



LO'L District

Chapter President Workbook



**HEALTHY
CHAPTER**
INITIATIVE

BARBERSHOP HARMONY SOCIETY

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Revised & Updated by LO'L - 2025

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1. The Chapter President

1.1. What the Chapter President does

The chapter president is, in essence, the chapter chief executive officer who is responsible for leading and ensuring the chapter carries out its mission. The Barbershop Harmony Society and the district rely on the chapter President as one of the primary contacts and communication links between the Society, District and Chapter.

The chapter president is:

- An active, voting (in cases of a tie), chapter board member
- The head of the chapter leadership team
- Responsible for the planning and chair at all chapter board and member meetings
- Accountable for directing the establishment of the chapter's mission statement, and supporting the goals and objectives to ensure consistency with the organization's objectives and purpose.
- Knowledgeable of the ongoing duties and progress of all Board members
- Responsible for appointing committee chairs and committees as the Standard Chapter Bylaws and chapter rules, regulations and policy calls for.
- A member of all committees and teams of the chapter (except for the Nominating Committee)
- Accountable for following up with each Board member to ensure that all projects, goals and initiatives within that officer's portfolio are being "worked" and will meet the agreed upon deadlines.
- Responsible for evaluating the performance of the leadership team and take steps to correct any noted weaknesses.
- Charged with the responsibility (along with the board) to assess progress of the chapter's annual plan and budget progress during the year and revise the plan as necessary, and ensure that all necessary forms are filed and monies correctly disbursed.
- Responsible to ensure that a weekly program of chapter activities is developed and carried out.
- Asked to serve as, or assign, the elected chapter delegate to the District House of Delegates (HOD)
- Responsible for attending any scheduled training or education related to Chapter administration and advancement.

1.2. Chapter Administrative Leadership Team

Each chapter has an administrative leadership team that consists of the Chapter President, Secretary and Treasurer. Below are the responsibilities of those two positions as described in their role manuals, published by the Barbershop Harmony Society.

1.2.1. The Chapter Secretary - Job Description

The chapter secretary is, in essence, a chapter business manager who keeps the chapter organized and current in correspondence, report filing and all paperwork related to the operations of the chapter. The Society and district also rely on the chapter secretary as a primary contact & communication link between the Society, District and Chapter.

The chapter secretary:

- Is an active, voting, chapter board member
- Maintains accurate membership records, including submission of new member applications and ensuring through the [Member Center](#) that all member information is current and accurate.
- Reports new chapter officers & leaders by updating their chapter [Member Center](#) profile. Once updated, this information is then supplied to the district and society officers.
- Reports chapter filings, in cooperation with Chapter Treasurer in chapter [Member Center](#) profile.
- Takes all meeting minutes, including any special or non-scheduled board meetings and annual chapter meetings at which election of officers takes place, etc.
- Files for show clearances [BMI/SESAC (for U.S. Chapters) or SOCAN (for Canada) Forms] with the District Secretary as needed. Also, U.S. Chapters submit ASCAP forms annually to the District Secretary.
- When needed, orders chapter supplies.
- Reports to the Society offices when a member of their chapter passes away, by e-mailing CustomerService@barbershop.org (preferred) or calling Society HQ.
- Maintains chapter legal files including:
 - Standard Chapter Bylaws
 - Chapter rules & regulations (if necessary)
 - Original Chapter License & Charter
 - Copies of Insurance Certificates
 - Copies of BMI/SESAC and ASCAP filings (U.S. Chapters) or SOCAN/Entandem Forms (Canadian Chapters).
 - Copies of Internal Revenue Service (IRS) or Canadian Revenue Agency (CRA) filings
 - State or Provincial incorporation documents.
 - Copies of completed Youth Membership and/or Participation Forms completed by parents or guardians.
- Attends the District Leadership Academy

1.2.2. The Chapter Treasurer - Job Description

The treasurer holds the chapter funds in trust. It is his responsibility to keep accurate financial records and to offer sound financial advice to the chapter board. The treasurer should be organized, detail-minded and have a rudimentary knowledge of bookkeeping practices.

The treasurer must keep up-to-date records, in clearly understandable form, of all income and expenditures. He should collaborate with the chapter secretary, officers and chapter committee members in the collection of all money. In addition, he should indicate on his records, under various classifications, who, what, where, when, why and how money is used.

