



**HEALTHY
CHAPTER**
INITIATIVE

BARBERSHOP HARMONY SOCIETY

CHAPTER SECRETARY TRAINING PRESENTATION

www.barbershop.org/healthychapters

INTRODUCTION

This PowerPoint Presentation is aligned with:

- BHS Chapter Secretary Manual
- BHS Online Document Center
- BHS Business of Barbershop Guide

Questions and Support:

BHS Chapter Leadership & Education Team

chapters@barbershop.org | 800.876.SING



CHAPTER SECRETARY TRAINING DESCRIPTION

This Chapter Secretary presentation will prepare new or veteran chapter secretaries to handle the numerous operational functions of the chapter.

General Topics that will be covered:

- The Role of the Chapter Secretary
 - Corporate Responsibilities
 - Business Responsibilities
 - Communication Responsibilities
 - Meeting Responsibilities
- Member Reporting
 - New Members
 - Dual, Transfer, and Reinstatement Members
 - Associates
- Chapter Filings
 - Incorporations
 - Financial Filings (IRS & CRA)
 - Financial Reviews
- Chapter Reporting
 - Elections
 - Rosters
 - Personnel
- Society Youth Policy
- Chapter Insurance
- Chapter Show Clearances & Licensing
- Copyright Law
- Contest Registration
- Quartet Registration



CHAPTER SECRETARY COURSE

This presentation will also cover the basics of utilizing the Online Resources available to chapter leaders through www.barbershop.org, our Online Document Center, as well as our 'Members Only' website: eBiz.

- www.barbershop.org
- www.barbershop.org/resources/document-center
- <http://ebiz.barbershop.org>



COURSE OBJECTIVES

Each Chapter Secretary will be able to:

- Utilize best practices and general leadership principles to support and effectively facilitate the various operational responsibilities in a chapter.
- Describe and have an understanding of the various roles of the Chapter Secretary to run an effective chapter.
- Outline the priorities of the Chapter Leadership Team (President, Treasurer and Secretary)
- Demonstrate how to utilize www.barbershop.org and locate documents and forms.
- Demonstrate the process of completing and submitting Membership Applications (including Dual, Transfer, and Reinstatements)
- Describe the factors determining the correct membership classifications.
- Describe the show clearance and licensing process.
- Describe the process for Chapter Insurance.
- Outline the legal documents that should be kept by your chapter
- Describe and effectively implement the Society Youth Policy.
- Demonstrate how to utilize and update the Society member only website, eBiz.
- Identify that a Chapter Secretary can be an effective chapter leader.



CLASS INTRODUCTIONS

To be shared ...

- Your Name and Where You are From
- Number of Years in the Organization
- Number of Years as Chapter Secretary
- “Gold Medal Moment” from your Barbershop Life
- What do you hope to get out of this training?





**YOU ARE A
LEADER**

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PROPOSED CONDITIONS OF SUCCESS

- Come prepared to work
- Show up and CHOOSE to be present
- Listen to Understand... Inquire (ask) before you advocate (persuade)
- Respect each other's opinions, even in the face of disagreement
- Listen from the "We" but speak from the "I"
- Strive to honor brainstorming without being attached to our own viewpoint
- Attack the problem, not the person
- Have fun! (yes it's possible)!



EFFECTIVE TEAM CHARACTERISTICS

- Encouraging and supportive
- Expression of concern
- Listening skills
- Solicitation of ideas
- Building consensus
- Trust
- Equal participation
- Appropriate use of power and influence
- Willingness to disagree



THE FIVE NON-NEGOTIABLES OF THE LEGACY BUILDER

EXCERPT FROM “THE LEGACY BUILDER” BY ROD OLSON

1. Specify the Win

- Maturity and balance go hand in hand.
- Specify daily what a “win” is for you at work and especially at home.
- Be process driven: things that are built to last are not built fast.
- You control the pace of leadership; don’t let the pace control you.
- Focus on one thing at a time... one day at a time.

2. Simplicity

- Are you a FAT leader? The criteria for an uncomplicated and qualified leader:
 - F- aithful: you fully trust the organization; you believe without seeing.
 - A- vailable: you make time to help yourself, others, and your community.
 - T- eachable: you posses a teachable and coaching spirit.
- “Control the Controllable”... Great leaders can discern what they can control and what they cannot.
- A leader’s job is to take an individual or a team and get them to a level they cannot get to themselves.
- You can’t give away what you do not posses yourself as a leader.
- Focus on Attitude and Effort daily; these two things control everything else



THE FIVE NON-NEGOTIABLES OF THE LEGACY BUILDER

EXCERPT FROM "THE LEGACY BUILDER" BY ROD OLSON

3. Be a Three-Dimensional Leader™

- The three dimensions of leadership:
 - Level 1 - You are fundamentally sound, and you maintain high competency levels.
 - Level 2 - You know and practice the secrets of motivating the twenty-first century team member.
 - Level 3 - You are a master relationship builder who is focused on capturing people's hearts while holding them accountable.
- Be mentally tough: the ability to be comfortable with being uncomfortable.
- Everyone needs to feel safe, secure and significant every day.
- Remember that 90% of motivation lies in relationship; people today want a leader who authentically cares about them both professionally and personally.
- Great leaders and coaches are easy to please and hard to satisfy.
- Earn the right to speak into your people by capturing their hearts.



