

MUSIC TEACHERS' ASSOCIATION OF CALIFORNIA

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Incorporated 1897



Certificate of Merit Policies & Procedures

2013-14

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Introduction

Certificate of Merit is an evaluation program that was created and developed by the Music Teachers' Association of California ("MTAC," "Association," or "State") in 1934, and continues to evolve over time to best meet the needs of teachers and students. The Certificate of Merit (CM) evaluation program is based on a solid foundation of systematic progression through eleven (11) Levels, from Preparatory through Advanced (Level 10). The CM program includes students performing musical repertoire and technique based on requirements set forth in an applicable instrument Syllabus (e.g. Harp, Piano, Winds, Strings, Voice).

The *Certificate of Merit Policies & Procedures* ("CM Policies & Procedures") is designed to help implement the State's CM program and to establish uniformity of its administration and operation throughout the State of California. Its purpose is also to clarify and expand upon the policies and procedures contained in the Syllabus for each instrument. However, where the applicable Syllabus and *CM Policies & Procedures* may conflict, the *CM Policies & Procedures* prevails.

The MTAC *State Bylaws* ultimately govern the MTAC organization, its members, and the administration of State Programs including CM. Members participating in CM are encouraged to review the *State Bylaws* in addition to the *CM Policies & Procedures*. Participation in the CM program is granted through membership in the Music Teachers' Association of California. Where the CM Policies & Procedures conflict with any Syllabus, the CM Policies & Procedures prevails.

CM DEADLINES: All deadlines listed in these *CM Policies & Procedures* are final and non-negotiable, no exceptions.

POLICIES & PROCEDURES UPDATES: Major updates and changes for the 2013-14 *CM Policies & Procedures* have been marked in **red** throughout the document. References to the "CM Teacher PowerPoint Presentation" have been deleted as they are no longer required for use by Teachers.

IMPORTANT DEADLINE INFORMATION

The Registration Period for Certificate of Merit has changed, and is now:

OCTOBER 1 THROUGH OCTOBER 31, 2013*

*The registration database closes at 11:59pm.

No late registrations. No exceptions.

Section 1. Purposes of CM Policies & Procedures

The purpose of the *CM Policies & Procedures* is to help implement MTAC's Certificate of Merit program at the State and Branch levels, and to establish consistency and uniformity of its administration and practices throughout the Branches to the extent possible, in order to ensure fairness for all participating Branches and students.

Section 2. Certificate of Merit Information Online

Certificate of Merit information and documents are posted at the MTAC website (www.mtac.org), on the "Teacher Home Page." To access the Teacher Home Page, which is accessible to members only, Teachers must input their username and password. This action will bring you to the Teacher Home Page, from which Teachers can access CM information and documents. Teachers are responsible for regularly checking in on the Teacher Home Page for critical information, deadlines, and updates.

Section 3. Certificate of Merit Council (CM Council)

Certificate of Merit is a program developed and owned by the MTAC State Association. The CM Council is a committee appointed by the State Board of Directors to oversee the administration and operation of the Certificate of Merit program throughout California. Certificate of Merit is largely administered through the affiliate Branches of the MTAC, in accordance with Certificate of Merit policies and procedures that are regularly posted online at www.mtac.org/login > CM Resources > CM Documents. In addition to these policies and procedures, all members are also subject to the provisions set forth in the *State Bylaws*.

CM Council Member names and contact information are listed in the *State Directory* and at www.mtac.org/login. For any questions or issues regarding Certificate of Merit, CM Teachers should contact their CM Branch Chair *first*. If a question or issue cannot be resolved, the CM Branch Chair will direct the question or issue to the appropriate MTAC personnel. Please do not contact the State Board or the State Office for Certificate of Merit questions.

Section 4. Teacher Requirements

4.1 Permitted Membership Classes

The following membership classes are eligible to participate in CM: Active, Life, Provisional, Student, and Cal Plan. Teachers must be in good standing in paying MTAC dues by the State deadline and, if applicable, shall have paid any other outstanding CM fees. Teachers may register students in CM through their Primary Branch, within the teacher's MTAC-approved instrument, as listed in the *State Directory*.

4.2 Non-MTAC-Member Teachers

Teachers who are **not** members of the MTAC, or who are not in the permitted classes, may not enroll students in CM. Such teachers may not use or rely upon the identity or membership of another qualified CM Teacher in order to circumvent this provision. A CM Teacher who wrongfully enrolls the student(s) of a non-MTAC-member shall be subject to disciplinary action.

- For example, consider this scenario. There are three teachers working in a music school. Two teachers are qualified CM Teachers who enroll their own students in CM. The third teacher is an associate teacher, but does not have membership in MTAC. The two CM Teachers may not enroll the students of the non-MTAC-member teacher into CM, as their

- own students, in order to circumvent the third teacher's non-membership. If the students of the third teacher wish to participate in CM, the third teacher must separately and individually apply for the appropriate class of membership in MTAC.

4.3 CM Teacher - Primary Teacher

Teachers who meet the criteria in Section 4.1 above may only register students whom they teach on a **regular** basis for the **majority** (75%) of lessons, as that student's Primary Teacher ("CM Teachers").

- For example: A CM Teacher occasionally coaches a student once per month, but that student actually takes lessons regularly for the majority of the year with another teacher. The CM Teacher may not register that student in CM under the CM Teacher's name or studio.

4.4 CM Teacher Regulations

CM Teachers are required to read and review the applicable Syllabus for their instrument. CM Teachers hereby agree to be subject to, and abide by, the *State Bylaws*, the *Syllabi*, and the current *CM Policies and Procedures*. Violations of the foregoing policies and procedures may result in the restriction of a CM Teacher's participation in the CM program, or other disciplinary actions.

4.5 Change of Teacher

Teachers should be aware that a change of teacher may affect a current student's registration. If a CM student changes teachers at any time, steps may need to be taken by the new CM Teacher in order to ensure the student's CM registration continues to be valid and effective:

4.5.1 Before or On **October 31**

- The new CM Teacher will initiate the Change of Teacher process online when registering the student as a "new student."
- On the CM New Student Registration Page, a series of preliminary questions will be asked. Click "YES" to the first question regarding Change of Teacher and you will be directed to the Change of Teacher Page.
- The website will notify the appropriate technology personnel on CM Council ("CCSR"). The CCSR will then complete the change.
- The new teacher must wait to receive an email from the CCSR, which will inform them that the Change of Teacher process is completed.
- After receiving the email, the new CM Teacher must then "Re-Enroll" the student from the "List to Re-Enroll."
- The student shall be evaluated at the Branch of the new CM Teacher. The new CM Teacher is responsible for checking and ensuring that the student's online CM records are appropriately transferred, in order to be listed as that student's current CM Teacher for CM purposes.

4.5.2 After **October 31**

In order to initiate the Change of Teacher process after the close of CM Registration, the new CM Teacher must complete the "Change of Teacher Form After October 31," which is available from www.mtac.org/login > CM Resources > CM Documents. Upon completion, the Form must be submitted to the CM Branch Chair. Once the Change of Teacher is completed, the new CM Teacher will be responsible for continuing the preparation for the new student's CM Evaluation and for entering and editing all online Evaluation information as needed on the MTAC website.

