

# THE BUSINESS OF BARBERSHOP

## A CONSOLIDATED AT-A-GLANCE CHAPTER BUSINESS GUIDE FOR BHS CHAPTER PRESIDENTS, SECRETARIES, AND TREASURERS

Your chapter is a business, a 501(c)(3) non-profit corporation to be exact. Accordingly there are certain legal, financial, and business requirements that must be met; some every month, some only as needed, and some on a schedule throughout the year. This is a quick-reference guide to some of the more important things that have to happen.

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### EVERY MONTH

- **PRESIDENT**
    - Prepare monthly board meeting agenda with Chapter Secretary.
    - Preside over monthly Chapter Board meeting.
  - **SECRETARY**
    - Prepare agenda for monthly Board meeting with Chapter President.
    - Download a current chapter roster from the Society's online Chapter Management system, **eBiz**, located at <https://ebiz.barbershop.org/ebusiness>.
      - Verify with the membership any changes in contact information (mailing address and emails and phone) and update it on **eBiz**.
      - Include in the minutes of the Board meeting.
      - Pass off to Membership VP for follow-up on lapsed members.
    - Take minutes at the board meeting.
  - **TREASURER**
    - Keep an accurate record of all chapter income and expenses.
    - Process the payment of bills.
    - Report the current financial status at every Board meeting.
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### ANY MONTH AS NEEDED/REQUIRED

- **PRESIDENT**
  - Fill any vacancies on the Chapter Board by having the Nominating Committee select a candidate and have him stand for election by the remaining Chapter Board.
  - Sign any membership applications.
- **SECRETARY**
  - Record any changes in the make-up of the Chapter Board in the minutes of a Board meeting.
  - Report any changes in the make-up of the Chapter Board under the **CHAPTER OFFICER** link in eBiz at <https://ebiz.barbershop.org/ebusiness>.
  - File any changes in the make-up of your Chapter Board with your Secretary of State, Incorporations Section, if required in your state.
  - File with your state's Secretary of State, Incorporations Section (or equivalent agency) any state required **Statement of Continuing Existence** (This date will vary from state to state and may NOT be a requirement in all states).
  - Report any filing of a statement of Continuing Existence in eBiz at <https://ebiz.barbershop.org/ebusiness>, **FINANCIAL FILINGS** section.

- File with your state's Secretary of State, Incorporations Section (or equivalent agency) any state required update of your **Registered Agent**. Your Registered Agent is the person whose name and address are on file with the state as the official point-of-contact for communications and legal service.
- File necessary **BMI Show Clearance Applications** before finalizing show venue and guest quartet contracts. Shows within 200 miles of each other on the same date are in conflict.
- One important aspect often overlooked is **maintaining a record of your public service**. This record comes in handy should your tax exempt status ever be challenged by the IRS as it documents your charitable service.
- Update your chapter's dues structure in eBiz at: <https://ebiz.barbershop.org/ebusiness>, **DUES PRICES** section (**NOTE:** There is a **45 day lag** between the date you input a new chapter dues structure and the operational effective date of the change).
- Process membership applications located here: <http://www.barbershop.org/document-center/category/1-membership-documents.html?download=124%3Amembership-application-and-transfer-form>
- **TREASURER**
  - Process required **BMI Show Clearance** payments as needed.
  - At the time of the BMI filing for your first show of the year, pay the required once-per-year **ASCAP** payment. See the form to be included with payment located here: <http://www.barbershop.org/document-center/category/71-show-clearance-and-legal-ascap-etc.html?download=517%3Aascap-reporting-form-2011>. The minimum amount is subject to change without notice. For 2011 the minimum annual **ASCAP** fee is \$222.00 (subject to change in 2012 and subsequent years) on the first \$48,667. Gross ticket sales in excess of that annually are due on a sliding scale located on the form.

## **SCHEDULED THROUGHOUT THE CALENDAR**

### **JANUARY**

- **PRESIDENT**
  - Appoint a Nominating Committee to develop a proposed slate of officers for the annual chapter election held in October.
  - Appoint a committee to perform the Annual Financial Review and report back before May 15<sup>th</sup> with their results. This committee should NOT include the Treasurer as the review is essentially a "peek over his shoulder" to verify the quality and integrity of his work.
    - This is a requirement of our Fidelity Bond. The purpose is to inform our Fidelity Bondsman that the record is a fair representation of the chapter's finances.
    - See Treasurer Exhibits for format, Pages 25 & 26 here: <http://barbershop.org/images/phocadownload/BHS-Treasurers-Exhibits-FULL-201003-Stk-4081.pdf>
- **SECRETARY**
  - Monthly Board Meeting
    - Read into the minutes of the Board meeting the names of any members who can reasonably be expected to handle money in any capacity for the chapter throughout the year. This extends to those individuals coverage under the Society's Fidelity Bond. Elected chapter officers are automatically covered and need not be recorded in the minutes.
- **TREASURER**
  - When asked, surrender financial records to the Annual Financial Review Committee. As this is a "peek over your shoulder", you should NOT be a part of the committee.

