

THE BUSINESS OF BARBERSHOP

A consolidated at-a-glance Chapter business guide for
Chapter Presidents, Secretaries and Treasurers in Land O'Lakes District

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, located at <https://ebiz.barbershop.org/ebusiness>
 - Verify with the membership any changes in contact information (mailing address, e-mails, 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 of the chapter board meetings.

 - **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.
 - Chapter Board approve any membership applications.

- **SECRETARY**
 - Record any changes in the make-up of the Chapter Board in the minutes of the 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 with your States Secretary of State, or Province, Incorporation section any required **Incorporation renewal** or **Statement of Continuing Existence**.
 - Report any filing of Incorporation renewal or Statement of Continuing Existence in ebiz, Financial Filings section at <https://ebiz.barbershop.org/ebusiness>.

- If required, file with your State/Province, Incorporations Section (or equivalent agency) any required update of your **Registered Agent**. Your Registered Agent is the person whose name and address are on file with the State or Province as the official point-of-contact for communications and legal service.
 - File necessary BMI Show Clearance Application before finalizing show venue and guest Quartet contracts. Shows within 40 miles of each other on the same date are in conflict and must be resolved. Resolving the conflict means submitting a written waiver of District Policy to the District Secretary. **NO SHOW CLEARANCE, NO SHOW.**
 - Send your completed form to: Arv Zenk, LO'L District Secretary
209 Candi Court
North Mankato, MN 56003
 - Your show will appear on the www.loldistrict.org web site Chapter event and also will appear on the back cover page of the Pitch Piper.
 - 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 chapters 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.
- **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 the payment located at: www.barbershop.org/document
 - For 2012 the minimum **ASCAP** fee is \$230.00. If gross ticket sales are in excess of \$ 51,111.11 annually are due on a sliding scale shown on the form.
 - File return with IRS before May 15th based on Chapter gross revenue receipts:
 - Form 990-N, Electronic Notice (e-Postcard) if gross receipts less than \$50,000
 - Form 990EZ with Schedule A if gross revenue receipts exceed \$50,000
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SCHEDULED THROUGHOUT THE CALENDAR YEAR

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 with their results. This committee should NOT include the Treasurer as the review is essentially a “peak 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 chapters finances.
 - See Treasurers Exhibits for format. www.barbershop.org Document Center.
 - Appoint such other Chapter committees normally held in your chapter.
 - **SECRETARY**
 - Monthly Board Meeting
 - Read into the minutes of the Board meeting the names of any chapter 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 Fidelity Bond. Elected chapter officers are automatically covered and need not be recorded in the minutes.
 - **TREASURER**
 - Submit budget for coming year to board for any modifications and approval.
 - When asked, surrender financial records to the Annual Financial Review Committee. As this is a “peak over your shoulder”, you should NOT be a part of the committee.
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FEBRUARY

- **PRESIDENT**
 - Check with each chapter committee for established goals and functioning for the good of the chapter.
 - Are any Chapter Quartets planning to attend Division Quartet Coaching Clinic. Will Chapter be assisting in any financial obligation to attend.
 - **SECRETARY**
 - **TREASURER**
 - IRS Forms 1098/1099 are due to the IRS and to anyone your chapter pays including director, show quartets, etc., by February 28th of each year.
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MARCH

- **PRESIDENT**
 - Follow up on Chorus plans to participate in your Division Contest.
 - **SECRETARY**
 - Verify your Chapters Incorporation status with your States Secretary of State or required Province agency.
 - Post to the Financial Filings section of ebiz the date to which your Chapters Incorporation is good. If “perpetual”, enter 1/1/2099.
 - Verify your Chapters Registered Agent information with the Secretary of State and update if necessary.
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APRIL

- **PRESIDENT**
 - The Spring meeting of the District House of Delegates will be held the first weekend in May and you are the presumptive chapter Delegate to the meeting. If you cannot attend the meeting please designate an alternate and have his name read into the minutes of the Board meeting.
 - Share with chapter membership the District Spring Convention information.
 - Remind your Treasurer that the IRS Form 990 return is due by May 15th.
 - Remind the Annual Financial Review Committee their report must be filed by you with Society HQ by May 15th.
 - Review with Treasurer
 - File a copy with Society HQ
 - Give a copy to Secretary for the record.
 - **SECRETARY**
 - If your chapter selects an Alternate Delegate to the Spring District House of Delegates meeting record the name of the alternate in the minutes of the chapter board meeting.
 - Receive from the President a copy of the Annual Financial Review.
 - Post to the Financial Filings section of ebiz the date of the Annual Financial Review.
 - **TREASURER**
 - Review with chapter board the Annual Financial Review
 - File your Chapter IRS filing by May 15th
 - IRS Form 990-N, Electronic Notice (e-postcard) if \$50,000 or less.
 - IRS Form 990EZ with Schedule A if gross receipts exceed \$50,000
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MAY

- **PRESIDENT**
 - Attend District House of Delegates meeting at Spring District Convention
 - Report to Chapter results of District House of Delegates meeting
 - Receive from Treasurer acknowledgment of IRS filing
 - **SECRETARY**
 - Receive from President copy of Annual IRS filing
 - Post to the Financial Filings section of ebiz the date filed with IRS.
 - **TREASURER**
 - Review with chapter board IRS filing
 - Review with chapter board Financial Review
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JUNE

- **PRESIDENT**
 - Follow up with Nominating Committee on action of the committee
 - Verify with Secretary that IRS 990 information was reported on ebiz.
 - Verify with Secretary that Annual Financial Review was reported on ebiz.
 - Verify with Secretary that Chapter Incorporation was reported on ebiz.
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JULY

