### **WI-025 – Prepare Guild General Membership Meeting slides**

The general membership meeting slides are located on OneDrive>guild communications public>general meeting presentations. They are in PowerPoint.

Open the previous presentation, in PowerPoint perform a “save as” function and save the previous meeting presentation AS “Gen Mtg mm-dd-yyyy.ppt” where mm-dd-yyyy is the date of the general meeting that the slides will be presented.

Modify the new PowerPoint slides as required.

Publish a in process slide deck to all board members at least 10 days prior to the general meeting.

Update slides as board members provide their slide data.

Publish a final slide deck at least 3 days prior to the general meeting to allow time to upload onto presentation computer.

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#### **WI-026 - Gift Certificate Control and Sales**

Gift Certificates are controlled by the Treasurer.

A gift certificate control Excel workbook is located on OneDrive>treasurer>gift certificate control.xlsx.

3-5 certificates are kept in the woodshop office for sale to members and residents.

The gift certificate master is a PowerPoint file located on OneDrive>treasurer>board of directors>woodworker gift certificate master.pptx. Additionally, there is a sample gift certificate in this same folder.

When gift certificates are needed at the shop, open the Excel control file,

obtain the next unused certificate number

open the gift certificate master file

assign the next unused certificate number to the certificate. Record the necessary information for the certificate in the control file.

Leave the “To”, “From”, and “certificate” values blank

Check that the expiration date is updated to the end of the year date that is over 10 months in the future.

Print the certificate.

Open the file OneDrive>treasurer>board of directors>gift certificates>Sun City Woodworkers Gift Certificate Recipients.docx. This document should be attached to every gift certificate printed. It defines the procedure for use of the certificate by a member or resident.

Place the newly printed certificates to the Front Desk and Concessions Director’s mail slot in the office.

There are times when a certificate is requested from the Treasurer for a specific member or resident. Follow the steps above but enter the “To”, “From”, and “certificate” values. Record this information in the control file. Collect payment and provide the new certificate to the person requesting it.

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### WI-027 – Redeeming Gift Certificate

Sale of the certificates is managed by the office volunteer. The volunteer will accept payment for the certificate via CAM charge, check, or cash. They will record the certificate number, amount, and purchaser and place the payment in the Treasurer’s mail slot. When received by the Treasurer, record the appropriate sale information in the control file.

Gift certificates can be cashed for anything in the woodshop.

There are two ways the certificate can be redeemed.

When a member purchases wood on the WoodRoom computer.

Enter all normal WoodRoom computer information

In the “Project” or “Comments” section of the WoodRoom screen, enter “Gift Certificate XXXX” where XXXX is the gift certificate number.

If the wood purchased consumes the entire gift certificate value, or the remaining value of the gift certificate, or is greater than the gift certificate, affix a note to the gift certificate describing what the gift certificate was used to purchase, and place the gift certificate in the Treasurer’s office mail slot.

Upon receipt of a used gift certificate the Treasurer will

Update the gift certificate control noting the date/dollar amount used, and balance (if any) left on the certificate.

Record an entry in Quicken crediting the account associated with the sale (i.e. for wood, use Quicken account Lumber Sales – Members or appropriate account) and debiting the account Gift Certificate Redemption (Record the certificate number in the Quicken memo field). Don’t forget to select the “Sales Tax” flag when crediting the account if appropriate.

When the lumber activity is downloaded (weekly on Saturday) (See Work Instruction – 028) search for the gift certificate transaction. Reduce the sales recorded when the WoodRoom transaction processed by the value of the gift certificate being redeemed (whole or partial). Reduce the sales tax appropriately.

When a member or resident presents the gift certificate to the office volunteer for merchandise or services.

The office volunteer will record the certificate number, amount, and purchaser and place the payment in the Treasurer's mail slot.

The Treasurer will record an entry in Quicken crediting the account associated with the sale and debiting the account Gift Certificate Redemption (Record the certificate number in the Quicken memo field).

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### **WI-028 – Import Lumber Transactions from the WoodRoom Computer**

Weekly – Usually Saturday data generated by sales from the WoodRoom computer is transferred from the transaction file located on OneDrive>woodroom>transactionlog.txt

Open the file OneDrive>woodroom>YYYY Lumber Activity.xlsx (where YYYY = the current year). There are tabs in this workbook for each month's lumber purchases. Click on the appropriate tab. Determine the last transaction transferred.

In the OneDrive>woodroom>YYYY Lumber Activity.xlsx file

Click "File", Select "Open" from the drop down menu, Click "Browse" from the Open window, change file type to "All Files (\*.\*)", select OneDrive>woodroom>transactionlog.txt.

In the "Text Import Wizard" window, click "Next."

Remove the vertical line immediately following the "\$" in columns 37 and 53.

Slide the vertical line at 102 to 112.

Click on 143 to create a vertical line. These 3 steps create the proper Excel columns.

Determine the next transaction to be imported after looking at the last transaction activity performed above.

Bring in all appropriate rows from the .txt file to the Excel workbook.

Close (without saving) the transactionlog.txt file.

Copy row 3 columns U thru AM to the data rows just brought in from the step above.

Examine the data looking at column AM margin percentage. If a percentage is not around 25% investigate the transaction by looking at the cost that is pulled from the

OneDrive>woodroom>woodroom pricing.xlsx file. Correct the data in the YYYY Lumber Activity.xlsx file.

Look for lumber purchases made using gift certificates and make the appropriate update to the data as described in Work Instruction – 027.

After all adjustments are made to the data imported above, copy columns U thru AM of the data imported then "Paste Special – Values" the data columns U thru AM to remove all calculations.

**IF THIS STEP IS NOT PERFORMED THE DATA TRANSFERRED TO THE CAM REIMBURSEMENT REQUEST FILE WILL CONTAIN 3 OR MORE DECIMAL PLACES AND WILL BE REJECTED BY CAM.**

Save the YYYY Lumber Activity file.

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### **WI-029 - Generate YTD cash flow in Quicken. Save as PDF on OneDrive**

Weekly – Usually Saturday YTD cash flow data generated out of Quicken for use by the BOD.

The report is stored in OneDrive>Treasurer>Board of Directors>Cash Flow with the format of the file name 1-1-YY thru MM-DD-YY Cash Flow.PDF

Open Quicken

Select "Reports" from the menu bar. A drop down menu will be displayed.  
Select "Banking" from the drop down menu. A side menu will be displayed.  
Select "Cash Flow" from the side menu. Quicken will by default provide YTD cash flow data.  
Select "Print" from the menu icons. A "Print" window will be displayed.  
In the "Printer" field, select "Quicken PDF printer." Additionally select "Portrait" orientation.  
Click the "Print" button on the bottom of the window. A "Save to PDF File" window will be displayed.  
Select "OneDrive>treasurer>board of directors>cash flow" and update the file name to the correct month day and year as described in step 1.

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### **WI-030 - Coordinate with President during short periods when the Treasurer is away from the Guild.**

During the first month as President, the Treasurer and President sign check authorization cards at the Woodworker Guild bank - currently Truist Bank. This process allows the President to write and sign checks when the Treasurer is away for a short duration. The following process should be used by the President during this time. If the Treasurer is unable to perform their duties for an extended time, the Treasurer's backup should have their name added to the check authorization card and should begin performing the Treasurer's duties per the Woodshop Treasurer's Duties and Schedule as detailed above.

Prior to the Treasurer leaving, the President should obtain the checkbook, "PAID" stamp, and bank balance.

Determine if there are enough blank checks in the checkbook to cover the Treasurer's absence. Daily, audit the Treasurer's mailbox located in the front office of the woodshop. Perform the following task:

Membership Renewal - Check that the member is in fact eligible to renew (was a paid member during the prior year or the year preceding that - i.e., for 2022 renewal, member must be a paid member in 2021 or 2020). If the member was a paid member 2019 in this example, they must first be scheduled and complete the BOS and cluster classes (no charge). If the member was a paid member in 2018 in this example, they are treated as a new member and must go thru the new member process at their cost.

For members renewing from years 2021 & 2020 in the above example, collect the appropriate dues amount, mark the method of payment on the bottom of the membership renewal form (check # or CAM ticket # (upper right preprinted number on the CAM ticket)[not member CA #]).

Stamp the renewal application "PAID" Hold the payment and application for the return of the Treasurer. Give the renewal form and payment to the Secretary who will update the membership Access database on OneDrive>frontdesk>"GuildMemberDatabase.accdb" which will allow the member entry into the woodshop. The Secretary will retain all renewal paperwork (application and payment) and give to the Treasurer then they return.

For members renewing from year 2019 in the above example, inform the member that they must retake the BOS and cluster classes at no cost to them. They cannot enter the woodshop and will be scheduled in the next available cluster slot when the Treasurer returns. The Treasurer will contact them. Collect the appropriate dues, mark the method of payment on the bottom of the

membership renewal form (check # or CAM ticket #) [not member CA #]. Give the application and payment to the Secretary who will hold the application and payment for the return of the Treasurer.

For members renewing from year 2018 collect no money. Inform the resident that they will have to be scheduled for the BOS and cluster classes at their expense. The Treasurer will contact them and will establish their training schedule and training fees.

New Member Application - Collect no money. Inform the resident the Treasurer will contact them to establish their training schedule, dues, and training fees. Give new member application to the Secretary who will hold the application for the return of the Treasurer.

Member Reimbursement Request - From time-to-time members purchase goods or services for the Guild. The member will submit a Reimbursement/Payment Request with enough backup to explain the reimbursement request. Verify the amount being requested equals the backup and if the purchase is authorized. If purchase is authorized, write a check to the member for the requested amount. Make a copy of the check and attach to the reimbursement request. If the check is for more than \$500 or is being made payable to ANY Board of Directors member, obtain a second signature (on check and copy of check) from any Board of Directors member. Place the check in an envelope and place in the mailbox immediately below the Treasurer's mailbox. Retain the request, backup, and check copy for the Treasurer.

Guild Products, Aprons, etc. Sales - Retain the backup and payment for the Treasurer.

Special Products Sales - Separate payment from special products sales form. Record check#/Cash/CAM charge # on bottom of special products sales form. Stamp special products sales form PAID. Place special products sales form in Special Products Administrator mailbox. Mark check with the product being sold and hold for Treasurer.

Cash Sales for Special Projects Lumber Cuts - If payment is received in the form of cash, place in envelope and mark outside of envelope as SPCC-CUT. If payment is received in the form of check or CAM charge, mark check or CAM charge SPCC-CUT and hold for Treasurer.

Lumber Purchases Backup - When a shipment of lumber is received, the Wood Room Administrator will place the receiving ticket in the Treasurer's mailbox. Hold for Treasurer.

Anchor Hardware Invoice - Tool Room Manager gets supplies from Anchor. He places them without a member reimbursement request form in the Treasurer's mailbox. It is held for the monthly statement from Anchor to pay or hold by the Treasurer.

Check the USPS curbside mailbox at the woodshop for incoming mail. If any material is for 850 Red Dam Road, take the material to the golf maintenance building front office.

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**WI-031 - Generate current year membership listing from Access DB.**

The office needs a listing of all current Guild members for various reasons. Monthly or as requested a listing is generated from the Guild Access Access Database. The database is located on OneDrive>frontdesk>GuildMembershipDatabase.accdb.

Additionally, a listing of non-renewed members is created. See Exhibit 9 for examples of both listings.

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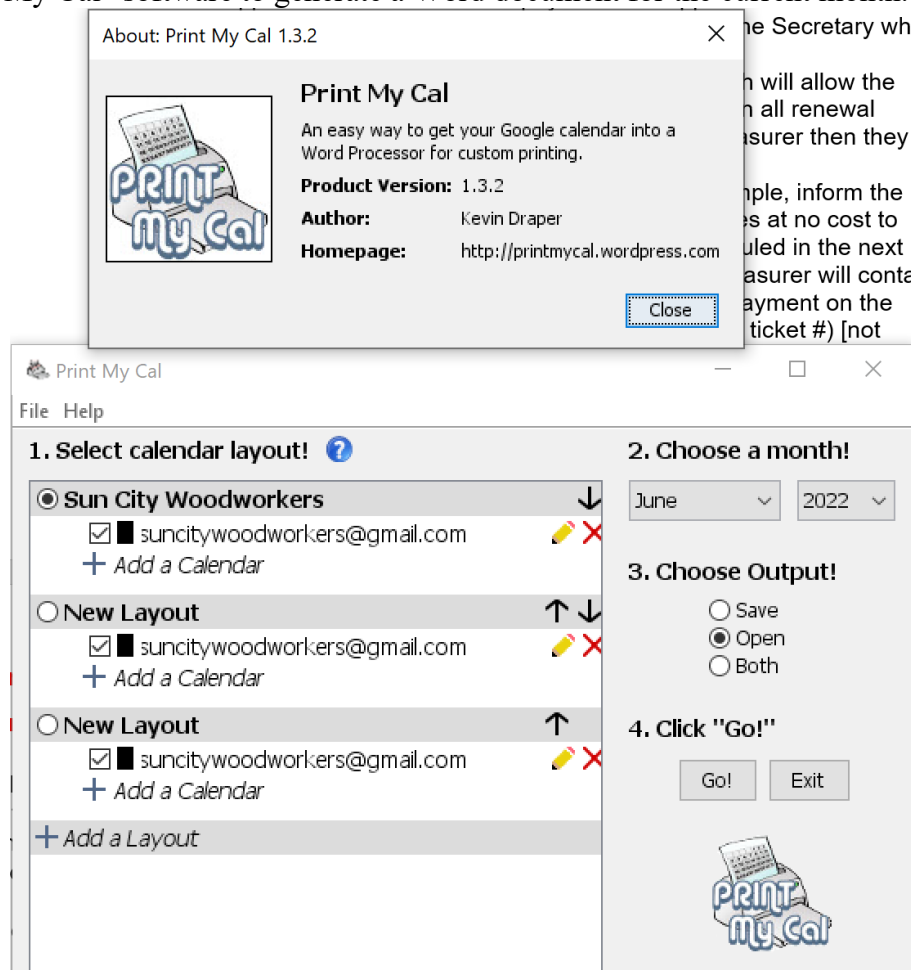
**WI-032 - Generate various membership listings from Access DB. Send to appropriate board members and SIG leaders.**

This data is created from the Access database located on OneDrive>frontdesk>GuildMembershipDatabase.accdb. The data is saved in OneDrive>treasurer>board of directors>membership and sent to appropriate board members as well as SIG leaders.  
See Exhibit 10.

**WI-033 - Print Shop Calendars for the Office each time there is a change in the current month or the following 2 months.**

See Work Instructions 21 for calendar maintenance.

There is 1 hard copy of the calendar in the office for the current month and following 2 months. Use "Print My Cal" software to generate a Word document for the current month.



Adjust the days so that all events are displayed.

If the calendar is set to print on 2 pages, copy the first page heading and paste just below the last day on the second page.

Print on legal size paper.

Using screen grab software (I use Hypersnap8) copy the first page of the month. Save the file as “MONTH1.jpg” to OneDrive>Guild Communication Public>DisplayInShop.

Using screen grab software copy all subsequent pages of the month. Save the files as “MONTH2.jpg” etc.

The calendar will be displayed on the woodroom computer in rotation when the computer is not in use.

Place hard copies of the calendars in the Front Desk/Concessions BOD member mail slot.

Do this (printing and saving the files) for the current month and following 2 months.

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#### **WI-034 – Generate Concessions Report.**

The concessions report provides BOD members with information regarding Guild Sales and Training activity with a comparison to prior years.

The report is included in the OneDrive>Treasurer>Board of Directors>Monthly Meeting>2022 Treasurers Reports.xlsx.

Enter current YTD data.

Copy the Concession report tab worksheet to a new Excel workbook.

Save the file as MM-YYYY Concessions Report in the above directory.

Send all BOD members an email with MM-YYYY Concessions Report file just created attached.

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#### **WI-035 – Get Shop Usage for Previous Month.**

Open OneDrive>Treasurer>Board of Directors>Shop Usage>”Shop Usage Comparison by Year and Month.xlsx” file.

WHEN THE SHOP IS CLOSED AND NO MEMBERS ARE CHECKING IN ON THE OFFICE COMPUTER using Excel, open the file

OneDrive>FrontDesk>LogInTransactionsLog.txt.

In the Text Import wizard window #1 click the “Delimited” radio button then click the “Next” button.

In the Text Import wizard window #2 click the “Comma” radio button then click the “Next” button.

In the Text Import wizard window #3 click the “Finish” button.

The check in data will be displayed.

Select the appropriate data for the month.

Paste that data in a new file OneDrive> Treasurer>Board of Directors>Shop Usage>“YYYY-MM Check Ins.xlsx.”

Also paste that data at the bottom of the file OneDrive> Treasurer>Board of Directors>Shop Usage>“YYYY-YTD Check Ins.xlsx.”

Update the appropriate month’s data in the “Shop Usage Comparison by Year and Month.xlsx” file.

Send all BOD members an email with the above file attached.

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#### **WI-036 – Generate Woodworker Guild Financial Status.**

Refer to Exhibit 11 below. Update data as appropriate and send email to all BOD members.

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### WI-037 – Generate check transaction report for prior month

In Quicken, run Transactions Report. Quicken menu bar, click “Reports” then Banking then Transactions.

In the date range field, select prior month begin and end date.

Click “Num” on the report displayed to sort the data by check number.

Print report in landscape format.

Select prior month’s work which contains backup for payment and a copy of the check written.

Sort check backup by check number

Attach report generated and check backup.

Place in Vice President’s mail slot in the woodshop office.

Vice President will audit checks vs. backup, note that the data has been audited then return the package to the Treasurer.

Refer to Exhibit 12 below.

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### WI-038a – Process Lumber Transactions in CAM Reimbursement Request

Refer to Work Instruction 028. Weekly lumber sales thru the woodroom computer system are captured in the file OneDrive>woodroom>YYYY Lumber Activity.xlsx.

Select the appropriate tab for the correct period.

Sort the data by column “F” (Personal or Guild)

See Work Instructions 039 for the CAM Reimbursement workbook creation.

Copy the following columns from the “P” (personal) lumber sales to the Excel workbook containing the current CAM reimbursement request– “Z”, “AA”, “AB”, “AG.” (member last name, member first name, member cam number, total sales including sales tax. (Note – column AG contains all sales but there may be items in this column that must be posted in 1) lumber sales, 2) faceplate sales, 3) other charges). When copying column “AG” post these sales in the appropriate column in the CAM reimbursement request column. Balance sales in the CAM reimbursement request workbook with the “YYYY Lumber Activity” workbook.

Update the YYYY Lumber Activity.xlsx tab by entering the last date the data included in the tab covers.

Create a new tab. Update the tab name to include the first date lumber sales data will be captured.

Copy rows 1 thru 6 from the previous tab to the tab just created.

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### WI-038b – Process Lumber Transactions in Quicken

Refer to Work Instruction 028. Weekly lumber sales thru the woodroom computer system are captured in the file OneDrive>woodroom>YYYY Lumber Activity.xlsx.

Select the appropriate tab for the correct period.

Sort the data by column “F” (Personal or Guild)

Personal wood sales processing is covered in Work Instruction 038a.



Sort “Guild” lumber sales by column “S” (Project).

Audit column “AE” (Taxable?). Examine the project charged to determine if the sale is taxable at this time. Sales for Guild use (clusters, practicum, advanced classes, shop end use projects should be taxable)

Sales for items that will be resold which will then be taxable such as Guild products and special projects should not be taxed and the “Y” in column “AE” should be removed.

Resort “Guild” lumber sales by column “AE” (Taxable?).

Sum column “AG” for both taxable and nontaxable sales as a control.

Print Guild lumber sales data only – no need to print personal members sales. The following columns may be hidden before printing. B-R, U-AB, AH-AP

In Quicken, using an existing check entry, add the Guild use lumber sales in two groups – taxable and nontaxable sales. The entry should be a zero-sum entry as no funds are actually being deposited or cashed out of the checkbook. “Credit Lumber Sales – Guild Use” and offset charge the appropriate expense where the lumber was used.

 Split Transaction

### Split Transaction

Enter multiple categories to itemize this transaction; use the Memo field to record more details.

	Category	Tag	Memo	Amount
4.	Special Project Expense:...		tools	19 06 ^
5.	Administrative Expense:...		door prizes	75 00
6.	Training Expense:BOS a...		member badge holders	66 77
7.	Sales:Lumber Sales:Wo...	Tax	taxable charges	-836 51
8.	Training Expense:Advan...		Imbr room 5/22	19 06
9.	Training Expense:Advan...		Imbr room 5/22	21 99
10.	Training Expense:Advan...		Imbr room 5/22	67 97
11.	Training Expense:Advan...		Imbr room 5/22	169 86
12.	Training Expense:Advan...		Imbr room 5/22	29 85
13.	Training Expense:BOS a...		Imbr room 5/22	143 71
14.	Shop Expense:Miscella...		5/22 Imbr room - 21-b re...	10 91
15.	Training Expense:BOS a...		Imbr room 5/22	339 95
16.	SIG:Woodturners:Wood...		Imbr room 5/22	33 21

Below is a sample entry for taxable Guild use lumber sales.

Below is a sample entry for non-taxable Guild use lumber sales.

**Q** Split Transaction

### Split Transaction

Enter multiple categories to itemize this transaction; use the Memo field to record more details.

	Category	Tag	Memo	Amount	
12.	Training Expense:Advan...		Imbr room 5/22	29	85 ^
13.	Training Expense:BOS a...		Imbr room 5/22	143	71
14.	Shop Expense:Miscella...		5/22 Imbr room - 21-b re...	10	91
15.	Training Expense:BOS a...		Imbr room 5/22	339	95
16.	SIG:Woodturners:Wood...		Imbr room 5/22	33	21
17.	Sales:Lumber Sales:Wo...		non taxable Imbr room ...	-881	08
18.	Purchases:Guild Product...		lumber room 5/22	175	48
19.	Purchases:Guild Product...		lumber room 5/22	32	16
20.	Purchases:Guild Product...		lumber room 5/22	12	07
21.	Purchases:Guild Product...		lumber room 5/22	47	90
22.	Purchases:Guild Product...		lumber room 5/22	317	30
23.	Special Project Expense...		lumber room 5/22	296	17

Using the above entries, the lumber sales account is credited for Guild use lumber and the appropriate expense categories are debited for the consumption of lumber. Both entries must equal zero as no money was actually transferred.

You will notice that the lumber sales value includes sales tax for sales that are taxable and does not include sales tax for non-tax sales. This is because sales tax payable is calculated by taking the lumber sales and dividing by 1.06 – where the sales tax rate is 6%

**WI-039 – Compile CAM reimbursement worksheet. Send to Lifestyles. Write entry into Quicken for monthly activity.**

Monthly (around the 25<sup>th</sup> of each month) the Guild submits CAM reimbursement request to Lifestyles for lumber and other items sold by the Guild and payment was received via a CAM charge.

At the beginning of the year, I create a master workbook containing all monthly charges such as member donations or project share derived from member renewal activity.

I then copy the master workbook and rename it to 01-YYYY CAM Charges. I can then add quarterly charges to this workbook derived from member renewal activity. (some members pay member donations and project share quarterly). Once this workbook is populated, I copy it to 04-YYYY CAM Charges, 07-YYYY CAM Charges, and 10-YYYY CAM Charges for each month beginning a quarter.

When preparing for CAM charge reimbursement request monthly, I either use the quarterly file created above or copy the monthly master to MM-YYYY CAM Charges for the appropriate month.

In addition to the monthly and quarterly data, there are several groups of data that are entered into the reimbursement request.

Manual CAM charges received for Guild product sales or any member CAM charge.

On-line renewal activity.

Lumber purchases from the woodroom computer.

Member last name, first name, CAM number are copied from the Access database and pasted into the monthly workbook being created. All manual CAM charges are sorted by member last name and entered against this data.

Refer to Work Instruction 038a and copy/paste member lumber purchases (and other purchases run thru the woodroom computer such as faceplates, etc.).

If appropriate (Usually during the months of October thru January) copy the member on-line renewal data.

Sort data by column D (Amount) and delete any zero amount rows. (Remember negative amounts can be submitted on this workbook to give members/residents credits).

Sort data by member/resident last name, first name.

Print recap located at the bottom of the workbook.

Submit email with the workbook attached to [Chartered.Clubs@schca.com](mailto:Chartered.Clubs@schca.com) with a copy to the Guild President. In the body of the email request “please confirm receipt and forward to accounting for payment”

Using the printout created above create a zero-balance entry using an existing check as shown below charging “Accrual Offset – CAM Charges” and crediting the appropriate income account:

## Split Transaction

Enter multiple categories to itemize this transaction; use the Memo field to record more details.

	Category	Tag	Memo	Amount	
26.	Accrual Offset - CAM Ch...		May Activity	8,084	10 ^
27.	Sales:Lumber Sales:Wo...	Tax	May Cam Charges	-3,003	59
28.	Member Dues		May Cam Charges	-359	00
29.	Training Income:BOS & ...		May Cam Charges	-160	00
30.	Training Income:BOS & ...		May Cam Charges	-768	00
31.	<input checked="" type="checkbox"/> Misc Income & Interest...		May Cam Charges	-512	00
32.	Sales:Guild Products:Ca...	Tax	May Cam Charges	-84	00
33.	Sales:Guild Products:Bir...	Tax	May Cam Charges	-220	00
34.	Sales:Guild Products:D...	Tax	May Cam Charges	-45	00
35.	Sales:Guild Products:Ch...	Tax	May Cam Charges	-35	00
36.	Misc Income & Interest:...	Tax	May Cam Charges	-15	00
37.	Misc Income & Interest:...	Tax	May Cam Charges	-211	00
38.	Misc Income & Interest:...		May Cam Charges	-60	00
39.	Misc Income & Interest:...	Tax	May Cam Charges	-143	00
40.	Sales:Guild Products:Wa...	Tax	May Cam Charges	-100	00
41.	Misc Income & Interest:...	Tax	May Cam Charges	-310	00 v
	Category	Tag	Memo	Amount	
42.	Misc Income & Interest:...	Tax	May Cam Charges	-5	00 ^
43.	Special Project Income:M...	Tax	May Cam Charges	-421	00
44.	Special Project Income:...	Tax	May Cam Charges	-90	00
45.	Special Project Income:...		May Cam Charges	-22	00
46.	SIG:Woodturners:Wood...	Tax	May Cam Charges	-113	45
47.	Sales Tax		May Cam Charges	-7	06
48.	Misc Income & Interest:...		2022 D. Wright	-100	00
49.	Misc Income & Interest:...		2022 J. Sodt	-25	00
50.	Misc Income & Interest:...		2022 L Picariello	-25	00
51.	Misc Income & Interest:...		2022 P. Lundholm	-25	00
52.	Misc Income & Interest:...		2022 J. Bedient	-100	00
53.	<input checked="" type="checkbox"/> Misc Income & Interest...		May Cam Charges	-15	00
54.	<input checked="" type="checkbox"/> Misc Income & Interest...		May Cam Charges	-449	00
55.	Sales:Guild Products:Ma...		May Cam Charges	-65	00
56.	Member Dues		May Cam Charges	-90	00
57.	Sales:Guild Products:Me...	Tax	May Cam Charges	-20	00 v
58.	Misc Income & Interest:...	Tax	May Cam Charges	-168	00
59.	Training Expense:BOS a...		May Cam Charges	-8	00
60.	<input checked="" type="checkbox"/> Misc Income & Interest...		May Cam Charges	-220	00
61.	Training Income:Advanc...		May Cam Charges	-70	00
62.	Maintenance:Member R...		May Cam Charges	-20	00

**WI-040 – Receive Eventbrite (advance training fees) activity from Eventbrite Administrator, write accrual entry into Quicken**

Monthly (around the 25<sup>th</sup> of each month) the Advanced Training Eventbrite Coordinator should forward a listing of training income for the month.