4.6 Former CM Students

4.6.1 Returns to Same Teacher

In the event that a previous CM student moves away or stops studying music for several years, but then returns to the same CM Teacher, the CM Teacher will need to “Recall” the student’s information and history in the CM Database by clicking “New Student Registration” located at www.mtac.org/login, under “CM Students.” The CM Teacher will be asked a series of questions on that page. The second question asks if the student has ever been a CM student with the registering teacher before; clicking “Yes” to this question will direct the teacher to the “Recall a Student Form.”

4.6.2 Student List History

In the event that a student moves away or stops studying music with a CM Teacher, and does not return, those students will continue to appear on the Student List. The CM Database must retain all students’ CM records for various eligibility requirements, just in case a student returns to the CM system, even after many years of not participating in CM, and whether or not they return to the same teacher or a different one. Therefore, the student must remain linked to the most recent CM Teacher on record, until a “Recall a Student” or “Change of Teacher” request re-activates the process.

4.7 Secondary Instrument

CM Teachers who wish to be approved for more than one instrument must apply directly to the State Office, using the ***Secondary Instrument Form***, available at www.mtac.org/membership.

4.8 CM Teacher Training

CM Teachers are required to read all guidelines, instructions, policies, procedures, Syllabi and any Syllabi Addenda, and forms related to Certificate of Merit, which are located at www.mtac.org/login. In order to register online, CM Teachers must attend an initial mandatory CM Information Meeting at their Branch. If a Teacher cannot attend, then he or she must contact their Branch Chair for alternatives approved by the Branch Chair.

Education sessions regarding Certificate of Merit may also be required by the Branch. CM Council members may also provide live CM information and education sessions at several Branches during the year, at MTAC’s determination.

Section 5. CM Enrollment Requirements

5.1 One Path

As of summer 2012, MTAC has eliminated the Path B portion of the Certificate of Merit program, and the CM program is now comprised of only one path (formerly Path A). Certificate of Merit Evaluations include all the components of the former Path A program in performance, technique, sight-reading, written theory, ear training, and optional improvisation, as sequenced in levels from Preparatory through Advanced (Level 10). All Certificate of Merit Evaluations are held at the Branch level on an assigned date or dates, at a site determined by the Branch and evaluated by an MTAC State-contracted Evaluator.

5.2 Student Qualifications; Age Requirement

Students who are (i) age **five or older** as of **October 31** (the CM Registration Deadline), and (ii) are studying with a CM Teacher as their Primary Teacher in good standing, may participate in CM.

5.3 Special Needs Students

Teachers who intend to enroll students with special needs (e.g. physical disabilities) that require special accommodations must contact the CM Branch Chair as soon as possible. Before enrolling such students, Teachers must exercise reasonable judgment as to whether a student will be able to complete all components of CM Evaluations.

In order to be eligible to request special accommodations, Teachers must obtain a *Special Needs Accommodation Request* form from the CM Branch Chair and complete it with the following information:

- (1) written parent consent (including signature) to enroll child in CM and request special accommodations;
- (2) supporting documentation evidencing that the child has special needs, including an Individual Education Program or Plan (IEP) as already assessed by child's school, or the equivalent, such as a qualified doctor's report*; and
- (3) written request for the specific accommodation sought (e.g. permission to bring magnified photocopied score for visually-impaired child; waiver of ear-training component of CM Evaluations for deaf student, etc.).

*MTAC and its Branches are not qualified to provide these types of special educational assessments; therefore students must obtain the required documentation from qualified third parties.

Not every case may be able to be accommodated and CM Council and/or CM Branch Chair will make each determination on case-by-case basis.

5.4 Same Student, Multiple Instruments

A student who enrolls in CM for more than one instrument has a unique secure ID for each instrument that is based on the student's name. Therefore, in order to register a student for more than one instrument, the student's name **must also include their middle initial** in order to create a unique ID that accurately identifies that student.

5.5 Enrollment Deadlines

Enrollment for CM opens on October 1 each year. Enrollment is a multi-step procedure: (i) completing the Online Registration process, (ii) submitting registration materials and payments to the Branch, and (iii) submitting the CM Evaluation Information online form, which includes students' Repertoire, Branch Honors, Convention, and other Branch administration information.

5.5.1 Mandatory Branch Meeting (or Approved Alternative)

Teachers must attend the CM Information Meeting at their Branch. If a CM Teacher cannot attend their Branch's Mandatory Information Meeting, then he or she must contact the Branch Chair to receive alternative training options approved by the Branch Chair. CM Teachers may not be able to access the Online Registration unless they have attended the mandatory meeting, or have received alternative training.

5.5.2 Online Registration

CM Teachers must complete all student registrations online at www.mtac.org/login no later than **October 31** ("CM Registration Deadline"). Completing the student registration includes collecting personal information from parents, for which teachers must receive consent:

- First, Last Name
- Instrument

- CM Level
- School Grade
- Student Date of Birth
- Checkbox application for Panel Auditions/Young Artist Guild, and/or Senior Award
- For Panel/YAG: Student phone, email

This information goes into a CM database (the “CM Database”), exactly as input by the CM Teacher. CM Teachers must apply for Panel Auditions and Senior Award during the Online Registration; CM Teachers are responsible for checking the eligibility requirements. The State Board of Directors, CM Council, Evaluators and the Branch are not responsible for errors or omissions made by the CM Teacher in the Online Registration.

5.5.3 Online Registration Agreement

Please review the online Registration Agreement carefully before proceeding through Registration.

5.5.4 Branch Registration Materials

Registration is not complete until CM Teachers have also submitted the following materials (“Branch Registration Materials”):

- (i) All applicable, non-refundable Fees; and
- (ii) Student List (printed out from the Student List page); and
- (iii) Student Fees List (printed out from the Student Fee’s List page); and
- (iv) *If required by the Branch*, signed Teacher Work Agreement along with any applicable Non-Work Fees.

Branch Registration Materials must be sent to the Branch’s CM Chair, or other Branch designee, postmarked no later than **November 1**, with no exceptions. If CM Teachers do not submit Branch Registration Materials by **November 1**, the **Registration is void**.

5.5.5 CM Evaluation Information Online Form & CM Evaluation Report Form

The CM registration system requires that CM Teachers input student and repertoire information into a “CM Evaluation Information” online form. This collected data is then used to generate a printed, hard-copy “Evaluation Report Form,” for Evaluators to write ratings and comments at CM Evaluations.

After Registration is completed in November, CM Teachers must return to www.mtac.org/login after **January 2** in order to submit CM Evaluation Information for each student registered in CM for that year. The CM Evaluation Information must be submitted **by the deadline set by the Branch**, and its contents may not be changed by the CM Teacher after the Branch deadline.

CM Teachers must input on the Evaluation Information online form:

- accurate and complete Repertoire information;
- applications for Branch Honors or Convention programs;
- accompanists and ensemble partners; and
- any other Branch administration options, as applicable.