## FEBRUARY

- **PRESIDENT**
    - You are the presumptive chapter delegate to the House of Delegates meetings. If you cannot make the meeting, please designate an alternate and have his name read into the minutes of a Board meeting.
    - Share with membership the Spring Convention information.
  - **SECRETARY**
    - If your chapter chooses to participate, fill out and submit Chapter Achievement Program information <http://www.barbershop.org/chapter-achievement-program.html>
  - **TREASURER**
    - IRS Forms 1098/1099 are due to the IRS and to anyone your chapter pays (director, show quartets, etc.) by February 28<sup>th</sup> of each year.
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## MARCH

- **PRESIDENT**
    - Attend the District House of Delegates Meeting in conjunction with Spring International Prelims as the official delegate for your chapter.
  - **SECRETARY**
    - Verify your chapter's incorporation status with your state's Officer of the Secretary of State, Incorporations Section (or equivalent agency).
      - Post to the Financial Filings section of eBiz the date to which your chapter's incorporation is good. If "perpetual", enter 1/1/2099.
    - Verify your chapter's Registered Agent information with the Secretary of State and update it if necessary.
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## APRIL

- **PRESIDENT**
    - Remind your Treasurer that the IRS Form 990N E-Postcard filing is required by May 15<sup>th</sup>
    - Remind the Annual Financial Review Committee their report must be filed by you with Society HQ by May 15<sup>th</sup>.
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## MAY

- **PRESIDENT**
  - Receive the report from the Annual Financial Review Committee.
    - Post a copy for the membership to review.
    - File a copy with the Society HQ
    - Give a copy of the report to Secretary for the record.
    - Review with the Treasurer.

- Receive from the Treasurer a copy of the acknowledgement of the IRS 990-N E-Postcard filing (or 990 Return).
    - Give a copy to the Secretary for the official record.
  - **SECRETARY**
    - Receive from President a copy of the Annual Financial Review
      - Post to the Financial Filings section of eBiz the date the Annual Financial Review was filed with Society HQ.
    - Receive from President a copy of the IRS acknowledgement of filing IRS Form 990-N and file with chapter records.
      - Post to the Financial Filings section of eBiz the date the IRS Form 990-N was filed with the IRS.
  - **TREASURER**
    - File your IRS Form 990-N E-Postcard filing by May 15<sup>th</sup>.
    - Provide a copy of the IRS's acknowledgement of the filing to your President.
    - Review with the President the Annual Financial Review.
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## JUNE

- **PRESIDENT**
    - Verify with Secretary that 990-N filing information was reported on eBiz.
    - Verify with Secretary that the Annual Financial Review was reported on eBiz.
    - Verify with Secretary that State Incorporation information was reported on eBiz.
    - Inform membership of the upcoming Society International Convention.
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## JULY

- **PRESIDENT**
    - Review Society Board developments with the membership
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## AUGUST

- **PRESIDENT**
    - Verify Nominating Committee is preparing the Slate of Officers for the coming year.
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## SEPTEMBER

- **PRESIDENT**
  - Set the date for the Annual Chapter Meeting at which the next year's chapter officers will be elected. Must be before October 15<sup>th</sup> of each year.
  - Have the Secretary send notices to the membership of the Annual Chapter Meeting.
  - You are the presumptive chapter delegate to the House of Delegates meetings. If you cannot make the meeting, please designate an alternate and have his name read into the minutes of a Board meeting.

- Share with membership the Fall Convention information.
  - **SECRETARY**
    - Send required notices to the membership of the Annual Chapter Meeting.
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## OCTOBER

- **PRESIDENT**
    - Attend the Fall House of Delegates Meeting at the Fall Convention as your chapter's official delegate.
    - Preside over your chapter's Annual Chapter Meeting by October 15<sup>th</sup>.
      - Must read the proposed slate once each week for two weeks ahead of the meeting and once at the meeting for a total of three readings.
  - **SECRETARY**
    - Record minutes of the Annual Chapter Meeting.
    - **CRITICAL** – Report in the **CHAPTER LEADERS>Future Leaders** section of **eBiz** the elected slate of new officers. If you don't report the next year's leaders, when the New Year rolls around your officers will be left out of the communications loop and you will be unable to update anything in eBiz. At a minimum, report the new secretary, even if it is you.
    - File any changes in the make-up of your Chapter Board with your Secretary of State, Incorporations Section, if required in your state.
    - Register incoming officers for Leadership Ranch.
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## NOVEMBER

- **PRESIDENT**
    - Assist the new President in transition to office.
    - Have all incoming Chapter Officers attend Leadership Ranch officer training.
  - **SECRETARY**
    - Assist the new Secretary in transition to office.
    - Attend Leadership Ranch officer training.
  - **TREASURER**
    - Assist the new Treasurer in transition to office.
    - Attend Leadership Ranch officer training.
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## DECEMBER

- **PRESIDENT**
    - Verify with the Treasurer that the annual ASCAP filing and payment were made.
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## **SUMMING IT UP**

One of the problems we have faced down through the years is the lack of a coordinated understanding of who is responsible for what and when they are responsible for doing it. This guide is intended as a **“QUICK-REFERENCE GUIDE”** to lay out a work plan for your chapter’s executive team showing who is responsible for what and when so things are no longer “somebody else’s” responsibility and thus might actually get done.