The main duties of the treasurer are to:

- Function as an active, voting, chapter board member
- Prepare, in conjunction with the president & the other officers, an anticipated chapter income and expense budget for the year.
- Keep an accurate set of financial records.
- Pay all bills promptly on receipt of billing from the Society office, district or other businesses.
- Prepare monthly reports of cash receipts and disbursements.
- Prepare and file on behalf of the chapter governmental, regulatory and tax returns and forms.
- Present financial records to the chapter financial review committee for annual review as required by the Society.
- Submit treasurer's report to chapter board, usually at each board meeting (or as requested).
- Offer advice and make recommendations to the board regarding financial matters.
- Perform such other financial assistance to the chapter as required.
- Attend the District Leadership Academy
- Work closely with the secretary to collect chapter dues (Canadian chapters only.)
- Present the Chapter Secretary for filing in Chapter's records: Chapter's financial reports, annual financial review, chapter governmental, regulatory, and tax returns and forms.

1.3. Chapter Schedule of Responsibilities

A sample schedule of responsibilities for Chapter Presidents, Secretaries, and Treasurers can be found in the “**LO’L Business of Barbershop**” found on the District Web site in the Document Center.

1.4. Chapter Charter Suspension or Revocation

When a chapter is suspended for violations as laid out in the Chapter Chartering, Suspension and Revocation Procedure, all general privileges are denied including being prohibited from participating in BHS division, district or international contests. A chapter's charter can be suspended or revoked for chapter noncompliance. It is important that the Chapter President work alongside its Secretary and Treasurer to ensure compliance is upheld.

The Society can suspend a chapter for the following reasons:

1.4.1. Late Bill Payments

The Society may suspend a chapter if it does not receive a statement remittance by month's end of the month the statement was received.

1.4.2. Late Filing of a Copy of the Chapter's IRS 990 or CRA Required Forms

The chapter must update their BHS Chapter [Member Center](#) Profile with a copy of the chapter's annual IRS Form 990, 990EZ or 990-N tax return or required CRA Filings (if applicable) by May 15th each year.

1.4.3. Late Filing of Annual Financial Review

The chapter must update their BHS Chapter [Member Center](#) Profile with a copy of the chapter's annual financial review by June 30th each year.

1.4.4. Late Filing of Incorporation Status

The chapter must update their BHS Chapter [Member Center](#) Profile with a copy of the chapter's incorporation information (if required to renew) by May 30 each year.

There are other criteria and indicators for chapter suspension/revocation, that are not always in direct control of the chapter. [i.e. the minimum number of chapter members to remain an active chartered chapter, is eight (8)]

If concerted efforts by the Society office, assisted by district officers, fail to rectify the situation(s) within a general time frame of sixty (60) days from the suspension date, the Society office will automatically begin steps to revoke the chapter charter. It will transfer all current members to the Frank H. Thorne Chapter-at-Large for the remainder of each individual's membership year unless a member requests transfer to another chapter. Even though the Society gives chapters advance warning of a suspension by including special notices with past due statements, it may suspend chapters frequently.

The main reasons for chapter non-compliance are generally:

- The chapter secretary or treasurer became inactive
- The chapter did not report the new officers to the Society office (*i.e. where to send chapter notices or statements/bills to*)
- The chapter did not report the treasurer's new address. (*i.e. where to send chapter notices or statements/bills to*)
- The treasurer did not understand the billing procedure.
- The treasurer sent the check too late to be received on time

In addition to paying bills on time, the best way to avoid suspension is to report any changes to the Society office immediately, by updating your BHS Chapter [Member Center](#) Profile.

2. Communication & Administration

2.1. Utilizing the Chapter Administrative Leadership Team

The “[LO’L Business of Barbershop](#)” found on the LO’L District web site is a major resource for the Chapter President, Secretary, and Treasurer (the Chapter Administrative Leadership Team) to guide the business aspects of the chapter.

It is important to remember that the chapter is an organization that needs to be run in a business-like manner. Effectively utilizing communication and a team mentality, will be some of the first steps to see success in the areas of carrying out the chapter’s goals and mission.