CM Teachers must complete the CM Evaluation Information online form correctly, paying close attention to the piece chosen from the applicable Syllabus so that compliance with Level requirements may be verified, in addition to all other requirements outlined in the applicable Syllabus. Branch Chairs will also check the CM Evaluation Information online form for Syllabus compliance (e.g., listed Syllabus page numbers and correct student Level), and contact the CM

Teacher if any adjustments are required. CM Teachers are responsible for carefully checking their students' eligibility requirements for Branch Honors and Convention Recitals.

5.6 CM Evaluation Results; CM Database

The Branch is responsible for ensuring that all students' CM Performance Evaluation and Theory Examination Results are entered into the CM Database. After the CM Evaluation Results have been released, CM Teachers are responsible for checking that the Results match those entered in the CM Database online (www.mtac.org/login). Corrections must be submitted to the Branch Chair by **May 31**. Any corrections submitted after **May 31** cannot be changed in the CM Database.

5.7 Teacher Work Requirements

Branches may require participating CM Teachers to work, in order to assist the Branch in the administration and operation of CM Evaluations. Participation requirements (e.g. number of work hours) are determined by the number of students a CM Teacher has registered as of **November 1**. The Branches may use and collect a Teacher Work Agreement from each participating CM Teacher, and impose a monetary fine ("Non-Work Fee") for CM Teachers who do not fulfill any mandatory CM work requirement established by CM Council and/or the Branch. CM Teachers who do not pay the Non-Work Fee by the deadline set by the Branch shall be disqualified from participating in subsequent CM Evaluation programs until the Non-Work Fee has been fully paid.

5.8 Change from Panel Auditions to Non-Panel Auditions Status

CM Teachers may change a student who originally applied for Panel to Non-Panel (regular CM Evaluations) status by notifying both the Branch Chair and the Panel Coordinator no later than **January 15**. After **January 15**, students are not permitted to revert back to Non-Panel (regular CM Evaluations) status. This means students will be expected to perform at Panel Auditions as scheduled at the Panel venue, and if they do not appear and perform without prior notice and/or legitimate excuse, they will be treated as a "No Show" and forfeit the Panel Audition and CM Evaluation. Those who do not appear and perform with prior notice and excuse approved by CM Branch Chair may qualify for a Make-Up Evaluation (see Section 7.15).

5.9 No Late Registrations

Late Registrations are not accepted under any circumstances. The Registration deadline is **October 31, 11:59pm**, with no exceptions. This policy is strictly enforced in order to preserve fairness and equal treatment for all participants.

Section 6. CM Evaluations

A. CM Evaluation Components

CM Evaluations are composed of the following components: (1) a **Performance Evaluation** in which students shall perform appropriate Repertoire selections (as set forth in the applicable Syllabus), Technique requirements, and a Sight-Reading Test; and (2) a written **Theory Examination**, which includes an Ear-Training Test.

All components of the CM Evaluation are conducted in **English only**. Evaluators, Teachers, Branch volunteers, and students may communicate only in English in all testing areas, except in emergencies not related to the CM Evaluation contents.

6.1 Syllabus

Guidelines and requirements for each of the components of the Certificate of Merit program are contained in the Syllabi published by the MTAC, which are available for purchase online at www.mtac.org. Syllabi are provided for each instrument (Harp, Piano, Strings, Voice, Winds). Syllabi Addenda are published as necessary, and are located at www.mtac.org/login.

6.2 Performance Evaluation

Students are assigned a specific performance schedule at an allotted time based on the students' registration level. Students perform the repertoire while an Evaluator listens and provides written comments and ratings for the benefit of the student and teacher. Venues for the Performance Evaluation are arranged by the Branch, and typically held at local colleges, studios, churches or schools. Students receive ratings of Excellent, Good, Average, Weak, and/or Incomplete in the areas of Technique and Sight-Reading; ratings of Excellent, Good, Average, Weak for Repertoire; and ratings of Pass, Ineligible for Certificate, No-Show, or Remain at Level for the overall Performance. Numerical ratings are assigned for Branch Honors and Convention Recital eligibility, if applicable. General comments and selection information are also provided for those students who have registered for Panel Auditions or Young Artist Guild.

6.3 Repertoire Requirements

Students must perform only Permitted Repertoire in a CM Performance Evaluation.

6.3.1 Permitted Repertoire

"Permitted Repertoire" is defined as original compositions written specifically for the instrument being evaluated, and any repertoire listed in the applicable instrument Syllabus.

6.3.2 Unacceptable Repertoire

For repertoire that is **not** permitted at CM Evaluations, please refer to the applicable instrument Syllabus ("Unacceptable Repertoire"). Students performing any Unacceptable Repertoire will receive an "Ineligible for Certificate" rating by the Evaluator, and will be ineligible for Branch Honors and Convention Programs.

6.3.3 Repertoire Exclusions in the Syllabus

The Syllabus provides a Repertoire List of acceptable repertoire for each CM Level. In some cases, such as in collections and anthologies, certain repertoire does not meet the student's registered CM Level. In these cases, such repertoire has been specifically excluded in the Syllabus Repertoire List. Teachers should double-check carefully for these exclusions.

- For example, in the *Piano Syllabus 2012*, Level 5 Repertoire List, "Anthologies," entry "Olson, L.F., *Essential Keyboard Repertoire*, v. 2 is listed as an acceptable anthology. However, the Syllabus specifically excludes the following repertoire by stating: "not Schumann Chorale, Happy Farmer; Gretchaninoff Cycling; Bartok Game."

6.3.4 Repertoire As Listed on Evaluation Report

Students must perform the Repertoire as listed on their Evaluation Report Form. CM Teachers are locked out of the online registration system after the established Branch deadline; therefore, if a CM Teacher wishes to change a student's Repertoire selection after the deadline, the Teacher must contact the Branch Chair in advance for consent provided at the discretion of the Chair. A student performing Repertoire that is not listed on the Evaluation Form and/or has not received the required Branch Chair consent to change a Repertoire piece, will be ineligible for Branch Honors and Convention performance.

6.3.5 Foreign-Language Music Publications

- (a) Teachers must provide an English translation for the Title and Composer of any piece brought to Evaluations that is published or printed in a foreign language, so that the Evaluator can properly identify the piece. “Foreign language” is defined to mean those languages that do not use the English (Romanized) alphabet (e.g. Russian, Chinese, Korean, Japanese, Arabic, Hebrew, etc.)
- For example, if a CM Teacher uses a Chinese-language publication of Beethoven’s *Für Elise*, but only the Chinese appears for the title 給愛麗斯, the CM Teacher must provide a translation of the Title and Composer as: “*Für Elise*, Ludwig van Beethoven.”
 - *Für Elise* does not need to be additionally translated into English (“For Elise”) if the Title is provided in the original German language using a Romanized alphabet, because it is recognizable and identifiable to English-reading Evaluators.
- (b) The English translation of the Title and Composer can be notated by the teacher on the score, or attached on a separate sheet of paper to the score.
- (c) Students will be ineligible for Branch Honors or Convention, if a translation is not provided.