THE FIVE NON-NEGOTIABLES OF THE LEGACY BUILDER

EXCERPT FROM “THE LEGACY BUILDER” BY ROD OLSON

4. The Power of Speaking Greatness

- Realize that “life and death lie in the power of the tongue”
- Speaking Greatness is a style of communication that allows a leader to motivate others by giving feedback in such a way that the individual listens to the instructions and/or criticisms and is not motivated by fear but by the desire to reach new levels and not disappoint the leader.
- Focus on the process or performance rather than just results.
- Practice a 3:1 ratio when giving feedback or critiquing your people.
- Utilize a transformational vocabulary and work on helping others discover what the “greatness” is that is inside of them - and fan that flame!
- There are only three things we should do when we make a mistake:
 - Admit It
 - Fix It
 - Don’t Repeat it; Learn from it
- THINK before you speak and ask these questions:
 - T- rue: is what I am about to say true? If not, do not speak
 - H- elpful: Is what I am about to say helpful, or will it escalate things?
 - I- nspiring: Is what I am about to say going to inspire them to the next level in their performance?
 - N- ecessary: Is what I am about to say truly necessary, or am I wanting to hear myself talk?
 - K- ind: Is what I am about to say going to be received as a kind, professional comment?



THE FIVE NON-NEGOTIABLES OF THE LEGACY BUILDER

EXCERPT FROM “THE LEGACY BUILDER” BY ROD OLSON

5. Value People over Productivity

- True Legacy Builders live out principles daily, not when they feel like it
- Emphasizing people always enhances performances
- Don't buy the lie that winning or success will cure all your problems... Legacy Builder want to win, but that is secondary to winning in life.
- Keep your antennas up for opportunities to demonstrate to your family or team members that they are more valuable to you than what they can do for you.
- Remember that consistent behavior breeds trust, and trust breeds loyalty.

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*The Legacy Builder: Five-Foundational Principles
That Work in Sports, Leadership and Life*



HOW TO BE A GOOD LEADER

1. Leaders relentlessly upgrade their team.
2. Leaders make sure people not only see the vision, they live and breathe it.
3. Leaders get into everyone's skin, exuding positive energy and enthusiasm.
4. Leaders establish trust with candor, transparency and credit.
5. Leaders have the courage to make unpopular decisions and gut calls.
6. Leaders probe and push with a curiosity that borders on skepticism, making sure their questions are answered with action.
7. Leaders inspire risk and learning by setting the example.
8. Leaders celebrate.



- Jack Welch, CEO of General Electric
From His Book "Winning"





ROLE OF THE CHAPTER SECRETARY

www.barbershop.org/healthychapters

WHY DO WE HAVE A CHAPTER SECRETARY?

- Each chapter is **required** to have a Chapter President, Secretary and Treasurer.
 - The Secretary and Treasurer can be the same person.
- To serve as a knowledge **resource**
 - To serve so that all may continue to sing.
- To perform **required** functions for
 - The Chapter
 - The Members
 - The Organization



ROLE OF THE CHAPTER SECRETARY

- **Corporate Responsibilities**
 - Voting Board Member
 - Maintains corporate status with state or province
 - Registered or Resident Agent
 - Meetings
 - Board of Directors
 - Chapter Annual Meeting
 - Maintains Corporate Legal Files
 - Partners with the Treasurer and other Officers



ROLE OF THE CHAPTER SECRETARY (CONTINUED)

- **Membership Responsibilities**
 - Society Youth Policy
 - Membership Forms/Application
 - New Members
 - Dual Members
 - Transfer Members
 - Reinstating Members
 - Celebration of Membership
 - General Reporting to Board and Members
 - Monthly Reports (in cooperation with VP of Chapter/Membership Development)
 - Contact and Encouragement
 - Chapter Roster



ROLE OF THE CHAPTER SECRETARY (CONTINUED)

- **Business Responsibilities**
 - Society Invoices & Compliance
 - Insurance
 - Liability, Accidental Death and Dismemberment (AD&D) and Bonding.
 - Copyright Compliance
 - Show Licensing (BMI/SESAC, ASCAP and/or SOCAN)
 - Licensing for Music & Learning Media



ROLE OF THE CHAPTER SECRETARY (CONTINUED)

- **Communication Responsibilities**
 - The chapter secretary fosters communication all levels:
 - Members <-> Chapter Officers
 - Members <-> Other Chapters
 - Members <-> District Leaders
 - Members <-> Society Leaders & Staff
 - Notification to Members
 - Annual Meeting & Elections
 - Renewal of Membership
 - Contest Preparation (Membership Status)
 - Reporting Officers & Financial Filings to BHS (thru eBiz)
 - Bulletin/Newsletter Support & Meeting Summary



SECRETARY ANNUAL SCHEDULE

All Information about the Annual Schedule for the Chapter Leadership Team can be found in the BHS Business of Barbershop Guide.