Order #	Order Date	Ticket Type	start date	Total Paid	Eventbrite Fees	Eventbrite Payment Processing	woodshop Net
2928851699	03/01/22	101 Introduction to turning - Start 5/3	5/3	\$70.00	\$4.04	\$1.75	\$64.21
2928858149	03/01/22	101 Introduction to turning - Start 5/3	5/3	\$70.00	\$4.04	\$1.75	\$64.21
2928853809	03/01/22	101 Introduction to turning - Start 5/3	5/3	\$70.00	\$4.04	\$1.75	\$64.21
2928851039	03/01/22	102 Basic Pen Making - Start 5/17	5/17	\$35.00	\$2.82	\$0.88	\$31.30
2928881819	03/01/22	102 Basic Pen Making - Start 5/17	5/17	\$35.00	\$2.82	\$0.88	\$31.30
2928970659	03/01/22	102 Basic Pen Making - Start 5/17	5/17	\$35.00	\$2.82	\$0.88	\$31.30
2929141389	03/01/22	102 Basic Pen Making - Start 5/17	5/17	\$35.00	\$2.82	\$0.88	\$31.30
2928849109	03/01/22	104 Bowl Turning - Start 5/17	5/17	\$70.00	\$4.04	\$1.75	\$64.21
2928848039	03/01/22	104 Bowl Turning - Start 5/17	5/17	\$70.00	\$4.04	\$1.75	\$64.21
2928849479	03/01/22	104 Bowl Turning - Start 5/17	5/17	\$70.00	\$4.04	\$1.75	\$64.21
3255158279	04/06/22	107 6 Inch Salt & Peppermill - Start 5/24	5/24	\$55.00	\$3.52	\$1.38	\$50.10
3334636019	04/15/22	107 6 Inch Salt & Peppermill - Start 5/24	5/24	\$55.00	\$3.52	\$1.38	\$50.10
2928850619	03/01/22	108 Lathe Setup - Start 5/21	5/21	\$15.00	\$2.12	\$0.38	\$12.50
3072126039	03/16/22	108 Lathe Setup - Start 5/21	5/21	\$15.00	\$2.12	\$0.38	\$12.50
3291225639	04/10/22	108 Lathe Setup - Start 5/21	5/21	\$15.00	\$2.12	\$0.38	\$12.50

Using the list create a zero-balance entry using an existing check as shown below charging “Accrual Offset – Eventbrite” and crediting the appropriate advanced training income account:

4.	Accrual Offset - Eventbrite	May Activity	1,819 04
5.	Training Expense:Advan...	May Activity	-210 00
6.	Training Expense:Advan...	May Activity	-140 00
7.	Training Expense:Advan...	May Activity	-210 00
8.	Training Expense:Advan...	May Activity	-110 00
9.	Training Expense:Advan...	May Activity	-90 00
10.	Training Expense:Advan...	May Activity	-165 00
11.	Training Expense:Advan...	May Activity	-180 00
12.	Training Expense:Advan...	May Activity	-140 00
13.	Training Expense:Advan...	May Activity	-300 00
14.	Training Expense:Advan...	May Activity	-80 00
15.	Training Expense:Advan...	May Activity	-220 00
16.	Training Expense:Advan...	May Activity	-50 00

**WI-041 – If applicable write reimbursement checks to RR-SIG and Turner-SIG**

During the month any CAM activity where the proceeds of the CAM charge are to go to the RR-SIG or Turner-SIG is recorded in the “SIG Reimbursements” tab in the OneDrive>Treasurer>Board of Directors>YYYY Membership.xlsx workbook.

April Submission 4/1/22						April Submission 4/1/22							
CAM #	Last	First	Reference	2022 Dues	Donation	CAM #	Last	First	Reference	sales	tax dues		
6047689	Happold	Hap	46484	\$20.00		449681	Yrnela	Robert	45978	37.78	-2.14		
						448003	Kremer	Ken	48287		20		
						445005	Hahn	Tom	48296		20		
						439202	Rasmussen	Beth	48295		20		
						6180487	Weber	Ed	48298		20		
						450172	Hopper	Keith	48292		20		
						442509	Lackovitch	Don	48294	25.00			
						442718	MACKSEY	WILLIAM	48293	25.00			
						6018768	GUGLIELMI	JOHN	48291	35.00			
						446076	White	Neal	48288	50.00			
						447138	Quinter	Gary	48290	28.00			
						6018768	GUGLIELMI	JOHN	48289	60.00			
3/24/2022	Check	6944			\$20.00	3/24/2022	Check			260.78	-2.14	100.00	358.64

Monthly (around the 25<sup>th</sup> of each month) a check for any activity for either SIG is written and placed in the SIG mail slot in the office.

### WI-042 – If appropriate, authorize new listserv moderators and remove old moderators

Currently there are 3 monitors for our listserv general email program – The President, the Vice President, The Treasurer. Their respective emails are entered into the listserv master. When the individuals move from these positions or when new members assume these positions, an update is required.

One the WEB, navigate to <https://lists.islc.net/mailman/admin/suncitywm> user = list.islc.net, password – scwm.admin. the following will be displayed.

**SunCityWM Administrator Authentication**

List Administrator Password:

Enter password “scwm.admin” and click the “Let me in” button. The following will be displayed.

**General Options**

	Value
<i>General list personality</i>	
The public name of this list (make case-changes only). <a href="#">(Details for real_name)</a>	SunCityWM
The list administrator email addresses. Multiple administrator addresses, each on separate line is okay. <a href="#">(Details for owner)</a>	listowner@islc.net tdraayom.schhwg@gmail.com catvan858@gmail.com
The list moderator email addresses. Multiple moderator addresses, each on separate line is okay. <a href="#">(Details for moderator)</a>	mike.mtconsulting@gmail.com catvan858@gmail.com tdraayom.schhwg@gmail.com

Changes can be made to the list administrator email addresses– currently the President and Vice President as well as the list moderator email addresses.

Submit Your Changes

After changes are made, click the data.

button at the very bottom of the

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**WI-043 – Send cluster students midmonth reminder email.**

Send reminder email to the following month's cluster students. See Exhibit 13.

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**WI-044 – Send cluster students initial reminder email.**

Send reminder email to the following month's cluster students. See Exhibit 14.

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**WI-045 – Prepare New Member Training Materials for Following Month's classes**

Print members class schedules using "Member Class Schedule" tab of OneDrive>Treasurer>Board of Directors>Registration>"YYYY Cluster Class Registration.xlsx" Excel file.

Print member White badges using "White Badges" tab of OneDrive>Treasurer>Board of Directors>Registration>"YYYY Cluster Class Registration.xlsx" Excel file. (See Work Instructions – 019)

Print member Gold badges using "Gold Badges" tab of OneDrive>Treasurer>Board of Directors>Registration>"YYYY Cluster Class Registration.xlsx" Excel file. (See Work Instructions – 019)

Print Orange Book Sheets (Cluster class attendance records) using the appropriate month columns of the "Orange Book Sheets" tab of OneDrive>Treasurer>Board of Directors>Registration>"YYYY Cluster Class Registration.xlsx" Excel file.

Print Medical Forms (Member Medications listing) using the "Medical Form" tab of OneDrive>Treasurer>Board of Directors>Registration>"YYYY Cluster Class Registration.xlsx" Excel file.

Place above in the New Member Training Director's office mail slot by the Saturday before BOS.

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**WI-046 – Gather and Submit form CC-90 for Guild and all SIGs**

The CC-90 (Club Annual Financial Report) contains financial information for both the Guild and all SIGs for the previous year.

Examine the latest version of the CC-90 on the Sun City Hilton Head Community Association web site – Resident Central – Community Library – Forms – CC90.

Modify OneDrive>Treasurer>Board of Directors>CC-90 Annual Financial Report>"CC90-YYYY-Annual Financial Report (Excel).xlsx" to include any additions or deletions from the previous report.

Use Quicken and other reports to obtain prior year financial information.

Obtain signatures of Guild President, Guild Treasurer (You), SIG Presidents and Treasurers.

Compile a binder using prior submissions as a guide.

Submit binder to Lifestyles by 1/31.

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**WI-047 – Provide Membership Listing to Lifestyles**

Using OneDrive>Frontdesk>"GuildMemberDatabase.accdb" prepare a listing of current year members using the format

Member CAM	Last Name	First Name	Address
------------	-----------	------------	---------

Supply to Lifestyles by 5/1.

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**WI-048 – Balance Quicken to Bank Statement**

When the checking account bank statement is received, copy

Onedrive>Treasurer>Quicken "Balance Checking Account Master.xlsx" to "YYYY-MM-DD Balance Checking Account.xlsx" where MM-DD is the last day of the prior month.

Use the above file to balance Quicken to the bank statement. Print 3 copies

Make 2 copies of the bank statement

Using HyperSnap or other screen capture program capture last 20 days activity in

Quicken with the month end checking account balance showing. Print 3 copies

Make 3 sets of forms – Bank Statement – Quicken screen print – Balance Checking account printout make in the 1<sup>st</sup> step of this work instruction.

Give original (marked sign and return) to President

Give 1 set (marked your copy) to President

Retain 1 set for Treasurer.

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**WI-049 – Daily Scheduling Activities (Note this process was created during COVID-19. It is no longer needed but is being kept if it is needed in the future)**

**Note: This Daily Scheduling System was deactivated in June 2021 and is no longer in service. The purpose of including this section is to document the process and procedures need in event this system is needed to be reactivated in the future.**

The Community Association imposed a limit of members using the woodshop due to COVID-19. A max of 35 members may be in the woodshop at any one time on M-S-F-Sa. The Guild has established a max of 15 members for any P-Card day on T-T-Su.

Overview and Procedures

Use the following link to enter your request:

[https://docs.google.com/forms/d/e/1FAIpQLSeuiMadW\\_1IW20Z451evppgoATuDs5VrKiVH0amhf3MG4Dw\\_Q/viewform](https://docs.google.com/forms/d/e/1FAIpQLSeuiMadW_1IW20Z451evppgoATuDs5VrKiVH0amhf3MG4Dw_Q/viewform) OR  
<https://tinyurl.com/Revised-SCWWG-Reservations>



Request can be entered 7 days a week, 24 hours a day up for the upcoming week plus the following two weeks.

Every Friday at 3pm, reservations for the upcoming week will be closed. No further activity will be accepted (request or cancelations) for the upcoming week after 3pm every Friday.

Members will be notified via email (the information will also be posted in this section) of the confirmed request, waitlisted members, and pending request for future weeks. Use the following link to access this information

<https://www.suncityhiltonhead.org/GroupPage/46134~2548>

Cancelations of confirmed reservations must be made directly to the woodshop front office via telephone. Cancelations of pending request can be made anytime using Google Forms links above.

Data entry

Enter your "email address" to receive a detail of your data entry – Click the Next Button

Enter your "CAM number"

Enter "Enter a Request" or "Cancel a Request" – Click the Next Button

Select Date and Shift (ONLY P-Card Holders may select Tuesdays – Thursdays - Sunday)

Select as many days/shifts as you want – Click the Submit Button

The following chart details all particulars of the revised system:

	Open Shop Days	P-Card Days
Weekday Shifts	Mon/Wed/Fri 9-12:45 morning, 1-4:45 afternoon	Tue/Thu 9-12:45 morning, 1-4:45 afternoon
Weekend Shifts	Sat 10-12:45 morning, 1-3:45 afternoon	Sun 10-4
Management Team	Shop Manager, Assistant Shop Manager, Tool Room Monitor, Front Desk Assistant, and Mentor	Red Apron Managers as Shop Manager
Management TeamHours	4 hours per shift	1-hour rotation each per shift
ReservationSubmission	24 hours/7 days - up to 3 weeks in advance. Every Friday 3pm request will be closed for the upcoming week.	24 hours/7 days - up to 3 weeks in advance. Every Friday 3pm request will be closed for the upcoming week.
Daily Shift Reservations	Choose one shift/day – morning or afternoon Up to 35 chosen by random number	Choose one shift/day – morning or afternoon Tue/Thu, 1 shift Sun Up to 15 chosen by random number
Waitlist	Over 35 waitlisted for chosen shift	Not Applicable
Confirmation ofReservation	Published 6PM Friday for coming week	Published 6PM Friday for coming week
Notification of Reservation	Email and Guild webpage posting	Email and Guild webpage posting
Open Slot	Slot not reserved or canceled	Slot not reserved or canceled
Filling Open Slots	Call Front Desk Assistant to reserve No voice mail or walk-ins allowed Starts after 10:30 on Saturday After 9:30 on Mon/Wed/Fri  No calls on Tue/Thu/Sun	Call Front Desk Assistant to reserve No voice mail or walk-ins allowed Starts after 10:30 on Saturday After 9:30 on Mon/Wed/Fri  No calls on Tue/Thu/Sun
2 Member Households	Must identify control memberBoth must have a reservation Control member chosen, both given reservation	Must identify control memberBoth must have a reservation Control member chosen, both given reservation
Cancellations	Use Google Forms if reservation notconfirmed Call Front Desk if reservation was confirmed	Use Google Forms if reservation not confirmed Call Front Desk if reservation was confirmed

Friday 3pm Process

Using a web browser navigate to the Guild's Google Forms area

<https://drive.google.com/drive/u/2/my-drive>

Open the google spreadsheet – Revised Shop Reservation System (Responses)

Prepare excel workbook, word files for use

Open onedrive/treasurer/board of directors/shop reservation scheduling/Shop Reservation Workbook Master.xlsm. Save a copy as shop reservation workbook xx-xx-xx(where xx-xx-xx is the calendar date of the Friday when you are performing this activity)

Open onedrive/treasurer/board of directors/shop reservation scheduling/Reservations for Master.doc. Save a copy as “Reservations for xx-xx-xx.doc” where xx-xx-xx is Sunday of the week being confirmed. Perform this step for Monday thru Saturday of the week being confirmed.

Open onedrive/treasurer/board of directors/shop reservation scheduling/Pending Request as of Master.doc. Save a copy as “Pending Request as of xx-xx-xx.doc” where xx-xx-xx is the current date.

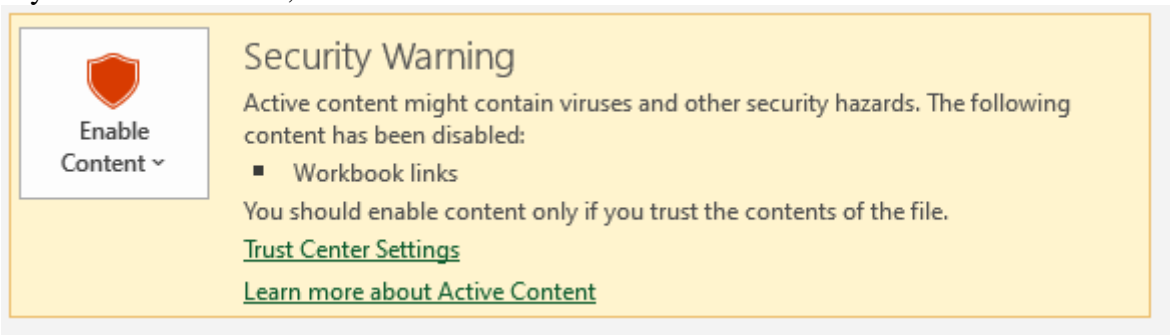
Open onedrive/treasurer/board of directors/shop reservation scheduling/Rejected Request for the week of Master.doc. Save a copy as “Pending Request as of xx-xx-xx.doc” where xx-xx-xx is the current date.

○

Copy all data in Google form to the Raw DB tab of Shop Reservation Workbook xx-xx-xx.xlsm created in the above step.

Navigate (Ribbon Bar – View) Select “View Macros” icon then View Macros from the dropdown menu Run the Reset Workbook macro.

If you receive an error, Click File/Info You should see



Click “Enable Content” then run the “Reset Workbook” macro (this will clear all data from the following tabs)

Return to the Google spreadsheet.

Copy all data in Google Form “Revised Shop Reservation System (Responses).” (Columns A thru F) (NoHeaders) to Raw DB tab of Shop Reservation Workbook xx-xx-xx.xlsm. This serves as a resource if you are investigating problems.

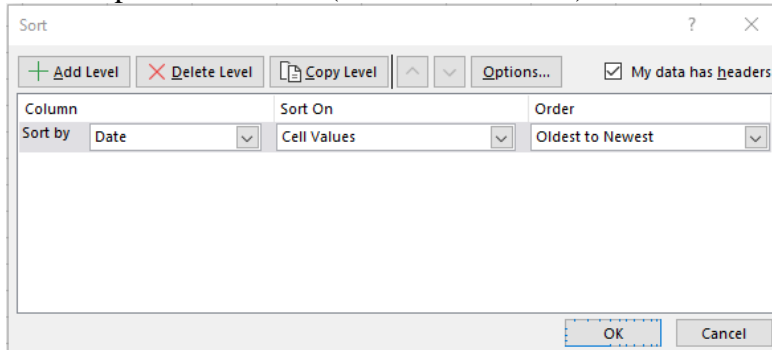
Copy all data in Google Form Responses (Columns A thru F) (No Headers) to InputSheet of ShopReservation Workbook xx-xx-xx.xlsm

Run ParseInput macro. This should populate the OutputReservations and OutputCancelations tabs of Shop Reservation Workbook xx-xx-xx.xlsm

Examine the OutputCancelations tab for data. Delete all requested cancelations (as well as the cancelrequest entry as well) in the Google Forms spreadsheet.

In the OutputReservations tab, select columns A, B, C, and D by clicking and holding on A and moving across B, C and D.

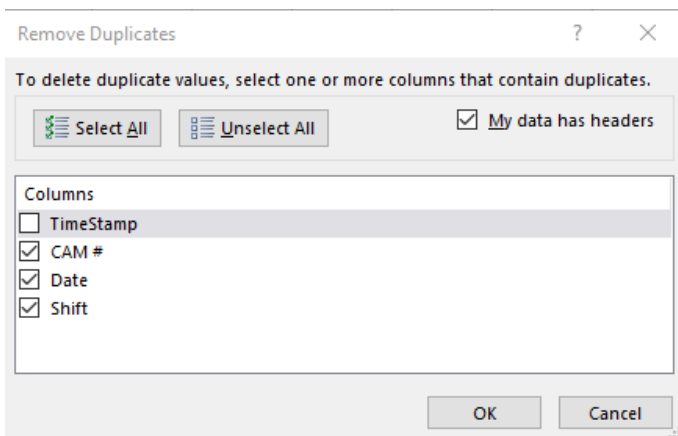
Sort OutputReservations (Columns A thru D) as follows



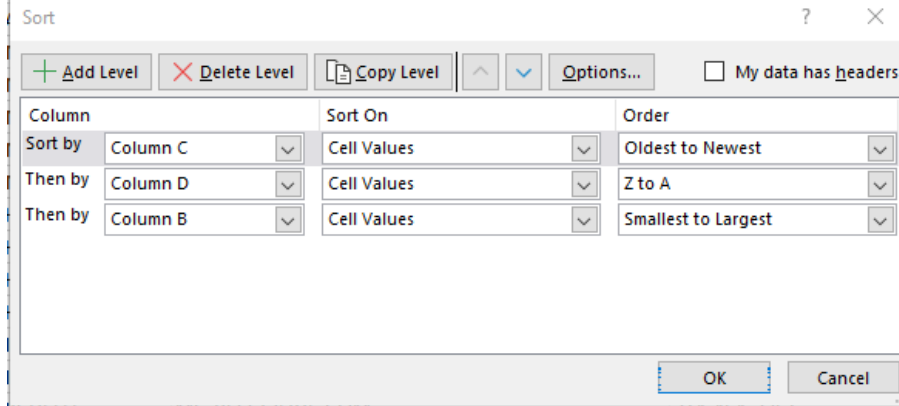
Navigate (Ribbon Bar – View) Select “Data” then click the “Remove Duplicates.”

Uncheck the TimeStamp column (A). Make sure all 3 other columns are checked and click the OK button. Failure to uncheck the TimeStamp column will result in TimeStamp data being assigned to othermembers’ entries resulting in major data corruption.

This will remove all duplicate data.



This data can contain request for previous weeks. Navigate down to the first entry containing datapertinent to the period being managed.  
 Copy OutputReservations (Columns A thru D) (no headers) for rows pertinent to the period beingmanaged to “Data from Google Forms” tab (Columns A thru D) starting with row 4.  
 Sort the data in Data from Google Forms tab (columns A thru D) just copied as follows:



Press F9 to calculate columns E thru V. Examine data for duplicate entries, Invalid Shift, Invalid CAM. Copy columns P thru U for all duplicate entry data lines to the errors section of Pending Request as of xx-xx-xx.doc file created above. Remove the duplicated request entry (delete the row) from the google forms data.

Repeat this process until all duplicate entries have been recorded as errors and deleted from google forms as follows:

Delete data in columns A thru D in the “Data from Google Forms” tab in the Shop Reservation Workbook xx-xx-xx.xlsm. Press F9 to remove all calculations.

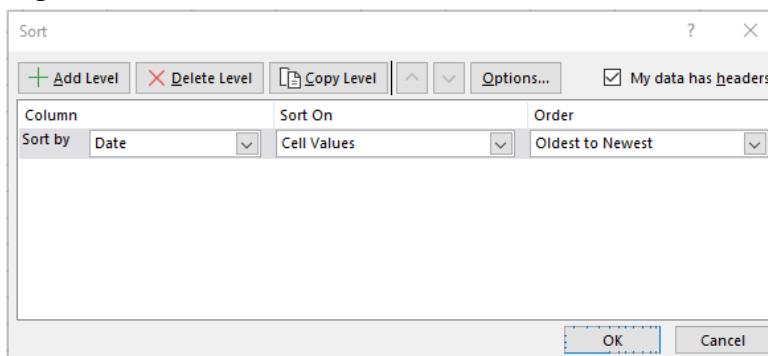
Run the ResetWorkbook macro again. This will clear data in the InputSheet, Output Reservations, and OutputCancelations tabs.

Copy all data in Google Form Responses (Columns A thru F) (No Headers) to Raw DB and InputSheet of Shop Reservation Workbook xx-xx-xx.xlsm as done previously

Run ParseInput macro. This should populate the OutputReservations and OutputCancelations tabs of Shop Reservation Workbook xx-xx-xx.xlsm

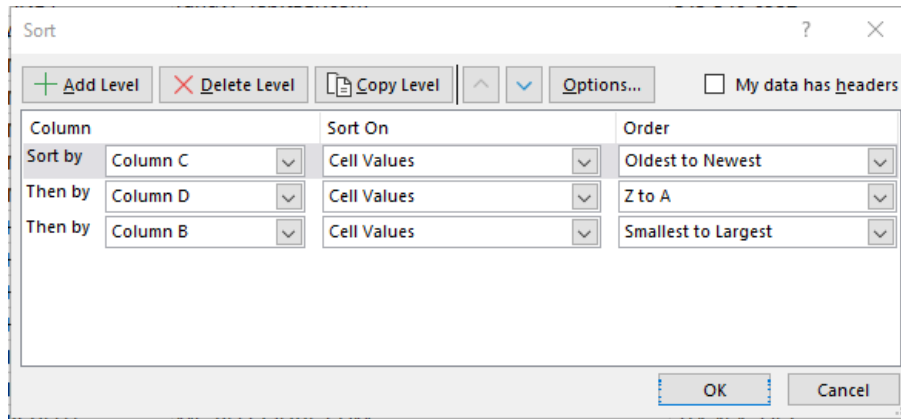
Examine the OutputCancelations tab for data. Delete all requested cancelations in the Google Forms spreadsheet. Run previous steps until there are no output calculation data in the spreadsheet.

Sort OutputReservations (Columns A thru D) as follows



This data can contain request for previous weeks. Navigate down to the first entry containing data pertinent to the period being managed.

Copy OutputReservations (Columns A thru D) (no headers) for rows pertinent to the period being managed to “Data from Google Forms” tab (Columns A thru D) starting with row 4.  
Sort the data in Data from Google Forms tab (columns A thru D) just copied as follows:



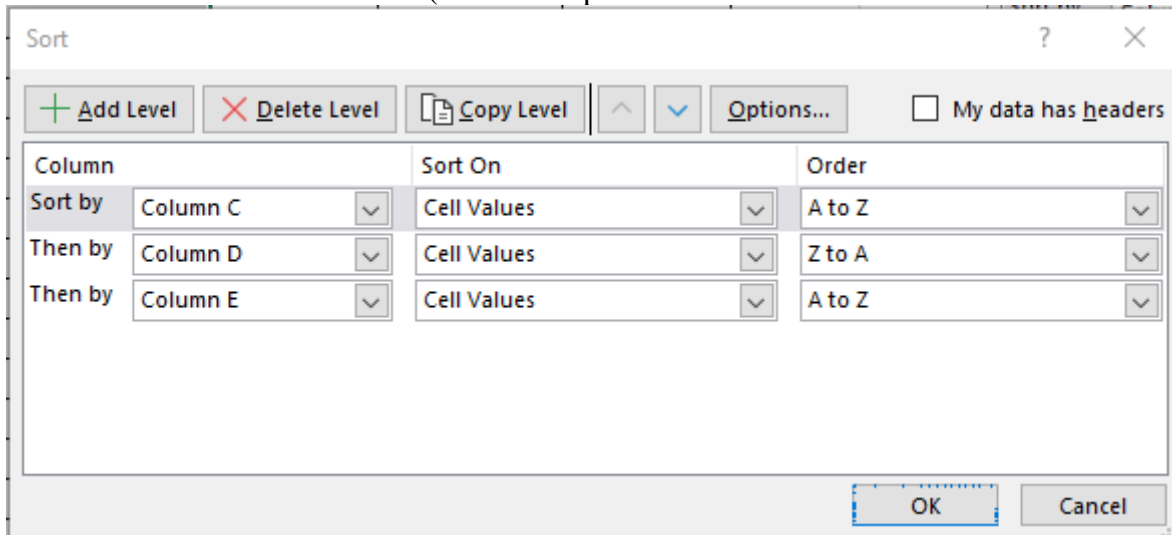
Press F9 to calculate columns E thru V. Examine data for duplicate entries or invalid Shift or CAM.

After all entries are correct, copy data in “Data from Google Forms” tab (columns P thru U) to “Schedule” tab (columns C thru H) using “paste special” technique (values). This eliminates any calculation that was performed on the “Data from Google Forms” tab.

Click “Random Number Generator” tab Press F9 to recalculate

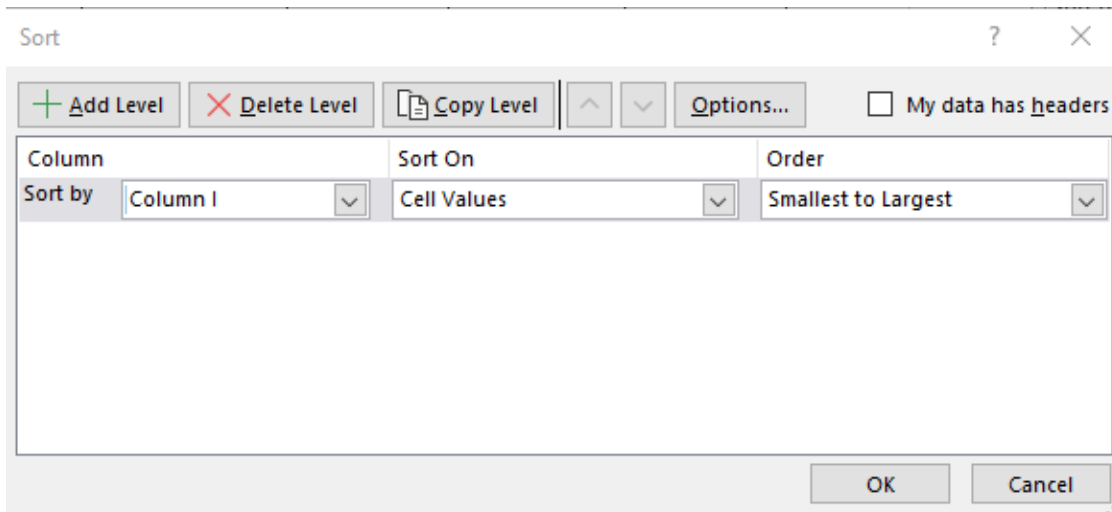
Copy data in “Random Number Generator” tab column A – rows 3 thru 300 to “Schedule” tab column I row 6 using “paste special” technique (values). Again, to eliminate any calculation that was performed previously.