6.3.6 CM Evaluation Information Online Form – Repertoire Entry

- (a) **Composer Name.** Composer’s FIRST and LAST name must be included.
- (b) **Title.** Title should include key signature and catalogue number, *e.g.* BWV, Op., K., L., Hob.
- (c) **Movement.** Movement should indicate Tempo, *e.g.* “Allegro” and not “First Movement.”
- (d) **Syllabus Citation.** Required Syllabus Piece must be as listed Required Syllabus Piece must be as listed in the Syllabus and include the page number on which the piece appears in the Syllabus.
- (e) **Chronological or Performance Order.** Preferably, repertoire should be entered either by historical chronology or in order of performance.

6.4 Memory Requirements

Please refer to the applicable instrument Syllabus for memory requirements for technique and repertoire.

6.5 Improvisations

Students may include an improvisation lasting from **5 to 60 seconds** during the Performance Evaluation. Improvisations are optional and will not be rated by the Evaluator. Any improvisation is acceptable; please refer to the MTAC website (www.mtac.org/login, Teacher Home Page) under “Improvisation” for more information. Important: The allowed time for the entire Performance Evaluation shall not be lengthened due to the addition of an improvisation.

6.6 Technique Requirements

Students perform the technique requirements set forth in the applicable Syllabus that correspond to their registered instrument and level. Technique is performed and evaluated as part of the Performance Evaluation. Technique must be memorized and played without notation, but students may look at a Technique Chart that is included in the Sight-Reading Booklet. Each Level has a specified time limit in which to perform the technique requirements, which are comprised of various elements such as scales, arpeggios, and chords in designated keys. If the student exceeds the allowed time limit, the student’s rating shall be affected. For Piano, Advanced (Level 10) Etude must be from the Etude list provided in the Syllabus. String requirements vary; please refer to the Strings Syllabus for more information.

6.7 Sight-Reading/Singing Test

The Sight-Reading/Singing Test shall be administered in the Evaluation Room as a portion of the Performance Evaluation. Students are strictly prohibited from seeing the Sight-Reading/Singing Test materials in advance of the Evaluation. Students shall be shown the Sight-Reading/Singing Test materials for the first time at the Performance Evaluation. Students will be given a certain amount of time to study the Sight-Reading/Singing excerpt, in accordance with the times specified in the applicable Syllabus. Students may put their hands on their instrument and “shadow play” during that time. Counting aloud or saying note names aloud is acceptable both before and during the Sight-Reading/Singing Evaluation. **Exception:** Panel Auditions for Piano, Strings, and Winds are not required to take the Sight-Reading Test.

6.8 Theory Examination

The Theory Examination is a written examination to test a student’s knowledge and skill regarding music theory. The Theory Examination shall take place in a separate Theory Test Room, which is monitored and proctored by trained teachers. CM Teachers shall be provided with the opening and closing hours of the Theory Test Room. All participating teachers and students must adhere to the *Theory Test Room Guidelines*, which includes additional policies and procedures. Please refer to the applicable instrument Syllabus for a list of Theory Examination and Ear-Training Test requirements per Level.

- (a) Students may spend as much time on the Theory Examination as they wish but must submit the Theory Examination by the closing of the Test Room at the end of the Evaluation day, even if the test is incomplete.
- (b) In some instances, a student may have a Performance Evaluation scheduled in another room during the time in which the student is also taking the Theory Examination. Such students who have not completed the Theory Examination may be escorted to and from their Performance Evaluation by designated CM personnel, and return to complete the Theory Examination after they have finished their Performance Evaluation. However, all Theory Examination papers must remain in the Theory Test Room, and the student may not take them out of the Theory Test Room for any reason.
- (c) If a student is taking a CM Evaluation for more than one instrument, the student must take both the Performance Evaluation and Theory Examination for each instrument being evaluated.
- (d) No personal electronic devices (cell phones, iPods, iPads, etc.) are allowed in the Theory Test Room.
- (e) Parents and unauthorized teachers are not allowed in the Theory Test Room.
- (f) **The Theory Test Room is an English-only testing area. Proctors, students, and teachers may communicate only in English, except in emergencies not related to the contents of the examination.**
- (g) **Students must be able to read the Theory Examination (and Ear-Training Test) independently in English without adult help or intervention. While students may ask minor clarifying questions, proctors may not read a test or portions of a test out loud to students. Students may not bring another person as a test reader or translator, except where special needs have been approved by the Branch.**

6.9 Ear-Training Test

The Ear-Training Test is based on the specific requirements listed in the Syllabus by instrument and level. The Ear-Training Test is located on the last page of the Theory Examination, and occurs during the Theory Examination. Students listen to an audio recording, provided in the Theory Test Room, of various melodic, harmonic, and rhythmic examples. Students may listen to the questions and excerpts as many times as they wish. If the audio recording is played for a group of students,

the examples may be repeated multiple times. Please refer to the applicable instrument Syllabus for a list of Theory Examination and Ear-Training Test requirements per Level.

6.10 Advanced (Level 10) Theory Exemption

At the Advanced (Level 10), a student in school grade 9 or above who passes Advanced (Level 10) Theory with a score of 90% or higher is exempt from taking only the Advanced (Level 10) Theory examination in subsequent CM years. Advanced (Level 10) students who fail Performance, but score 90% or higher on the Theory Examination, shall retain their Advanced (Level 10) Theory Exemption. There is no exemption for Voice students. If taking evaluations for more than one instrument, students must earn a separate Advanced (Level 10) Theory Exemption for each instrument.

6.11 Ensembles

Students may choose to perform one ensemble piece (e.g. duet) during their CM Performance Evaluation. However, ensembles must be composed only of students who are individually enrolled in CM. Parents, teachers, non-MTAC members, and non-CM students, may not be part of any ensemble for CM Evaluation, including serving as substitutes in the event an ensemble member is unable to perform or attend. If an ensemble member is unable to perform or attend at a CM Evaluation, the remaining ensemble members shall perform the ensemble piece, and shall be evaluated on an individual basis but will be ineligible for Convention. For more information, please refer to the applicable instrument Syllabus. Ensembles may combine students of different levels and instruments, **but the ensemble piece must be at the level of the highest-level student in the ensemble. Instrument solos with accompaniment are not accepted as Ensemble pieces.**

6.12 Piano Ensembles

The Piano Ensemble may include a maximum of **five pianos**. The CM Teacher representing any multiple piano ensemble must contact the Branch CM Chair to receive approval by **October 15**. The CM Teacher is responsible for set-up of additional pianos or keyboards, including cartage and any set-up/removal expenses, before Evaluations begin for the day, and are responsible for removal at the end of the day. The CM Teacher should not contact the facility directly; any facilities questions should be directed through the Branch CM Chair.

6.13 Live Accompaniment Required; Exceptions

Strings, Winds and Voice students in Levels 8 through Advanced (Level 10) must use live accompaniment for all pieces using accompaniment. Recorded accompaniments are permitted for Level 7 and below, but only for pieces not being considered for Branch Honors or State Convention Recitals. Any piece being considered for Branch Honors or State Convention Recitals requires live accompaniment.