Example Schedule:

Monthly

- Processes all Membership Applications
- Processes dual membership and transfer requests
- Verifies Society invoices with treasurer
- Announces chapter board meeting
- Writes, publishes, and distributes meeting minutes

As needed & appropriate:

- Remind Members of Renewals
- Notify necessary chapter leaders of members who fail to renew
- Distribute new member kits and renewed membership cards

www.barbershop.org/resources/document-center/business-and-finance



ROLE AT CHAPTER BOARD MEETINGS

- You are a **voting member** of the Board of Directors
- You are the recording secretary and are responsible for taking the **minutes**
- You work closely with the **Chapter President and Treasurer**
- You are an active resource considered a man “**in the know**” for each officer as well as the chapter membership
- You accurately **share information with** the members and officers
- You **share information to and from** the District & Society.



MEETING RESPONSIBILITIES

BEFORE THE MEETING

- Announce to the membership that a meeting is taking place (including sharing its time and location)
- Design and publish the agenda with the Chapter President
- Solicit and make available all documents and reports needed for the meeting.
- Prepare a Membership status report.

AFTER THE MEETING

- Promptly prepare and publish minutes
- Share information with the bulletin/newsletter editor
- Answer questions from chapter membership
- Share appropriate information with the District and/or Society

DURING THE MEETING

- Record accurate minutes
- Provide input during meeting discussions





SAMPLE MEETING FORMS

www.barbershop.org/healthychapters

SAMPLE MEETING AGENDAS & MINUTES

The BHS Online Document Center hosts
sample chapter meeting agendas and
minutes for your use

www.barbershop.org/resources/document-center/business-and-finance





PARLIAMENTARY PROCEDURES

www.barbershop.org/healthychapters

WHY USE PARLIAMENTARY PROCEDURE?

Parliamentary Procedures allow for...

- Everyone to be heard at a meeting
- A decision-making process without confusion
- A fair hearing of an issue/proposal
- Flexibility to address most meeting situations
- Protection of the rights of everyone
- Democratic process at meetings



ROBERT'S RULES OF ORDER

The Barbershop Harmony Society Standard Chapter Bylaws call for use of “Robert’s Rules of Order” as the governing rules for our chapters. However, your meetings do NOT need to follow strict parliamentary procedures to be run effectively. It is only meant to be used to as a guide.

A guide to utilizing Robert’s Rules of Order for Small Boards can be found on the BHS Online Document Center. Here are some recommendations for you:

- Use consensus, rather than voting motions, whenever possible
- Use motions, in writing, when dealing with all money matters
- Stress written reports from chapter officers or committee chairmen; delivered well in advance of the meeting
- Always publish your agenda ahead of the meeting



PARLIAMENTARY TERMS

Quorum – A quorum is the minimum number of members (of the body) required at a meeting in order to conduct business.

- **Chapter Board Meetings:** More than 50% of voting members must be present
- **Annual Membership Meetings:** At least 30% of current chapter members present.



PARLIAMENTARY TERMS (CONTINUED)

MOTIONS – A procedural device for decisions. Usually, a proposal to direct or affirm action on behalf of the body.

Here are some terms that you may hear about (not necessarily normal for our Chapter Meetings) but are important terms to be familiar with.

- **Main Motions**
- **Subsidiary Motions**
 - Amendments to the Motion
 - Motions to Table
- **Privileged Motions**
 - Personal Privilege
 - Point of Order
- **Incidental Motions**
- **Motions to Reconsider**
 - Requires 2/3 Majority and special requirements to reconsider.





MEMBER REPORTING

www.barbershop.org/healthychapters

MEMBERSHIP CLASSIFICATIONS

Further details about each classification can be found on BHS website.

- **Regular Member**
 - a member who is neither a youth nor senior member
- **Youth Member**
 - a member under the age of 26 years old [student status NOT required!]
- **Senior Member**
 - a member 70 years old and a member for 10+ years
- **Senior Legacy Member**
 - a member who achieved senior status prior to Jan 1, 2010
- **Life Member**
 - a member who pays 20X the current regular dues rate
- **50-year Member**
 - a regular or senior member who has been a member 50+ years



EFFECTS OF CLASSIFICATIONS

Chapter and/or District dues discounts may be the same or they may vary

- **Youth Member**
 - 50% discount on Society dues.
- **Senior Member**
 - 25% discount on Society dues.
- **Senior Legacy Member**
 - 50% discount on Society dues.
- **Life Member**
 - Pays NO annual Society dues.
- **50-year Member**
 - Essentially a Life Member, paying no Society dues.
 - Presentation of 50-year pin at International Convention
- **Golden Oldie**
 - a member with 35-years of Society membership.
 - Receives special gold badge Upon request to Society HQ (Not Sent automatically.)
 - No change in dues structure at 35 years