Sort columns C thru I as follows (This will alphabetize member names for front desk volunteer)



Assign numbers in “Schedule” tab - column B beginning with 1 and advancing up to last member request for a particular day and shift. Repeat for all days/shifts.

Examine each day. If number of members requesting reservations exceed maximum amount (35 for normal day, 25 for P-Card day) sort columns C thru I as follows.



If total members for the day/shift exceed 35, separate lowest 35 members (these members are confirmed) from over 35 members (these members request are denied). Insert blank lines (up to 55) between the above 2 groups for office to write in activity. Look at previous files as examples. Examine the 2<sup>nd</sup> group to see if they are in the couples control program. If the controlling couple member is confirmed, then the 2<sup>nd</sup> couple member must be placed in the confirmed request listing and the last member in that listing is moved down to the denied request listing.

For M-W-F-Sat sort columns C thru I up to 35 members to alphabetize by last name for office ease of use. Look at previous files as examples.

Create a "Reservations for xx-xx-xx.docx" file by word document using the "Reservations for MASTER.docx" as the master file for each day of the week.

Create a "Rejected Reservations for the week of xx-xx-xxxx" word document using the "Rejected Reservations for the MASTER.docx" word document.

Create a "Pending Request as of xx-xx-xxxx" word document using the "Pending Request as of MASTER" word document.

Copy confirmed request thru line 55 for each shift to appropriate "reservations for xx-xx-xx.docx" file. Export data from above word file to PDF file.

Copy rejected request for each day of the week to the "Rejected Reservations for the week of xx-xx-xxxx" word document.

Copy pending request to the "Pending Request as of xx-xx-xxxx" word document. Export data from above word file to PDF file.

Create an email addressed to Guild Products Director (for office control and use in checking in members). Copy President. Unhide column G on the "Schedule" tab and determine members email address for who's request is being confirmed for each day. Use the "Member Email Check" tab to eliminate duplicate email addresses and copy email addresses to the blind copy section of the above email. Perform this step for all confirmed request dates.

Copy rejected request for the week into the above created document.

## WI-050 – Shutterfly Web Site Management

### Scope of Work:

The Woodworker Guild Shutterfly web site contains pictures of Guild open houses from 2012 thru 2021.

Pictures are taken by various assigned members and uploaded to Shutterfly

URL for the web site is <https://schhwmgopenhouse.shutterfly.com/>

Owner of the Shutterfly web site is Mike Thomas

Username – [mike.mtconsulting@gmail.com](mailto:mike.mtconsulting@gmail.com)

Password – Toni0076\$

The user/password information is posted in the Guild’s KeyPass system also

This link is listed in every Plank newsletter

### As Needed:

After an open house or other event that the Guild wants pictures to be uploaded sign on to the website using the username and password above and in KeyPass

If a new “page” is required – Pages are shown on the white stripe at the top of the screen



To add a new page,

Click the + in the top black stripe.

A dropdown menu will be displayed

Click “Add Page”

Complete the information for the page

To add photos

Click the page in the white bar. A dropdown will be displayed



Click the album and follow directions to upload the new pictures





You will also receive an email as shown below

## SunCityWM subscription notification




SunCityWM <mailman-bounces@lists.islc.net>

To suncitywm-owner@lists.islc.net



2:51 PM

 We removed extra line breaks from this message.

Toni Thomas <[toni.mtconsulting@gmail.com](mailto:toni.mtconsulting@gmail.com)> has been successfully subscribed to SunCityWM.  
(admin mass sub)

## Exhibits

**Exhibit 1** – new member email generated by Listserv when new member is added to Listserv.  
Subject Welcome to the "SunCityWM" mailing list  
New Member Email #1 of 3 - Woodworker Guild

Welcome to the Sun City Woodworker Guild listserv system. This system allows us to send you our monthly newsletter (The Plank) as well as provide you from time to time with information about the woodshop. If you have any questions regarding listserv contact me.

Thanks Mike Thomas - Treasurer  
15 Lacebark Lane  
Bluffton, SC 29909  
H - 843.705.2715  
C - 843.298.9214

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Listserv administrators will receive the following email.


### SunCityWM subscription notification



SunCityWM <mailman-bounces@li  
To suncitywm-owner@lists.islc.net



2:10 PM

 We removed extra line breaks from this message.

Mike Thomas <[mike.mtconsulting@gmail.com](mailto:mike.mtconsulting@gmail.com)> has been successfully subscribed to SunCityWM. (admin mass sub)

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End of Exhibit 1

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**Exhibit 2** – new member email #2 when new member is processed. A copy of the most recent Plank newsletter should be attached to this email.  
Subject - New Member Email #2 of 3 - Welcome to the Sun City Woodworkers Guild!

**PLEASE CONFIRM RECEIPT OF THIS EMAIL SO THAT WE CAN VERIFY YOUR EMAIL.**

Welcome to the guild! I have placed your email address into our listserv program. This will allow us to send you broadcast messages of guild events as well as the monthly newsletter. I am attaching the latest issue of the plank, our monthly newsletter, for your reading.

You should receive an email from the listserv a short while ago (marked New Member Email #1 of 3) verifying that you were added. If you do not receive an email from

[suncitywm-request@lists.islc.net](mailto:suncitywm-request@lists.islc.net)

notifying you that you were added to the listserv, please look in your spam box as your email service has rejected the message.

You will receive the monthly newsletter The Plank via the listserv. The "from" address will be [suncitywm-bounces@lists.islc.net](mailto:suncitywm-bounces@lists.islc.net); on behalf of; Mike Thomas [mike.mtconsulting@gmail.com]

Please make sure the above two "from" addresses will pass your spam filter or you will not receive emails from the club.

Also, you can access our new member web page at <https://wwmmg.org/>

You can take a youtube video tour of our woodshop at <https://www.youtube.com/watch?v=IN0PGT0CQmk>

You can access our Facebook page at [https://www.facebook.com/schhwmg/photos\\_stream?tab=photos\\_albums](https://www.facebook.com/schhwmg/photos_stream?tab=photos_albums)

You can access our Sun City Community Web Page at [www.SunCityHiltonHead.org](http://www.SunCityHiltonHead.org) After sign in using your CAM number and password, click Community Groups and search for wood. Our web page will be shown at the bottom of the list.

Finally, if you have any scheduling problems with your cluster classes, please call Mike Thomas @ 843.705.2715

Mike Thomas  
15 Lacebark Lane  
Bluffton, SC 29909  
H - 843.705.2715  
C - 843.298.9214

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End of Exhibit 2

**Exhibit 3** – new member email #3 when new member is processed. A copy of the cluster class schedule, welcome letter (Exhibit 4), WoodChicks welcome letter (Exhibit 5) if applicable, Carvers welcome letter (Exhibit 6) if applicable.

Subject - New Member Email #3 of 3 - Woodworker Guild Training Schedule

Attached is your training schedule and a letter detailing our new member web site. Please read the BOS/Clusters/Practicum section of the New Member web site prior to attending classes as it contains your class handouts.

If you are mailing a check, please make the check payable to Sun City Woodworkers and mail to 841 Red Dam Road Bluffton, SC 29909

Please look over your training schedule and advise if there is a problem. Since we are working with 8 students every month and specific training classes are only offered one day a month, it is extremely difficult to reschedule a missed class. You can cancel and reschedule up to 1 week before BOS training with no penalty. If you cancel or reschedule within 7 days before BOS training, you will be assessed a penalty of \$45. Please be mindful that cluster class slots are valuable. As you have probably experienced, we have a long waiting list to get into cluster classes. If for some reason you cannot attend BOS, please let me know with as much lead time as possible so we can reschedule another member to take your place. **PLEASE JUST DON'T SHOW UP FOR YOUR FIRST CLASS. THAT CAUSES THE TRAINING SLOT TO REMAIN OPEN WITH NO CHANCE OF FILLING IT.**

I will send you 2 reminder emails – 2 weeks before you scheduled BOS class and the week before your scheduled BOS class. I will also remind you via phone the Thursday or Friday before your BOS class.

Remember that there are 3 hurdles build into the training classes. You have to attend the Basic Orientation and Training Class (BOS) before any cluster classes can be taken. If you miss the BOS class, we will have to reschedule you to another month. You must successfully complete all 10 cluster classes before you can take the practicum classes. As stated above, it is extremely difficult to reschedule a missed class. Rescheduling might delay your completion of training for a month or more. You must successfully complete the 3 practicum classes before you can begin working in the woodshop on your own. Please treat the cluster classes seriously for your safety and for your learned experience in the practicum class.

Don't forget to access the New Member web site located at <https://wwmmg.org/>

The cluster class student handouts are located under the BOS/Cluster/Practicum heading. Please read all cluster class handouts. There is no need to print them or bring them to your classes.

Also don't forget to visit the Woodworker Guild Sun City Web page. The Sun City Community web site is available only to residents of Sun City Hilton Head. Please visit our web page by navigating to the Woodworker and Modelmakers Guild community group on the [WWW.SunCityHiltonHead.org](http://WWW.SunCityHiltonHead.org) web page then selecting the Woodworkers and Modelmakers Guild club from the Community Groups.

If you have any questions, please contact me.

Mike Thomas  
15 Lacebark Lane  
Bluffton, SC 29909  
H - 843.705.2715

**Exhibit 4** – New member welcome letter



**SUN CITY WOODWORKERS AND MODELMAKERS GUILD**

Dear New Member,

We have filled out your class schedules for your cluster classes. Please look over your training schedule and advise if there is a problem. Since we are working with 16 students every month and specific training classes are only offered one day a month, it is extremely difficult to reschedule a missed class. You can cancel and reschedule up to 1 week before BOS training with no penalty. If you cancel or reschedule within 7 days before BOS training, you will be assessed a penalty of \$45.

You will be issued safety glasses at the first class.

Please wear closed-toed shoes - no sandals. Short sleeve shirts are recommended otherwise you will have to roll up your sleeves when operating the machinery.

On the first day, you will start taking classes at 5:15pm. It is imperative that you take this first class (BOS) Basic Orientation and Safety. You must take this class to move forward to the next classes. If you miss this BOS class, we will have to **reschedule your entire Cluster Class series to the next available date**. Please be mindful that cluster class slots are valuable. As you have probably experienced, we have a long waiting list to get into cluster classes. If for some reason you cannot attend BOS, please let Mike Thomas (843.705.2715) or (843.298.9214) know with as much lead time as possible so we can reschedule another member to take your place. **PLEASE JUST DON'T SHOW UP FOR YOUR FIRST CLASS. THAT CAUSES THE TRAINING SLOT TO REMAIN OPEN WITH NO CHANCE OF FILLING IT.**

The Guild has a new member web site - <https://wwmmg.org/>

Please enter URL into your web browser. Our home page will be displayed



Home Page - Scrolling down the home page provides you with general information about the Guild.

Guild Leadership – the Guild organization chart is accompanied by responsibilities of the Board of Director members as well as committee chairs  
Basic Guild Info - the Guild By-laws and Operations manual are available here

BOS/Cluster/Practicum – please concentrate on this section as a new member. This section houses student handouts for your Basic Orientation and Safety class, student handouts for your 10 cluster classes, and a brief description of our practicum classes. You must successfully pass the BOS and cluster classes before taking the practicum classes. The practicum class is where you demonstrate to us that you have learned how to operate the equipment at the woodshop. Once you successfully pass the practicum classes, you will be given free reign of the woodshop to construct any project you wish.

Safety Videos – The Guild produces videos on safe operation of the machinery at the woodshop. These videos are posted on YouTube. Additionally, there is a video tour of the Guild if you want to show your friends and relatives.

Library Resources – The Guild has a computer in the library that is available for all members to use. The document in this tab describes the programs that are installed on the computer.

The Guild also maintains a web page on the Sun City Hilton Head Community web site. The Sun City Community web site is available only to residents of Sun City Hilton Head. Please visit our web page by navigating to the Woodworker and Modelmakers Guild community group on the <https://www.suncityhiltonhead.org/> web page then selecting the Woodworkers and Modelmakers Guild club from the Community Groups. You may also want to take a video tour of our woodshop by pasting the following in your internet browser <https://www.youtube.com/watch?v=IN0PGT0CQmk>. Finally, you may also want to visit our Facebook page at [https://www.facebook.com/schhwmg/photos\\_stream?tab=photos\\_albums](https://www.facebook.com/schhwmg/photos_stream?tab=photos_albums).

After completing The BOS class and all 10 cluster classes, you are scheduled to take our required Practicum sessions. The Practicum allows you to make a cheese board with experienced members of the Guild - usually 1 instructor for 2 new students. It takes you thru all steps in the project using a lot of the equipment in the woodshop. See the next page for more details.

Make sure you check the Cluster Class dates and times on your attached schedule.

The Guild offers new members the following at very reasonable cost:

Aprons - stop by the front office to purchase one. The Guild now carries 2 styles, the broad shoulder and the cross back which is slightly longer, and sells these aprons at our cost.



Broad Shoulder  
Cross Back

New member starter tool kit – the front office also stocks tape measures and small combination squares.



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End of Exhibit 4

### Exhibit 5 – WoodChicks Welcome letter

Welcome to the Sun City Woodshop!

You are getting this letter as an invitation to the WoodChicks, a Special Interest Group (SIG) within the shop. We have 3 nights per month set aside for our meetings/activities/projects:

First Monday 5:00-7:30 p.m.

The in-between Wednesday 5:00-7:30 p.m.

Third Monday 5:00-7:30 p.m.

We especially extend an invitation to join us on the First Monday of the month, which includes a special welcome to you, a new Woodshop member. Our reason for getting together has evolved over the years as more women have joined the Woodshop. Originally there were a few gals who got together for lunch, and now it has grown to an official SIG. Our desire is to help our members become more comfortable and competent in the use of the shop equipment and promote an environment of support while we work on both personal and Guild projects. Please email me ([LYNNEHOOS@gmail.com](mailto:LYNNEHOOS@gmail.com)) if you want to be a member of the WoodChicks SIG, and your name will be included in our emails letting you know the schedule of events for each month. There will be some months where the group does volunteer work on projects for the Guild to sell as fund-raisers. Other meetings will have “Exploratories” where we focus on a specific type of equipment and get the opportunity to become more comfortable its use. We also meet regularly for lunch and other purely social gatherings.

We encourage you to come and check us out! Membership is free, and the friendly, supportive atmosphere can't be beat!

See you around the shop!

Lynne Hoos  
WoodChicks SIG Chair  
[LYNNEHOOS@gmail.com](mailto:LYNNEHOOS@gmail.com)  
843-271-2114

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End of Exhibit 5



Exhibit 6 – Carvers Welcome Letter

Sun City Woodworkers and Model Makers Guild  
Woodcarving Special Interest Group (SIG)

Hello! You are getting this note because you have shown some interest in carving.

The SIG welcomes anybody interested in carving, regardless of skill level. We have some very experienced carvers that can guide you as you get started in carving. Free lessons! Woodcarving tools and safety equipment are available for use by members until they become skilled enough to know what kind of tools they would like to purchase on their own. The SIG also has a growing library of books and articles with step-by-step instructions on carving a variety of projects including Santas, Angels, Birds (and other Animals), Signs, Fish, and many other unique projects that you may be interested in. New members will need to join the Guild and complete BOS (Basic Orientation and Safety Training).

We meet every Wednesday from 9-11 AM in the Guild Resource Room or outside by the trains in warm weather (bring a chair!). We have a 50-50 balance of men and women that regularly carve with our group. Stop by to see us and what we are working on; we love to show our work to others!

If you have any questions, please contact me. I hope to see you soon.

Mark Parsons, SIG President

631-792-5621

[RPFDEMT@GMAIL.COM](mailto:RPFDEMT@GMAIL.COM)

And

There is also a handout. Both are provided by the Carver SIG President

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End of Exhibit 6

Exhibit 7 – new member CAM charge

**Sun City Hilton Head Community Association, Inc.**  
**Charter Club Member Charge Authorization** 46292

(Club Name) \_\_\_\_\_  
CA. No.: 447050 Charge Amount \$ 107 Date: 3/3/22  
MCCUNE, MARC  
Name: (Last, First) (Please Print)  
Item:  Dues  Training  Other B10 C48 E32  
I authorize Sun City Hilton Head Community Association, Inc. to charge my member account  
for the amount and the items listed above.  
\_\_\_\_\_  
Signature

Form CC-101 rev 01/10

End of Exhibit 7 \_\_\_\_\_

Exhibit 8 – Member P-Card notification email

Subject - Woodworker Guild - Privilege Card Issuance

Message –

Congratulations! your privilege card has been printed and will be in the badge holder box in the front office tomorrow.

As a reminder, below is some information from the operations manual regarding obtaining and retaining your p-card. Since you are entering the P-card process mid-year the requirements for retaining your p-card for 2022 will be prorated. It is your responsibility to make sure you have accumulated the necessary volunteer hours in the proper categories by 12/31/22 to retain your p-card.

2.2.4 P-Card Name Badges

Members who hold a Gold Card and contribute significantly and consistently to the operation of the shop may be awarded a colored name badge called a Privilege Card (P-Card).

To qualify for a P-Card, an individual must:

Possess a Gold Card; AND

Have a minimum of 48 hours of annual volunteer activity with at least 24 of those hours from participating as Manager, Assistant Manager, Mentor, Instructor, or Board Member; AND

Attend and successfully complete the “Red Apron” Training class; AND

Comply with other requirements articulated in the P-Card Application.

- OR -

Possess a Gold Card; AND

Be recognized by the Board of Directors as having special skills or providing a special service to benefit the Guild, AND

Attend and successfully complete the “Red Apron” Training class; AND  
Comply with other requirements articulated in the P-Card Application.

Volunteer hours include hours accumulated and reported during the previous four quarters (as opposed to a calendar year). The P-Card Committee may also consider those volunteer hours a member commits to provide during the next four quarters.

P-Card holders can use the shop during the hours when the shop is closed (see exceptions below) to the general membership, if at least two P-Card members remain in the shop. One P-Card member must wear/assume the duties of the Red Apron. The exceptions to this rule are:

Cluster Training Days (1<sup>st</sup>& 2<sup>nd</sup> Tuesdays and Thursdays starting in weeks within a month that have both days in them, from August through April. There are generally no classes in May, June, or July. Check the Guild calendar);

During special events (for example in days prior to the annual Open House. Check the Guild calendar);

During community-wide emergencies (i.e., hurricane evacuations);

Other exceptions determined by the Board of Directors.

On Cluster Training days (Tuesdays and Thursdays), the only members permitted in the shop are Cluster Instructors teaching or preparing to teach and students scheduled for each

Cluster. Additionally, selected Advanced classes, can be held to promote more efficient use of shop resources. Upon completion of a Cluster class, students must leave the shop unless they have another class immediately following a just completed class. The first and second Tuesday and Thursday of each month are generally reserved for BOS and Cluster training.

P-Card holders have additional responsibilities. During normal shop hours, they are to augment the supervision and guidance of the Shop Manager by ensuring members use equipment properly and safely. If they observe a member acting recklessly or unsafely, they must intervene directly or advise the Shop Manager. Outside of shop hours, they are each responsible for the safety and security of the entire shop and one of the P-Card holders must wear the Red Apron and assume the responsibilities of a regular Shop Manager, filling out the shop opening/closing paperwork, approving lumber sales, etc. If a Red Apron shop monitor leaves the building, another P-Card holder must assume the duties of the Red Apron Shop Monitor. If no one is willing to assume the Red Apron duties, the Red Apron Manager shall announce that the shop is closed, and all present must leave the building.

P-Cards are awarded and rescinded by the P-Card Committee based on a periodic review of members to ensure that they are maintaining their qualifications. The review of incumbent P-Card holders is based on the prior year’s activity or portions thereof as determined by the P-Card Committee. The P-Card Committee may also issue P-Cards to others based on special circumstances. Following this review, P-Cards will be issued in a new color or a new year date will be printed on them. Only the holders of the updated P-Cards will be allowed the privileges stated above.

The Secretary is responsible for the calculation of qualifying hours for P-Card members. This calculation should be performed each quarter with raw data being received from Coordinators of the base roles stated above and the front office check in data for certain roles. Raw data should be provided to the Secretary by the 5<sup>th</sup> workday following the end of each quarter. Volunteer

hours should be posted by the 10<sup>th</sup> workday following the end of each quarter for members to review. The P-Card committee consisting of the Vice President (Chairman), the Secretary, and the Treasurer shall conduct an annual review in the first quarter of each year of the P-Card holder volunteer hours. The P-Card committee will recommend P-Card members for the year at the January BOD meeting. The BOD will review the recommendations of the committee and adjust based on circumstances of each P-Card member. The list of approved P-Card members will be made available for members by the end of January, together with P-Card badges.

The VP is the chair of the P-Card committee that includes the Secretary and Treasurer. They meet on a quarterly basis to review the continued holding of P-Cards by members based on volunteer hours and comments from BOD members. An email among the Committee members is sufficient to grant approval of a P-Card to a member assuming that they have the support of the respective BOD Director for the volunteer role that they seek.

Members can be awarded a P-Card at any time based on their exhibited volunteer efforts, long term commitment to the volunteer area of interest and their level of expertise.

The process for a Guild member to gain a potential P-Card is as follows:

They must exhibit some level of volunteerism and expertise

They must commit to sustained effort in key volunteer area

48 hours annual volunteer time with at least half in key volunteer area

They request a P-Card through appropriate BOD member

Basic Instructors → Clusters & Practicum Director

Advanced Instructors → Advanced Training Director

Shop Managers & Mentors → Manager & Mentor Director

Special Projects & Furniture Repair → Front Desk & Concessions Director

Lathe Mentors → Vice President

Tool Monitor Trainers & Leaders → Equipment & Supply Director

Maintenance, Shop or Safety Administrator Support → President

The BOD member recommends the volunteer for P-Card

The volunteer must take Red Apron training

P-Card Committee approves recommendation

## 2.15 Off Shop Hours Procedures

The term “first person” is defined as the first P-Card individual not teaching.

Off-hours operation is only open to P-Card members who are required to maintain a safe and clean operation during such usage.

The following guidelines are required for off-hours usage:

The first P-Card member entering the shop will take on the duties of Shop Monitor and will wear the Red apron. They must follow the shop opening procedures and fill out the shop opening report. These responsibilities include, turning on the lights, checking the saw dust collection barrel, making sure all equipment that is not locked out of service, is operational. The Red apron member assumes the same responsibilities of a regular shop manager such as checking lumber purchases and requiring compliance with safety and cleanliness guidelines.

When leaving the shop, the Shop Monitor is to pass the red apron and duties to another P-Card holder. At the end of the day, or as otherwise needed, the Shop Monitor is to empty the barrel, if

needed, make sure the shop is clean, turn off main air supply, complete the Shop Closing Report, turn off the lights and make sure the shop is locked and secure.

Instructors who are teaching a class are not to assume the duty of Shop Monitor. However, if they are the first or last person in the shop, they are required to complete the Shop Opening/Closing Reports respectively. If while teaching a class and they are the Shop Monitor another P-Card holder comes into the shop, the new P-Card holder will take on the Shop Monitor role, allowing them to get back to being just the instructor.

Mike Thomas  
15 Lacebark Lane  
Bluffton, SC 29909  
H - 843.705.2715  
C - 843.298.9214

End of P-Card Notification Message

End of Exhibit 8

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**Exhibit 9 – Member listing and non-renewed member listing for office**

Send email to all board members, Tool Room Leader, Shop Administrator, Jim Renauer, Shawn Fogarty

☛ Sun City Woodworkers Guild Membership Listing as of 5-1-2022

Confidential - Club Use Only - Do Not Copy									
CAM #	Last Name	First Name	Address	Home Phone	ICE Number	ICE Contact	Email	P-CARD	Attended BOS?
447019	ACKERMAN O'BRIEN	ANNE	43 SUMMERPLACE DRIVE		843-726-1066	JOAN	anneackermanobrien@gmail.com		Yes
441946	ADAMS	DIANE	205 HONEY HILL DRIVE	843-705-2629	843-422-1332	Jim Lowell	dianead14@gmail.com		Yes
444834	ADAMS	ROBERTA	31 SPRING BEAUTY DRIVE	843-705-3691	617-875-0575	Jack	robertab42@hargray.com		Yes
451927	ADASE	RICHARD	9 DEVANT LANE	908-906-4623	908-906-4624	Rita	RICKROCK47@GMAIL.COM		Yes
451928	ADASE	RITA	9 DEVANT LANE	908-906-4624	908-906-4623	Richard	rm0848@gmail.com		Yes
446809	AKEY	MICHAEL	42 BASKET WALK DRIVE	413-303-9716	413-303-9716		mdakey@yahoo.com		Yes
439182	ALESCZYK	CINDY	1379 NORTHLAKE BLVD	215-317-0092	267-454-8724	Mark	SIND610@YAHOO.COM		Yes
439181	ALESCZYK	MARK	1379 NORTHLAKE BLVD	267-454-8724	215-317-0092	Cindy	MALESCZYK@VERIZON.NET	P-CARD	Yes
446342	ALLEN	AMY	4 DORY COURT	410-830-9793	410-830-9695		agallen54@gmail.com		Yes
437215	ALLEN	CLARENCE	101 HUNLEY COURT	843-706-3745	843-368-4208		claall10@yahoo.com		Yes

There are 3 hidden columns between “email” and “PCard” that contain data that determine the data in the “P-Card” and “Addended BOS” columns. See previous saved reports on onedrive>treasurer>board of directors>membership>mm-dd-yy Guild Membership Listing.xlxs.

☛ <b>Non Renewing Members for 2022</b>						
The following members have not renewed as of 5/1/22. To Renew, Member MUST complete renewal app and write a check or CAM charge BEFORE being admitted into the shop. <b>NO EXCEPTIONS.</b> Contact Mike Thomas - 843.298.9214 if there are any questions.						
Last Name	First Name	New CAM #	Date Paid	Amount	CA #	Check #
Allen	Clarence	5356900				
Allen	John	442276				
ANDERSON	ELAINE	450015				
Ankney	Robert	451207				
Aronoff	Gene	441024				
ARRIERO	JACOB	527261				
Attreed	Raymond	451423				
AVEDON	ROY	446886				
Baily	Lynn	437637				
Bamman	John	449768				
Barnberg	Joel	1001200				

The above listing is generated by combining the non-renewed members from the current year plus non-renewed members from the preceding 2 years. The shell of this report is located in onedrive>treasurer>yyyy-Membership.xlxs (where yyyy is the current year). Use the “Not Renewed” tab. The current year non-renewed members data can be obtained from the onedrive>treasurer>yyyy-Membership.xlxs “yyyy Members” tab. The 2 previous years data is stored in the onedrive>treasurer>yyyy-Membership.xlxs “Not Renewed” tab. Annually the 2 previous years data should be updated.