The Secretary’s Role

Communication with the Team

- Between President/Secretary/Treasurer
- Secretary is a Board member, not just the guy who writes the minutes
- Reports to Board

General Chapter Status

- Responsible for keeping Chapter off suspension
- Chapter Legal Files

Corporate status

- Annual state reports and fees
- Report current status annually via [Member Center](#) (Compliance Filings)
- Registered or Resident agent (usually)

Membership

- Importance of teamwork
- Youth Protection Policy – membership and participation

Elections

- Reporting of officers and other important contacts via [Member Center](#)

Agenda and Minute Preparations & Filing

- Corporate records

ASCAP, BMI and/or SOCAN/Entandem licenses

- Filing – where and when
- Payment with Treasurer

Copyright laws – music & learning media and program notice

- Legal Obtainment
- Copyright Notice in programs
- Finding information

Annual Calendar Preparation

The Treasurer’s Role

Communication with the Team

- Between President/Secretary/Treasurer
- Treasurer is a Board member, not just the financial officer
- Financial Status Reports to Board

General Chapter Status

- Responsible for keeping Chapter off suspension
- Pays Society statement – promptly
- Sees to financial review (President appoints review team)
- Prepares and Files tax forms
- Maintenance of Insurance

Corporate Status

- Maintenance of status (if needs payment)

Bank Resolution and Signature Cards

- Number of signatures

Annual Financial Review

- President appoints team
- Must report to Society by June 30
- Treasurer from year being reviewed assists in the review but does not lead the review

Budgeting

- Input provided by parties responsible
- Treasurer does mechanics
- Board approves and facilitates
- Social vs. Operating Funds

Copyright Law & Show Licensing

- ASCAP; BMI; SOCAN/Entandem
- Chapter music & derivatives (Learning Media and Web sites)

General Records Retention with Secretary

2.2. Robert's Rules of Order

The Barbershop Harmony Society Standard Chapter Bylaws state that the governing rules and basis for facilitating meetings is "Robert's Rules of Order"

Despite how few people have or should read the book, Robert's Rules of Order is a standard basis for running effective meetings as a non-profit board of directors. If you've served on almost any board, you likely are familiar with the gist of it. At its most basic, it prevents individuals or groups of people to dominate a floor or topic of conversation but also permits equal opportunities for effective decision making as an entity.

Robert's Rules of Order also provides a Small Boards approach for assemblies that have not more than a dozen members. A guide for utilizing Robert's Rules of Order (and the small board approach) can be found on the Land O'Lakes Web Site.

2.3. Board Meeting Basics

2.3.1. Meeting Agendas

It is crucial that each meeting of the chapter board of directors has an agenda. It is the responsibility of the chapter president, in cooperation with the chapter secretary, to prepare and distribute an agenda *at least* one (1) week in advance of the board meeting to prepare board members for items to be discussed. A sample template is available on the Society online [Document Center](#).

To expedite the running of the meeting there is an expectation that all reports from functional vice-presidents and standing and special committee chairmen will be in writing. The written reports become a part of the permanent record (minutes) of the meeting. The written reports are filed with the chapter secretary and shared with other members of the board of directors well ahead of the meeting. Minor amplification of each written report is to be expected, but should be kept to a minimum. These reports are received in a group as part of the Consent Agenda.

2.3.2. Quorum

The BHS Standard Chapter Bylaws states that at a Board of Directors meeting a simple majority (greater than 50%) is required to constitute a quorum. A meeting of the general membership only requires 30% of the members to constitute a quorum.

2.3.3. Motions

Actions passed by the board of directors, especially those dealing with chapter money expenditures, should be done through a motion. It is unnecessary to have a motion for decisions that can easily be handled by a consensus of the body. Chapter secretaries should insist the maker of any motion place it before the body in writing. Motions should be conducted through a vote by voice, hands, ballot or roll call. Except for a roll call vote, it is unnecessary to record the results of the vote in the minutes, unless a minority voter requests that they be so noted, although, the passed motion should be noted in the minutes. Voting ties are broken by the Chair's (chapter president) vote.