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

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

- **PRESIDENT**
 - Set the date for the Chapter Annual Meeting at which the next years chapter officers will be elected. Must be held before October 15th of each year.
 - Have Secretary send notice to membership of the Chapter Annual Meeting date.
 - Make plans to attend Fall District House of Delegates meeting to be held 4th weekend in October at the District Fall Convention.
 - **SECRETARY**
 - Send notice to membership of the Chapter Annual Meeting.
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OCTOBER

- **PRESIDENT**
 - Attend District House of Delegates meeting held at Fall District Convention as your Chapters Official Delegate.
 - Preside over your Chapters Annual Meeting held before October 15th.
 - Proposed slate must be read once each week for two weeks prior to the meeting and once again at the meeting for a total of three readings.
 - **SECRETARY**
 - Record minutes of the Chapter Annual 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 years leaders, when the new year rolls around your officers will be left out of the communication loop and you will be unable to update anything on ebiz. Also know the information for the District Directory is obtained from the same ebiz site.
 - Provide incoming slate of Officers with information on Leadership Academy to be held the first weekend in January at UW-River Falls, WI.
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NOVEMBER

- **PRESIDENT**
 - Appoint chair for Installation of Officers and arrange for District Officer or Chapter Counselor to install the new Officers.
 - Encourage new officers to attend Leadership Academy in January
- **SECRETARY**
 - Send list of those attending Leadership Academy to the chairman at:
Tyler Smith
611 South Holcombe Street
Stillwater, MN 55082
 - Secure Hotel rooms for those attending Leadership Academy. Note: The published

- room rate is good only until a certain date after which the rate goes back to full rate.
 - Hotels are listed on the District web site at www.loldistrict.org
 - Assist the new Secretary in transition to office.
 - Plan to attend Leadership Academy if repeating in office for coming year.
- **TREASURER**
 - Assist the new Treasurer in transition to office.
 - Plan to attend Leadership Academy if repeating in office for coming year.
 - Send check for those attending Leadership Academy.
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DECEMBER

- **PRESIDENT**
 - Verify with the Treasurer that the annual ASCAP filing payment was made.
 - **TREASURER**
 - Meet with incoming Treasurer to review books and estimate the chapters year end financial position.
 - Review the past two years records to find cost comparable items to be included in the next years budget.
 - Meet with incoming President and Treasurer to prepare draft of the annual budget.
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SUMMING IT UP

One of the problems we have faced through the years is the lack of understanding of who is responsible for what, and when they are responsible to do it. This guide is intended as a Quick-Reference Guide to lay out a work plan for your Chapters Executive Team showing who is responsible for what and when. **If you have any questions, don't be afraid to ask for help.**

I am here to help make your job easier. So call me when you need anything:

Arv Zenk, Land O' Lakes District Secretary
209 Candi Court
North Mankato, MN 56003
Tel - 507-388-7509
e-mail arvjane@hickorytech.net

And remember, there is a team of highly talented people to help you when you call Society at 800-876-SING (7464) Society's toll-free number. The Society is staffed with knowledgeable people eager to be of assistance. So when all else fails, give Society a call because they have staff that's ready to serve you. You can find their job titles and names of all of the responsible individuals in every **HARMONIZER** along with their phone number and e-mail address. Being a Chapter Officer can be a very rewarding job, and remember, the reason we do this is to sing and have fun. Good Luck!

RESOURCES

Managing a small non-profit organization can be a bit daunting and with the scope of what's expected of you could easily become overwhelmed. But, just recognize that you don't have to learn all this stuff at once in order to do a great job. What you really need to know is **WHERE TO FIND WHAT YOU NEED TO DO YOUR JOB.**

Different things come up at different times of the year, so the first thing to do is get a plan on your calendar. Once you have that plan there are resources available at your fingertips that you can use as needed to get you through the year. And here are a few of them:

LAND O'LAKES DISTRICT Web site: www.loldistrict.org - Click on the **Document Center** and poke around in there at the various documents including chapter officer job descriptions and more. These are all in PDF and free for you to download.

ASCAP REPORTING FORM: www.barbershop.org - Click on **Documents** and in the drop down click on Legal.

BMI SHOW CLEARANCE APPLICATION: www.barbershop.org - Click on **Documents** and in the drop down click on Legal.

OTHER

- Rules and Regulations Handbook (contains Standard Chapter ByLaws).
www.barbershop.org - Click on Resources or click on Document
- Chapter Secretary Manual - www.barbershop.org - Document
- Chapter Secretary Exhibits - www.barbershop.org - Document
- Chapter Treasurer Manual - www.barbershop.org - Document
- Chapter Treasurer Exhibit - www.barbershop.org - Document
- Chapter Business Plan - www.barbershop.org - Document- General Business Documents
- Plus many more at - www.barbershop.org - Document - General Business Documents

EBIZ - The Society's Chapter Management and Reporting Section

<https://ebiz.barbershop.org/ebusiness>

Things you can do in ebiz:

- Download your chapter roster
- Track membership dues lapses
- Click members name and edit their personal information like Email address
- Change your Chapter dues structure
- Report the filing of your IRS Form 990
- Report the submission of your Annual Financial Review
- Report that you verified your Chapter Incorporation status
- Enter your Chapter Chorus in a contest - the official CJ-20 Contest Entry System
- Change your chapters listed meeting time/date
- Help a member pay his dues by credit card
- Report changes in chapter membership and leadership
- Annual report of newly elected chapter officers.