End of Exhibit 9

**Exhibit 10 – Member listings for board members, SIG leaders, and other leaders. Railroad**

## Send email to President, Vice President, RR-SIG President, RR-SIG Treasurer

cam_id	surname	name	address	home_phone	ice_number	ice_contact	email	model_railroader
1267601	BECKER	HENRY	16 BALDWIN LANE	843-705-9058	843-705-9058	Irma Becker		TRUE
1656900	BIALKO	RODNEY	4 SPRING VISTA LANE	843-705-2465	843-705-2465	Rodney Bialko	rbialko@gmail.com	TRUE
1984600	BURKE	JOSEPH H.	161 HAMPTON CIRCLE	843-705-9606	843-705-9606		jbhhi@roadrunner.com	TRUE
1147500	CORNELIUS	WILLIAM	8 FICKLING COURT	843-705-7650	843-705-7650		bcorn@hargray.com	TRUE
5173100	CUBIE	JAMES	95 COBURN DRIVE WEST	843-991-1059	843-991-1054		jimcubie@gmail.com	TRUE
1586700	CUDAHY	BRIAN	8 DAWN SKY COURT	843-705-2689	843-705-2689		bjcudahy@gmail.com	TRUE
1995700	DANCEY	GRAYSTON	105 COL COLCOCK COURT	843-705-2077	843-705-2077		danceyg@aol.com	TRUE
5104300	DANNHARDT	ROBERT	7 SALTUS COURT	201-532-0298	973-610-1518	Nancy	bobhart@aol.com	TRUE
1419800	DAVIS	JON	25 NIGHTINGALE LANE	843-263-2802	843-263-2880	Jon Davis	jonsdavis35@gmail.com	TRUE
1603700	DEL POZZO	NICK	11 ROSE BUSH LANE	843-705-3088	843-705-3088		delpozzo.nick@gmail.com	TRUE
5399100	GRELLA		319 HEATHWOOD DRIVE	000-000-0000				TRUE
1731100	HENRY	CAROL	30 NORTH BIRCHWOOD CIR	843-705-4730	843-705-4730	Baril	carolhenry@hargray.com	TRUE

## Carvers

### President, Vice President, Carver SIG Leader

cam_id	surname	name	address	home_phone	ice_number	ice_contact	email	wood_carver
5251300	COMITO	ATTILIO	308 RIVERGRASS LANE	843-707-7934	743-707-7934	Gloria	tglo75@aol.com	TRUE
5415500	DAUPHIN	JOSEPH	849 RIVERGRASS LANE	919-499-2305	919-499-2305	LaWanda	jpdauphin@gmail.com	TRUE
1580300	DORAN	CHARLES	1 GENERAL PREVOST COURT	843-705-2374	843-705-2374		doran.chuck@gmail.com	TRUE
5423100	DOUGHERTY	DANA	454 PROMENADE LANE	843-645-6567	302-382-9536		originaldinoflakes@gmail.com	TRUE
5292200	GREFALDA	HECTOR	301 COL THOMAS HEYWARD ROAD	843-707-1504	843-415-3652	Neilia	camgref@empireone.net	TRUE
1034702	HARTEN	JACQUELINE	72 PADGETT DRIVE	585-281-7328	843-540-3467		jharten2@prodigy.net	TRUE
5272101	HOWK	DAVID	30 CYPRESS HOLLOW	502-322-0992	502-526-2610	Helena	STUDIOHOWK@GMAIL.COM	TRUE
1854801	KRUSE	ELAINE	6 VESPER WAY	843-705-4086	843-505-3739	JAMES CRUZE	jimelaine@hargray.com	TRUE
5417500	LOMBINO	JOHN	705 KNOLLWOOD COURT	843-781-6755	585-747-4498		tdlombinotc@yahoo.com	TRUE

## WoodChicks

### Send email to President, Vice President, WoodChicks SIG Leader

CAM #	Last Name	First Name	Address	PrimaryContact#	ICE #	ICE Contact	Email	Woodchicks
441946	ADAMS	DIANE	205 HONEY HILL DRIVE	843-705-2629	843-422-1332	Jim Lowell	dianead14@gmail.com	TRUE
444834	ADAMS	ROBERTA	31 SPRING BEAUTY DRIVE	843-705-3691	617-875-0575	Jack	robertab42@hargray.com	TRUE
439182	ALESZCZYK	CINDY	1379 NORTHLAKE BLVD	215-317-0092	267-454-8724	Mark	SIND610@YAHOO.COM	TRUE
446342	ALLEN	AMY	4 DORY COURT	410-830-9793	410-830-9695		agallen54@gmail.com	TRUE
6212644	ALLEN	KATHERINE	16 SUNBEAM DR	415-466-5985	574-276-5630	LEANDRA	LHALLEN75@COMCAST.NET	TRUE
440273	ALLEN	LEANDRA	16 SUNBEAM DR	574-276-5630	574-276-6364	DARREN	LHALLEN75@COMCAST.NET	TRUE
675302	AMARAL	DONNA	24 HOLLY RIBBONS CIRCLE	401-391-1681	401-523-5749	DAVID	CHARLEA1620@GMAIL.COM	TRUE
441488	ARCHER	JANE	2 CLAIBORNE COURT	843-781-6777	865-809-9781	CHRIS ARCHER	janelarcher@gmail.com	TRUE
6204883	BAIK	JE	7 DEVANT COURT	646-573-8480	917-692-3715	JOHN	JEKAIK@GMAIL.COM	TRUE
6160574	BARRETT	BARBARA	459 Col Thomas Heyward	843-290-2023	843-683-8180	KENNY	barbarabarrett5@icloud.com	TRUE
444652	BARRETT	BONNIE	303 HAMPTON PLACE	440-226-9769	440-487-7396		BOSCOBON@YAHOO.COM	TRUE
675306	BELL	MARIAN	10 PLYMOUTH LANE	843-707-9802	973-580-8810	RON	THEBELLTEAM@AOL.COM	TRUE
450229	BERLIER	DIANE	691 RIVERGRASS LANE	843-705-5026	224-678-3307	JIM	DADBANKER@sbcglobal.net	TRUE
442317	BERNICK	ROSALIE	215 NORTHLAKE BLVD	304-707-1537	304-616-2977	NILES	BERNICKR@GMAIL.COM	TRUE
439110	BESS	MICHELLE	1345 NORTHLAKE BLVD	214-454-7751	469-767-2311	Charlie	MG.BESS@LIVE.COM	TRUE
439303	BLAKEY	KATHI	14 HAMILTON DRIVE	843-707-7414	440-258-8246	ROD BLAKEY	Kathi.blakey@gmail.com	TRUE
437732	BROOKS	CAROLINE	11 BECKET PLACE	508-835-2540	774-262-4471	Bud	BROOKSC13@GMAIL.COM	TRUE
6213519	BULLOCK	SHANNON	481 DREAMSCAPE DR.	858-863-3111	858-863-3902	JOE	ICYZEPHYR65@GMAIL.COM	TRUE

## Turners

Send email to President, Vice President, Turner SIG Leader

cam_id	surname	name	address	home_phone	ice_number	ice_contact	email	wood_turner
1486003	ADAMS	DIANE	205 HONEY HILL DRIVE	843-705-2629	843-705-2629	Gloria	dianeatsouth@aol.com	TRUE
5015001	ALLEN	AMY	4 DORY COURT	843-645-9695	843-645-2044		agallen54@gmail.com	TRUE
1772700	ALTMAN	STEVEN A	48 HOLLY RIBBONS CIRCLE	843-707-7116	843-548-0179		altmansa41@gmail.com	TRUE
5094600	ANDERSON	CHARLES	317 SERENITY POINT DRIVE	843-707-7832	843-707-7832		canders65@sc.rr.com	TRUE
1378600	ANKNEY	ROBERT	6 SUNFLOWER LANE	843-705-2875	614-296-1250		cbank66@gmail.com	TRUE
1889400	ARMSTRONG	HUGH	52 REEDY PLACE	843-705-7966	262-344-6478		hughandlana@yahoo.com	TRUE
1994400	BARDEN	KENNETH	12 TRESPOT LANE	843-705-7111	843-705-7111		klibarden@aol.com	TRUE
5099100	BASILE	JOHN	36 HAMILTON DRIVE	843-707-7479	508-776-2783	PEGGY	john1934@comcast.net	TRUE
1812800	BEAM	ALFRED	15 RAVEN GLASS LANE	412-445-9561	412-855-6599	Al Beam	abeam123@aol.com	TRUE
5051800	BEER	PATRICK	7 GRAHAM COURT	704-562-1148	704-560-5929	Patrick Beer	patrickbeer@mac.com	TRUE
1656900	BIALKO	RODNEY	4 SPRING VISTA LANE	843-705-2465	843-705-2465	Rodney Bialko	rbialko@gmail.com	TRUE
1513000	BURKE	JAMES W	63 REDTAIL DRIVE	843-705-6339	843-705-6339	James Burke	jburke17@sc.rr.com	TRUE
5183501	CALDIE	SCOTT	7 DORY COURT	267-615-6787	410-693-2958		stcaldie@gmail.com	TRUE
5033100	CARDALI	SALVATORE	8 FRENCH GARDEN LANE	843-705-4838	908-239-1527	Sai Cardali	kayc@hargray.com	TRUE
1830601	CARPIO	ELIA	28 CRESCENT CREEK DRIVE	301-340-3097	301-705-8300		susie.carpio@gmail.com	TRUE
5077302	CARTER	BRENDA	490 HAVENVIEW LANE	843-707-7660	443-534-0343		bjc42@live.com	TRUE
1619000	CHRIST	LEONARD	14 CHESWELL COURT	843-705-7590	843-838-0077	Len Christ	century22@hargray.com	TRUE
1912901	CLINE	DOUGLAS	56 KING'S CREEK DRIVE	843-705-9306	781-267-5352	Pat	dacline@hargray.com	TRUE
1744200	COLLIUKOS	CHRISTIE J	99 CYPRESS RUN	843-705-4769	843-705-4769		ccollukos1@gmail.com	TRUE
5104000	COLLINS	JOHN	21 BELVEDERE LANE	843-707-7274	561-951-0845	ANN COLLINS		TRUE
1451200	DE SIMONE	DESI	81 LAZY DAISY DRIVE	843-705-9300	843-705-9300	Desi De Simone	jdcomputing@msn.com	TRUE
1443700	DIAMOND	WALTER	15 PINYON DRIVE	843-705-6167	843-707-1300	Linda Harrison	walter750510@gmail.com	TRUE

## Tech

Send email to President, Vice President, Tech SIG Leader

CAM #	Last Name	First Name	Address	PrimaryContact#	ICE #	ICE Contact	Email	Technology SIG
444906	ANDERSON	CHUCK	317 SERENITY POINT DRIVE	843-707-7832	843-707-7832	LINDA	canders65@sc.rr.com	Yes
448841	BEDIENT	JIM	57 CYPRESS HOLLOW	843-941-4414	843-941-4414	Mary Carmen	jim.bedient@gmail.com	Yes
439109	BESS	CHARLIE	1345 NORTHLAKE BLVD	469-767-2311	214-454-7751	Michelle	CHAS.BESS@GMAIL.COM	Yes
447020	DECKER	DONALD	43 SUNBEAM DRIVE	843-707-1041	269-532-3877	DONALD DECKER	dd50@aol.com	Yes
449962	FORRY	MARK	654 PROMENADE LANE	513-519-4274	513-519-4271		jarvis4e@gmail.com	yes
6108714	GLEBA	RALPH	2036 NORTHLAKE BLVD	734-787-6934	734-748-7807	LAURIE	RALPHGLEBA@GMAIL.COM	yes
448916	HERRIN	DICK	574 RIVERGRASS LANE	843-290-7099	843-415-2707	Heidi Herrin	dickherrin@msn.com	Yes
437002	HEUSLER	MICHAEL	10 MILKMAID LANE	636-328-1847	561-374-9499	nancy	MICHAELHEUSLER@ICLOUD.COM	Yes
6170156	HUBELBANK	JAY	203 Landing Ln	845-270-1478	201-390-7395	Mitch	mcjj29909@gmail.com	yes
451894	LAFERRIERE	MICHAEL	9 CLOVER DRIVE	847-641-1066	847-917-6975	SUE LAFERRIERE	mikelaferriereschww@gmail.com	Yes
446231	LIVECCHI	RON	394 VILLAGE GREEN LANE	716-207-5610	716-207-5611	LYNN	kidfromsc@gmail.com	Yes
438386	LOLLIS	DENNIS	12 ANDOVER PLACE	843-705-6630	843-705-6630	BONNIE GREGORY	dlolllis@hotmail.com	Yes
443856	MEEHAN	TERENCE	28 CARAVELLE LANE	843-707-7591	631-235-9592	Terry Meehan	TCMPFM@GMAIL.COM	Yes
446138	MICHELINI	RAY	39 DONCASTER LANE	631-488-8884	631-827-2631	Anita	RPMICHELINI@GMAIL.COM	Yes
438859	MORRIS	JOAN	128 HAMPTON CIRCLE	843-705-6132	951-719-0567		JOANMORRIS@HARGRAY.COM	Yes

## Lathe Class Graduates

Send email to President, Vice President, Advanced Training Director, Lathe Class Instructors,

Last Name	First Name	Address	PrimaryContact#	ICE #	ICE Contact	Email	Lathe Setup	Basic Lathe Certified Date	Advanced Lathe Certified Date
1	ADAMS	DIANE 205 HONEY HILL DRIVE	843-705-2629	843-422-1332	Jim Lowell	dianead14@gmail.com		26-Mar-15	14-May-15
2	AKAY	MICHAEL 42 BASKET WALK DRIVE	413-303-9716	413-303-9716		mdakey@yahoo.com	19-Jan-19	05-Jan-00	20-Nov-14
4	ALESCZYK	CINDY 1379 NORTHLAKE BLVD	215-317-0092	267-454-8724	Mark	SIND610@YAHOO.COM		29-Apr-18	12-Dec-18
5	ALESCZYK	MARK 1379 NORTHLAKE BLVD	267-454-8724	215-317-0092	Cindy	MALESCZYK@VERIZON.NET	19-Jan-19	31-Jan-19	13-May-19
6	ALLEN	AMY 4 DORY COURT	410-830-9793	843-645-2044		agallen54@gmail.com		24-Jan-13	26-Mar-13
7	ALLEN	DOUGLAS 150 KING'S CREEK DRIVE	865-604-6450	865-604-6450		DALLEN@STRATAG.ORG	16-Feb-19	31-Jan-19	
8	ALTMAN	STEVEN A 48 HOLLY RIBBONS CIRCLE	843-707-7116	843-548-0179		altmansa@sc.rr.com		23-Sep-10	26-Sep-13
9	ANDERSON	CHARLES 317 SERENITY POINT DRIVE	843-707-7832	843-707-7832	LINDA	canders65@sc.rr.com		11-Sep-14	23-Oct-14



## P-Card Members

Send email to President, Vice President, Past President, Advanced Instructor BOD Member, Cluster Instructor BOD member, Secretary, BOD Member managing Managers, Safety

CAM #	Last Name	First Name	Address	PrimaryContact#	ICE #	ICE Contact	Email	P-Card Award Date	Shop Mgr	Asst Shop Mgr	Mentor	Lathe Mentor	Adv Inst	Cluster Inst	Other P-Card	Badge Title Lookup
547900	ALESZYK	MARK	1379 NORTHLAKE BLVD	267-454-8724	215-317-0092	Cindy	MALESZYK@VERIZON.NET	17-Aug-18								PRIVILEGE - 2019
509460	ANDERSON	CHARLES	317 SERENITY POINT DRIVE	843-707-7832	843-707-7832	LINDA	canders65@sc.rr.com	01-Jan-17	Yes	Yes						PRIVILEGE - 2019
1818800	ANTONELLI	MICHAEL	16 RAVEN GLASS LANE	843-707-7408	843-707-7408	VICKIE ANTONELLI	mike.micky63@gmail.com	01-Jan-17	Yes	Yes	Yes	Yes	Yes	Yes		MENTOR - 2019
1594400	BARDEN	KEN	12 TRESMOT LANE	843-705-7111	734-476-1622	CHARLOTTE BARDEN	klbarden@aol.com	01-Jan-17	Yes	Yes	Yes	Yes	Yes	Yes		MENTOR - 2019
5099100	BASILE	JOHN	36 HAMILTON DRIVE	508-776-0333	508-776-2783	PEGGY	john1934@comcast.net	01-Jan-17	Yes	Yes	Yes	Yes	Yes	Yes		MENTOR - 2019
5309100	BASS	BOB	356 NAUTICAL LANE	203-767-5552	203-231-9283	Janet	ed.r.bass@gmail.com	28-Sep-19	Yes	Yes						PRIVILEGE - 2019
1131200	BEDIENT	JAMES	57 CYPRESS HOLLOW	843-941-4414	843-968-4813	Jim Bedient	jim.bedient@gmail.com	02-Jan-17	Yes	Yes	Yes	Yes	Yes	Yes		MENTOR - 2019
2514700	BERNIER	GEORGE	24 BASKET WALK DRIVE	770-608-0344	770-354-4288	Elaine	GEORGE.BERNIERSR@GMAIL.COM	17-Aug-18								PRIVILEGE - 2019
05492900	BESS	CHARLIE	1345 NORTHLAKE BLVD	469-767-2311	214-454-7751	Michelle	CHAS.BESS@GMAIL.COM	01-Jul-18					Yes			BOD BOD MEMBER AT LA

Administrator, Shop Administrator

## First Aid Members

Send email to President, Vice President, Safety Administrator, BOD member managing Managers, Shop Administrator

CAM #	Last Name	First Name	Address	PrimaryContact#	ICE #	ICE Contact	Email	First Aid Vol
6205768	ANDERSON	TOM	77 NIGHTINGALE LANE	843-645-2016	360-544-2795		FLIGHTDIVE@GMAIL.COM	Yes
442317	BERNICK	ROSALIE	215 NORTHLAKE BLVD	304-707-1537	304-616-2977	NILES	BERNICKR@GMAIL.COM	Yes
437151	BLAIS	MOE	100 HOLLY RIBBONS CIRCLE	843-707-1806	843-707-7643		mblais61@gmail.com	Yes
451576	BRAYDEN	JIM	835 MYSTIC POINT DRIVE	843-304-2684	978-430-9034		jkbrayden@gmail.com	Yes
451625	BUSHNELL	PAT	85 BILTMORE DRIVE	760-468-5579	760-468-5579	Jeff	HONDASTJEFF@AOL.COM	Yes
440702	DITOMMASO	FRAN	173 HAMPTON CIRCLE	843-705-5871	843-705-5871	LINDA	frandito@gmail.com	Yes
445513	FARNHAM	MICHAEL	35 LAKE SOMERSET CIRCLE	203-530-5830	843-384-0925	Bobbie Cuvage	MJF88@MSN.COM	Yes
441040	GREENE	MATT	183 NORTHLAKE VILLAGE COURT	443-857-0690	410-302-7963	Beth	DRMRGREENE@GMAIL.COM	Yes
439494	GRUNDLEGER	BARRY	1421 NORTHLAKE BLVD	908-656-4404	908-581-8253	Randy	barryg51@gmail.com	Yes
6018768	GUGLIELMI	JOHN	765 RIVERGRASS	203-470-3600	203-231-6379	PAULA	gugie11@yahoo.com	Yes
563999	JENKINS	MARK	16 BOURQUINE WAY	210-314-0600	210-441-0271	CAROLYN	jenkins3449@gmail.com	Yes

## Tour Guide Listing

Send email to President, Vice President, Past President

CAM #	Last Name	First Name	Address	PrimaryContact#	ICE #	ICE Contact	Email	Tour Guide
445609	BASS	BOB	356 NAUTICAL LANE	203-767-5552	203-231-9283	Janet	ed.r.bass@gmail.com	Yes
439110	BESS	MICHELLE	1345 NORTHLAKE BLVD	214-454-7751	469-767-2311	Charlie	MG.BESS@LIVE.COM	Yes
451576	BRAYDEN	JIM	835 MYSTIC POINT DRIVE	843-304-2684	978-430-9034		jkbrayden@gmail.com	Yes
452464	COLLUKOS	CHRIS	99 CYPRESS RUN	843-705-4769	843-705-4769		ccollukos1@gmail.com	Yes
440702	DITOMMASO	FRAN	173 HAMPTON CIRCLE	843-705-5871	843-705-5871	LINDA	frandito@gmail.com	Yes
450902	DOMBROWSKI	JOE	76 HOLLY RIBBONS CIRCLE	302-563-5648	302-563-5672	Carol	sawhorse76@gmail.com	Yes
6019147	FIANTACA	ED	1098 Promenade Lane	828-242-2649	828-242-2629		edfiantaca@gmail.com	Yes
491873	GATES	MARY MARGARET	9 REDTAIL DR	703-969-3904	912-441-5786	CATHY	MMGATES978@MSN.COM	Yes
448051	GOLDBERG	RALPH	5 SUNBOW LANE	843-705-5279	973-495-6496	EILEEN	ralph32835@gmail.com	Yes
450701	HOUSEAL	SHARON	72 HOLLY RIBBONS CIRCLE	843-705-5419	843-705-5419	Ed	eshouseal1980@gmail.com	Yes
6170156	HUBELBANK	JAY	203 Landing Ln	845-270-1478	201-390-7395	Mitch	mcj29909@gmail.com	Yes

## Red Apron Trained Members

Send email to President, Vice President, Advanced Instructor BOD Member, Cluster Instructor BOD member, BOD member managing Managers

CAM #	Last Name	First Name	Address	PrimaryContact#	ICE #	ICE Contact	Email	Red Apron Trained
439181	ALESZYK	MARK	1379 NORTHLAKE BLVD	267-454-8724	215-317-0092	Cindy	MALESZYK@VERIZON.NET	1-1-2000
444906	ANDERSON	CHUCK	317 SERENITY POINT DRIVE	843-707-7832	843-707-7832	LINDA	canders65@sc.rr.com	1-1-2000
440244	ANTONELLI	MIKE	16 RAVEN GLASS LANE	843-707-7408	843-707-7408	VICKIE ANTONELLI	mike.micky63@gmail.com	1-1-2000
438598	BARDEN	KEN	12 TRESMOT LANE	843-705-7111	734-476-1622	CHARLOTTE BARDEN	klbarden@aol.com	1-1-2000
445673	BASILE	JOHN	36 HAMILTON DRIVE	508-776-0333	508-776-2783	PEGGY	john1934@comcast.net	1-1-2000
445609	BASS	BOB	356 NAUTICAL LANE	203-767-5552	203-231-9283	Janet	ed.r.bass@gmail.com	1-1-2000
448841	BEDIENT	JIM	57 CYPRESS HOLLOW	843-941-4414	843-941-4414	Mary Carmen	jim.bedient@gmail.com	1-1-2000
439109	BESS	CHARLIE	1345 NORTHLAKE BLVD	469-767-2311	214-454-7751	Michelle	CHAS.BESS@GMAIL.COM	1-1-2000
439110	BESS	MICHELLE	1345 NORTHLAKE BLVD	214-454-7751	469-767-2311	Charlie	MG.BESS@LIVE.COM	1-1-2000
451576	BRAYDEN	JIM	835 MYSTIC POINT DRIVE	843-304-2684	978-430-9034		jkbrayden@gmail.com	1-1-2000
445737	BROWN	DON	36 WAINWRIGHT DRIVE	843-705-6793	740-215-1253	Brenda	dfbrown0309@aol.com	1-1-2000
450346	CALDIE	SCOTT	7 DORY COURT	267-615-6787	773-680-1759		stcaldie@email.com	1-1-2000

End of Exhibit 10

## Exhibit 11 – Woodworker Guild Financial Status

Send email to all BOD members.

Subject - Woodworker Guild Financial Status - MM/1/YYYY

2021 Membership – Prior Year

Renewals - 766

New - 72

Total – 838

2022 Membership – Current Year

Renewals - 676

New - 134

Total – 810

2023 Membership – Next Year (Begin reporting this data as new members are scheduled for January classes)

Renewals - 678

New - 71

Total – 749

Checking account balance - \$71,234

Certificates of Deposit - \$124,000

Total Funds - \$195,234

Receivables - 12/1 & 1/1 cam submissions - \$47,543

    Mailbox - \$146

    Various - \$0

Payables - Sales Tax - \$0

Year to date cash flow - See attached PDF file – Produce PDF file of YTD financial activity from Quicken

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End of Exhibit 11

Exhibit 12 – Prior Month Transaction Register

Transaction - Apr 2022 4/1/2022 through 4/30/2022									
Date range: Custom dates...		Subtotal by: Don't subtotal		Sort by: Account/Check#					
Edit									
Date	Account	Num		Memo	Category	Tag	Tax Item	Clr	Amount
<b>BALANCE 3/31/2022</b>									<b>104,174.72</b>
4/2/2022	WWMMG ...	6956	S		--Split--	--Split--	--Split--	R	-146.02
4/4/2022	WWMMG ...	6957	S		--Split--	--Split--	--Split--	R	-634.06
4/4/2022	WWMMG ...	6958	S		--Split--	--Split--	--Split--	R	-102.46
4/4/2022	WWMMG ...	6959			Specia...			R	-6.53
4/4/2022	WWMMG ...	6960	S		--Split--	--Split--	--Split--	R	-707.97
4/8/2022	WWMMG ...	DEP	S		--Split--	--Split--	--Split--	R	3,661.94
4/12/2022	WWMMG ...	DEP		February Activity	Accru...			R	10,408.06
4/14/2022	WWMMG ...	DEP		Jan-Mar Activity	Accru...			R	5,872.67
4/15/2022	WWMMG ...	DEP	S		--Split--	--Split--	--Split--	R	2,219.50
4/26/2022	WWMMG ...	DEP	S		--Split--	--Split--	--Split--	R	3,015.50
4/8/2022	WWMMG ...	6961			Purch...			R	-15.35
4/8/2022	WWMMG ...	6962			Purch...			R	-46.82
4/9/2022	WWMMG ...	6963		Zoom subscription 4/8/22 thru 4/7/22	Syste...			R	-158.89
4/11/2022	WWMMG ...	6964		carbide cutter inserts	Shop...			R	-68.64
4/12/2022	WWMMG ...	6965		2034169	Purch...			R	-2,103.50
4/14/2022	WWMMG ...	6966			Sales Tax			R	-0.14
4/15/2022	WWMMG ...	6967			Specia...			R	-56.29
4/18/2022	WWMMG ...	6968	S		--Split--	--Split--	--Split--	R	-1,966.92
4/19/2022	WWMMG ...	6969		library door bell	Shop...				-34.72
4/19/2022	WWMMG ...	6970			Main...			R	-79.88
4/20/2022	WWMMG ...	6971		Funeral Home Table	Specia...			R	-70.07
4/20/2022	WWMMG ...	6972	S		--Split--	--Split--	--Split--		-2,566.41
4/25/2022	WWMMG ...	6973		2034930	Purch...			R	-1,927.25
4/25/2022	WWMMG ...	6974	S	april activity	--Split--	--Split--	--Split--	R	-132.11
4/25/2022	WWMMG ...	6975		253280 & 252931	Main...			R	-27.44
4/25/2022	WWMMG ...	6976	S		--Split--	--Split--	--Split--	R	-1,777.95
4/29/2022	WWMMG ...	6977	S		--Split--	--Split--	--Split--	c	-120.38
4/30/2022	WWMMG ...	6978			Traini...			R	-19.95
<b>4/1/2022 - 4/30/2022</b>									<b>12,407.92</b>

End of Exhibit 12

## Exhibit 13 – Midmonth reminder email to cluster students

Send	From	mike.mtconsulting@gmail.com
	To	
	Cc	
Subject		Woodworker Guild - New Member Final Email Reminder - Your Woodworker Guild Cluster Classes begin 2/28/2022

For most of you, your first class (Basic Orientation and Safety (BOS)) begins 5:15pm Monday 2/28/22 at the woodshop. **NOTE THE CHANGE IN TIME FOR THIS CLASS. THE SCHEDULE YOU HAVE SHOWS 3:30PM OR 5:00PM – THE TIME HAS BEEN CHANGED TO 5:15PM FOR ALL STUDENTS.** It is imperative that you attend this class to move forward in your cluster classes. If you miss this BOS class, you cannot take any other classes and we will have to reschedule your entire cluster and practicum class series. **Please be mindful that cluster class slots are valuable. As you have probably experienced, we have a long waiting list to get into cluster classes. If for some reason you cannot attend BOS, please let me know with as much lead time as possible so we can reschedule another member to take your place. PLEASE, SHOW UP FOR YOUR FIRST CLASS.**

You will be given a set of safety glasses to keep when you check in. Denim shop aprons are available for a cost of \$22 to \$30 depending on apron style chosen. Twelve-foot tape measures and squares are required and are available at the shop. Respirators and hearing protection are also for sale. Closed toed shoes are required – no sandals are allowed in the woodshop at any time. If you want to take notes, bring a pen/pencil and paper. Please bring your Sun City Community identification card.

In the days following the BOS class, you take 10 cluster classes. You must successfully complete all 10 cluster classes to attend the practicum classes.

Your practicum classes are scheduled to begin the week following your final cluster class. You must attend all classes to receive your gold card which allows you access to all equipment in the woodshop with the exception of the lathes. You cannot skip or reschedule these classes. If you cannot attend a particular practicum class, you must reschedule all practicum classes.

Don't forget to access the New Member web site located at:  
<https://wwmmg.org/>

The cluster class student handouts are located under the BOS/Cluster/Practicum heading. Please read all cluster class handouts. There is no need to print them or bring them to your classes.