B. Evaluation Results

6.14 Evaluation Results.

CM Teachers are required to review and provide their students with the results of their CM Evaluations as soon as possible after such Evaluations Results are released by the Branch Chair.

6.15 Evaluation Results if Change of Teacher

If a student terminates lessons with his or her CM Teacher after the CM Evaluations, the former CM Teacher must still provide the student with the CM Evaluation Results, or leave the Evaluation Results with the Branch Chair and inform the former student to contact the Branch Chair to retrieve the Evaluation Results.

6.16 Remain at Level Rating

The Remain at Level rating (RAL) means that a student may not progress to a higher CM Level at his or her next CM Evaluation. A CM student who receives an RAL rating at a CM Performance Evaluation or Theory Examination, must pass the same CM Level in Performance **and** Theory, in order to progress to a higher CM Level on their next CM Evaluation. Students who receive an RAL rating may not repeat the Evaluation in the same CM Evaluation year.

6.16.1 Performance Remain at Level (Fail)

The Remain at Level rating is for the student who clearly is not prepared for the Performance Evaluation or receives an Automatic Remain at Level. Students will receive an RAL rating for (i) a weak, unprepared performance, or (ii) Automatic RAL situations.

Students shall receive an Automatic RAL rating for the following:

- (i) **Repertoire:** Advanced (Level 10) required Etude is not memorized (Piano only).
- (ii) **Sight Reading:** Student refuses to attempt to perform the sight-reading excerpt. (Legally-blind students exempt.)
- (iii) **Technique:** Student has not prepared and cannot perform any Technique, or Student has not memorized the Technique (Strings étude excepted).
- (iv) **Memory:** Memory requirements for the applicable Syllabus are not met.
- (v) **Number of Pieces:** The number of pieces required in the Syllabus is not correct.
- (vi) **Copyright Restrictions:** A student who brings a photocopied score or brings music reproduced from a CD or downloaded from the Internet without an authorized logo or source shall not be heard by the Evaluator and shall receive an automatic RAL rating. The only exceptions are copies to facilitate page turns (an original score must be present) and copies for confirmed out-of-print material. Confirmed out-of-print material must be accompanied by written permission from the publisher.

6.16.2 Theory Remain at Level (Fail)

Students who receive a Fail grade (less than 70%) on the written Theory Examination will receive a Remain at Level rating. Students receiving an RAL rating for **either** the Performance Evaluation **or** the Theory Examination must pass the same CM Level in Performance **and** Theory, in order to progress to a higher CM Level on their next CM Evaluation. Any year in which a student receives an RAL rating will not be included as a participation year for the Senior Medallion or Panel Audition Eligibility.

6.16.3 No CM Evaluation Re-Takes

Students may not re-take their CM Evaluation in Performance or Theory, for any reason, including receiving a dissatisfactory result or RAL rating, during the same CM Evaluation year.

6.17 Ineligible for Certificate (IC)

The "Ineligible for Certificate" rating shall be used for students who perform a proficient CM Performance Evaluation, but who have violated rules and regulations not related to performance quality. Students who receive an IC rating will not receive a CM Certificate for the CM year in which the IC was given. However, they are permitted to move to a higher CM Level at their next Performance Evaluation. An IC rating will disqualify a student from Branch Honors, CM Convention Recitals, and Panel Convention performances. IC ratings will not affect future Senior Award or Panel eligibility.

Students shall receive an IC rating for the following:

- (a) performing incorrect repertoire categories, Syllabus piece, or not having a required Syllabus piece;
- (b) performing technique from an incorrect Syllabus or level;

- (c) Advanced (Level 10) Etude is not from required Etude list as provided in the Piano Syllabus;
- (d) performing any Unacceptable Repertoire.

6.18 Ineligible for Branch Honors or Convention

The “Ineligible for Branch Honors or Convention” marking on the Evaluation Report Form refers to those students who applied to be considered for Branch Honors or Convention programs, based on their performance at CM Evaluations. Students shall receive an “Ineligible for Branch Honors or Convention Recitals” for the following:

- (a) performance did not meet the required Evaluator ratings and/or theory score;
- (b) original music scores were not provided to the Evaluator (see 7.11 above);
- (c) repertoire performed was not listed in the Evaluation Report Form;
- (d) English translation of the Title and Composer for music published in a foreign language was not provided.

6.19 Certificate of Merit Achievement

Students must pass **BOTH** the Performance Evaluation and Theory Examination for their registered CM Level in order to receive a Certificate showing that they have passed that CM Level and may progress to a higher CM Level.

Section 7. CM Evaluation Administration

A. Fairness Practices

7.1 Cheating Defined

Cheating is strictly prohibited at CM Evaluations. Cheating is the act of dishonestly, deceitfully, or unfairly obtaining, supplying, or changing student answers, by any person (including students, teachers, Branch members, proctors, monitors, volunteers, parents), during any component of CM Evaluations. Anyone caught cheating, or determined to have cheated, will be subject to disciplinary action, including but not limited to immediate disqualification of a Student, suspension of membership for a Teacher, and restriction from future CM participation.

7.2 Security of CM Materials

All CM Teachers and students are strictly prohibited from reviewing, receiving, or distributing CM Theory Examinations, Ear-Training, and Sight-Reading Examination materials before the CM Evaluation testing dates. Students are strictly prohibited from taking any written examinations outside the testing area, without prior authorization and supervision. Students must leave any unfinished or incomplete written Theory Examinations in the Theory Room while they take the Performance Evaluation in the Evaluation Room.

Any violations of this policy, as determined by CM Council or the State Board of Directors pursuant to the *MTAC State Bylaws* and the *MTAC Conflict Resolution and Disciplinary Guidelines*, shall result in significant restriction or disqualification from participation in CM in future years and/or other appropriate disciplinary action against the involved parties.

7.2 Confidential Information

CM Branch Chairs, CM Teachers, and Branch volunteers may receive, access, or handle data and information that is confidential and proprietary to MTAC (“Confidential Information”), in performing their duties to MTAC. CM Branch Chairs, CM Teachers, and Branch volunteers are not permitted to disclose any Confidential Information to any third party, including other CM students

and parents (except the students/parents' own CM Teacher), without the prior written consent of MTAC.

7.3 CM Evaluators

CM Evaluators are strictly prohibited from discussing students' CM Evaluations with other parties, including teachers, parents, students, or door monitors or other Evaluators. Therefore, CM Teachers, members, or Branch CM Chairs who have questions regarding an Evaluator's decision must follow the Communication and Conflict Resolution procedures set forth below (see Sections 13 and 14).

7.4 Evaluation Venues

Every attempt must be made by the Branches to schedule students at appropriate Evaluation Venues, other than their own CM Teachers' studios or homes, to reduce the possibility of unfairness or cheating.

7.5 Security of Theory Examinations

Theory Examinations materials must be kept and secured by the Branch CM Chair until all CM Evaluations are complete statewide (usually in early April, but Branch CM Chair must confirm dates with CM Council).

7.6 Branch CM Ear-Training Test Materials

Branches must **download** CM Ear-Training test materials for all instruments and retain them securely with the Branch CM Chair, or other appropriate Branch Board members. Teachers are not permitted to borrow, take, or listen to any Ear-Training test materials before or during Evaluations.