2.3.4. Meeting Minutes

The chapter secretary records the minutes at all chapter board meetings to provide a complete and accurate record for the chapter. The secretary should promptly send a copy of the minutes to the chapter president to alert him of unfinished business and to get confirmation of its accuracy. Once approved by the board at a subsequent meeting, he retains these minutes as part of the chapter's permanent record in the Chapter Legal File. If the chapter secretary is unable to attend a meeting, he should arrange for someone else to record the minutes. A template is available on the Society online [Document Center](#).

Additional information about meeting minutes can be found in the BHS Chapter Secretary Manual.

2.4. Chapter Meeting Basics

There is no one chapter that is alike in how it runs its chapter meetings. Most often, the primary dedication of time is the rehearsal of the chorus. There is so much more potential to chapter meetings to increase the enjoyment and ownership to the chapter activities! What are some of the other elements of the chapter meeting that you'd like to see included in your chapter meeting nights?

2.5. Engaging Volunteers

Not only is the Barbershop Harmony Society a member-based organization, but it is also volunteer based. Your chapter members (including your chapter board of directors, committee members, and even sometimes, your musical leadership are volunteers. What are some of the things to be mindful of when engaging and utilizing volunteers for your chapter?

3. Annual Business Planning

3.1. How does your business plan define success?

a) **Quantitatively**- observed by analyzation of measurable data

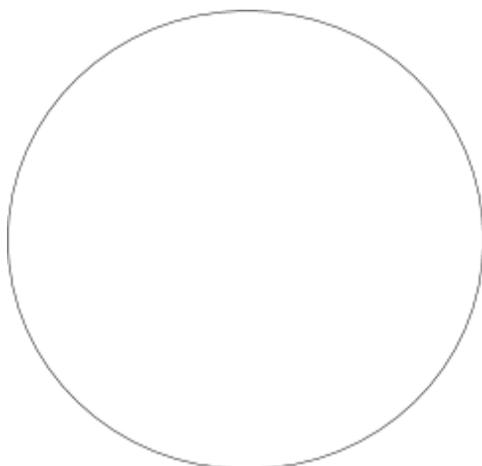
b) **Qualitatively**- observed through participation and thematic description

3.2. What type of chapter are we?

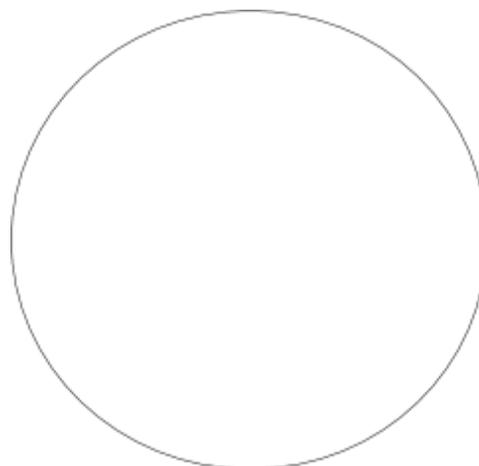
- 3.2.1. Social & Fellowship Based
- 3.2.2. Community and Service Oriented
- 3.2.3. Show & Performance Focused
- 3.2.4. Competition Focused
- 3.2.5. Quartetting Focused

Take a moment and allocate the percentages of what you believe the type of chapter you are

TODAY



WE HOPE TO BE...



3.3. Setting Goals

For this year I hope to...

- Use the Society Copyright and Show Clearances
 - Use the Harmony Foundation's Donor's Choice program
 - Attend a District Leadership Academy
 - Use the Society Customer Service & Chapter Leadership Team
 - Attend a District Convention
 - Use the Society Director Search
 - Perform in the Community (how many times)

 - Visit the BHS website
 - Order Music from the Marketplace
 - Collaborate with other community arts organizations
 - Host a singing valentines program
 - Collaborate with other chapters
 - Order merchandise from the marketplace
 - Attend the BHS International Convention
 - Attend Midwinter Convention
 - Send your Director or Asst Director to Harmony University
 - Send your chorus to Harmony University
 - Send a quartet to Harmony University
 - Send a member to Harmony University
 - Discuss the Society annual report with the board
 - Participate in the Standing Ovation Program
- Apply for a Society Grant
 - Sponsor the startup of a youth quartet
 - Provide community service to a school choral department
 - Create a website for the chapter
 - Create a facebook page for the chapter
 - Create and post a YouTube video of our chapter performing in our community
 - Produce an annual show
 - Maintain Society Liability Insurance
 - _____
 - _____
 - _____
 - _____
 - _____
 - _____
 - _____
 - _____
 - _____
 - _____