Also don't forget to visit the Woodworker Guild Sun City Web page. The Sun City Community web site is available only to residents of Sun City Hilton Head. Please visit our web page by navigating to the Woodworker and Modelmakers Guild community group on the [WWW.SunCityHiltonHead.org](http://WWW.SunCityHiltonHead.org) web page then selecting the Woodworkers and Modelmakers Guild club from the Community Groups.

End of Exhibit 13

## Exhibit 14 – Initial reminder email to cluster students

Send	From	mike.mtconsulting@gmail.com
	To	mrmel48@aol.com
	Cc	
Subject: A friendly reminder that your Woodworker Guild training classes begin Monday 4/4/22 at the woodshop.		
Mel Bailey2.pdf 43 KB		

A friendly reminder that your Guild training classes begin Monday 4/4/2022 at the woodshop. There may be some of you who already attended all your cluster classes and are just taking your Practicum classes.

Attached is your training schedule. Please look over your schedule and advise if there is a problem. Since we are working with 16 students every month and specific training classes are only offered one day a month, it is extremely difficult to reschedule a missed class. You can cancel and reschedule up to 1 week before BOS training with no penalty. If you cancel or reschedule within 7 days before BOS training, you will be assessed a penalty of \$45.

A copy of your training schedule will be handed out at that time. It is imperative that you attend this class to move forward in your cluster classes. If you miss the BOS class, we will have to reschedule your entire cluster and practicum class series. **Please be mindful that cluster class slots are valuable. As you have probably experienced, we have a long waiting list to get into cluster classes. If for some reason you cannot attend BOS, please let me know with as much lead time as possible so we can reschedule another member to take your place.**

You will be given a set of safety glasses to keep when you check in. Denim shop aprons are available for a cost of \$22 to \$30 depending on apron style chosen. Twelve-foot tape measures and squares are required and are available at the shop. Respirators and hearing protection is also available for sale. Closed toed shoes are required – no sandals are allowed in the woodshop at any time. If you want to take notes, bring a pen/pencil and paper.

Your practicum classes are scheduled to begin the week following your final cluster class. You must attend the Practicum classes to receive your gold card which allows you access to all equipment in the woodshop with the exception of the lathes. You cannot skip or reschedule these classes. If you cannot attend a practicum class, you must reschedule both practicum classes.

Don't forget to access the New Member web site located at

<https://wwwmmg.org/>

The cluster class student handouts are located under the BOS/Cluster/Practicum heading. Please read all cluster class handouts. There is no need to print them or bring them to your classes.

Also don't forget to visit the Woodworker Guild Sun City Web page. The Sun City Community web site is available only to residents of Sun City Hilton Head. Please visit our web page by navigating to the Woodworker and Modelmakers Guild community group on the

<https://www.suncityhiltonhead.org/>

web page then selecting the Woodworkers and Modelmakers Guild club from the Community Groups.

Mike Thomas  
15 Lacebark Lane  
Bluffton, SC 29909  
H - 843.705.2715  
C - 843.298.9214

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End of Exhibit 14

## Appendix 9: Safety Administrator's Responsibilities

The Safety Administrator's responsibilities include but are not limited to the following:

1. Makes policy recommendations to the BOD.
2. Provides support to the BOD and shop managers for the proper implementation and functioning of the program in the daily operation of the workshop.
3. Makes safety inspections of the workshop building, cooling, and heating equipment, fire extinguishers, first aid kits, electrical panels for security of panel doors.
4. Responds to serious injury or accidents in the workshop.
5. Provides guidance to the Training Director in matters relating to safety training. The instructor works in close liaison with that position.
6. Makes recommendations to the BOD for changes or additions needed to meet new laws or regulations.
7. Researches and prepares equipment safety storyboards and gains board concurrence for same.
8. Reviews the safety program to all new members during the BOS sessions.
9. Issues Safety Bulletins to membership after approval by BOD.
10. The Safety Administrator should be a year-round resident or has a BOD approved alternate to assume these duties during any extended time away from Sun City.
11. Performs other duties as required.

## Appendix 10: Shop Administrators Responsibilities

The Shop Administrator is responsible for facilitating the smooth and efficient operation of the shop. The Shop Administrator receives guidance and direction from the President and the BOD. The Shop Administrator will coordinate operational decisions among and with the managers/directors of the various functional areas. These functional areas include, but are not limited to, Training, Safety, Volunteer Positions (Shop Manager, Red Apron Shop Manager and Front Office), Special Projects, Procurement, Maintenance, Resource Center, and Special Interest Groups (SIGs).

Major decisions in shop configuration and operation will affect most of these functional areas as well as all Guild members. Therefore, these major decisions will remain in the purview of the BOD. The Shop Administrator coordinates and implements these major decisions using his/her best judgment. Routine decisions in operations can be initiated and implemented by the Shop Administrator with, in his/her judgment, the proper coordination, timing and use of resources. The Shop Administrator shall not make unilateral decisions that have a major impact.

With the Equipment & Supplies Director and Treasurer, the Shop Administrator conducts an annual inventory. Inventory forms will be forwarded to the BOD for review. Missing items or items disposed of will be deleted from Guild assets.

The Shop Administrator will attend all BOD meetings and is also chair of the Rules and Safety Committee (RSC).

The Shop Administrator cannot be present in the shop at all times, but the President, members of the BOD, Shop Manager, and Front Office should be able to contact him/her most of the time that the shop is open to the general membership. When the Shop Administrator leaves town for an extended period, his/her duties will be passed to the back-up Shop Administrator or a responsible member of the Guild.

## Appendix 11: Maintenance Administrator Responsibilities

The Maintenance Administrator is responsible for maintenance and operations of all shop tools and equipment.

The Maintenance Administrator receives guidance and direction from the President, Shop Administrator and Safety Administrator and the BOD. The Administrator will coordinate maintenance decisions in the various functional areas in concert with the Shop Administrator, Safety Administrator and Equipment and Supplies Director.

Major Decisions in equipment and tool operation will affect most of these functional areas as well as all Guild members. Therefore, these major decisions will remain in the purview of the BOD. The Maintenance Administrator coordinates and implements these major decisions using their best judgment. Routine decisions in maintenance can be initiated and implemented by the Maintenance Administrator with, in their judgment, the proper coordination, timing and use of resources. The Maintenance Administrator shall not make unilateral decisions that have a major impact.

The Maintenance Administrator will attend all BOD meetings.

The Maintenance Administrator cannot be present in the shop at all times, but the President, members of the BOD, Shop Manager, and Front Office should be able to contact him/her most of the time that the Shop is open to the general membership. As all other key positions, the Maintenance Administrator will have a backup and/or second to act in his/her absence. When the Maintenance Administrator leaves town, for an extended period of time, the Maintenance Administrator will keep the President informed and their duties will be passed to their backup/second stand-in.

The Maintenance Administrator makes recommendations to the BOD on existing equipment and tool condition.

The Maintenance Administrator is responsible for all maintenance Volunteers.

The Maintenance Administrator is responsible for the management of the ongoing maintenance of tools, equipment, and machines in the workshop. By providing an effective maintenance program, the workshop will be a safer, more reliable, and less costly operation. Reports to the President along with the Shop and Safety Administrators

The Maintenance Administrator responsibilities include but are not limited to, the following:

1. Maintains a maintenance shop within the workshop.
2. Recruits and supervises Maintenance Mechanics.
3. Establishes and maintains a duty roster for Maintenance Mechanics.
4. Repairs damaged equipment and returns to service.
5. When outside repairs or maintenance is required, coordinates with the Shop Administrator for action.
6. Establishes routine and ongoing inspections of stationary machines for signs of wear or developing mechanical problems. Takes corrective action when required.
7. Sees that routine maintenance and minor repairs are conducted on an ongoing basis.
8. Schedules the maintenance work on Saturday mornings as required.
9. Participates, as may be requested by RSC relative to an accident.



10. Keeps on file all owner's manuals, repair manuals and repair parts for all power equipment in the workshop. Provides an orderly and readily accessible storage place for these manuals and parts.
11. Stays current and sees that all Maintenance Mechanics remain current with repair techniques and maintenance requirements of workshop equipment. Adds new maintenance tools and replaces old, worn, or outdated tools as needed and necessary, following established expenditure procedures. Submits requests to the Shop Administrator for tools requiring major expenditure.
12. Performs other duties as required.

## Appendix 12: Maintenance Mechanic Responsibilities

The Maintenance Mechanic's responsibilities include but are not limited to, the following:

1. Performs repair and detailed or complicated maintenance work as assigned by the Maintenance Manager.
2. Makes routine internal adjustments to equipment such as changing and setting planer blades, replacing sanding belts on stationary sanders, tightening belt tension on table saws, changes blades on band saw, etc.
3. Maintains a high level of familiarity with all workshop equipment manuals.
4. Attends training classes as assigned.
5. Performs other duties as required.

## Appendix 13: Guild/Community Relations Administrator Responsibilities

The Guild/Community Relations Administrator stays abreast of community guidelines and rules regarding the following:

- Public Relations – interface with community management and other clubs and groups within Sun City and outside entities as they become apparent.
- Interface with community for displays, Club News, Club fair and assistance on venue scheduling and club fair advertising.
- Audio Visual Advice, consulting and setup.
- Social Media Facebook, You Tube.
- Website Management – New Member and Community sites.
- Streaming Club Meetings – Zoom.
- Advertising/Publicity Placement and Adherence to Standards.
- Sunshine Health and Welfare updates on members.
- Tour Program design and Tour Guide Training.
- Security and Systems Oversight – closed circuit television, PA systems.
- Coffees oversight for food and beverage setup and program design.
- SunSations updates and ad placement. (See example following)

SunSations Monthly Article – Essentially every month, an article describing general Guild information is written and submitted to the SunSations staff for inclusion in the next month's SunSations magazine. This article details the Guild name, location, President and Vice President and general information about the Guild. For the most part, each month's content does not change except for the month of Dec/Jan to detail the new Board members, and the 2 months preceding the Open House to announce its date. The general information of the article is not to exceed 100 words. It is sent to the following email address: [sunsations@schhca.com](mailto:sunsations@schhca.com). The SIG leaders are responsible for a similar article that is limited to 50 words. The VP is to inform new SIG leaders of this responsibility. Examples of the Guild and a SIG article are shown below:

Guild SunSations Article – must fit the format below:

**WOODWORKERS AND  
MODELMAKERS  
GUILD**

**841 Red Dam Road      (843) 705-2968**

**Shop Hours: 9 am – 5**

*pm Mon, Wed, Fri; 10  
am - 4 pm Sat.*

*Xxxx xxxx, President  
[xxxxxxx@outlook.com](mailto:xxxxxxx@outlook.com)  
xxxx xxxx, Vice President  
[xxxxxxxxx@gmail.com](mailto:xxxxxxxxx@gmail.com)*

*The Guild is over 900 members with 19% women. The Guild provides safe operating instructions to all new members. Our 9000 square foot facility contains state-of-the-art equipment and tools. We recently decreased our open shop time on Saturdays from 8 hours to 6. We provide many services for Sun City residents and clubs including mailbox repair and replacement, furniture repair, many wood products for sale and the creation of special projects. Come by the shop to learn more. Residents and guests are welcomed and encouraged to tour the Guild facility during the times above. Follow us on Facebook.  
[www.facebook.com/schhwmq](http://www.facebook.com/schhwmq)*

***SIG SunSations Article*** – must fit format below (can include other officers):

**WOODTURNERS SIG**

Fran DiTomasso,  
president....843-705-5871  
[frandito@gmail.com](mailto:frandito@gmail.com)

We are dedicated to turning wood. Through the use of a lathe, we create articles of art, craft, and utility. We meet at 6 p.m. the third Tuesday at the Guild shop (no meetings in July, August, or December). Each meeting features a turning demonstration. All residents are welcome.

## Appendix 14: Cluster & Practicum Director Responsibilities

The Cluster & Practicum Director responsibilities include but are not limited to, the following:

- Implements orientation and cluster training classes for new members and schedules classes as needed.
- Determines and implements sufficient training sessions to accommodate new member registration with the understanding that the resident population is mobile and frequently unavailable.
- Creates, maintains, and publishes monthly training schedules for both cluster and practicum programs, ensuring the established schedules do not conflict with other ongoing shop activities.
- Maintains a current list of instructor phone and email contact information.
- Assigns instructors for each class, attempting to ensure a level of equity in earned instructor credit hours is achieved. See Appendix A for additional details.

## Appendix 15: Advanced Training Director Responsibilities

The Advanced Training Director responsibilities include but are not limited to, the following:

- Schedules classes around other Guild activities i.e., SIG meetings, Practicum, and other advanced courses.
- Determines need for instruction beyond the cluster and practicum levels. Seeks out interest in all woodworking spectrums, i.e., wood turning, intarsia, raised panel cabinetry, joinery, etc.
- Identifies instructors willing to teach for each class.
- Requests synopsis of instruction and shop resource usage from each instructor.
- Places synopsis of each potential class in the “Green” Advanced Training book as well as the Guild Training online storage area. They will define a data repository for each class where the advanced training instructor will place and maintain the class written materials.
- Reviews interest status periodically and then works with instructors to set a date for each class.
- Periodically reviews the relationship between materials cost, time utilization and student cost.
- Aids a student and the instructor in finding a substitute for a class.

Determines whether a missed class should be refunded or not pending on the specific circumstances.

## Appendix 16: Cluster Instructor Responsibilities

The Cluster instructor's responsibilities include but are not limited to, the following:

- As assigned, conducts classes using the lesson plan and training aids provided.
- Reviews the performance of training by means of quizzes, performance drills and practice sessions and provides assistance to those experiencing difficulty. As required, working with his Director, arranges for or provides remediation to any student not safely and successfully learning the cluster skills.
- When instructing training courses, the instructor will make a careful evaluation of each trainee's performance. The instructor makes recommendations concerning those who cannot satisfactorily complete the training.
- Attends training as assigned to maintain competency as an instructor.
- Is responsible for knowing the safety requirements for the equipment used for the class as well as teaching safe operating procedures.
- Performs other tasks as required.
- Prepares all lumber and equipment needs to implement Cluster Lesson Plans
- Attests to Students' satisfactory and successful completion of Cluster Class Training by Student Schedule and Orange Book Class Schedule.
- Instructors are to teach a class. They do not assume the duty of Red Apron Shop Manager. The last Instructor that leaves the shop (unless a Red Apron Shop Manager is on duty) reviews and completes the Shop Closing process prior to locking the Shop.



## Appendix 17: Practicum Instructor Responsibilities

The instructor's responsibilities include but are not limited to, the following:

- As assigned, conducts classes using the lesson plan and training aids provided.
- Reviews the performance of training by means of practical practice sessions and aids those having trouble. As required, working with his Director, arranges for or provides remediation to any student not safely and successfully learning the Practicum skills.
- Prepares all lumber and equipment needs to implement Practicum Lesson Plans
- When instructing, the instructor will make a careful evaluation of each trainee's performance. The instructor makes recommendations concerning those who cannot satisfactorily complete the training.
- Is responsible for knowing the safety requirements for the equipment used for the class as well as teaching safe operating procedures.
- When assigned as the Lead instructor, ensures a smooth flow of activities by directing the other instructors to setup tools and job aids as required by lesson plan. Prior to the first session, prepares all lumber needs to implement the Practicum Lesson Plans.
- Takes class picture, noting names and order in picture.
- Last Practicum Class instructors provides to successful students their Gold Card and finalizes paperwork.
- Performs other tasks as required.

## Appendix 18: Advanced Training Instructors Responsibilities

The instructor's responsibilities include but are not limited to, the following:

- Conducting assigned classes using the lesson plan and training aids provided.
- Reviewing the performance of training by means of practical practice sessions and aids those students having trouble with the material.
- Preparing all lumber and equipment needed to implement Lesson Plans prior to the first session of the class.
- Making a careful evaluation of each trainee's performance. The instructor makes recommendations concerning those who cannot satisfactorily complete the training.
- Knowing the safety requirements for the equipment used for the class as well as teaching safe operating procedures.
- Ensuring a smooth flow of activities as the lead instructor by directing the other instructors to setup tools and job aids as required by lesson plan. Prior to the first session, prepares all lumber needs to implement the Lesson Plans.
- Taking on the Red Apron Shop Manager role as required when their class is the only activity in the shop.
- When special class tools are required:
  - If the tools/products are relatively inexpensive (<\$25), talk to the Advanced Training Director who will buy the tool and submit an expense reimbursement request to the Guild Treasurer. If the tooling costs more than that, talk with the Advanced Training Director, who will work with the Guild Equipment & Supply Director to resolve.
  - When an Advanced Training Instructor is given the authority to purchase material for the Guild, the responsible Advanced Training Director will identify the purchase limit for each designee. To assure control, these designated Guild members will submit their expense reimbursement request to the responsible Advanced Training Director. The responsible Advanced Training Director will approve and forward to the Treasurer for payment.
  - If more expensive tools are required, they should be made available only after the class has been approved and after the trial runs and Guild interest are verified. After a class has been approved, the tools will be made available to the Guild membership, even if the tools are under lock and key requiring the user to meet certain qualifications for access. There is an exception for a tool where the student must purchase their own set, since normal use consumes the tool.
  - There can be tools dedicated to a class, but there must be at least one instance of the tool available for the Guild use. We are training our members to do things with the tools, not just be trained on a tool's possible use with no access to actually use it.
- Performs other tasks as required.

## Appendix 19: Manager & Mentor Director Responsibilities

The Manager & Mentor Director:

- Identifies and maintains sufficient number of members to staff manager, assistant manager, and mentor positions
- Schedule these functions for open shop hours of operation.
- Periodically reports the number of hours each manager, assistant manager, and mentor volunteers
- Develops and coordinates an annual meeting of managers and mentors.
- Coordinates and instruct Red Apron Training to P-Card candidates

P-Card holders are entitled to use the shop during off hours. During such times, one person wears a red shop apron that indicates who is in charge of the shop. As an additional duty, the Manager & Mentor Director develops, coordinates, and presents “Red Apron” training. The training provides an overview of matters a shop manager is likely to encounter. This training is an initial step for those individuals wishing to obtain a “P-Card” by volunteering as an instructor, shop manager, assistant manager, or mentor.

## Appendix 20: Shop Manager Responsibilities

The on-duty Shop Manager's responsibilities include but are not limited to the following:

- Assumes full control and responsibility for all functions ongoing in the workshop.
- Supervises the on-duty Tool Room Monitor and makes determinations concerning willful or careless damaging of Guild tools by a member when referred to him by the Tool Room Monitor. If the member refuses to pay for damaged tool, brings the matter before the Shop Administrator.
- Offers limited suggestions to members working in the workshop. Requests the Mentor or other experienced member to assist.
- When observing improper woodworking practices or safety violations or receiving report of same from other members, takes appropriate action to correct and report unresolved issues to the Safety Administrator or Shop Administrator.
- In case of an accident follows established accident procedures. (See Section 4.3)
- All incidents and accidents with injuries, makes investigation, completes, and submits report. (See Section 4.3)
- Shuts down and locks out any machine or equipment that has a malfunction or has become unsafe for any reason.
- Reports all maintenance needs to Maintenance Administrator using the designated maintenance form<sup>1</sup>.
- Makes sure individuals are qualified for the power tools they are using by checking their shop badge and/or listing at the managers podium provided monthly by the treasurer.
- Oversees sign out sheets for equipment locked out from general use, inspects prior to member usage and again prior to re-locking this equipment. If any consumable was damaged, informs member of fee and requests payment via a CA charge slip or a check.
- Ensures that all members are wearing safety glasses, name badges and appropriate clothing and footwear.
- Completes the Shop Opening/Closing report.
- Performs other duties as required.

<sup>1</sup>If any equipment is damaged during a shift, notifies member causing the damage that the BOD has determined a fee schedule for damage to certain tools and that the member must pay the appropriate amount either by check or a CA charge form at the time of damage. If the member is not willing to pay for damages, or wishes to appeal the manager's decision, the manager writes up what has occurred, notes the time and date, requests the Systems Manager or other trained member to copy the video data to a thumb drive and leaves this info in the President's or Shop Administrators mailbox in the Front Office. Manager informs the member that a decision will be provided within a few weeks from the BOD.

## Appendix 21: Assistant Shop Manager Responsibilities

The Assistant Shop Manger responsibilities include but are not limited to, the following:

- Maintains a constant observation of all ongoing activities in the workshop and assembly area. Corrects any unsafe or improper operation of equipment. Checks badge for machine use.
- The Assistant Shop Manager will notify the Shop Manager of any problems in the shop or assembly area.
- Offers limited suggestions to members working in the workshop. Requests the Mentor or other experienced member to assist.
- In the event of a serious accident with injuries, the Shop Manager/Assistant Shop Manager will cause all woodworking activity in the shop to cease. All machines will be shut off and all persons not directly involved in the first aid action or in the investigation will be asked to leave the area. Prior to asking people to leave, the Assistant Shop Manager will make certain all witnesses are identified and asked to remain until the Shop Manager and Safety Administrator have talked to them.
- When determining any machine or other equipment to be unsafe for any reason, the Assistant Shop Manager will secure same and take the equipment out of service and place an out-of-service placard on it. The Assistant Shop Manager will then notify the Shop Manager of his actions.
- At the end of the assigned shift, Assistant Shop Manager will check in all unlocked controlled equipment and assist in cleaning the workshop.
- Make sure individuals are qualified for the power tools they are using by checking their shop badge.
- Performs other duties as required.

## Appendix 22: Shop Mentor Responsibilities

The Mentor responsibilities include but are not limited to, the following:

### **Mentor Qualifications**

- Have a broad range of woodworking skills.
- Know how to use all shop machines correctly and safely.
- Be familiar with shop operating and safety practices.
- Be familiar with the storyboards for all machines.

### **Work Shift Duties**

- Mentors will be allowed to do their own projects while casually observing other members. If asked to assist, they must stop their own work and assist the member in need.
- Help members who ask for advice or assistance with a task, but do not do the work for them!
- Watch for any member struggling with a task, and offer help, intervening if it's obvious they don't know what to do.
- Intervene with any member doing anything unsafe or going against shop policies and involve the shop manager, as necessary.
- Give advice one-on-one, do not give impromptu classes, even if several people seem to need the same type of help.
- Cover the whole shop, including the Assembly Area and the Quiet Room
- Ask for help/advice from members more experienced in a particular area when not sure about how to proceed with a task, or if busy with one member and another asks for help.
- Communicate periodically with the Shop Manager, to share information, safety concerns, to avoid giving conflicting instructions/advice etc.

### **Mentor Application Process**

Candidates for mentor must complete the following:

- Possess a P-Card or attend and successfully complete the Guild's "Red Apron" training; and
- Review specific sections of the Operations Manual. The specific sections are on the Assistant Manager Application Form; and
- Review all lesson plans for Cluster classes; and
- Review all storyboards; and
- "Shadow" a shop manager on the AM shift; and
- "Shadow" a shop manager on the PM shift; and
- Ensure the Assistant Manager Application Form is complete, and all necessary signatures are affixed; and
- Forward the form to the Manager & Mentor Director.

The Manager & Mentor Director will approve/reject the application or designate any area(s) that need further evaluation.

## Appendix 23: Lathe Mentor Responsibilities

The Lathe Mentor must ensure the following:

- Proper lathe setup and proper lathe selection
- Proper lathe tool selection and use
- Proper tool rest position
- Proper use of the facemask and cage
- Correct speed range for a turning project
- Proper use of drive spurs, face plates, chucks, and jaws
- Proper use of live centers, jam chucks and rubber chuckies
- Proper use of accessories to reduce excessive vibration and noise

To help reduce lathe setup incidents, the Lathe Mentor on duty will be asked to do the following:

- Take either the far Jet lathe or near Powermatic lathe where the entire lathe area can be observed. Members should take any lathe but these two until the Lathe Mentor has chosen one of these lathes. Further, if the Lathe Mentor comes in and neither lathe is available, the Lathe Mentor may ask someone to move to another available lathe. The only case where you might not have lathe access is if they are all taken by the membership.
- Take a break about every 20 minutes from your project work and do a “walkabout” in the lathe area to observe what is going on and make any suggestions necessary. Net, the Lathe Mentor should do about 10-12 “walkabouts” during their time. More “walkabouts” may be warranted if less experienced or less confident turners are at the lathes or during periods of heavy lathe usage.
- Be alert to sights and sounds indicating that something is wrong. Many of us get totally engrossed in our project work and forget what we are there for during our 4-hour duty time. Project work is secondary to your role as Lathe Mentor. Please make sure this is a priority!
- No double duty. The Lathe Mentor Scheduler will take steps to assure that there is no duplication with Shop Manager/Shop Mentor duty. However, if you find that you have double duty, please alert the Lathe Mentor Scheduler so that this can be changed.

## Appendix 24: Equipment and Supplies Director Responsibilities

The ES Director is responsible for defining the overall equipment and supply needs for the Guild's shop. This will be based both on what the ES Managers feel is needed to keep their areas functioning properly to meet the needs of the membership on a daily basis and fulfilling the BOD's vision of what is needed for current and future operation. Major equipment purchases over \$500 are approved by the BOD and purchased by the ES Director. Purchases for Equipment and supplies by ES personnel are as follows:

Position	Spending Limit	With ES Director Approval	With Guild Board Approval
Director, ES	\$500	---	>\$500
Tool Room Manager	\$300	\$500	---
Tool Room Supplies Manager	\$300	\$500	---
Lumber Room Manager	\$300 <sup>1</sup>	---	>\$3500 <sup>2</sup>

<sup>1</sup>For purchases other than lumber

<sup>2</sup>For bulk lumber purchases

The ES Director works with the Shop Administrator, Safety Administrator and Maintenance Administrator to address special shop operational needs including:

- Organization and setup of the machine room
- Requirements/modifications for safe equipment operation
- Lathe area needs and safety (with involvement of the Turner Action Committee Chair)
- Approval of shop and personal jigs for operation and safety
- Shop space requirements and needs

The ES Director supports the Tool Room Manager and Tool Room Supplies Manager with input from the Shop Administrator, Safety Administrator, and other interested parties to address special operation needs in the Tool Room including:

- What's required in the Tool Room to meet Guild membership needs.
- New equipment and jigs being added to the Tool Room to meet Guild membership needs.
- New supplies needed to support the Guild membership needs

The ES Director is responsible for the scroll saw equipment needs and addressing any problems identified by the designated Intarsia experts. This expert team oversees the scroll saw area and mentors new users. Like the ES Managers, these experts can make daily operation purchases under \$300, but involve the ES Director for major equipment purchases over \$300 and anything that will impact the broader Guild operation.

The ES Director supports the Guild Membership requests for purchases of specific tools and/or supplies need for a Guild related project. When a Guild member requests a tool or supplies for a specific Guild related project:

- Guild member must submit a written/email request to the ES Director or designee that includes the justification and total cost including applicable shipping and sales tax.
- It is recommended the ES Director or designee should make the purchase for the member. If the member makes the purchase, then the following must occur:



- The ES director or designee must provide written approval or email to the requesting member prior to proceeding with the purchase.
- The member making the purchase must submit a completed Expense Reimbursement/Payment Request to the Treasurer attaching the purchase invoice and copy of the request approval.

The ES Director is the principle purchasing agent for Guild and the ES Director's responsibilities include but are not limited to the following:

- Negotiates contracts(agreements) for materials, supplies and services. Submits a preliminary draft of the proposed agreement to the Shop Administrator.
- Agreements over \$500 must be submitted to the BOD for approval. Outside contracts must be approved by CA.
- Maintains records, receipts, bid copies, agreements, and other appropriate documents for all expenditures. Forwards the originals of receipts, canceled checks, etc. to the Treasurer, keeping copies for his files. Keeps agreement originals, sends copies to Treasurer.
- With the Shop Administrator and Treasurer conducts an annual inventory of but not limited to shop machines and tools, furniture, books, and printed materials. Any missing items or other discrepancies will be duly noted. Inventory forms will be forwarded to the BOD for review. Missing items or items disposed of will be deleted from Guild assets.
- Performs other duties as required.