OTHER ROLES IN SOCIETY

- **Society Associate (not a member)**
 - Not considered a “member” only “associate, is a female, who may be active in your chapter as a director, assistant director or acting in chairmanship role; may also just be interested in chapter & Society. Female directors must be Associates for competition.
- **Society Member (different than Frank Thorne)**
 - Someone who does not intend to join a chapter, district or compete in a quartet but wants to be a member of the Society! (Not Available for Females)



MEMBERSHIP APPLICATION FORM

- Membership Application Form available on BHS Website.
 - Printable and Fillable PDF
 - Hard Copy available (if necessary)
 - Do NOT use remaining stock of old forms (if you have any)
- Online Application is available but is NOT for Chapter Membership
- Form is used for not only New Members, but also Dual, Transfer, and Reinstating Members.
- If a member is reinstating, and doesn't know their Member ID#, write their former chapter membership on the form for our Customer Service Department
- Process the Membership Application form IMMEDIATELY.
 - Individuals may need assistance on completing form
 - Requires Chapter Secretary or Officer Signature in order to be processed by the Society Offices.
- Contact the Society (Customer Service Department) if you do not receive the New Member Kit with membership certificate, membership card and, in most cases, lapel pin in a timely manner (2-3 weeks.)
- Maintain copy of completed Membership Application forms as part of the chapter's permanent legal file (minus credit card information, if provided)



NEW MEMBER APPLICATION PROCESS

- Applicant completes **Section I** at the top of the form and Signs **Section IV**
- Chapter Secretary should assist in completing **Sections II & III** and Signs **Section IV** when applicant is approved by Chapter.
- Ensure that all options are completed (Member Kit, Men of Note, EZDues, etc.)
- Issue a receipt to the new member when collecting money
- Chapter Secretary sends the completed application and forms (if using EZDues) immediately to the Society
 - Scanned copies can be accepted by emailing customerservice@barbershop.org



DUAL MEMBERSHIP & TRANSFER OF MEMBERSHIP

- Member Completes an Application for Membership
 - Not a separate form! (Section II of Application for Membership)
- Completed Membership Application should be sent to Society.
 - There is no fee for transferring membership.
 - There is currently a \$10.00 administrative fee to process dual membership applications.
- Transfer or Dual membership may require payment of dues of the chapter joining (discretion to the chapter).
- Dual membership into a different district requires district dues also.
- Chapter Secretary should email the Chapter (using information in eBiz) that the member is leaving to ensure the member left in “Good standing” prior to accepting membership.



TIPS FOR MEMBERSHIP APPLICATION FORMS

- Neatness Counts! Consider typing or printing
- Be accurate, complete with information
- Explore payment options with the applicant
- Ask new members regarding their sponsor as a man who helped him know about & to join the Society.
- Make a copy for your chapter records



EZDUES PAYMENT PLAN

- Plan designed for new members (or reinstated after 2 years).
- Member pays \$10 Enrollment fee upon joining plus 50% of first year's dues.
- Use Credit Card (Visa, MasterCard or Discover) or two checks one for first year and another voided.
- EZDues or Regular Annual Dues processing chosen on application.
- Use EZ Dues Enrollment Form for checking account option.
- Second year's dues are prorated over the next 11 months and applied on months 2-12.
- Continues for future years as Auto Draft.



OTHER PAYMENT METHODS

- **General Annual Payment**
 - Member pays his full dues upon receipt of the invoice from the Society.
- **Escrow Plan**
 - Member pays a portion of his dues weekly or monthly to the chapter treasurer or his designee. Sometimes called “Pay As You Go, Joe”.
 - Chapter treasurer or designee issues a receipt for cash received from the member
 - When renewal notice is received by the member he submits this notice to the chapter treasurer who can pay the member’s dues online or mail a check.
 - Disadvantage of this plan is that it requires a large amount of bookkeeping for the chapter treasurer.



ASSOCIATE STATUS (NON-MEMBER)

- Associate status is for female individuals who are interested in supporting and being a part of the organization.
- Female Directors of BHS Choruses looking to participate in competition, must be an associate.
- Associates receive minimal similar benefits to members
- Associates have a separate application to complete (paper form can be found on the BHS Website)

www.barbershop.org/join-us



LAPSED MEMBERSHIPS

Reinstated Membership

Member dues that are more than six-months late

- Member completes a new Application for Membership and submits fees with it.
- Membership Certificate, lapel pin, and membership card is sent to chapter secretary.
- Member will have a new membership expiration date.

Late Renewal of Membership

Member dues that are less than six-months late

- Member pays dues and may have late fee added to amount.
- Renewed membership card is sent to Chapter Secretary.
- A Member may need to be reminded that it may appear to him that he gets fewer months before next renewal.