7.7 Evaluation Area

Only registered students and Evaluators are permitted in the Evaluation Room. Except for Teachers who are working at Evaluations, Teachers and Parents are not allowed in the Evaluation room or testing area. This includes hallways, student restrooms, Evaluation rooms, Theory Test room, Theory Grading room, and the surrounding area. Teachers and Parents are not permitted to view the Evaluation through windows or door windows. The sole exception is accompanists for non-keyboard instruments who are allowed in the Evaluation Room only during the time required for accompanying a student's pieces.

In the event that an Evaluator, working Teacher, or Door Monitor notices a parent or non-working Teacher in the Evaluation Room or other prohibited areas, the Evaluator or working Teacher should **kindly** inform the parents or non-working Teacher that their presence is not allowed. Explain that this rule is to ensure the integrity of the evaluations taking place. Gently find out the reasons the parents or non-working Teacher is present, as there may be a legitimate reason (e.g. student medical emergency). If a problem arises, then the Evaluator or working Teacher should inform the parent or non-working Teacher that the CM Branch Chair needs to be contacted. **Kindly** ask the parent or non-working Teacher to wait in another area until the CM Branch Chair arrives, so that the student's Evaluation may continue without further disruption.

7.8 Accompanists

Any individual (e.g. parent, teacher, non-MTAC member, non-CM student) may serve as an accompanist for Strings, Winds, and Voice CM Evaluations. Accompanists may be present in the Evaluation Room only during the pieces for which accompaniment is required. Piano ensemble performers are not considered accompanists, and such ensemble performers must be individually enrolled in CM.

B. Materials & Fees

7.9 Photocopy Permissions for MTAC-Published Materials

MTAC has provided permission for CM Teachers to reproduce limited portions of all MTAC-published Syllabi and Technical Requirements booklets for personal use. A limited number of CM tests from previous years are also available for purchase at the State Office or MTAC Online Store, and may be photocopied for use within the CM Teacher's studio.

7.10 Copyright Restrictions

Students and accompanists are prohibited from bringing photocopied music to CM Evaluations. Individuals who bring in unauthorized photocopied music to CM Evaluations shall not be heard by an Evaluator and shall automatically receive a "Remain-at-Level" rating. The only exceptions are copies to facilitate page turns (an original score must be present) and photocopies for confirmed out-of-print material. Confirmed out-of-print material must be accompanied by written permission from the publisher. If a student has not memorized a piece, the student must provide a second original score for the Evaluator. A photocopy may not be used as a second score.

7.11 Music Score Required for Evaluator.

In order for Evaluators to do their jobs, students must bring an original, published music score for each piece:

- All scores must be provided even if student has memorized all pieces (the Evaluator still needs a score for each piece).
- Additional scores must be provided if pieces are not memorized (Evaluator and Student each have a score).
- A third additional score is required if a live accompanist is used (Evaluator, Student, and accompanist each have a score).

Please remind parents and students to bring original scores for EACH piece to CM Evaluations. Missing scores for any piece will result in the student receiving an "Ineligible for Branch Honors or Convention Recitals" marking.

7.12 Branch Registration Fees

If a student must be evaluated at another Branch, or at Regional Evaluations for any instrument, the \$6.00 Branch Registration Fee, plus the Branch surcharge, should follow the student to the receiving Branch or Regional Center. The student must pay the difference if the Branch surcharge of the receiving Branch is more. All fees must go through the Branch Treasurer.

7.13 Non-Refundable Fees

All CM Fees are non-refundable.

C. Alternative Evaluations

7.14 Missed or Late-Arrival Evaluations

If a student arrives late and misses their assigned Evaluation time, the Evaluator or another Evaluator may hear the student at the end of the day, *at the Evaluator's sole discretion*. The Branch shall be responsible for paying the Evaluator for the extra Evaluation time provided, at the end of the same Evaluation day. This negotiation must take place solely between the Evaluator and CM Branch Chair, and neither the student's teacher nor parent may be involved. The Branch should collect the additional Evaluation Fee from the student/parents.

7.15 Make-Up Evaluations (MUPs)

Make-Up Evaluations are available **only** to students in school grades 9 through 12 for **legitimate, extreme emergencies**, such as serious illness, injury, or mandated school conflicts, and require approval from the CM Branch Chair. The CM Branch Chair may require students to provide written evidence of the emergency, such as a doctor's note. The student's CM Teacher must submit a MUP Application and the MUP fee to the Branch Chair no later than **April 15**.

MUP students do not qualify for any Convention program or for Advanced (Level 10) Theory Exemption. Different procedures and deadlines apply for MUPs for Performance (e.g. Evaluator scheduling), and MUPs for Theory. MUPs for Performance must be completed by **May 15**, and MUPs for Theory must be completed by the date on which CM Theory Results are released statewide (typically **early April**).

For further information, please refer to the MUP Application form and corresponding procedures available at www.mtac.org/login (Teacher Home Page).

7.16 Inter-Branch Evaluations

Non-Piano students (Harp, Strings, Voice, Winds) may need to be evaluated at another neighboring Branch ("Host Branch") other than their registered Branch ("Home Branch"). This may occur if there are not enough students to engage an Evaluator for a full Evaluation day, as determined by the CM Council Instrument Coordinator. In cases where the student cannot test on a certain day for religious reasons (any instrument), and his or her Home Branch does not offer an alternative testing day, the CM Branch Chair may contact the CM Evaluator Scheduling Coordinator or CM Council Instrument Coordinator to arrange for an Inter-Branch Evaluation at a Host Branch.

Section 8. Branch Honors

8.1 Branch Honors Eligibility

- (a) Minimum Eligibility Requirements: Students must pass both the Performance Evaluation and the written Theory Examination, and must not have been rendered ineligible due to the reasons specified above in Section 6.18.
- (b) Additional Eligibility Requirements: Additional eligibility criteria are established solely by the Branch. Teachers should check with their Branch regarding these additional criteria.

8.2 Live Accompaniment Required

For Strings, Winds, and Voice Branch Evaluations, any pieces being considered for Branch Honors or Convention programs must be accompanied by a live accompanist for all CM Levels.

Section 9. State CM Convention Programs

9.1 CM Convention Recitals

CM Convention Recitals are designed to honor students who have demonstrated exceptional skill in all areas of the CM program. Students who receive top ratings and have been selected by the Evaluator at the CM Evaluation that year are invited to participate in the Convention Recitals, which take place at the MTAC's Annual Convention. **Repertoire changes are not allowed at Convention, and students must perform the piece(s) evaluated at CM Evaluations.** The Recitals are categorized as follows:

9.1.1 Festival Recitals

- Feature repertoire from the Certificate of Merit Syllabus at the student's enrolled level

9.1.2 Theme Recitals

- Feature the musical literature of a special theme topic chosen in advance by CM Council. The recitals may include students from various instrument disciplines.
- Please check with the CM Branch Chair or www.mtac.org/login for information on the current selected Theme.