## Appendix 25: Tool Room Manager Responsibilities

The Tool Room Manager will be responsible for the Tool Room Monitors that oversee the use of the small tools by the Guild. This includes making sure that the Tool Monitor organization has the required knowledge of the tools. The Tool Room Monitors will follow the responsibilities defined by the OPS Manual Duty Statement (7.15). Separately, the Tool Room Manager can designate one or two Assistants to coordinate the monthly Tool Room Monitor calendar and volunteer schedule. The Tool Room Manager will have a Tool Room Assistant Manager who can support and replace the Manager as required. This Assistant Manager can take on and support key project initiatives as needed.

The duties and responsibilities of the Tool Room Manager are as follows:

- Tools in Tool Room and on the Tool Board in the Assembly Area
- Tool Monitor Organization
- Purchase Tools and Equipment for Tool Room, Tool Walls, and other supplies as needed.

## Appendix 26: Tool Room Monitor Responsibility

The duties and responsibilities of the Tool Room Monitor are as follows:

### **Tool Room:**

- Obtains a chit for each tool being removed and assures the sign-out sheet for designated tools are filled in. The rule is “No chit, no tool!”
- Ensures tool is in good shape for the user before leaving the tool room, and the user has cleaned tool before returning. If a tool is returned in a dirty condition, ask the member to clean it first before it is placed in its designated location.
- Inspects all tools in the tool room for damage and cleanliness.
- Places a defective tool in the designated area with a dated tag containing the person’s name and the specific problem. Further, the log for defective tools is filled out.
- Removes drill and driver batteries and replaces them with freshly charged ones as needed.
- Has access to the Supply Cabinet to replenish supplies required by the Guild membership or replenish defective tools with available backups as needed.

### **Tool Wall:**

- Enters items on Supplies Needed list (on wall outside tool room).
- Cleans and fills all glue bottles as well as cleans the glue brushes
- Makes sure that tools are properly organized in their designated areas and cleans any tools that were not properly cleaned by the membership.
- Places any defective tool in the designated area with a dated tag containing a description of the specific problem. Further, the log for defective/damaged tools is filled out.
- Notes any missing tools on the Tool Monitor log. All the hand tools have labels indicating where they should be located and how many tools are available.

### **Workbench Assembly and Project Glue Storage Areas:**

- Cleans up the workbench assembly area; cleans and arranges clamps in an orderly manner; cleans the tool sharpening area; and cleans up the Tool Room floor.
- Monitors will observe the assembly area from a safety and cleanliness standpoint. They will point out any unsafe behavior like not wearing safety glasses to Guild members and report any specific issues to the Shop Manager.
- Monitors should periodically check to make sure that the 2 emergency exits, and the eye wash area are clear of obstacles for safe egress.
- Tool monitors may approach members consistent with policy 107A concerning long sleeves, loose clothing, dangling accessories and/or long hair. “When operating any power tools, short sleeves are preferred and recommended. If a person is wearing long sleeves when operating power tools, they should be rolled or pushed up above the elbow. No loose clothing or dangling accessories are allowed. If the person has long hair, it should be secured up and out of the way.
- The Tool Room Monitor will periodically during their shift inspect the project storage area for projects that have been labeled with a date on the project indicating the glue up is at least 24 hours old. The Tool Room Monitor will remove, clean, and store all clamps

stripped. If there is a concern regarding the project, the Tool Room Monitor will consult with the Shop Manager for guidance.

### **Monitors Do's and Don'ts**

- Monitors will observe the assembly area from a safety and cleanliness standpoint. They will point any unsafe behavior like not wearing safety glasses to Guild members and report any specific issues to the Shop Manager.
- Monitors may work on their own projects only after completion of their monitor duties, and only at the bench in front of the tool room door. They may not go and work on any machines in the machine area. In certain situations, they may work on special projects designated by the Tool Room Manager or the Tool Room Supplies Manager within the area near the tool room.
- Monitors will take direction from the Shop Manager in terms of any specific need instructor has identified. This is particularly true when a safety emergency has been called.

## Appendix 27: Tool Room Supplies Manager Responsibilities

The Tool Room Supplies Manager will be responsible for:

- All consumables that the membership uses on a daily basis.
- Defining the consumables required by the Guild to support new tools. Supplies will be purchased in bulk to maximize cost savings wherever possible.
- Servicing the tools in the Tool Room. The Maintenance Manager will repair tools the Tool Room Supplies Manager cannot easily service. If it is not repairable, the Tool Room Supplies Manager will notify the Tool Room Manager that the tool needs to be replaced. The Tool Room Supplies Manager will inform the Treasurer and the Equipment & Supplies Director when the manager purchases a new tool (providing the manufacturer, model number, serial number, amount, and cost) as well as when a tool is removed from daily operation. The tool serial number and the calendar date the tool is placed into service will be marked using a permanent marker.
- Defining the clamps required by the Guild. This includes servicing and replacing these clamps as well as the organization and storage of them.

The Tool Room Supplies Manager will work with the Shop Administrator and key stakeholders to identify and build jigs and presses needed for use by the Guild. Refer to Appendix 24. Further, the Tool Room Supplies Manager will work closely with Tool Room Manager to define the organization and storage of these new jigs and presses.

The Tool Room Supplies Manager will have a Tool Room Supplies Assistant Manager who can support and replace the Tool Room Supplies Manager as needed. This assistant can take on and support key project initiatives as needed.

## Appendix 28: Lumber Room Manager Responsibilities

The Lumber Room Manager is responsible for the following duties as it relates to lumber room operation, inventory management, lumber pricing, and material handling.

- Ensure Lumber Room stock of lumber and sheet goods are maintained and organized.
- Inventory Management
  - The Lumber Room Manager and Assistant Lumber Room Managers are responsible for monitoring the lumber and sheet good inventory. When the inventory of the regularly stocked items is low, the manager contacts the appropriate vendor for reordering. The \$500.00 limit for purchasing does not apply for the purchase of lumber. However, BOD approval is required for a bulk lumber purchase of greater than \$7500.
  - When the lumber orders are delivered, inspect the quality of the items delivered. Return any material that is unacceptable. After the purchased material is received at the shop it is sorted as necessary, cut to optimal lengths as required and placed in the appropriate places. The manager will place a copy of the supplier invoice in the Treasurer's box so that supplier invoice can be paid.
  - After the material is delivered, review the cost on supplier invoice to determine if the current pricing requires updating. Update the pricing as soon as possible to minimize any loss to the Guild. Updates will be made to:
    - WOODROOM, the electronic lumber purchasing and management system
    - Lumber Room Bulletin Board
    - Website
  - Lumber costs are converted from supplier cost per board foot to price per cubic inch. Sheet goods prices are also reviewed and adjusted to current cost. Updates to WOODROOM will be at supplier cost level, as program provides pricing for lumber by inch in both width and length. WOODROOM will then add Guild markup and sales tax upon purchase by member.

**For information purposes, pricing by width by lineal foot will be posted on the wall outside the Lumber Room and on Guild website.**

- Handle Special Orders – The Lumber Room Manager will coordinate with members wanting to make a special order for lumber, oversized lumber and/or sheet goods. The members are required to fill out a Special-Order sheet and place it in the Lumber Room Manager's slot by the Front Desk. Special Orders will normally be combined with normal orders to minimize special delivery costs. If special delivery is required, the delivery costs will be added to the price to member. The Lumber Room Manager will ensure the Shop Manager is notified when an order is to arrive at the shop and given any instruction required for the Special Order. Any Special Order received is checked for price, mark-up and sales tax added. The purchaser is notified by lumber room manager when the order has been received and advised of the price.
- Inspect scrap/free lumber delivered to the shop. If the lumber is saleable, it is placed in the appropriate location. Any lumber that is not saleable but may be useable by Guild members is placed in bins in the shop that requests "Cash" contributions for any wood taken from the bins. Monitor the money in the "Cash" boxes and, when necessary, count the funds and give to the Treasurer.
- Keep the lumber room clean, generally swept weekly.

- Monitor lumber and sheet good sales through the WOODROOM system to determine buying trends and to assure that inventory stock is in place for Guild members. Assist Treasurer with any charge related issues that may arise on a monthly basis.

## Appendix 29: Front Office and Concessions Director

The Front Desk and Concessions Director (FDC) responsibilities include but are not limited to the following:

- Manages and supervises all aspects of the front office area (lobby) of the Guild including overseeing the duties of the Front Office Coordinator and Assistants.
- Supervises and supports all Guild Concessions managers and their volunteers. This includes: Guild Products, Furniture Repair, Special Projects, Mailbox Repair and Locker/Storage Rental.
- Supports the Guild VP in overseeing the products made to be sold at the Annual Open House and Sidewalk Sale held in the fall.



## Appendix 30: Front Office Coordinator and Assistant

The Front Office Coordinator duties include:

- Training all volunteers on all aspects and activities associated with the Front Desk/Office
- Preparing a monthly schedule of volunteers
- Maintaining an active list of volunteers
- Keeping volunteers informed of all changes to procedures.
- Keeping the Front Desk/Office area in good order

The Front Office Assistant is responsible for the operation and activities of the Front Desk/Office. The Assistant reports to the Coordinator of the Front Office. During their shift, they report to the on-duty Shop Manager.

Duties of this position will include, but are not limited to, the following:

- Greeting all visitors into Workshop
- Arranging tours with the Shop Manager/Assistant Manager following all protocols
- Overseeing member sign-in and adherence to safety procedures before entering the shop.
- Handling the issuance and collection of tool chits strictly following protocols.
- Answering telephone.
- Providing forms to residents requesting a special project.
- Placing reminder phone calls to the next scheduled shift including manager, assistant manager, mentor, tool room monitor and front office staff.
- Performing other duties as required.

Returns and/or Refunds on Guild Products Purchases:

Generally, we will not give a refund on a Guild Product purchase, whether it is made through the front office or at any of our sales; Open House and Sidewalk Sale, Holiday Bazaar, First Saturday Sales, etc.

In the event that the product is defective, we will issue a refund or replacement of the item.

In the event of "buyer's remorse" we will gladly issue a shop credit.

See Front Desk Ops Manual for details on how to process a refund or shop credit.

## Appendix 31: Furniture Repair Manager Responsibilities

The responsibilities of the Furniture Repair Manager/team member include:

- Reviews Furniture Repair Intake Form to determine repair needed to be performed. This form MUST be kept with the piece during all phases of the repair. A copy of this form is kept at the front desk.
- Determines the cost of the repair with regard to time and materials used.
- Records all communication with the resident on the Furniture Repair Intake Form, including clarification of questions regarding work to be performed, verifying cost, getting approval (verbal) to proceed with repair. (These duties can be performed by the Front Office Assistant.)
- Takes proper care of the furniture during all phases of the repair to ensure no damage is done to the piece. All upholstered furniture MUST be wrapped in plastic upon intake to the furniture repair area. When appropriate, a clean furniture blanket can be used.
- Ensures all flammable materials used; stains, varnishes, etc. are properly stored.
- Maintains a clean work area.
- Informs Front Office Assistant that repair is complete. The Front Office Assistant notifies the resident the repair is complete. Front Office Assistant collects full payment at the **time of pick up. Payment is placed in Treasurer's box for deposit to the Guild account.**

## Appendix 32: Guild Product Coordinator Responsibilities

The responsibilities of this Coordinator include:

- Calculates the selling price for each Guild Product such that it is competitively priced and provides for a fair return on the Guild investment.
- Coordinates the volunteers that make the Guild Products.
- Determines/maintains a small inventory for sales throughout the year.
- Prepares pricing lists for products and ensures that the lists are available to front office staff.
- Coordinates the sale of Guild Products at the annual Open House, Sidewalk Sales, Holiday Bazaar and at other community events in Sun City.

## Appendix 33: Special Products Manager Responsibilities

The duties and responsibilities of the position include but are not limited to the following:

- Receives all requests for special projects. After review, refers to BOD for approval.
- Advises recipients, in advance, of a special project of all costs for which they will be responsible. The cost should be specified in writing and agreed to by the recipients before the start of any project. All payments shall be made by personal check, or a CA charge slip and given to the Treasurer for deposit in the Guild account.
- Coordinates the formation of Special Project Task Force teams. Supervises the teams in concert with the Shop Administrator to ensure all individuals participating are recognized for shop access.
- Ensures that Special Projects do not interfere with the normal operations of the Guild.
- Performs other duties as required.

## Appendix 34: Locker/Drawer Rental Manager

The duties and responsibilities of this position include:

- Maintains a list of all spaces to be rented and working with the Treasurer, collects fees annually.
- Maintains a locker keyboard (currently located in the Front Office Printer Room)
- Ensures that repairs and replacement are done.
- Keeps records of requests and availabilities.

Reviews fees annually and forwards recommendations to the FDC Director or the Treasurer for BOD approval.

## Appendix 35: Mailbox Repair Manager Responsibilities

The duties and responsibilities of this position include:

- Maintains inventory of supplies needed to make repairs/replacements
- Oversees team that prepares mailbox parts
- Oversees team that performs the repairs at the resident's home
- Makes timely repairs based on resident's request
- Prepares invoice with payment instructions

## Appendix 36: Rules & Safety Committee Responsibilities

The RSC is tasked to investigate and document any reported violations (Incident Hearing) of rules, policies and or procedures.

The RSC will determine if the violation has merit and will request the member be charged with the violation.

The RSC will notify the member if any remediations or punitive actions be implemented.

The RSC will maintain a report of the findings, conclusions and details of the committee's recommendations.

In case of an appeal the Executive Board will determine the ruling.

## Appendix 37: Systems Manager Responsibilities

The Systems Manager' responsibilities include, but are not limited to, the following:

- The overall management of the workshop information system. This will include the initial planning, organizing and setup of the system. Sees that the necessary software, hardware, and network equipment is obtained to support the collection and processing of the information.
- Periodically reviews and makes recommendations, if needed, for upgrades and/or modifications of any systems products to the Vice President with input from the Shop Administrator.
- Provides training and ongoing system support to the Shop Administrator and any other member that the Shop Administrator or the BOD so directs.
- Annually, and with the Shop Administrator, Maintenance Administrator, Equipment & Supply Director and Treasurer, conduct an inventory of the workshop. The inventory should include but not be limited to the following: shop machinery and tools, furniture, books, and printed materials. The Systems Manager updates system information files and works with the CA Comptroller, as required.
- Maintains and updates the Front Desk, Resource Room and Laptop computers to meet Guild operational needs.



## Appendix 38: Security Managers Responsibilities

The Security Managers' responsibilities include but are not limited to, the following:

- The overall management of the workshop camera safety/security system. This will include the initial planning, organizing and setup of the system. Sees that the necessary software, hardware, and network equipment is obtained to support the security system.
- Periodically reviews and makes recommendations, if needed, for upgrades and/or modifications of any Security systems products to the Vice President with input from the Shop Administrator.
- Periodically verifies that the safety camera systems are functioning (recording video), and that memory utilization is optimized (cameras are motion sensitive, so cobwebs cause added recording time wasting disk storage space). Removes cobwebs periodically to minimize useless recordings.
- Provides training and ongoing system support to the Shop Administrator and any other member that the Shop Administrator or the BOD so directs.

## Appendix 39: Nominating Committee Duties

The nominating committee shall present the proposed slate of Officers and MAL/Directors at the Guild's general membership meeting held in the 4<sup>th</sup> Quarter of the year. Nominations may be made from the membership following the report from the nominating committee.

Following the Nominations Committee report of slate of candidates:

- Nominations will be requested from the floor general membership meeting held in the 4<sup>th</sup> Quarter of the year. Floor nominations will follow Robert's Rules, the nomination and a second by members in good standing.
- Nominations will be made for specific officer's position (President, VP, Secretary, and Treasurer) or a Member-at-Large/Director position. Members nominated from the floor, are required to formally accept the nomination in writing. An email or written note (signed electronically or by hand) delivered no later than 14 days prior to the 4<sup>th</sup> quarter general membership meeting, to the Chair of the Nominations Committee stating acceptance of the nomination, are acceptable forms of formal acceptance.
- Voting may be by a show of hands if uncontested and/or may be by secret ballot if more than one member is running for the same office. An electronic vote can also be made if necessary due to special circumstances or as needed. Use of Google Forms may be used as shown on the next page.

## 2024 Woodworker Guild Officers

At the Guild 10/28/23 meeting the following slate of officers for the 2024 Board of Directors was presented. Floor nominations were solicited. There were no floor nominations received.

The slate of officers are:

President -

Tim Draayom  
Vice President - Bob Bass  
Secretary - Sue Gordon  
Treasurer - Mike Thomas  
Member at Large - Charlie Bess  
Member at Large - Matt Greene  
Member at Large - Mark Parsons  
Member at Large - Ed Fiantaca  
Member at Large - Kathy Sunderman

suncitywoodworkers@gmail.com [Switch account](#)



\* Indicates required question

Email \*

Your email



Please Enter Your CAM Number

Your answer

Please cast your vote FOR or AGAINST APPROVAL of the 2024 Slate of Directors. \*

- I cast my vote FOR all above candidates
- I cast my vote AGAINST all above candidates

During the 10/28/2023 general membership meeting a call for questions regarding the 2024 Financial Plan were requested. There were none. Please cast your vote FOR OR AGAINST APPROVAL of the 2024 financial plan. \*

- I vote FOR approval of the 2024 financial plan as presented in the October 28 General Membership Meeting
- I vote AGAINST approval of the 2024 financial plan as presented in the October 28 General Membership Meeting

A copy of your responses will be emailed to the address you provided.

Submit

Clear form

## Appendix 40: Resource Center Manager's Responsibilities

The Resource Center Manager's duties include but are not limited to the following:

- Develops and maintains a master plan for the organization of printed material.
- Ensures all materials are arranged by magazine name and issue dates, books alphabetically by title and plans alphabetically project name. Videos are arranged alphabetically by title.
- Supervises the ongoing needs of cataloging, shelving, and storing of library literature. May recruit voluntary help as needed.
- Performs other duties as required.

## Appendix 41: New Member Registration Duties by Treasurer

The following list responsibilities and duties the treasurer must perform when getting a new member registration.

- Call new member to schedule BOS and cluster class dates/times.
- Discuss payment of dues, BOS, SIG, and cluster class fees with new member – arrange payment either using CAM charge or personal check.
- If CAM charge, create CAM charge.
- If personal check, have new member drop it off at the woodshop and place in Treasurer's mailbox.
- Obtain a copy of the new member's community association card.
- Schedule BOS, cluster, and practicum class dates/times. Record information in OneDrive>Treasurer Public>Registration> XXXX Cluster Class Registration.xls workbook (where XXXX is the appropriate year)
- Enter new member email in Guild listserv (an email will be sent to the new member from listserv – New Member email #1)
- When dues/fees payment is received, enter member in the OneDrive>Front desk>GuildMemberDatabase.accdb Access database.
- Update new member application with BOS schedule date. Note on new member application that the listserv database & Access database has been updated. Record CA charge #, Check # and amount collected from new member.
- Create soft copy (PDF) of member class schedule for file
- Send new member confirming email. Attach current copy of The Plank newsletter – New Member Email #2 (Appendix A Treasurer's Duties and Schedule EXHIBIT 9)
- Send new member email attaching welcome letter (Appendix A Treasurer's Duties and Schedule EXHIBIT 11) which contains New Member website link, copy of new member application, and PDF schedule of classes – New Member Email #3 (Appendix A Treasurer's Duties and Schedule EXHIBIT 10). If new member is joining any SIGs, attach appropriate welcome letter.
- Mark application "PAID" and forward to Secretary.
- If new member joined a SIG, notify SIG management and forward SIG dues to the SIG.
- When requested by new member, reschedule BOS and cluster class schedule. Send updated schedule to new member. Create new soft copy.

See Treasurer Work Instruction WI-001 in Appendix 8 for additional details.

## Appendix 42: Web Page Master Responsibilities

The Webmaster is responsible for maintaining the Woodworker Guild web page and the New Member web site as follows:

### *As Needed:*

- Update "Headlines," "More Information," "Calendar of Events," "External Links," and "Photos," for new or changed information.
- Examine items in the "Documents" section - update each document as needed.

### *Monthly:*

- By the 25<sup>th</sup> of each month, add schedule documents for the following month:
  - Shop Managers
  - Assistant Shop Managers
  - Mentors
  - Tool Room Monitor
  - Cluster Instructor
  - Lathe Monitor
  - Front Desk Volunteer

### *January of Each Year:*

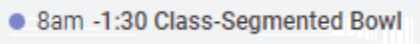

- Update "Contact Information" data
- Update "YEAR Board Responsibilities" document
- Update "Calendar of Events" for general membership meeting dates, monthly coffee days and any other information pertinent to the membership

### *October of Each Year:*

- Update "YEAR Member Renewal" document
- Update "YEAR New Member Application" document

## Appendix 43: Guild Calendar Administrator Responsibilities

The Calendar Administrator is responsible for keeping the Guild calendar up to date and maintaining current copies posted at the front desk, Guild website and the monitor over the manager's station.

- Work with the Advanced Training Director to enter or adjust Advanced Training classes
  - When entering advanced training classes use the format
    - -ending time Class-Class name (-1:30p Class-Segmented Bowl). Entry will be displayed as 
  - If the class requires the use of the library use the format
    - Library start time-end time Class-Class name (Library 1p-2p Class-Intro to Turning). Select "all day" so that class is displayed as follows 
- Audit for room conflicts

Google Calendar username and password:

- On the internet, navigate to [www.google.com](http://www.google.com)
- Log on as (see Treasurer Passwords document held by President or Vice President)

user – User Name #6  
password – Password #6  
select the calendar app

- Read only link for members (<https://goo.gl/xwt16m>)

*As Needed*

- Insert, move, delete events into the appropriate date and time on the calendar
- As events are added or changed, print 3 copies of the appropriate month on legal paper (I use the program "print my cal" which creates a word document that can be printed.
- Post the calendar printouts at the woodshop in the library and over the Kreg machine.
- **NOTE** - there is a read only link to this calendar on the web page and in each Plank.

See Treasurer Work Instruction WI-001 in Appendix A for additional information.

## Appendix 44: Cluster Activities Coordinator Responsibilities

In preparation for Students arriving, the Cluster Activities Coordinator, currently the Treasurer, is responsible for scheduling new student Practicum and Cluster training and advising students of their schedules. The following activities must be performed.

1. Mid-month in the month before a student's scheduled classes – Send a reminder email with a copy of the student's class schedule per the following format

---

**Subject** - Woodworker Guild - New Member Mid-Month Email - Reminder - Your Woodworker Guild Cluster Classes begin MM/DD/YYYY (enter exact date of BOS class)

**Body** - A friendly reminder that your Guild training classes begin Monday MM/DD/YYYY (enter exact date of BOS class) next month at the woodshop. There may be some of you who already attended all your cluster classes and are taking your Practicum classes.

Attached is your training schedule. Please look over your schedule and advise if there is a problem. Since we are working with 16 students every month and specific training classes are only offered one day a month, it is extremely difficult to reschedule a missed class. You can cancel and reschedule up to 1 week before BOS training with no penalty. If you cancel or reschedule within 7 days before BOS training, you will be assessed a penalty of \$45.

Your first class (Basic Orientation and Safety (BOS)) begins Monday evening at 5:15pm at the woodshop. A copy of your training schedule will be handed out at that time. It is imperative that you attend this class to move forward in your cluster classes. If you miss the BOS class, we will have to reschedule your entire cluster and practicum class series. **Please be mindful that cluster class slots are valuable. As you have probably experienced, we have a long waiting list to get into cluster classes. If for some reason you cannot attend BOS, please let me know with as much lead time as possible so we can reschedule another member to take your place. PLEASE JUST DON'T SHOW UP FOR YOUR FIRST CLASS. THAT CAUSES THE TRAINING SLOT TO REMAIN OPEN WITH NO CHANCE OF FILLING IT.**

You will be given a set of safety glasses to keep when you check in. Denim shop aprons are available for a cost of \$22 to \$30 depending on apron style chosen. Twelve-foot tape measures and squares are required and are available at the shop. Respirators and hearing protection are also available for sale. Closed toed shoes are required – no sandals are allowed in the woodshop at any time. If you want to take notes, bring a pen/pencil and paper.

Second day classes run from 8am straight thru to 4pm, there will be a 1-hour lunch break. You may bring lunch or snack but there is no refrigerator at the woodshop.

Following the BOS class, you take 10 cluster classes. You must successfully complete all 10 cluster classes to attend the practicum classes.

Your practicum classes are scheduled to begin the week following your final cluster class. You must attend all four Practicum classes to receive your gold card which allows you access to all equipment in the woodshop with the exception of the lathes. You cannot skip or reschedule one or two of these classes. If you cannot attend a practicum class, you must reschedule all 3 practicum classes.



Don't forget to access the New Member website located at:

<https://wwmmg.org/>

The cluster class student handouts are located under the BOS/Cluster/Practicum heading. Please read all cluster class handouts. There is no need to print them or bring them to your classes.

Also don't forget to visit the Woodworkers Guild Sun City Web page. The Sun City Community website is available only to residents of Sun City Hilton Head. Please visit our web page by navigating to the Woodworkers and Modelmakers Guild community group on the

<https://www.suncityhiltonhead.org/>

web page then selecting the Woodworkers and Modelmakers Guild club from the Community Groups.

- 
2. The last week of the month before a student's scheduled classes – Send a reminder email per the following format.
- 

**Subject** - Woodworker Guild - New Member Final Email Reminder - Your Woodworker Guild Cluster Classes begin next week.

**Body** - For most of you, your first class (Basic Orientation and Safety (BOS)) begins at 5:15pm next Monday evening at the woodshop. It is imperative that you attend this class to move forward in your cluster classes. If you miss the BOS class, you cannot take any other classes and we will have to reschedule your entire cluster and practicum class series. **Please be mindful that cluster class slots are valuable. As you have probably experienced, we have a long waiting list to get into cluster classes. If for some reason you cannot attend BOS, please let me know with as much lead time as possible so we can reschedule another member to take your place. PLEASE, JUST DON'T SHOW UP FOR YOUR FIRST CLASS. THAT CAUSES THE TRAINING SLOT TO REMAIN OPEN WITH NO CHANCE OF FILLING IT.**

You will be given a set of safety glasses to keep when you check in. Denim shop aprons are available for a cost of \$22 to \$30 depending on apron style chosen. Twelve-foot tape measures and squares are required and are available at the shop. Respirators and hearing protection are also for sale. Closed toed shoes are required – no sandals are allowed in the woodshop at any time. If you want to take notes, bring a pen/pencil and paper. Please bring your Sun City Community identification card.

Tuesday, your first day of cluster classes will run from 8am to 3pm. There will be a 1-hour lunch break at 12pm. You can bring your lunch but there is no refrigerator or microwave at the woodshop.

In the days following the BOS class, you take 10 cluster classes. You must successfully complete all 10 cluster classes to attend the practicum classes.

Your practicum classes are scheduled to begin following your final cluster class. You must attend all four classes to receive your gold card which allows you access to all equipment in the woodshop except for the lathes. If you cannot attend a practicum class, please contact the Cluster and Practicum Director as soon as possible.

Don't forget to access the New Member website located at:

<https://wwmmg.org/>

The cluster class student handouts are located under the BOS/Cluster/Practicum heading. Please read all cluster class handouts. There is no need to print them or bring them to your classes.

Also don't forget to visit the Woodworkers Guild Sun City Web page. The Sun City Community website is available only to residents of Sun City Hilton Head. Please visit our web page by navigating to the Woodworkers and Modelmakers Guild community group on the [WWW.SunCityHiltonHead.org](http://WWW.SunCityHiltonHead.org) web page then selecting the Woodworkers and Modelmakers Guild club from the Community Groups.