3.4. Sample Outline Guidance

- Executive Summary
- Chapter Vision Statement
- Chapter Mission Statement
- Situational Analysis (*current*)
- Prioritized Objectives
- Prioritized Strategies to achieve the objective(s)
- Supporting tasks
- Timeline for implementation
- Metrics for measuring success or progress
- Team to Complete (*who is responsible for execution?*)
- Budget information (*what is this and going to cost?*)

4. Basic Tips & Guidance

4.1. A Chapter President Needs to Know How To...

4.1.1. Lead

- Assess readiness of a follower to accept an assigned task
- Select the most appropriate leadership approaches to use
- Modify/Apply their own behaviors most effectively

“Leadership is the ability to influence the thinking and behavior of others... and to direct them toward the specific goal outcomes”

“Effective Leadership is adapting *your* behavior to the performance needs of the individual or group”

4.1.2. Communicate

- Plan for and distinguish between effective and ineffective communications
- Recognize how different social (interpersonal) styles impact communications
- Know how to adapt and modify their own style and communication behaviors

Words	What You Say Word Choice, phrasing, filler words, etc.	9% of the Message
Voice	The way you say it Tone, volume, pitch, speed, etc.	41% of the Message
Body	How you look when saying it Eye contact, posture, gestures, proximity, facial expression, etc.	50% of the Message

- Effective Communication requires:
 - Knowing yourself
 - Knowing your target audience/individual
 - Selecting the most appropriate information and approach
 - Planning what, how, and when to deliver the message.

“Leadership is the ability to influence the thinking and behavior of others... and to direct them toward the specific goal outcomes”

“Effective Communication is adapting *your* behavior to influence and achieve the performance goals of the individual or group”

4.1.3. Engage with Volunteers

Generally, there are four types of people:

5% Leaders:

Proactive, visionaries, makes change happen

25% Responsible:

Gets things done, with leadership

50% Responsive:

Prod them to get a job completed

20% Inert:

Complainers, non-participants, unreliable

Spend your time and energy enrolling the top 80% in the Mission & Vision of your organization.

Don't get sidetracked by the inert 20%

Why do people volunteer? (Examples)

- Someone asked me
- Belief in the leader or a key official
- Business or professional growth
- Personal recognition
- Opportunity to give back
- Enjoy seeing things done well
- Identify with success
- Enjoy being a leader
- To be in the know
- To keep an eye on the leaders

What other reasons do people volunteer?

Volunteers: How We Get Them | How to Keep Them

1. A volunteer needs a specific manageable task with a beginning and an end
2. A volunteer needs a task that matches interests and reasons for volunteering
3. A volunteer needs a good reason for doing the task
4. A volunteer needs written instructions
5. A volunteer needs a reasonable deadline for completing the task
6. A volunteer needs the freedom to complete the task when and where it is most convenient for the volunteer
7. A volunteer needs everything necessary to complete the task without interruption
8. A volunteer needs adequate training
9. A volunteer needs a safe, comfortable, and friendly working environment
10. A volunteer needs follow-up to see that the task is completed
11. A volunteer needs an opportunity to provide feedback when the task is finished.
12. A volunteer needs appreciation, recognition, and rewards that match the reasons for volunteering

Volunteers: Recruiting Guidance

- Be genuine – sincerity works
- Match position with interests and/or capabilities
- Provide accurate, clear responsibilities description
- Don't minimize time requirements
- Communicate the training and support available
- Explain they would be good in the job
- Paint a word picture of him being successful

What other guidance would you give someone else?

Volunteers: Keep Volunteers Producing | Be Sure Their Needs are Being Met

- Volunteers want their work to make a difference and to be appreciated, recognize them genuinely and frequently
- Volunteers have outside lives – understand their conflicts and honor them
- Volunteers are busy people – don't waste their time – ever!
- Don't punish volunteers for being successful!

What do you think about these issues and why do you as the leader need to pay attention to retaining volunteers?