That’s it, folks. Just follow this simple consolidated guide and there few administrative responsibilities that will fall through the cracks. You are the business managers. These are your responsibilities so the other members of your chapter can spend their time singing their hearts out.

## **RESOURCES**

If you allow yourself to think of the enormity of the scope of things you need to know, you will just throw up your hands and quit. So, let's put some of this in perspective. The great thing is that you don't have to learn all this stuff at once in order to do your job. What you really need to know is **WHERE TO GO TO FIND WHAT YOU NEED TO DO YOUR JOB**. Different things come up at different times of the year. If you forget everything else, remember this – There are resources available at your fingertips you can tap as needed to get you through the year. And here are a few of them. Just click the link.

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**ASCAP REPORTING FORM:** <http://www.barbershop.org/document-center/category/71-show-clearance-and-legal-ascap-etc.html?download=517%3Aascap-reporting-form-2011>

**BMI SHOW CLEARANCE APPLICATION:** <http://www.barbershop.org/document-center/category/71-show-clearance-and-legal-ascap-etc.html?download=19%3Aapplication-for-show-clearance-bmi-and-sesac-license>

**BARBERSHOP HARMONY SOCIETY WEBSITE:** [www.barbershop.org](http://www.barbershop.org)

**BHS DOCUMENT SECTION:** <http://www.barbershop.org/document-center.html>

- **Rules and Regulations Handbook (contains Standard Chapter Bylaws):** <http://www.barbershop.org/document-center/category/46-policy-documents.html?download=77%3Arules-regulations-handbook>
- **Chapter Secretary Manual:** <http://www.barbershop.org/document-center/category/69-chapter-secretary-documents.html?download=40%3Achapter-secretary-manual-2011>
- **Chapter Secretary Exhibits:** <http://www.barbershop.org/document-center/category/69-chapter-secretary-documents.html?download=41%3Achapter-secretary-manual-exhibits-2011>
- **Chapter Treasurer Manual:** <http://www.barbershop.org/document-center/category/70-chapter-treasurer-and-expenses.html?download=44%3Achapter-treasurer-manual>
- **Chapter Treasurer Exhibits:** <http://www.barbershop.org/document-center/category/70-chapter-treasurer-and-expenses.html?download=43%3Achapter-treasurer-exhibits-manual>
- **Sample Chapter Business Plan:** <http://www.barbershop.org/document-center/category/4-general-chapter-business-documents.html?download=35%3Achapter-business-plan-sample>
- **Chapter Management Guide:** <http://www.barbershop.org/document-center/category/4-general-chapter-business-documents.html?download=38%3Achapter-management-guide-2004>
- **AND MUCH MORE.....**You really should spend some time poking around in here.

**EBIZ – The Society's Chapter Management and Reporting Section:** <https://ebiz.barbershop.org/ebusiness>

- **Things you can do in eBiz:**
  - Download a chapter roster
    - Track membership dues lapses
    - Click their name and edit their personal information, like emails
  - Change your chapter dues structure
  - Report the filing of your IRS Form 990-N
  - Report the submission of your Annual Financial Review
  - Report that you verified your State Incorporation status
  - Enter your chapter in a contest – the official CJ20 Contest Entry System
  - Change your chapter's reported meeting time/date
  - Help a member pay his dues by credit card
  - There is much more you should discover by just trolling around in the website

**800-876-SING (7464)** – the Society’s toll-free phone number. The Society is staffed with knowledgeable people eager to be of assistance. When all else fails, call Society HQ. You’re paying for it – USE IT.

- Key people (by phone or email – they will respond to email):
  - **Becca Box**, Director of Membership Services – [bbox@barbershop.org](mailto:bbox@barbershop.org) – for questions about membership.
  - **Heather Verble**, Chief Financial Officer – [hverble@barbershop.org](mailto:hverble@barbershop.org) – for questions about financial reporting requirements, to report a possible claim against our liability insurance policy, to report a possible claim against our Fidelity Bond.
  - **Eddie Holt**, webmaster – [eholt@barbershop.org](mailto:eholt@barbershop.org) – for issues with eBiz like obtaining a log-in.
  - **Paul Wietlisbach**, Dir of Education – [education@barbershop.org](mailto:education@barbershop.org) – for questions about the education and training of all barbershoppers in music or administration
  - **Erin Elkins**, Old Songs Library – [eelkins@barbershop.org](mailto:eelkins@barbershop.org) for questions about copyright issues, producing/publishing learning tracks, online music distribution, etc.

There is much more available to you if you will only poke around in the various websites. We really do want you to have all the resources you need to be comfortable in taking on the responsibility of Chapter President, Secretary, or Treasurer. Your chapter members may not all know it, but they owe you a huge debt of gratitude. So, here’s a big **THANKS** for stepping up to this service.

**Tremendous thanks to the composer of this document: Gary Hannah, Secretary, fall 2011**