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3. The Friday before the scheduled BOS class – Call each student reminding them that their woodshop training begins next Monday.
4. The weekend before training classes begin.
  - a. Print a class schedule for each student.
  - b. Create a white badge for each student OR create a special white badge for RR-SIG or CARVER-SIG only members (those that attend BOS but not attend cluster and practicum classes) (see XXXX Cluster Class Registration excel workbook located on OneDrive>Treasurer Public>Registration where XXXX is current year – White Badges tab OR RR-Carver White Badge)
  - c. Create a gold badge for each student that is attending practicum class) (see XXXX Cluster Class Registration excel workbook where XXXX is current year – Gold Badges tab) (attach gold badges to practicum schedule sheets)
  - d. Create a BOS, Cluster, Practicum class schedule detailing all students attending classes (see XXXX Cluster Class Registration XXXX excel workbook where XXXX is current year – Orange Book Sheets tab)
  - e. Print medical forms for students (Medical Form tab)
5. Badges must contain QR barcode of the member CAM number – Process for obtaining this barcode
  - On the internet, go to <https://qrexplre.com/generate/>
  - In the QR Code(s) field, enter one or more member CAM numbers
  - Under Configurable Options, enter
    - Error correction level – medium high
    - Pixels per block – 3
    - Check box beside “Add file name to image.”
    - Click the Generate Codes bar
    - QR codes will be displayed.
    - Using Hypersnap or other screen grab program, copy bar code to member badge information in XXXX Cluster Class Registration excel workbook where XXXX is current year – White or Gold Badges OR RR-Carver White Badge tabs
6. Both White and Gold Badges will be in this format.

OPEN SHOP USE

**John**

**Doe**

I.C.E: 843-422-0837



1473901

The day of BOS training – greet students and walk them thru sign-in process in office. Give each new member their training schedule and safety glasses.

Additional Information can be found in Treasurer Work Instruction WI-043, 044, 045 in Appendix 8.

## Appendix 45: Checkbook Reconciliation Steps

Transactions in the checkbook (currently on Quicken) should be reconciled by the Treasurer. Take these steps to perform this activity.

- 1) Open Quicken. Open the checkbook account
- 2) Using a web browser, go to <https://www1-wholesaleportal.suntrust.com/ocm/user/login>
- 3) Use the Quicken password and click the sign on button. The following screen will be displayed. The password can be found in the document Treasurers Passwords located on onedrive/treasurer.

**Business Online**

**Good Morning, Mike**  
Sun City Hilton Head Woodworkers & Modelmakers Guild

Sign Out

Dashboard

Accounts

Payments

Payroll

All Business Personal

**BUSINESS**

Checking Accounts 1 Account  
Updated as of Today 9:53 am

Total Business Banking *0140	Current Balance <i>i</i> \$41,522.07	Available Balance <i>i</i> \$41,522.07
------------------------------	---	---

View Recent Transactions

- 4) Click Accounts under the Dashboard. The following screen will be displayed

Select Account  
Cd Investment \*0001

View Account Details


Transactions Statements

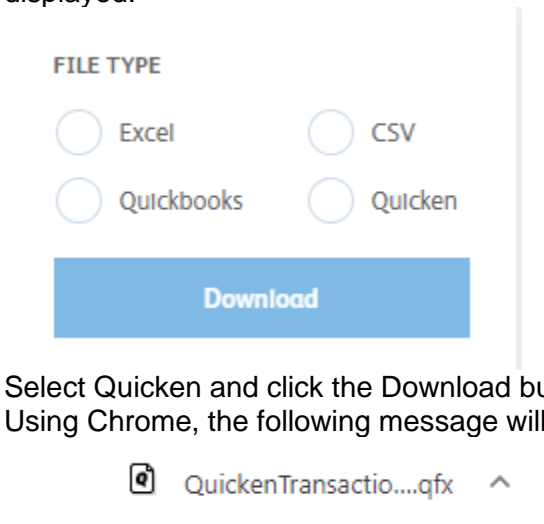
From 08/30/2020 To 09/13/2020 Search...

Date	Description	Type	Amount	Available Balance
------	-------------	------	--------	-------------------

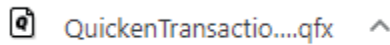
PENDING

- 5) Change the Select Account field to “Total Business Banking” using the red down arrow
- 6) Enter the date for the previous Saturday into the From field. Today’s date will default into the To field.

- 7) Click the Download icon  to the right of the dates. The following drop-down menu will be displayed.



- 8) Select Quicken and click the Download button  
 9) Using Chrome, the following message will be displayed on the bottom left of the screen



- 10) Click the ^ icon to download the data  
 11) Switch to Quicken and the data should be displayed on the bottom of the quicken screen.

Status	Date	Num	Payee	Payment
Match	9/8/2020	6267	Check 6267 / CHECK 00000006267 6267	66.05
Match	9/8/2020	6265	Check 6265 / CHECK 00000006265 6265	106.87
Match	9/9/2020	6266	Check 6266 / CHECK 00000006266 6266	56.70
Match	9/9/2020	6264	Check 6264 / CHECK 00000006264 6264	1,060.55
Match	9/10/2020	6268	Check 6268 / CHECK 00000006268 6268	35.29

- 12) All entries should display matched. If not, correct by entering a check or manually selecting a match. A “C” will be displayed in the reconciliation column.  
 13) After all entries display matched, click the Accept All button to perform the reconciliation. A “R” will be displayed in the reconciliation column.

106 87	R
56 70	R
66 05	R
35 29	R

- 14) **NOTE** - There are other ways to accomplish this activity, but this is the only **FREE** method. Sun Trust will assess a \$25 fee if you use the normal Quicken One Step Update connect method.

## Appendix 46: Privilege Card (P-Card) Responsibilities and Steps

P-Card holders have additional responsibilities. During normal shop hours, they are to augment the supervision and guidance of the Shop Manager by ensuring members use equipment properly and safely. If they observe a member acting recklessly or unsafely, they must intervene directly or advise the Shop Manager. Outside of shop hours, they are each responsible for the safety and security of the entire shop and one of the P-Card holders must wear the Red Apron and assume the responsibilities of a regular Shop Manager, filling out the shop opening/closing paperwork, approving lumber sales, etc. If a Red Apron shop monitor leaves the building, another P-Card holder must assume the duties of the Red Apron Shop Monitor. If no one is willing to assume the Red Apron duties, the Red Apron Manager shall announce that the shop is closed, and all present must leave the building.

P-Cards are awarded and rescinded by the P-Card Committee based on a periodic review of members to ensure that they are maintaining their qualifications. The review of incumbent P-Card holders is based on the prior year's activity or portions thereof as determined by the P-Card Committee. The P-Card Committee may also issue P-Cards to others based on special circumstances. Following this review, P-Cards will be issued in a new color or a new year date will be printed on them. Only the holders of the updated P-Cards will be allowed the privileges stated above.

The Secretary is responsible for the calculation of qualifying hours for P-Card members. This calculation should be performed each quarter with raw data being received from Coordinators of the base roles stated above and the front office check in data for certain roles. Raw data should be provided to the Secretary by the 5<sup>th</sup> workday following the end of each quarter. Volunteer hours should be posted by the 10<sup>th</sup> workday following the end of each quarter for members to review. The P-Card committee consisting of the Vice President (Chairman), the Secretary, and the Treasurer shall conduct an annual review in the first quarter of each year of the P-Card holder volunteer hours. The P-Card committee will recommend P-Card members for the year at the January BOD meeting. The BOD will review the recommendations of the committee and adjust based on circumstances of each P-Card member. The list of approved P-Card members will be made available for members by the end of January, together with P-Card badges.

The VP is the chair of the P-Card committee that includes the Secretary and Treasurer. They meet on a quarterly basis to review the continued holding of P-Cards by members based on volunteer hours and comments from BOD members. An email among the Committee members is sufficient to grant approval of a P-Card to a member assuming that they have the support of the respective BOD Director for the volunteer role that they seek.

Members can be awarded a P-Card at any time based on their exhibited volunteer efforts, long term commitment to the volunteer area of interest and their level of expertise.

The process for a Guild member to gain a potential P-Card is as follows:

They must exhibit some level of volunteerism and expertise

They must commit to sustained effort in key volunteer area

48 hours annual volunteer time with at least half in key volunteer area

A member can request a P-Card through the appropriate BOD member

or

The BOD can recommend a member for a P-Card

The BOD sponsor provides the P-Card application (OP 11) to the member

Basic Instructors → Clusters & Practicum Director

Advanced Instructors → Advanced Training Director

Shop Managers & Mentors → Manager & Mentor Director

Special Projects & Furniture Repair → Front Desk & Concessions Director

Lathe Mentors → Vice President

Tool Monitor Trainers & Leaders → Equipment & Supply Director

Maintenance, Shop or Safety Administrator Support → President

The volunteer must take Red Apron training and shadow the managers

P-Card Committee approves recommendation

When the P-Card Committee approves the application:

- 1) A P-Card is printed (colored badges are used for mentors and standard P-Card – these colors change annually) using the OneDrive/treasurer/public/P-Card/P-Card Badge One-Off Printing.xlsx or OneDrive/treasurer/public/P-Card/Mentor Badge One-Off Printing.xlsx excel workbooks.
  - 2) Using the Member Access DB, obtain CAM number and ICE number.
  - 3) Enter Member name, CAM number, and ICE number.
  - 4) Badges must contain QR barcode of the member CAM number – Process for obtaining this barcode
  - 5) On the internet, go to <https://qrexplora.com/generate/>
  - 6) In the QR Code(s) field, enter one or more member CAM numbers
  - 7) Under Configurable Options, enter
    - a. Error correction level – medium high
    - b. Pixels per block – 3
    - c. Check box beside “Add file name to image”
    - d. Click the Generate Codes bar
    - e. QR codes will be displayed
    - f. Using Hypersnap or other screen grab program, copy bar code to member badge information in XXXX Cluster Class Registration excel workbook where XXXX is current year – White or Gold Badges OR RR-Carver White Badge tabs
  - 8) Up to 6 badges may be printed if needed.
  - 9) Print badges on proper color paper.
  - 10) Enter date P-Card printed.
  - 11) Select reason P-Card being given to member by selecting proper P-Card column or entering information in the Other P-Card column.
  - 12) Determine if member deserves a Lathe Qualified, Intermediate Lathe Qualified, First Aid Qualified stamp by examining the member Access DB.
  - 13) Place new P-Card in Member badge box in the shop.
  - 14) Obtain member email from Access DB and send the following email: (Copy Track Director) (This data can be found in OneDrive/Treasurer/P-Card/ New P-Card Member.docx
- 

Congratulations!

I have created a Privilege (p-card) for you. Look for it in the badge box to the right of the front door.

A Privilege card carries a benefit for the member but also carries a responsibility to the Guild. I have pulled sections from our operations manual that pertain to the Privilege card. Please familiarize yourself with them. You might want to read the entire operations manual which can be found in the documents section of our Sun City Hilton Head web page ([www.suncityhiltonhead.org](http://www.suncityhiltonhead.org)) as well as our new member website ([www.wmmg.org](http://www.wmmg.org))

## Appendix 47: Lumber Sales Accounting Steps

The Woodroom program (run on a computer next to the managers desk) in conjunction with the file OneDrive>Woodroom Pricing.xlsx produces a file (OneDrive>Woodroom>transaction log.txt). This data is downloaded weekly to a file (OneDrive>Woodroom>XXXX Lumber Room Activity.xlsx where XXXX is the calendar year) which contains each transaction. Weekly (Saturday) and Monthly (end of the month) transactions are downloaded into XXXX Lumber Room Activity where sales and cost are calculated so that an entry can be made into Quicken to record the monthly lumber activity and member CAM charges can be derived. Lumber selling prices can be updated anytime by the Lumber Room Manager thus the following activity should be performed weekly (Saturday) so that selling prices/cost are consistent with the transactions.

- Obtain monthly lumber charges (both Guild projects and Members personal projects) from OneDrive>Woodroom>transaction log.txt.
  - From a blank excel workbook, open all files (transaction log.txt)
  - The following will be displayed

Text Import Wizard - Step 1 of 3

The Text Wizard has determined that your data is Fixed Width.  
If this is correct, choose Next, or choose the data type that best describes your data.

Original data type

Choose the file type that best describes your data:

Delimited - Characters such as commas or tabs separate each field.

Fixed width - Fields are aligned in columns with spaces between each field.

Start import at row: 1 File origin: 437 : OEM United States

My data has headers.

Preview of file <https://d.docs.live.net/ba67a7769b5f272b/Woodroom/transactionlog.txt>.

1	2020/10/25	10:17	001	0440715	0444906	G: \$	004.08	Tax: \$	0.00	- 4/4:
2	2020/10/25	11:45	001	0446408	0444906	G: \$	006.60	Tax: \$	0.00	- 4/4:
3	2020/10/25	11:45	002	0446408	0444906	G: \$	010.00	Tax: \$	0.00	- 4/4:
4	2020/10/25	11:45	003	0446408	0444906	G: \$	011.16	Tax: \$	0.00	- 4/4:
5	2020/10/25	11:45	004	0446408	0444906	G: \$	027.00	Tax: \$	0.00	- 4/4:

Buttons: Cancel, < Back, Next >, Finish

- 
- Click the Next button. The following will be displayed



Text Import Wizard - Step 2 of 3

This screen lets you set field widths (column breaks).  
 Lines with arrows signify a column break.

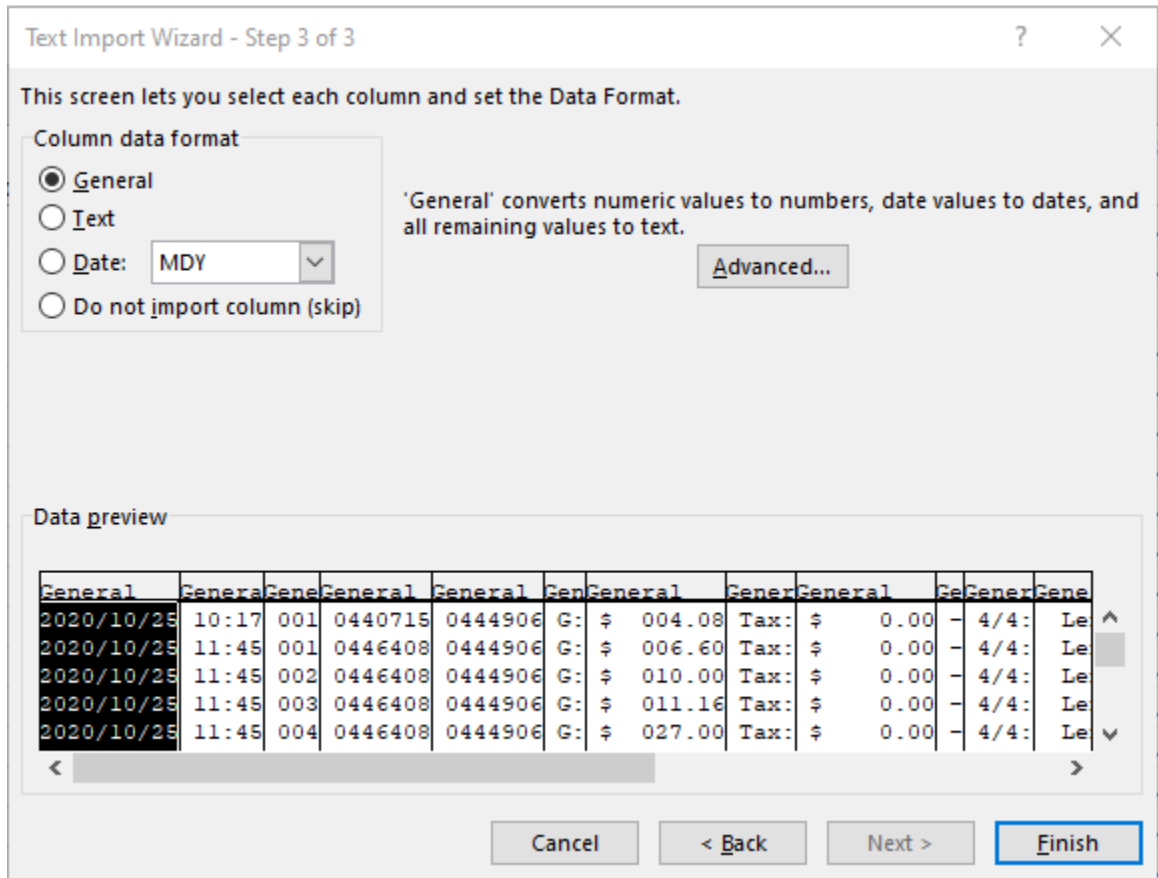
To CREATE a break line, click at the desired position.  
 To DELETE a break line, double click on the line.  
 To MOVE a break line, click and drag it.

Data preview

	10	20	30	40	50	60	70					
2020/10/25	10:17	001	0440715	0444906	G: \$	004.08	Tax: \$	0.00	-	4/4:	Le	^
2020/10/25	11:45	001	0446408	0444906	G: \$	006.60	Tax: \$	0.00	-	4/4:	Le	
2020/10/25	11:45	002	0446408	0444906	G: \$	010.00	Tax: \$	0.00	-	4/4:	Le	
2020/10/25	11:45	003	0446408	0444906	G: \$	011.16	Tax: \$	0.00	-	4/4:	Le	
2020/10/25	11:45	004	0446408	0444906	G: \$	027.00	Tax: \$	0.00	-	4/4:	Le	v

Buttons: Cancel, < Back, Next >, Finish

- 
- Double click on the arrows on lines 41,56,111,114,116,151 and move 124 to 127 and 143 to 147 to format for import to Lumber Activity. Click the Next button and the following will be displayed.



- Click the Finish button and the data will be imported into a blank excel workbook. The following will be displayed.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
1	#####	10:17	1	440715	444906	G:	\$4.08	Tax:	\$0.00	-	4/4:	Len:	56	Wid:	6	Q:	1	Poplar	card holders		
2	#####	11:45	1	446408	444906	G:	\$6.60	Tax:	\$0.00	-	4/4:	Len:	48	Wid:	9	Q:	1	Red Oak	Lazy Susan		
3	#####	11:45	2	446408	444906	G:	\$10.00	Tax:	\$0.00	-	4/4:	Len:	48	Wid:	12	Q:	1	Birch	Lazy Susan		
4	#####	11:45	3	446408	444906	G:	\$11.16	Tax:	\$0.00	-	4/4:	Len:	48	Wid:	10	Q:	1	Cherry	Lazy Susan		
5	#####	11:45	4	446408	444906	G:	\$27.00	Tax:	\$0.00	-	4/4:	Len:	48	Wid:	9	Q:	1	Walnut	Lazy Susan		
6	#####	11:45	5	446408	444906	G:	\$9.75	Tax:	\$0.00	-	4/4:	Len:	48	Wid:	9	Q:	1	Soft Mapl	Lazy Susan		
7	#####	9:36	1	526748	445609	P:	\$7.29	Tax:	\$0.51	-	4/4:	Len:	48	Wid:	10	Q:	1	Poplar			
8	#####	10:19	1	440702	442025	P:	\$6.11	Tax:	\$0.42	-	4/4:	Len:	40	Wid:	8	Q:	1	Red Oak			
9	#####	10:19	2	440702	442025	P:	\$10.50	Tax:	\$0.73	-	4/4:	Len:	24	Wid:	12	Q:	1	Sapele			
10	#####	10:22	1	442036	442025	P:	\$17.50	Tax:	\$1.22	-	4/4:	Len:	48	Wid:	10	Q:	1	Sapele			
11	#####	11:17	1	449477	442025	P:	\$12.50	Tax:	\$0.87	-	4/4:	Len:	16	Wid:	10	Q:	1	Walnut			
12	#####	13:22	1	445572	450701	P:	\$10.55	Tax:	\$0.73	-	8/4:	Len:	40	Wid:	8	Q:	1	Poplar			
13	#####	13:33	1	461032	450701	P:	\$13.95	Tax:	\$0.97	-	4/4:	Len:	60	Wid:	8	Q:	1	Cherry			
14	#####	14:01	1	693987	437239	P:	\$11.16	Tax:	\$0.78	-	4/4:	Len:	48	Wid:	8	Q:	1	Cherry			
15	#####	14:01	2	693987	437239	P:	\$7.29	Tax:	\$0.51	-	4/4:	Len:	48	Wid:	7	Q:	1	Birch			
16	#####	14:01	3	693987	437239	P:	\$44.53	Tax:	\$3.11	-	4/4:	Len:	57	Wid:	10	Q:	1	Walnut			
17	#####	9:17	1	437374	443085	P:	\$44.00	Tax:	\$3.08	-	SG:	Full			Q:		1	Birch - White (Import)-1/2			
18	#####	13:10	1	450288	447138	P:	\$7.00	Tax:	\$0.49	-	4/4:	Len:	24	Wid:	8	Q:	1	Sapele			
19	#####	13:29	1	448555	448841	P:	\$14.00	Tax:	\$0.98	-	SG:	Half			Q:		1	Birch - White (Import)-1/4			
20	#####	9:44	1	449451	440702	P:	\$12.75	Tax:	\$0.89	-	4/4:	Len:	48	Wid:	9	Q:	1	Hard Maple			
21	#####	10:03	1	443875	449477	P:	\$22.00	Tax:	\$1.54	-	SG:	Half			Q:		1	Birch - White (Import)-1/2			
22	#####	10:15	1	438226	449477	P:	\$1.94	Tax:	\$0.13	-	4/4:	Len:	16	Wid:	8	Q:	1	Poplar			
23	#####	10:15	2	438226	449477	P:	\$12.50	Tax:	\$0.87	-	4/4:	Len:	16	Wid:	10	Q:	1	Walnut			
24	#####	10:57	1	451862	440702	P:	\$6.30	Tax:	\$0.44	-	4/4:	Len:	55	Wid:	6	Q:	1	Red Oak			
25	#####	11:47	1	442025	440702	P:	\$3.91	Tax:	\$0.27	-	4/4:	Len:	43	Wid:	6	Q:	1	Poplar			
26	#####	13:15	1	437151	445575	P:	\$12.03	Tax:	\$0.84	-	4/4:	Len:	132	Wid:	6	Q:	1	Poplar			

- Widen column A. Identify next transaction to be imported into Lumber Activity. Copy columns A thru T to Lumber Activity file.
- Copy columns U3 thru AJ3 to all rows just imported to calculate cost and margin.
- Copy columns U3 thru AJ3 for all rows just imported and paste special (values) over the same rows. This turns the calculated data into values so that no further calculation will be performed when the woodroom pricing file is updated.

- If necessary, update member database contained on the “Membership” tab in the workbook
- Edit data for duplicate entries (Look for same date, time, seq number) eliminate duplicates. Additionally, edit data for selling price/cost/margin. Advise Lumber Room Manager if issue is encountered.
- For member charges, copy member name, CAM number, and lumber charge to monthly Sun City Community Association (CA) charges by member’s request.
- For Guild Projects, record lumber sales (taxable and non-taxable) with an offset to project expenses based on the expense category charged. Since this is a zero-sum entry, add to an existing check entry (see check 5630 for an example) lumber sales will be recorded as a credit since this information is being added to a check that was previously written and expense accounts will be charged as identified on the lumber room project worksheet.
- Quicken accounting for the following activity using new method:

Quicken Entries	January	February	March	April
Lumber Sales	60	60	180	0
Accrual Offset – CAM				
Charges	-60	-60	-180	0
Cost of Sales	-50	-50	-150	0
Inv Fluctuation Accrual	50	50	150	0
Lumber Purchase	-100	0	-100	-50
Net Quicken				
Entries	-100	0	-100	-50
When CAM Check Received	60	60	180	0
Total Quicken Entries after CAM Receipt	-40	60	80	-50
	20		30	

## Appendix 48: Guild Information Technology Tools – File Sharing, Eventbrite, WoodRoom, Front Desk Check-in

### File Sharing

Every modern organization needs an efficient and effective tool for secured sharing of information. [OneDrive is a cloud service](#) provided by Microsoft that enables real-time sharing of information. It has provisions to provide individual level access security, as well as link-based group access. The following is a set of guides to understand how the Guild will use OneDrive as part of our normal practices. OneDrive allows for folders to be automatically kept in sync between a user's home PC and the shared cloud instance of the files (when edit access is granted to a folder and they set the folder for OneDrive synchronization).

Each of the officers has their own Personal OneDrive area, which they access using their personal email account. The account is the Microsoft account used to access OneDrive directly on the PC, Mac, phone or just a browser. This account is owned by the user. What is done here is not visible to anyone – unless they explicitly allow it. These files can show up in the file manager (desktop or mobile OS) as native files, when configured properly. Web access of personal OneDrive files is available using a browser via: <https://OneDrive.live.com>.

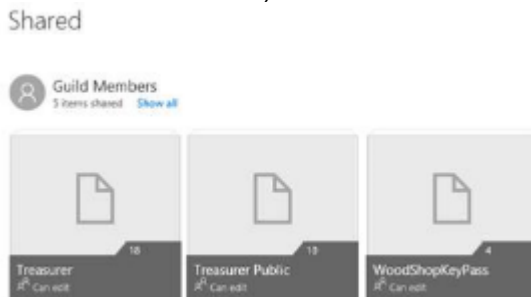
Within the Guild OneDrive storage area are OneDrive specific structures that need to be created for each officer role:

- 1) Guild OneDrive role folders: These folders are essentially owned by the Guild and are private to the role. Once an officer leaves their role, ownership will be transferred to the next person to take on the role.

The **Shared** capability (in the browser from a Personal OneDrive account) can be used to allow for a clone of these files into the individual's personal OneDrive. If this is done, the files will show up in the individuals personal OneDrive just like any other folder/file. The folders cannot be renamed or moved on the local machine; they must be top level folders in OneDrive.

Each officer will need to provide their Personal OneDrive account information to the Guild IT coordinator for this sharing to take place. The officer will have private read/write access to these files, though access can be shared with others. The use of links to these private areas is highly discouraged to the extent that links will be removed if identified. Sharing with named individuals via their email is fine. Files that require link access should be in the office public area.

From the browser in the OneDrive **Shared** area, an officer should see something like this (this is for the Treasurer role):



To have these files show up at the top level of the personal OneDrive area, click on the folder and select **Add to my OneDrive**. They will be replicated to the personal OneDrive on the personal machine within a few minutes.

These three shared folders support 3 functions:

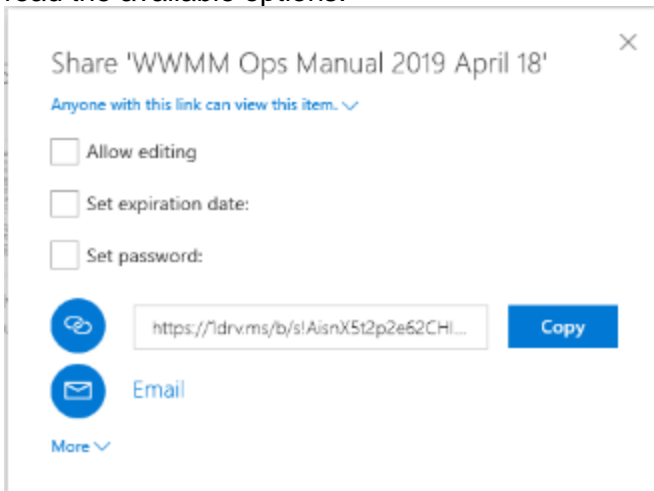
- 1) The roles 'private' folder: used for roles personal use or explicit sharing with individuals. If links to files are found in this folder, they will be removed when they are found.

- 2) The roles 'public' folder: the files within these folders can be shared as links or explicitly. Think of this as a place to share information with Guild members. All Guild officers will have write access to this information, as well.
- 3) WoodShopKeyPass folder: this is where KeePass information is stored. If you don't know what that means yet, don't worry about it.