If a member does not remember their member ID#, please ensure that you include any former names and chapter affiliations on the application for our Customer Service Team to find a member, instead of creating a new ID#





CHAPTER FILINGS

www.barbershop.org/healthychapters

CHAPTER REQUIRED FILINGS

The Society requires specific filings be completed and reported in order to maintain charter status. Chapter Secretaries are responsible for reporting this information to the Society, through eBiz.

- **Chapter Incorporation**
 - All Chapters (regardless of U.S. or Canadian) must update their EBIZ profile noting their status with their State or Province.
- **IRS 990 or Canadian Equivalent**
 - For U.S. Chapters, ask your Chapter Treasurer for a copy of your IRS 990 (when completed). Upload to your eBiz profile, annually.
 - For Canadian Chapters, ask your Chapter Treasurer if your Province or the Canadian Revenue Agency requires an annual filing. Even if not required, eBiz profile should be updated, annually, that you are in compliance.
- **Financial Review**
 - All BHS Chapters are required to have and report (in eBiz) an annual financial review. For more information and a guide to complete your chapter financial review, visit BHS Online Document Center.



CHAPTER INCORPORATION

It is the policy of the Society that each chapter is incorporated in the State or Province where they reside.

- Incorporation protects individual members from lawsuits brought against the chapter
- Contact your Secretary of State or Province office to determine if your chapter is incorporated. Often this can be done online.
- Most states/provinces require annual renewal, some require every 5 years, and some require only one registration. Check your requirements.
- U.S. Chapter incorporations should be confirmed annually by receiving a Certificate of Continued Existence (with possible payment of an annual fee to the State or Province)
- All U.S. and Canadian incorporations should be reported in your Chapter Profile in eBiz.
- Review with the chapter treasurer to determine if the annual fee has been paid.
- Each chapter needs a Registered or Resident Agent to monitor the continued incorporation of the chapter.



CHAPTER IRS 990 OR CRA FILING

Internal Revenue Service (IRS) 990 Filing or Canadian Revenue Agency (CRA) Filing

- **IRS 990 or Canadian Equivalent**
 - For U.S. Chapters, ask your Chapter Treasurer for a copy of your IRS 990 (when completed). Upload to your eBiz profile, annually.
 - For Canadian Chapters, ask your Chapter Treasurer if your Province or the Canadian Revenue Agency requires an annual filing. The CRA requires filings six months after the end of the fiscal year. Even if not required, eBiz profile should be updated, annually, that you are in compliance.

*Tutorials for Chapter Treasurers are available on the BHS Website to complete an
IRS 990 Filing*

**Your Chapter IRS or CRA filings should be uploaded to your Chapter
eBiz Profile by no later than**

U.S. Chapters- May 15th Every Year

Canadian Chapters- June 30th Every Year



CHAPTER FINANCIAL REVIEW

Visit the BHS Website for a Financial Review User's Guide:

www.barbershop.org/resources/document-center/business-and-finance

A Financial Review provides validation that the financial information maintained by the treasurer is accurate. A review also should quickly identify whether there are red flags that should be made known to the boards of directors. A board of directors has the fiduciary responsibility to the organization; more specifically: to ensure that the money entrusted to it is being handled properly.

An annual Financial Review also instills confidence in your members that everything is in order by verifying the numbers, ensuring accuracy, and assessing procedures. The Financial Review can give closure to the treasurer to set a starting point for the next year's activity. Similar to a full audit, Financial Reviews may uncover financial mismanagement. We never want our chapters or districts to be in that type of position, but if not found, poor practices can become significantly more serious as time passes.

Your Chapter Annual Financial Review should be uploaded to your Chapter eBiz Profile by no later than June 30th Every Year.



CHAPTER LEGAL FILES

It is crucial that all chapter legal documents are kept in a safe and secure location to be passed on from Chapter Secretary to Chapter Secretary.

The chapter secretary is primarily responsible for keeping and maintaining the chapter legal file. More information found in BHS Chapter Secretary Manual and BHS Business of Barbershop Guide.

- Chapter License & Charter
- Incorporation Records
- Certificate of Continued Existence
- Standard Chapter Bylaws
- Chapter Rules and Regulations
- Chapter Statements of Policy
- Membership Applications
- Board & Chapter Meeting Minutes
- Insurance Records
- Year-End Treasurer Reports
- IRS 990 or CRA Filings
- Annual Financial Reviews
- Employee (Director) Contracts
- Show Talent Contracts
- BMI/SESAC/ASCAP/SOCAN Licenses
- Music, Mechanical, & Synchronization Licenses



HOW LONG DO I KEEP RECORDS?