5. Chapter Bylaws & Code of Regulations

The Standard Chapter Bylaws are established and maintained by the Society Board of Directors and are binding on **all chapters**. Variations from these Standard Bylaws are permitted **only** when necessary to comply with national, state or provincial statutes or ordinances, or otherwise as approved by the Society Governance and Bylaws Committee. There are some blanks to be completed (e.g. correct chapter name, number of board members-at-large, and district association) for individual chapter bylaws.

Before ANY amendments to the Standard Chapter Bylaws can become final and effective, they must be approved by the Society Governance and Bylaws Committee. A copy is then filed in the chapter record at Society Headquarters. To request an exception or update to your chapter bylaws, please seek approval by the Society Governance & Bylaws Committee through Society Staff (chapters@barbershop.org).

The identification of chapter-unique requirements can be provided in a document termed “Code of Regulations” or through “Statements of Policy.” These documents may be compiled by the chapter and are also subject to approval by the Society Governance and Bylaws Committee on behalf of the Society Board of Directors.

Because questions frequently are asked of the chapter secretary regarding these documents, it is recommended that a current version of the Standard Chapter Bylaws and if created and approved, the chapter Code of Regulations or Statements of Policy, should be accessible and always filed in the chapter legal file.

For more information or additional questions, contact the District or Society Offices.

Key District Information Including: [LO’L District Website](#)

Chapter Liaison-District Liaison program

Fall Convention – District Board and House of Delegates meeting

District Harmony Academy

Chapter Grants Program

6. Suggested Reading & Videos for Chapter Presidents

6.1. Non-Profit & Business

- Good to Great and the Social Sectors, Jim Collins
- The Five Dysfunctions of a Team: A Leadership Fable, Patrick Lencioni
- Golden Circles - Why, How, What, Simon Sinek ([VIDEO](#))
- Road to Relevance, Harrison Coerver and Mary Byers
- The Fifth Discipline, Peter M. Senge
- Diversity Explosion, William Frey
- Purple Cow, Seth Godin
- Chorus Leadership Guide, Chorus America
- Why Quitters Win, Nick Tasler
- Legacy Builder, Rod Olson

6.2. Barbershop & Music

- Heritage of Harmony, Val Hicks
- Barbershopping, Musical and Social Harmony, edited by Max Kaplan
- The Barbershop Singer, Inside the Social World of a Musical Hobby, Robert A Stebbins
- Melodies for Millions, SPEBSQSA by Will Cook
- History of Barbershop, Dr David Wright ([VIDEO](#))
- Changing Lives, Gustavo Dudamel, El Sistema and the Transformative Power of Music, by Tricia Tunstall.
- This Is Your Brain on Music, Daniel J. Levitin

Frequently Utilized Forms, References, & Resources for Chapter Presidents

Each item below is a “clickable” link that will automatically bring you to the resource. If viewing the printed version, visit www.barbershop.org/resources/document-center to access the materials.

- [LO’L Business of Barbershop: Chapter Business Guide At-A-Glance](#)
An at-a-glance Chapter Business Guide for BHS Chapter Presidents, Secretaries, and Treasurers.
- [A Guide for Financial Reviews: BHS Chapter & District User Guide](#)
An annual financial review is required and a key safeguard for your group. This is a simple guide for Chapters & Districts in what they need to know about conducting an annual financial review.
- [A Guide for Robert’s Rules of Order for Small Boards: BHS Chapter & District User Guide](#)
A user guide for Chapters & Districts who may want to utilize ‘Robert’s Rules of Order for Small Boards’
- [BHS Standard Chapter Bylaws](#)
Each Chapter President should ensure that they have the most up-to-date copy of the Standard Chapter Bylaws.
- [Application for Membership](#)
Having copies of this form available at your chapter meetings is essential to ensure you’re prepared for new, transferring, and dual member applicants.
- [Society Youth Policy Statement](#)
Each Chapter should ensure that they have the most up-to-date copy of the Youth Policy.

District Leader Contacts and Information

Visit your District Website to ensure you have the names and contact information for the District Leaders and officers that can provide assistance to you in your journey as a Chapter President.

Similar to chapters, the District Administrative Leadership Team consists of your District President, Secretary, and Treasurer. One of those contacts can point you in the right direction to available resources in your district.