2) Guild OneDrive Public folders: Each of these folders are owned by the Guild. All Guild officers have write access to these folders via a link provided. Officers can grant named individuals edit access to folders if needed. Officers can also grant access via links to anyone in the Guild. If an officer opens the link provided to the SCHHWWMMG public higher-level folder, they should see something like:



To grant someone access, right click on the folder (in the Browser) and click **Share**. Be careful to read the available options:

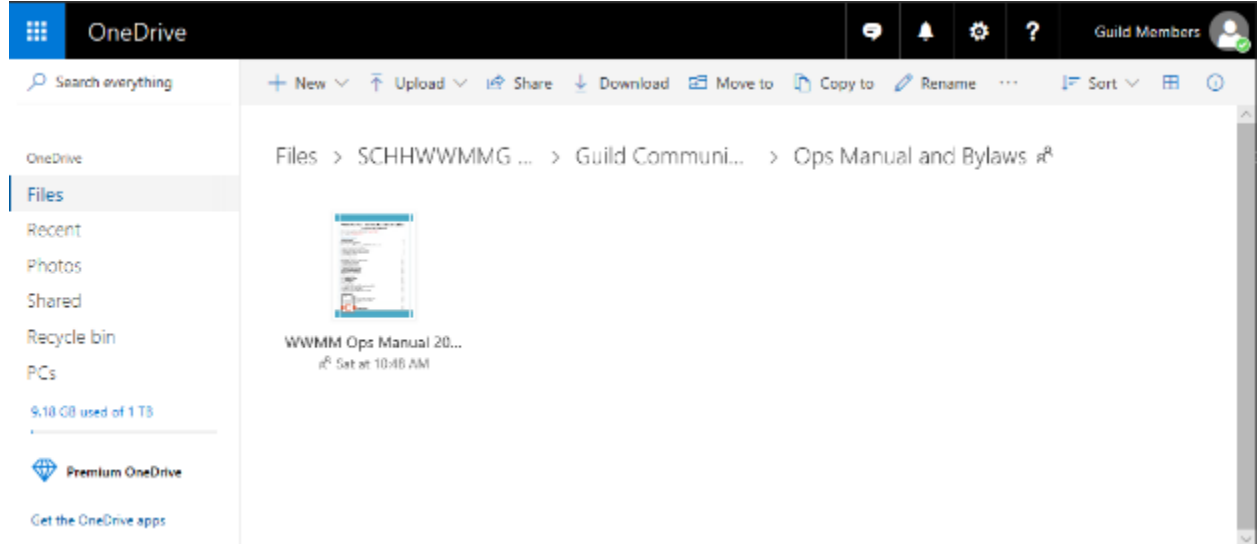


Please do not grant **Allow Editing** and send a link. If those are detected, they will be removed, since they allow unfettered access until it is removed. Only grant personal access (via **Email**) when using **Allow editing**, that way any future individual in the role can understand who has access.

Feel free to grant read access via a link to files in the role's public area. Do not use links in the role's private space.

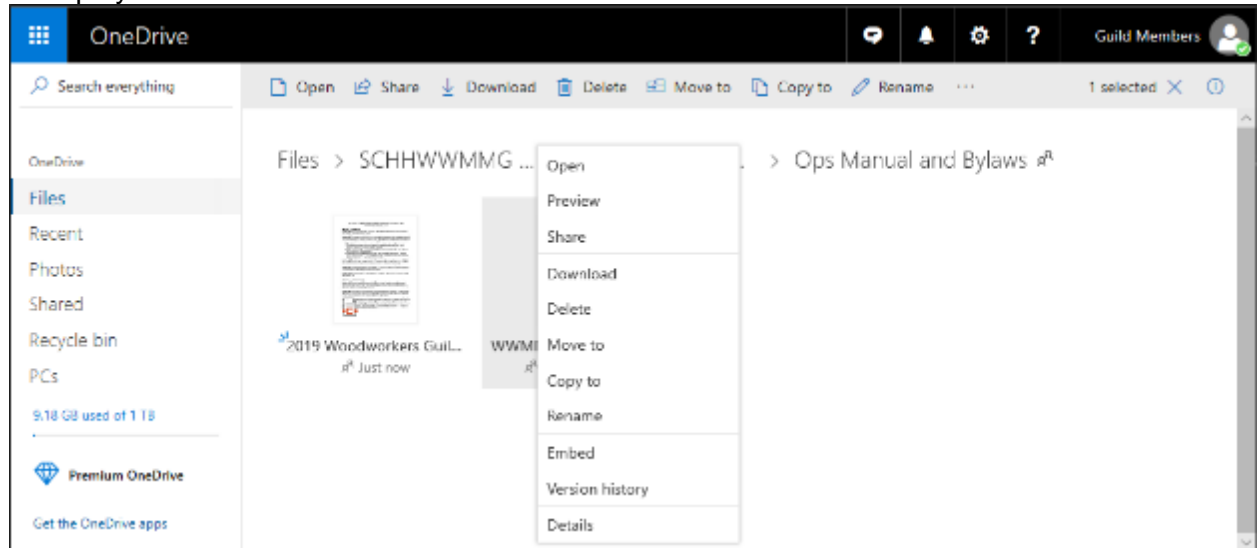
3) Other shared documents: There are folders defined that are used for general communications. An example is in the SCHHWWMMG Public -> Guild Communications folder. All the board members have write access to this folder. In order to move documents into the folder, open the

OneDrive folder from a browser, ideally from an InPrivate browser connection. Go down to the Guild Communications folder and drop the files to be shared into the folder:



This screenshot shows the SCHHWWMMG Public -> Guild Communications -> Ops Manual and By-Laws folder.

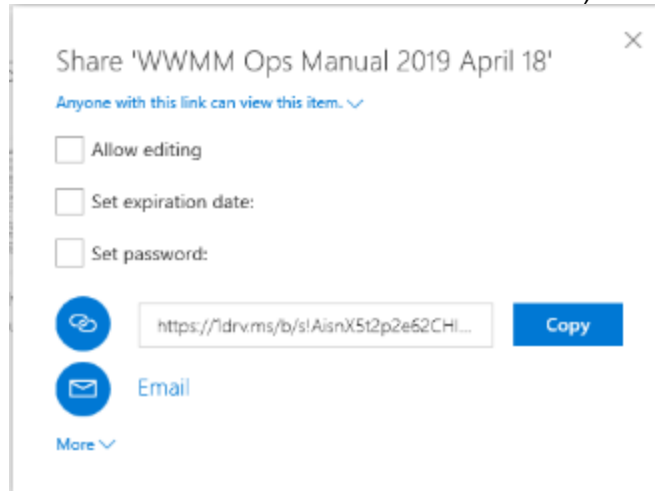
Once the file is there, right click on the file and a pulldown menu of options to execute on the file is displayed.



Select Share

A number of options related to sharing will be shown. Make sure Allow editing is not checked (since we shouldn't be sharing links with write access) and click on Copy. A link is now available

that can be shared in a website or email with anyone. That link that will allow them to look at the file (they do not even need to be aware that it is stored in OneDrive).



## Eventbrite

All the advanced training classes are listed in Eventbrite. This is a service to which the Guild subscribes that is more complex than can be described in the Ops Manual.

The classes are grouped by topic. A weekly vacancy email will be provided to the Guild members and a link will be included in that email for each topic of classes. These links will change each quarter, throughout the year. Individuals should not try to search for classes directly in Eventbrite. Since the Guild events are private, our classes will not be found.

The links shared each week have been tested on a number of different browsers. If they do not work, try to copy the link text, and paste it directly into your browser. If it still doesn't work try accessing them from an InPrivate (Edge) or Incognito (Chrome) browsing window – if they work there, that probably means you have some 'special' plug-in that is interfering with accessing the site.

All the classes are also listed in the Woodshop calendar.

Eventbrite class reservation process enables the first person to get to the financial transaction step to lock in a seat in the class for 8 minutes. This is the same way many of these reservation systems work; the first person with the \$\$ on the line wins.

If (for some reason) you abandon the transaction, it is locked out for 8 minutes for everyone.

## Woodroom Program

In 2019, an Excel spreadsheet was created to facilitate tracking wood consumption from the Guild's wood room. This tool displays a screen similar to:

Type of Transaction:	<input type="text" value="Personal"/>	
<input type="button" value="Add 4/4 Lumber"/>	<input type="button" value="Add 8/4 Lumber"/>	<input type="button" value="Add Other"/>
Payment	<input type="text"/>	
CAM Number:	<input type="text"/>	Submitter Name
Approval	<input type="text"/>	
CAM Number:	<input type="text"/>	Approver Name
Description (optional):	<input type="text"/>	
Transaction: \$0.00	<input type="button" value="Cancel"/>	<input type="button" value="Check CAM"/>

Guild members who wish to purchase wood enter the purchase information along with their CAM numbers and have the transaction approved by the Manager or Assistant Manager on duty. Individuals cannot approve their own purchases. Once the transaction is complete; they will receive an email at the address they have defined with the Guild Treasurer.

If the item is not on the list of purchasable items or the Guild member does not have a valid email in the system, a purchase transaction via CAM or cash needs to be created by the shop manager and provided to the Guild Treasurer.



## Front Desk Check-in Program

In 2019, an Excel spreadsheet was created to facilitate the check-in process. This tool displays a screen similar to:

### Sun City Woodworkers and Modelmakers Guild

Reason \_\_\_\_\_

Shop Use

Just using the shop (J)    Student (S)    Railroad (R)

Volunteer Activity

<input type="checkbox"/> Instructor (I)	<input type="checkbox"/> Class preparation (C)
<input type="checkbox"/> Tool room monitor (T)	<input type="checkbox"/> Maintenance (N)
<input type="checkbox"/> Front desk attendant (F)	<input type="checkbox"/> Shop manager (M)
<input type="checkbox"/> Special projects (P)	<input type="checkbox"/> Assistant shop manager (A)
<input type="checkbox"/> Other volunteer (V)	<input type="checkbox"/> Mentor (E)

CAM #:

Users of the shop check in defining why they are in the shop and this information is used by the Guild Secretary and Treasurer in tracking volunteer hours.

## Appendix 49: Covid-19 Pandemic Policies and Procedures

The purpose of this Appendix is to document the policies and procedures that were developed and implemented in response to the Covid-19 Pandemic. Future Boards of Directors would be able to use these documents as a blueprint in the event another similar type of situation occurs. The Board of Directors (BOD) would have the ability to reactivate the policies and procedures or modify as the current situation dictates precluding the need to create new documents. The Covid-19 Pandemic resulted in a three-month closure of all amenities in Sun City that included the Woodshop. During the shutdown, the BOD worked to develop a plan to open the woodshop, meeting CDC guidelines and most importantly, protecting our members to best of our abilities. The plan involved all members of the BOD and impacted all facets of the Woodshop daily operations. The plan was reviewed and approved by the Community Association.

### **Woodshop May 2020 Reopening Policies Document**

**Our mission is to establish and implement a process to reopen the shop to reasonably protect our members from the COVID-19 virus and that is consistent with federal, state, and Sun City Community Association guidelines.**

**The Woodworkers and Modelmakers Guild Board shall review these *ad hoc* policies as needed but not longer than every 30 days. Changes shall be implemented to ensure the Guild is using best practices relative to the COVID-19 virus.**

1. Members shall use the Woodshop at their own risk and shall follow the policies set to reasonably protect members from the COVID-19 virus. If they are not comfortable with these requirements or concerned about their health, they should not enter the shop. If any member is not in compliance with these policies, they shall be warned once by the Shop Manager and asked to leave if they are non-compliant a second time.
2. Open Shop hours are planned for Monday, Wednesday, and Friday from 9:00 AM to 12:45 PM (first shift), and from 1:00 PM to 4:45 PM (second shift). The shop will be open Saturdays from 1:00 PM to 4:45 PM. Guild members must arrive within the first 30 minutes of their shift. The Shop Management Team will use the 15 minutes at the end of each shift to clean-up in preparation for the next shift. See policy #4 for details on how daily shifts are allocated.
3. The reopening of the shop will be done in increments. Initially, there shall be no P-Card days on Tuesday, Thursday and Sunday or any off hours until new protocols can be assessed. Most likely several weeks after the Shop reopens, a procedure will be established for P-Card days from the learnings of the Open Shop days.
4. The number of Guild members per shift in the shop will be no more than 35.
  - a. The maximum allowed in the shop at any one-time is 45. This will consist of 35 Guild members, 4 Shop Management volunteers (Shop Manager, Assistant Shop Manager, Front Desk Attendant, and Tool Room Monitor), and 1 HO railroad member. The remaining 5 openings are discretionary including but not limited to Board Members observing how the process is working, facilities personnel, G-Scalers needing to use the Restroom, etc.
  - b. Mentors and Lathe Mentors will not be included until the social distancing requirement is lifted.
  - c. Thirty-five Guild members per shift will be chosen by the Guild Reservation System.
    - i. Mike Thomas manages the Guild Reservation System.
    - ii. The Front Desk Assistant can fill empty Guild member slots from the list of those who signed up but were not selected, up to an hour after the shift has started. These slots come from

chosen Guild members that did not show up within the first 30 minutes after their shift started or those members who leave before the first hour of their shift.

- iii. If the available slots are not filled for the daily shift through the Guild Reservation System, Mike Thomas will announce openings are available through the Guild web site. Open slots will be filled on a first call-in basis to the Front Desk Assistant. After the first hour, no more members will be accepted.
  - d. A chosen Guild member who is sick or feels sick may not enter the shop. They must notify Mike Thomas the day before the Open Shop Day OR the front desk assistant before the beginning of their shift if they will not be using their slot. If they get sick at the shop, they should notify the Shop Manager and let them know who they were in contact with during their shop time.
  - e. Consistent with CA guidelines, the Assistant Shop Manager or Front Desk Assistant will use an infrared digital thermometer to confirm a member's temperature is normal before they enter the shop. Using CDC guidelines, if the temperature is below 100.4 °F (green light on thermometer) they can enter. If the temperature is 100.4 °F and above (red light on thermometer), they are to be sent home their name recorded, and CAM notified.
5. Members must maintain social distancing while waiting, entering, and leaving via the front door. They must not arrive early for their shift. Further, they must follow any markings or notifications concerning social distancing that have been placed or posted.
    - a. Members leave via the front door notifying the Front Desk Assistant they are leaving.
    - b. No ingress/egress through other doors except for emergency, lumber delivery, trash / dust removal, or access to outside storage buildings. Shop Manager must be informed.
    - c. Members who leave prior to the end of their shift relinquish the remainder of their shift. If members leave during the first hour of their shift, the Front Desk Assistant will call the next available Guild member on the daily shift list.
  6. Masks are mandatory! They are to be properly worn at all times with mouth and nose covered.
    - a. Guild members must provide their own masks. The Guild can provide contacts for homemade masks. Otherwise, masks can be purchased at the local stores.
    - b. A Guild member entering without a mask will be asked to leave by the Shop Manager.
    - c. Face shields and handkerchiefs are not considered appropriate masks. Respirators can be worn as a mask.
  7. Due to a limited supply of shop approved disposable nitrile gloves, gloves will not be mandatory. Guild members cannot bring in their own gloves. Gloves are recommended to be worn by the Front Desk Assistant and Tool Room Monitor since they will be in closer contact with others and not near operating machinery or power tools.
  8. It is expected that the Guild members must wash their hands and/or use hand sanitizer provided at all sanitizer stations and bathrooms before and after using any machine or tool in the shop. The "20 second" hand washing technique is highly recommended.
  9. No Basic or Advanced Training will initially take place. Chuck Ruud and Charlie Bess are establishing Training protocols for when the Board decides to restart Training activities.
  10. Maintenance is planned for Saturdays from 8-10AM.
    - a. There will be no Maintenance Mechanic available during Open Shop time.
    - b. Shop will not be open to members before 1PM on Saturday due to Maintenance.
    - c. As we reopen, the Maintenance Mechanics will be doing Maintenance only on Saturday.

- d. Major maintenance that cannot be done on Saturday will be handled on Tuesday, Thursday or Sunday as needed and following appropriate COVID-19 protection protocols.
  - e. Members and Shop Management are not to do any repairs. The machine should be marked out of service and the problem identified and detailed for Maintenance to handle.
11. Upon arrival at the shop, Guild members will inform the Front Desk Assistant of their purpose at the shop. If “just using the shop”, they can scan their badge. If one of the Shop Management team, they need to inform the Front Desk Assistant who will enter the volunteer role before they scan their badge.
- a. Updated badges that reflect new CAM numbers will be available at the front door. Members are to use the updated badge for Guild activities.
  - b. Members are to take their badges home with them. The badge box will be removed temporarily to reduce potential COVID-19 contamination.
  - c. Members who do not have an updated badge with their new CAM number will be given a temporary badge and asked to provide their new CAM number to get an updated badge.
12. Front Desk Assistants will handle all their existing roles plus the following duties:
- a. They will enter the Guild member’s volunteer role. A Guild member should not touch the computer screen.
  - b. They will be behind a “sneeze guard” for their protection.
  - c. They are responsible for sanitizing surfaces in the Front Office touched by Guild members.
  - d. Due to a higher level of direct contact with Guild members, it is mandatory they wear a mask, and it is recommended they wear gloves.
  - e. Since the single HO railroad member is by themselves and isolated behind the door, the Front Desk Assistant will occasionally look-in to make sure they are safe.
13. Certain activities will be allowed on Tuesday, Thursday and Sunday since they are required for the operation of the shop and community needs. These activities should be coordinated to maintain social distancing and not overlap in time. The only activities allowed are listed below.
- a. The Lumber Room Manager will need to accept orders to keep the lumber room supplied. There will be a team not to exceed 4 persons chosen by the Lumber Room manager to unload lumber and to cut lumber as necessary. If a Lumber Room team member does not have their own work gloves, a new pair will be provided by the Shop for that member.
  - b. The Maintenance Team may need to handle projects outside the normal Maintenance time.
  - c. The Tool Room Manager and the Supply Manager may need to handle tool repair and supply needs.
  - d. Mailbox lumber cutting, painting, and construction will be limited to 2 people.
  - e. Other activities identified by the Board as needed.
14. There will be no Guild Product, Furniture Repair, and Special Project activities. Cathy Van Roten and Pam Rief are establishing protocols for when the Board decides to restart these activities.
15. There will be no SIG activities within the shop. Jay Hubelbank is establishing protocols for the SIGs for when the Board decides to restart these activities. The only exception is the Railroad SIG will be allowed to have one person on the HO layout per shift with the door closed. The G-scale can operate if they maintain social distancing requirements since they are an outside activity. However, no railroad SIG member may enter the Woodworking shop unless the Shop Manager allows it.
16. Policy Changes for Hand Tools and Tool Room
- a. The use of “chits” will be temporarily suspended and replaced with a sign-out register that is filled out by the Tool Room Monitor (TRM).

- b. The TRM will allow one Guild member at a time into the Tool Room to select the tools that they need for their project work. The TRM will fill out the sign-out register for these tools. When tools are returned, the Guild member must sanitize them before putting them back. The TRM will sign the register that the tools have been returned.
- c. Signs will be posted indicating that all members should consider all tools and clamps as unclean and should sanitize before and after use. Stations will be available with a sanitizer spray bottle and disposable wipes for the Guild members to use.
- d. It is the responsibility of the Guild member using hand tools from the Tool Wall to sanitize all tools they use before and after use and return them to their original location.
- e. It is the responsibility of the Guild member using the clamps to sanitize all the clamps used before and after they have been used and return them to their storage location.
- f. The TRM will close and lock the Tool Room door when performing other assigned duties during their shift.
- g. 30 minutes before the end of each daily shift, the TRM will stop issuing tools and request the Shop Manager or Assistant Shop Manager to make an announcement that the Guild members need to return the tools issued from the Tool Room.

#### 17. Policy Changes for Shop Administration including Outside Storage

- a. Only 2 members are allowed in the Resource Room at any one time. Social distancing guidelines will be followed. There will be no lunches. Guild members will be responsible for wiping down any areas that they have touched before and after use. Signs will be posted for using and sanitizing books and magazines.
- b. Only 2 Guild members will be allowed in the Lumber Room and Quiet Room at any one time. Social distancing guidelines will be followed. For the Lumber Room, Guild members will be responsible for wiping down key touch points like the gate and lock before and after use, but not the lumber. For the Quiet Room, Guild members will sanitize equipment as spelled out for the rest of the shop.
- c. Restrooms will be opened. Guild members will be responsible for wiping down any areas that they have used before and after use.
- d. Access to the storage buildings will require the approval of the Shop Manager who has a key.
- e. Social distancing requirements relative to using machines, workbenches, and hand tools will be followed. Special requirements will be marked or posted as appropriate.

#### 18. Policy Changes for Safety

- a. The members are to consider all equipment, tools and surfaces contaminated with coronavirus.
- b. The members are responsible for sanitizing surfaces before and after they touch them.
- c. All touch points on a machine including but not limited to switches, controls, fences, tables, etc. must be sanitized by the member before and after using the machine.
- d. Stations will be available with a sanitizer spray bottle and disposable wipes for the Guild members to use.

#### 19. Policy Changes for Shop Management

- a. The Shop Manager is expected to make sure members comply with mask use, social distancing and sanitizing policies. If any member is not in compliance, they are to be warned once and asked to leave if they violate it a second time.
- b. Social distancing must be maintained at all times. The Shop Manager will make sure that no congregating occurs and break it up if it does.
- c. The Shop Management Team will not wear the Manager's aprons to mitigate the likelihood of contamination. The Shop Management Team will wear a second badge that they will display for identification by Guild members. The Shop Manager will have a yellow badge with Shop Manager clearly stated; the Assistant Shop Manager will have a fuchsia badge with Assistant Shop

Manager clearly stated; and the Tool Room Monitor will have a green badge with Tool Room Monitor clearly stated. Mentors and Lathe Mentors will not be provided a second badge until after the social distancing requirement is lifted.



**Woodshop May 2020 Re-Opening Policies and Procedures  
Addendum to the Tool Room Monitors Duties  
(Revised 08/22/2020 v1.04)**

**The Guild's Mission Statement**

*"Our mission is to establish and implement a process to reopen the shop to reasonably protect our members from the COVID-19 virus and that is consistent with federal, state, and Sun City Community Association guidelines."*

**Ad Hoc Policy Review**

The Woodworkers and Modelmakers Guild Board shall review these *ad hoc* policies as needed but not longer than every 30 days. Changes shall be implemented to ensure the Guild is using best practices relative to the COVID-19 virus.

**Objective**

*The addendum is to provide guidance to the Tool Room Monitors regarding the additional duties as outlined in the Sun City Woodworker and Model Maker Guild Operations Manual (OPS Manual). These additional duties have been implemented as a result of the Covid-19 Pandemic and are consistent with the SCHHWWMMG Mission Statement. These additional duties are temporary changes to the duties and will be reviewed on a regular basis but not longer than 30 days.*

**A The following are the additional duties and responsibilities of the Tool Room Monitors daily routine for the morning and afternoon shifts.**

1. The new Shop Hours for the Guild Members (GM):
  - a. Monday, Wednesday, and Fridays
    - i. AM Shift: 9:00 AM to 12:45 PM
    - ii. PM Shift: 1:00 PM to 4:45 PM
  - b. Saturday Shop Hours
    - i. AM Shift: 10:00 AM to 12:45 PM
    - ii. PM Shift: 1:00 PM to 3:45 PM
  - c. Guild Members are required to leave the Woodshop at the designated times.
  - d. The 15 minutes is to allow the staff to prepare for the next shift.
2. **TRM to arrive 15 minutes prior to your scheduled shift.**
  - a. Mon. Wed.& Fri AM Shift: The TRM to check in NLT 8:45 AM
  - b. Mon. Wed.& Fri PM Shift: The TRM to check in NLT 12:45 PM
  - c. Sat. AM Shift: The TRM to check in NLT 9:45 AM
  - d. Saturday PM Shift: The TRM to check in NLT 12:45 PM
  - e. The new Open Shop Shift hours are 15 minutes longer than the Open Shop Hours to allow end of shift activities.
  - f. The 15 minutes before the shift begins is to provides time for the TRM to get the Tool Room ready.
  - g. The 15 minutes at the end of the shift is to prepare and sanitize for the next shift.
  - h. The crossover time between the AM and PM shifts. If necessary both TRMS to work together during the 15 minutes.

3. Notify the Front Desk Assistant (FDA) that you are the TRM.
  - a. You will need to tell the FDA your new CAM Number.
  - b. You should have already picked up your new badge. If not, it will be in the office badge box.
  - c. Your temperature will be taken, if below 100.4°F before you can enter the Woodshop.
4. Pick up the TR keys from the Shop Manager
5. Pick up and sound check the wireless Microphone from the Shop Manager
6. The TRM must wear their GREEN TRM Badge.
  - a. The use of the Green Apron has been suspended until further notice due to potential contamination.
7. **Mask are mandatory at all times while in the Woodshop and must cover the nose and mouth.**
8. The TRM can wear the shop provided nitrile gloves during their shift.
9. The TRM will perform all the opening and closing activities as outlined in the OPS Manual and the additional duties as outlined below.

**B The following are the details of the additional duties of the TRM.**

**First Shift of the day (MWF&S)**

1. Ensure the TR Sanitization kit is on the table with a full spray bottle is full and a roll of paper towels on the orange tray. This is for GM to sanitizing the tools they checked out and/or checked in.
2. The GM are responsible for cleaning and sanitizing the tools they are returning to the TR.
3. Sandpaper at the shop will not be returned to the sandpaper hangers due to the inability to sanitize the sandpaper sheets. Zip Lock bags and permanent marker are located on a tray on the TRM Table for members to store the sandpaper they use.
4. Ensure the Tool Room Tool Sign Out Sheet has new sheets on the Clipboard and marked with the days date, shift (AM or PM) and TRM NAME.
5. The Tool Sign Out Sheet is specific to the AM/PM Shift.
  - a. TRM to use a new Tool Sign Out sheet for each shift
6. The TRM will fill out all the information requested on the Tool Sign Out Sheet.
7. Ensure the instruction age is visible on the door and on the table.

**C Tool Sign Out/In Procedures**

1. Allow **ONLY ONE GM** in the TR at any one time to check out or return. This is for complying with the Social Distancing Rule.
2. The GM will be allowed to enter the TR if no one else is in the TR.
3. The GM will bring the tools to be signed out.
4. The TRM will document all the tools being checked out entering the following on the Tool Sign Out Sheet:
  - a. GM's - Name and CAM Number
  - b. Description of tool or tools
  - c. Time tool checked out.
5. When the GM returns the tools signed out to the TR, the tools are to **clean and sanitized** by the GM.
6. The TRM to inspect the returned tools and document:
  - a. Tool condition
  - b. Check-In time
  - c. Initial the line item
  - d. Direct the GM to return the tools to their TR location.
7. The TRM should expect a line when GM's checking tools out/in the TR.

**D Tool Wall and Microphone Use**



1. TRM to observe the members using the tools from TOOL WALL to see if they are sanitizing the Tools return to the Tool Wall.
2. If the member returning the tool is observed does not sanitize the tool the TRM is to do the following:
  - a. Turn on and use the microphone to notify the member they did not sanitize the tool they just returned
  - b. Instruct the member to go back and get the tool and sanitize the tool
  - c. If the member does not comply with sanitizing the Tool, notify the Shop Managers.
  - d. **OPTIONAL** - TRM has the authority to make 2 – 3 announcements per hour reminding GM they are required to sanitize the tools they take from the Tool Wall before the tools are returned to the Tool Wall.

#### **E Tool Room Door Closure**

1. The TR Door will be closed and locked when the TRM is performing the other TRM duties as outlined in the OPS Manual that take them away from the TR.
2. The TRM can use the Assembly table directly across from the TR to complete other tasks such as filling glue bottles and keep the TR door open and observe any GM needing access to the TR.

#### **F End of Shift and End of Day Activities**

##### **30 minutes prior to the end of each Shift**

1. NO tools to be checked out of the TR.
2. Notify the Shop Manager to announce all tools checked out to be returned to the tool room cleaned and sanitized.
3. Check-in the tools being returned and document the return on the Tool Sign Out Sheet
4. Check Tool Sign Out Sheet for all tools not returned and have the Shop Manager make the announcement for the tools to be returned.
5. After all the tools have been return the TRM to Sanitize the touchpoints in the TR that include but are not limited to the following:
  - a. Tabletop, Daily Tool Sign Out Log binder, Specialty router bit cabinet lock & knob, other items as needed.
  - b. Keys and wireless microphone
6. Add new Tool Room Tool Sign Out Sheet to the clipboard for next shift
7. Complete end of shift TRM activities as outlined in the OPS Manual.
8. **At shift change** off going TRM to give sanitized keys to oncoming TRM.
9. **End of Day** return the sanitized Wireless Microphone and TR keys to the Shop Manager.
10. Place the shifts Tool Sign Out Sheet in the Daily Tool Sign Out Binder.

**[END OF DOCUMENT]**