- In general, keep your corporate and financial records FOREVER.
- Discuss with your chapter board of directors the best way to store your chapter records
- Explore saving your documents electronically and store in a safe location

Year to Year	Three-Years	Seven-Years	Forever
<ul style="list-style-type: none">• Insurance Certificates• Copy of Society Bylaws• Copy of District Bylaws• Copy of Orders placed with Harmony Marketplace or other invoices	<ul style="list-style-type: none">• Copy of Membership Applications submitted to Society• Approved BMI/SESAC or SOCAN Show Licenses• Submitted ASCAP Applications & Records• Chapter Standing Ovation Program (SOP) Reviews	<ul style="list-style-type: none">• Copies of IRS 990 or CRA filings• Copies of Annual Financial Reviews• Original Director Contracts• Copies of Contracts for Venues or Rehearsal Spaces• Copies of Youth Protection Forms• Receipts/Invoices for Chapter Property Purchases	<ul style="list-style-type: none">• Original Chapter License• Original Chapter Charter• Annual End-of-Year Financial Statements• Articles of Incorporation• Statements of Continued Existence• Minutes of Annual Meetings• Minutes of Board Meetings• Chapter Bylaws & Policies• A record of community service and free performances.



PREPARE FOR A NATURAL DISASTER

As Chapter Secretary, you are responsible for the safekeeping of all chapter records and files

- Plan ahead for a possible natural disaster (flood, fire, burglary, etc.)
- Consider scanning and storing copies of documents electronically (*never go completely electronic, even that has its own set of risks!*)
- Store your chapter documents in a location safe from the elements



IS YOUR CHAPTER PREPARED FOR A VISIT FROM YOUR FEDERAL GOVERNMENT?

- Take the time to ensure that all Legal documents are in order
- Work with your Treasurer to have copies of your financial reports.
- Ensure that your Chapter minutes are in order and accessible.
- Collaborate with your Chapter Administrative Leadership team to have a running formal list of service and community activities that your chapter has participated.





CHAPTER ELECTIONS

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CHAPTER ELECTIONS

Election of Officers

- Chapter elections must be held by October 15.
- Chapter elections are held to coincide with the annual membership meeting, a requirement for continued existence as a not-for profit incorporated organization.
- Candidates must be announced two weeks prior to the annual membership meeting.
- The announcement of candidates and annual membership meeting shall be done by written notice through email, letters to those without e-mail or chapter bulletin.
- Elections are to be conducted with secret ballot, unless the slate of officers is uncontested.

Reporting Officers

- The chapter secretary must report the new officers on Chapter eBiz profile no later than December 15.
- When an officer resigns or is replaced, chapter eBiz profile should be updated right away!





CHAPTER ROSTER & PERSONNEL

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CHAPTER ROSTER & PERSONNEL CHANGES

Chapter Roster

Chapter Secretaries should consider publishing a chapter roster (utilizing the information in eBiz) for Chapter Members.

- Publish Quarterly
- Ask members to review their information and update online, if necessary.
- eBiz will allow Chapter Administrative Leadership Team to download an Excel format roster

Officer Changes

Update your Chapter eBiz Profile when Chapter Leaders are elected or change

- Done through Chapter eBiz Profile
 - Start and End Dates
 - Drop-Down Menu of Members
- Critical for Society and District Communications
- It doesn't hurt to notify your District Secretary of an update

Passing of a Member

Chapter Secretary is responsible for notifying the Society when a member passes. Email customerservice@barbershop.org with Name of Member, ID #, and Next of Kin.

The Society Sends a Condolence Letter to appropriate Next of Kin.





SOCIETY YOUTH POLICY

www.barbershop.org/healthychapters

LET'S WORK TOGETHER TO PROTECT OUR YOUNG PEOPLE & OUR MEMBERS

It is the policy of the Society that all youth under 18-years old must have the permission of their parent or guardian to participate in all chapter activities and that an adult member must supervise the youth at all times at the activities.

- A parent or guardian must complete and sign a Youth Policy Membership form if youth joining chapter.
- A parent or guardian must complete and sign a Youth Policy Participation form for each activity.
- Chapter secretary must file all forms in chapter legal file.
- Each youth member or guest must be supervised by an adult member at all chapter, district or Society sponsored activities at all times.

www.barbershop.org/resources/document-center/youth





CHAPTER INSURANCE

www.barbershop.org/healthychapters

CHAPTER INSURANCE POLICY

General Liability Insurance

- Each chapter automatically carries general liability insurance (bodily injury, and property damage).
- Protects the chapter, district and Society from third-party liability claims.
- Does not necessarily cover individual chapter members; but member accidental death & dismemberment (AD&D) now included in mandatory premium.
- The annual fee (subject to change) for the liability insurance is invoiced to individual chapters (usually towards the beginning of the year).
- Chapters may not opt out of this insurance policy.



CHAPTER INSURANCE CERTIFICATES

Process and forms to request general certificates and special certificates available on BHS Website.