9.1.3 New Materials Recitals

- Feature contemporary music (published within the last 10 years of the Recital), and are designed to encourage teachers and students to explore and present in this genre.
- New Materials does not include arrangements, method lesson or technique book pieces, or recent reprints of older compositions.

9.1.4 Ensemble Recitals

- Feature repertoire written for two more musicians performing together, and are designed to promote ensemble performance. Repertoire for Ensemble is not required to be memorized.
- Please see above Sections 6.11 and 6.12 regarding further Ensemble policies.

For more information on Convention Recital Instrument and Level requirements, please refer to Convention documents at www.mtac.org/login.

9.2 Eligibility for CM Convention Programs

To be eligible to participate in State Convention Programs, students must have fulfilled all CM requirements in the manner set forth by the CM Council and State Board. Students must also have achieved a Theory Examination score of 80% or higher, and have received "Good" or "Excellent" ratings for the repertoire, technique, and sight-reading components of their CM Performance Evaluation. Students who receive Ineligible for Certificate or Remain at Level ratings are not eligible for CM Convention Recitals for the year in which the IC or RAL was received. For further information regarding eligibility requirements, please refer to the "Convention Performance Requirements" page at www.mtac.org/login.

9.3 CM Convention Master Classes

Master Classes with invited Master Teachers/Artists are held during the annual MTAC Convention. Students are selected to work with the Master Teacher/Artist by invitation only. The minimum consideration requirement is that students must have received an Excellent rating on the Repertoire, Technique, and Sight-Reading portions of the Performance Evaluation, a 5+ rating on the designated Convention piece, and a score of 90% or more on their Theory Examination, but achieving such minimum requirements does not guarantee an invitation. CM Council also takes into consideration an equal combination of students representing both North and South Regions, a variety of repertoire from different historical musical periods, any special requests from the Master Teacher/Artist, before issuing an invitation. **Panel Master Classes are a separate category with different requirements, please see *CM Panel Audition & YAG Guidelines* at www.mtac.org/login.**

9.4 Live Accompaniment Required

For Strings, Winds, and Voice Branch Evaluations, any pieces being considered for Branch Honors or Convention programs must be accompanied by a live accompanist for all CM Levels.

9.5 Disqualification from CM Convention Programs

Students who have been accepted to participate in a State Convention Program, but who do not attend or appear at the Program without adequate reason or notification of absence to the CM Council Recital Coordinator, shall be disqualified from participating in any subsequent Convention program for the next two (2) years. Other disciplinary measures may also be imposed for teachers or studios who demonstrate a repeated pattern of non-excused absences.

9.6 CM Convention Participation Restrictions

Students may apply for only **one** (1) CM Convention program per year, per instrument. Panel Audition applicants (see Section 11 below) who are not ultimately selected for Panel Auditions may apply to participate in Festival, Theme, or New Materials Recitals, **only if** the CM Teacher previously checked the appropriate box for Convention Recital on the CM Evaluation Information online form during the CM registration process.

9.7 CM Convention Program Application Process

The application for CM Convention Programs is a two-step online process with the first step taking place several months before the second step. First, CM Teachers apply for their students' participation Convention Programs on the CM Evaluation Information online form in January (see Section 5). For the second step, CM Teachers must return to www.mtac.org (Teacher Home Page), and complete a Final Application for Convention Recital ("Final Application"). CM Teachers are responsible for complying with all the rules printed on the Final Application. The Final Application deadline is **April 15. No late applications or fees are accepted.** CM Teachers must check the Convention Student Performance Schedule after **June 1** for student performance times.

9.8 Convention CM Parent Agreement Form

The second and final step of the CM Convention Application includes the completion, signature, and submission of the Parent Agreement Form. CM Teachers are provided this Form through their Branch. Once collected, CM Teachers should keep these with their studio records for three years.

9.9 CM Convention Application Fee

A Convention Application Fee shall be charged per student at the time the CM Teacher applies. **No late application fees are accepted.** This fee is non-refundable and payable online during the Final Application process. The only students affected by this fee are those performing at the following: CM New Materials Recitals, CM Theme Recitals, CM Festival Recitals, CM Ensemble Recitals, and CT Symposium Recitals. Aside from this one-time Application Fee, all students and their family members are admitted to the entire Convention at no additional charge, and may attend any Convention event, including all recitals, master classes, lectures, concerts, and the exhibit hall.

9.10 Teacher Convention Registration Required

CM Teachers must register for Convention and pay the requisite Convention Registration Fee, in order to attend the MTAC State Convention and their own students' performances at Convention. CM Teachers who attend their students' performances at Convention and fail to register and pay for Convention shall be sent an invoice from MTAC. If such payment is not made by the due date provided, such Teacher's students shall be prohibited from performing at Convention in subsequent years until payment is made, regardless of the students' CM Evaluation results and qualifications for Convention performance.

9.11 CM Panel Auditions & Young Artist Guild

Please refer to Sections 11 and 12 below. More detailed information is available in the *Certificate of Merit Panel Auditions & Young Artist Guild (YAG) Guidelines* at www.mtac.org/login.

Section 10. Senior Award

10.1 Senior Award Eligibility

A graduating high school senior student in any instrument who – (i) passes all sections of CM, (ii) for three consecutive or non-consecutive years during school Grades 9 through 12, (iii) including in their final year of high school, **and** (iv) at CM Level 7 or above – is eligible for the Senior Award. IC Ratings will not affect Senior Award eligibility. However, CM Teachers **must apply** for Senior Award in the Online Registration by **October 31** (see Section 5). Young Artist Guild students are eligible for the Senior Award if they are accepted into the YAG program in their junior year of high school. YAG students will receive their Senior Awards at the State Convention.

10.2 Multiple Instruments

A graduating high school senior who has participated in CM for more than one instrument must apply for the Senior Award, for **each** instrument, and must fulfill the requirements for each instrument separately in order to be eligible.

10.3 Senior Award Special Circumstances

Special circumstances may exist, such as a student's early graduation from high-school, in which a student may be granted an exception from the above eligibility requirements in order to receive a Senior Award. CM Teachers may submit a written request for such exception to the Branch Chair, who shall submit the request to CM Council. CM Council shall make the sole determination as to whether to grant the exception.

Section 11. Panel Auditions

Panel Auditions are for outstanding students who exhibit artist-level achievement. Only students who have demonstrated exceptional performance quality should be enrolled for Panel Audition consideration, and must register for Panel Audition in the Online Registration by **October 31** (See Section 5).

All the policies and procedures related to Panel Auditions are set forth in the *CM Panel Auditions & YAG Guidelines*, at www.mtac.org/login > CM Resources > CM Documents.

Section 12. Young Artist Guild (YAG)

The Young Artist Guild (YAG) is the highest achievement that a Certificate of Merit student can attain. Students must be in school grades 11 or 12 and must have passed **consecutive, yearly** CM Evaluations from school grade 9 to apply for YAG. **Students do not qualify for YAG membership, and do not receive any YAG membership benefits including monetary awards and certificates, unless they perform at the YAG Concert at Convention in the same year that they were selected and invited to join YAG.**

YAG offers semi-professional, paid performance opportunities through Branch-sponsored concerts. A student who attains YAG membership belongs to the Guild for five (5) years, and may be invited to perform at various MTAC Branches throughout California during his or her tenure as an active member. In some cases, the Guild also provides awards, scholarships and other financial support for its members. For more information, please see the "Certificate of Merit Panel Audition Program Information" at www.mtac.org/login > CM Resources > CM Documents.

Section 13. Communication Procedures

Any communications, questions, or concerns received that do NOT follow the below procedures **will NOT be accepted, responded to, or considered by** the CM Branch Chair or CM Council, except as otherwise provided below. Anonymous complaints will not be addressed.

13.1 Communications, Questions and Concerns

Any communications, questions, or concerns regarding Certificate of Merit (e.g. administration, operations, evaluations, training, policies and procedures) from parents or students must first be directed to the student's own teacher. Many questions and potential issues can often be resolved at this level.

13.2 Inbound Communication

Questions or issues that cannot be resolved by the CM Teacher, and/or questions or issues from the CM Teacher that require a response from the Branch or State (or **"inbound" communications**), shall be directed as follows, and must be **communicated by email only** (*please identify Branch and Contact Name in all emails*):

- (1) Parent to CM Teacher...if needed, CM Teacher will refer to –
- (2) CM Teacher to CM Branch Chair....if needed, CM Branch Chair will refer to –
- (3) CM Council member (e.g. appropriate personnel/role)...if needed, they will refer to –
- (4) CM Conflict Resolution Committee and/or State CM Chair.

13.3 Exceptions to Inbound Communication

- (1) After **April 15**, a Teacher may communicate directly with a CM Council Recital Coordinator regarding student Convention Performance matters.
- (2) **Teachers may directly contact CM Panel Coordinators regarding Panel and scheduling issues.**

13.4 Outbound Communication

CM Council may contact anyone in the Line of Communication, as needed, including but not limited to the following:

- (1) **CM Council may contact Teachers regarding Change of Teacher issues;**
- (2) **CM Panel Coordinators may contact Teachers regarding Panel and scheduling issues.**

Section 14. Conflict Resolution Procedures

A conflict or complaint is a serious situation in which there are open, opposing parties over a problem for which there is no obvious solution, and that requires further consideration or investigation in order to resolve. All other communications, questions, concerns, or complaints of a non-serious nature must follow the procedures set forth in Section 13.

14.1 MTAC General Conflict Resolution Procedures

In accordance with the MTAC *State Bylaws*, Article IV, Section 22, all MTAC members are encouraged to make every effort to resolve conflicts through direct communication among the involved parties, or at the Branch level, so long as such resolution of the conflict does not affect the State Rights of a member. For any conflicts that involve State Rights, such conflicts must be submitted directly to the State Board of Directors, first through the appropriate Branch Liaison. State Rights include State membership rights, State voting rights, eligibility to participate in State programs, and holding State office. The policies and procedures regarding conflict resolution for

the organization are contained in the MTAC's *Conflict Resolution Procedures & Disciplinary Guidelines*.

14.2 CM Conflict Resolution Procedures

Any conflicts that specifically arise from the Certificate of Merit program must follow the procedures set forth below. Any conflict or complaint reports received that do **not** follow these procedures **will not be accepted, responded to, or considered by** the CM Branch Chair, Branch Board of Directors, CM Council, or MTAC:

- (a) All conflicts or complaints should first be addressed by direct communications between all the involved parties. Only conflicts or complaints which are **serious** and cannot be resolved directly by the involved parties should be submitted on a prescribed Conflict Report Form (Appendix A) to the CM Branch Chair.
- (b) If the conflict or complaint cannot be resolved by the involved parties, the person reporting a conflict or complaint ("Complaining Party") must submit a completed CM Conflict Report Form (see Appendix A) to the CM Branch Chair. The CM Conflict Report Form must be submitted within **three (3) months** of the alleged incident, or **will not be accepted or reviewed** by the CM Branch Chair, Branch Board of Directors, or CM Council. Anonymous reports are not accepted.
- (c) The CM Branch Chair shall evaluate the contents of the Conflict Report Form to ensure that it is complete and signed by the Complaining Party.
- (d) The CM Branch Chair shall present the Conflict Report Form to the Branch Board of Directors for review, consideration, and resolution. The Branch President and CM Branch Chair must both sign the form. If the Branch Board requires further investigation in order to make a determination, the Branch Board **MUST** follow the procedures contained in the MTAC's *Conflict Resolution Guidelines & Disciplinary Procedures*. The Defending Party must be notified of the complaint before the Branch Board proceeds to make any evaluation or determination.
- (e) If the conflict or complaint cannot be resolved at the Branch Board level within **two (2) months** of receiving the Conflict Report Form, the CM Branch Chair shall submit the Conflict Report Form and any other relevant documentation to their CM Council Branch Liaison Chair. The Complaining Party and Defending Party must be notified.
- (f) The CM Council Branch Liaison Coordinator shall work with the CM Branch Chair to resolve the situation, and if it cannot be resolved among them, the matter shall be submitted to the CM Conflict Resolution Committee. The Complaining Party and Defending Party must be notified.
- (g) The CM Conflict Resolution Committee (composed of CM Council members, including the CM State Chair and CM Assistant Chair or Information Coordinator), shall make the final evaluation and determination for resolving the complaint or conflict. CM Council will notify the Complaining Party and Defending Party of its final determination.
- (h) Matters that cannot be resolved by the CM Council, or which the CM Council has determined affect the State Rights of a member or members, shall be submitted to the State Board for final evaluation and determination. The State Board will notify the Complaining Party and Defending Party of its final determination.

14.3 CM Conflict Resolution Procedures Govern

For CM-related conflicts or complaints only – where the deadlines for submission or review may conflict in the MTAC's *Conflict Resolution Guidelines & Disciplinary Procedures*, the CM's Conflict Resolution Procedures above shall govern. In all other respects, the MTAC's *Conflict Resolution Guidelines & Disciplinary Procedures* shall govern.

If a member is uncertain as to whether their conflict or complaint is CM-related or is a matter that may affect State Rights, please contact the CM Branch Chair.

Appendix A

CM Conflict Report Form

Date of Conflict or Complaint:

Time of Conflict or Complaint:

Name of Complaining Party:

Name of Branch:

Name of CM Branch Chair:

Name of CM Council Branch Liaison:

Complaining Party's Contact Information:

Phone:

Mobile:

Email:

Complaining Party's Relationship to/Role in Branch:

Complaining Party's Relationship to/Role in MTAC State:

Name of Defending Party:

Defending Party's Relationship to/Role in Branch:

Defending Party's Relationship to/Role in MTAC State:

Incident Description (use back side of page or staple attachment pages to this Form)

Cite State or Branch Bylaws, Policies or Procedures that were allegedly violated by Defending Party:

Signature of Complaining Party

Date

By signing below, the Branch Board verifies that it has accepted and reviewed the submission of this Conflict Report Form. This Form must be signed if the Conflict is submitted to CM Council.

Signature: _____
Branch President (Print Name: _____)

Date

Signature: _____
CM Branch Chair (Print Name: _____)

Date