- For the most up to date procedure on requesting a certificate, visit website or contact BHS Customer Service Department (customerservice@barbershop.org)
- Complete questionnaire (Word or PDF download) and submit.
- Allow at least 30 days for processing. (60 days is ideal)
- May require copy of contract and/or a fee
- Potential Additional Premiums:
 - Youth Workshop/Festival per attendee
 - Non-member performing groups
 - Food and/or Alcohol Served
 - Multiple additional Insured



CHAPTER BONDING INSURANCE

- Each chapter is automatically covered by the “Employee Dishonesty” policy (also known as a Crime Bond or Fidelity Bond)
- Chapter may not opt out of this coverage.
- The Society’s “Employee Dishonesty” policy limit is \$50,000 for losses to a Named Insured (BHS, Districts & Chapters) due to theft/dishonesty by an “Employee” as defined under the Policy, with a \$1,000 deductible
- Chapter Board at the beginning of each year, should appoint, approved chapter “financial handlers” for the year. Non-Members must be cited in minutes in order for bond to carry.



CHAPTER PROPERTY INSURANCE

- This insurance policy is optional and not automatic.
- Recommended for chapters with risers, sound equipment and uniforms.
- Visit BHS Website or Contact BHS Customer Service (customerservice@barbershop.org) for more information.
- Does not cover automobile / moving vehicles, including hired and non-owned, except to the extent that coverage does exist to cover the chapter/district entity in the event that hired/non-owned claim is filed naming chapter/district.



INSURANCE CLAIMS

- Contact BHS Customer Service Department (800.876.SING or customerservice@barbershop.org) to start the claims process.
- BHS Customer Service will assist claimants to make certain the proper parties are notified and involved.
- Share the following information:
 - Name, address and phone number of the individual(s) involved
 - Date and location of the incident
 - Pertinent details of the accident or incident
- Do NOT make any statements (written or otherwise) to anyone except the BHS Customer Service Department, the Society's insurance agent or investigating police officials. The Society and its insurance agent will do any follow-up.





SHOW LICENSING & CLEARANCES

www.barbershop.org/healthychapters

ASCAP | BMI & SESAC | SOCAN

BMI/SESAC Clearance (U.S. Chapters Only)

- Done PRIOR to Show
- Download Form from BHS Online Document Center
- Submit through District Secretary (with applicable payment made to BHS)

ASCAP Licensing (U.S. Chapters Only)

- Done AFTER all chapter shows and is based on Annual Gross Ticket Revenue
- Download Form from BHS Online Document Center
- Submit through District Secretary (with applicable payment made to BHS)

SOCAN Clearance (Canadian Chapters Only)

- Date Clearance needed from district PRIOR to Show
- Download Forms from BHS Online Document Center
- Submitted directly to SOCAN AFTER show with applicable payment



BMI/SESAC SHOW CLEARANCE PROCESS

- Complete BMI/SESAC form and fees from table on the form.
- Send the completed form with 3 copies to district secretary
- District secretary returns a signed copy of the form back to the chapter clearing the show date and places the show date on district calendar. Signed form is stored in your legal files.
- The chapter is then free to finalize venue and talent contracts.
- File and get license/clearance early.



ASCAP LICENSING PROCESS

All performances in the United States where the public is asked to pay for admission must be licensed by ASCAP. Also, free-will or benefit concerts but also be licensed by ASCAP. It is the responsibility of the chapter to follow licensing procedures for shows that THEY produce. Failure to do so could result in copyright infringements, possible monetary penalties and/or cancellation of the show.

- ASCAP License is filed at the end of the year, even if there were no shows produced by the Chapter, to the District Secretary (& applicable payment)
- Any chapter who produces at least one show will annually pay a minimum rate determined annually.
- All other gross revenue sales have a formula, determined annually, on the ASCAP form for payment.
- There are special rates for free-will and benefit shows.
- There also are special additional fees for scripted shows or shows dedicated to a specific composer.
- Keep a copy of all completed forms in the chapter legal file.



SOCAN CLEARANCE PROCESS

All performances in Canada where the public is asked to pay admission must be licensed by SOCAN. It is the responsibility of the chapter to follow licensing procedures. Failure to do so could result in copyright infringements, possible monetary penalties and/or cancellation of the show.

- Complete SOCAN Licensing form and mail to your District Secretary prior to show to clear the show date.
- After the show, every song performed on the show must be listed on the Programme of Musical Works Performed form and accompany the submission of the SOCAN Licensing form.
- Compute the fees owed to SOCAN and send the completed licensing form and fee directly to SOCAN for processing.
- Keep a copy of the completed form in the chapter legal file.

Please note: The SOCAN Licensing form in Ontario District is different. Contact the Ontario District Secretary if your chapter is in Ontario District.



SHOW VENUE & TALENT

It is strongly recommended that each chapter looking to secure a venue or talent to perform on any chapter produced show, should secure applicable contracts to protect not just the chapter but also the vendor.

Other Tips:

- NEVER sign any contracts with talent or venue until your show date is approved by the District Secretary.
- Get EVERYTHING in writing.
- Utilize talent contract to finalize and clarify details and expectations.
- Stipulate a deadline to return signed contract
- In the U.S., remind chapter treasurer or IRS 1099 Form responsibilities for reporting fees paid to talent in excess of \$600
- In Canada, withhold payment of fee until list of songs for SOCAN are provided.
- File contracts in chapter legal file





COPYRIGHT

www.barbershop.org/healthychapters

CHAPTER SECRETARY RESPONSIBILITIES TO COPYRIGHT IT IS AGAINST THE LAW TO...

- Reproduce the copyrighted works in copies and recordings, without being purchased and licensed properly.
- Prepare derivative works based on the copyrighted works, without being purchased and licensed properly.
- Perform the copyrighted work publicly, without being purchased and licensed properly.
- Distribute the copyrighted work publicly, without being purchased and licensed properly.
- Display the copyrighted work publicly, without being purchased and licensed properly.

It is YOUR duty to remind your chapter officers of copyright.

For more FAQ's visit: www.barbershop.org/support/faqs



COPYRIGHT INFRINGEMENT

\$50,000 per copy of printed or recorded material

If you have questions regarding copyright law, process for making learning media, video recordings, or printed sheet music contact the Barbershop Harmony Society Licensing & Copyright Team at library@barbershop.org or call 800.876.SING

For more FAQ's visit: www.barbershop.org/support/faqs





CONTEST REGISTRATION (CJ-20)

www.barbershop.org/healthychapters

CONTEST ENTRY PROCESS

- Chapter Secretary has the ability to register Chorus for contest through the “CJ-20” form
- Form is completed through BHS eBiz
- Entry is automatically sent to District VP of Contest & Judging & Contest Administrators
- There is a deadline of submission for the Contest Entry Form and varies from district to district. Contact your DVP of Contest & Judging for more information.
- Information asked for during form submission includes:
 - Specific contests looking to compete in (regular, plateau, most improved, etc.)
 - Name and ID# of Chorus Director(s)
 - Songs Titles, Arrangers, Composers, Copyright Info, etc.



CERTIFICATION OF SONGS & MEMBERS

- Chapter Secretary is responsible for certifying that songs and arrangements performed in contest, are legal according to copyright law.
 - Submits Songs Titles, Arrangers, Composers, Copyright Info, and proof that the songs were purchased legally and arranger was paid for services.
 - Re-enters information through CJ-20 if songs that the chorus plans to sing, changes.
- Chapter Secretary is responsible for certifying that the individuals performing on stage during a contest, are members of good standing (including paid) of the Barbershop Harmony Society, its district, and chapter.
 - This also includes insuring that any female directing the chorus, is a good standing Associate.
 - Penalties for having non-members or a female non-associate on stage, may be severe including immediate disqualification of the entire ensemble.





QUARTET REGISTRATION

www.barbershop.org/healthychapters

QUARTET REGISTRATION

- It is NOT a responsibility of the Chapter Secretary to register quartets, however a Secretary can be a source of information for their chapter quartets
- There is an annual fee of \$40 to register and maintain registration of a quartet
- Quartets must have a name that is not the same of past Society International Quartet Champions or Medalists, past District champion, or currently registered quartet.
- Registered quartet members receive a quartet membership card and registration number.
- Forms and information found on BHS Website:
www.barbershop.org/quartets





USING EBIZ FOR YOUR WORK

www.barbershop.org/healthychapters

EBIZ TUTORIALS

Online Tutorials are available for use of BHS's Members Only Website 'eBiz': <http://ebiz.barbershop.org>

Example Available Tutorials:

- How to update your Chapter Dues Prices
- How to update/report your Chapter Leaders & Officers
- How to update your Chapter Financial Filings including:
 - Chapter IRS 990/CRA Filings
 - Chapter Financial Reviews
 - Chapter Incorporation Filings/Status





**WHO DO I
CONTACT AT BHS
HEADQUARTERS?**

www.barbershop.org/healthychapters

WHO DO I CONTACT AT BHS HEADQUARTERS?

www.barbershop.org/staff

PRIMARY RESOURCES:

BHS Customer Service Team
customerservice@barbershop.org

BHS Chapter Leadership & Education
chapters@barbershop.org

OTHER CONTACTS:

BHS Harmony Marketplace Team
marketplace@barbershop.org

BHS Events & Conventions Team
events@barbershop.org

BHS Marketing Team
marketing@barbershop.org

BHS Music Publications Team
library@barbershop.org

BHS Harmony University Team
harmonyu@barbershop.org

BHS Outreach Team
outreach@barbershop.org



1-800-876-SING





**YOUR
DISTRICT
SECRETARY
IS A RESOURCE
FOR YOU**

www.barbershop.org/districts



HEALTHY CHAPTER INITIATIVE

BARBERSHOP HARMONY SOCIETY

*Thank You for Your Service as
a Chapter Secretary!*

www.barbershop.org/healthychapters