



LO'L District

Chapter Secretary Manual



**HEALTHY
CHAPTER**
INITIATIVE

BARBERSHOP HARMONY SOCIETY

**Barbershop Harmony Society
Chapter Leadership & Education
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1. The Chapter Secretary

1.1. What the Chapter Secretary does

The chapter secretary is, in essence, the 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 BHS Member Center](#) that all member information is current and accurate.
- Reports new chapter officers & leaders by updating their chapter [BHS 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 [BHS 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/Entandem (for Canada) Forms] with the District Secretary as needed.
- U.S. Chapters submit ASCAP forms annually to Society Offices (% ASCAP Reporting).
- 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 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. Chapter Secretary Sample Schedule of Responsibilities

A sample schedule of responsibilities for chapter secretaries can be found in the “[LOL Business of Barbershop](#)” found on the LO’L District [Document Center](#).

Here are some common responsibilities:

- Sending Membership Applications to Society Offices.
- Working with the Chapter President & Treasurer to monitor documents or filings that need to be completed.
- Partnering with the Chapter President to ensure that appointments to positions and committees are carried out
- Verifying payment of invoices from the Society or other parties with the Chapter Treasurer.
- Ensuring that Membership Cards & New Member Packets are received by Chapter Members.
- Checking the Chapter’s [BHS Member Center](#) profile to ensure that membership, filings, dues prices, leaders, and meeting places are up-to-date.
- Filing chapter incorporation renewals (if necessary) with your local state/province.
- Distribute any relevant information that is forwarded from Society, District or other Chapter Leaders to members of the chapter.

1.3. Chapter Licensure and Chartering

When a new chapter is first looking to start, they must obtain a “license to operate” from the Society. More information about licensing a chapter can be found in the Society Chapter License, Charter, Suspension & Revocation Policy. (Policy documents can be found on the Society [Document Center](#))

A chapter license to operate expires after 12 months. It may be renewed, but only in increments of 6 months. After operating as a licensed chapter, a chapter may apply for to become a chartered chapter within the organization. A chartered chapter requires a minimum of 12 members, with a minimum of 50% new or reinstated members. Other information about chartered chapters can also be found in the Society Chapter License, Charter, Suspension & Revocation Policy.

1.4. Chapter Charter Suspension or Revocation

As a chapter of the Barbershop Harmony Society, there are applicable policies in regards to Chapter Licensure, Chartering, Suspension & Revocation. When a chapter is suspended, all general privileges are denied including being prohibited from participating in contests. A chapter could be suspended or revoked for chapter noncompliance. It is important that the Chapter Secretary work alongside its President & 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 [BHS 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 (for IRS) or June 15 (for CRA)

1.4.3. Late Filing of Annual Financial Review

The chapter must update their BHS Chapter [BHS 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 [BHS 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 Chapter [BHS Member Center](#) Profile.

2. Member Reporting

2.1. Requirements for Chapter Membership

The Society, generally, accepts as members “...congenial men of good character who like to sing”. Your chapter may establish additional requirements such as passing a musical audition or attending a certain number of rehearsals before being offered membership. Such requirements are usually outlined in your chapter’s Code of Operations and should be uniformly applied.

There is no minimum age requirement to join the Barbershop Harmony Society. However, it is recommended that chapter leaders familiarize themselves with the Society Youth Policy. Chapters with young members must conduct their meetings in an atmosphere appropriate to the young members. Whether or not minors are present, the use of alcoholic beverages at chapter meetings is strongly discouraged, and in all events, must strictly comply with local law.

2.2. Responsibilities to Youth

Each chapter must adhere to the [Society Youth Policy Statement](#) and each young person participating in chapter activities, should also obtain permission from their parents/guardians. The Barbershop Harmony Society has two template forms available for chapters:

- [BHS Youth Participation Form](#) - This form is specifically for young people who attend a chapter activity (i.e. rehearsal, chapter meeting, participating in a chapter show, etc.) but has not become a member of the Barbershop Harmony Society or the chapter, yet.
- [BHS Youth Membership Form](#) - This form is for young people who are looking to join the Barbershop Harmony Society and participate as a regular member.

These completed forms are stored by the chapter secretary in the Chapter Legal File and authorizes the youth to participate in chapter activities at the chapter meeting location, other locations where activities will take place, and traveling to those activities. The inclusion of youth under 18 years old requires that an adult member of the chapter will be responsible for and supervise the youth at all times when he participates in any chapter activity.

For more information about the Society Youth Policy or protection policies & procedures, please contact the Society Chapter Leadership & Education Team.

2.3. Membership Categories

Members of the Barbershop Harmony Society fall into one of the following classifications or categories followed by a coding designation found below or here:

www.barbershop.org/membership-documents

2.3.1. Regular Member [RG]

A member who is neither a Youth Member nor a Senior Member is considered a Regular Member.

2.3.2. Senior Member [SN]

A member who is seventy-five (75) years old regardless of years of service. As a Senior Member, Society dues are at a 25% discount off of (i.e., rate of 75%) the current regular member [RG] dues. Some districts and chapters may also have special rates for Senior Members. A regular member will automatically be reclassified by the Society Membership Department as Senior upon reaching 75 years old.

2.3.3. Youth [Y]

Dues for youth members under age 26 at the effective date of joining, renewal or reinstatement are set at the rate of **50%** of the dues for the Society's regular membership dues category.

2.3.4. Life Member [LF]

A member who pays a fee twenty-five (25) times the current regular dues rate may become a Life Member of the Society. Upon becoming a Life Member the member ceases to pay annual Society dues, but is still responsible for any district and chapter dues.

2.3.5. 50-Year [HF]

A member with 50 (or more) years of Society membership, i.e., 50 years of service. Upon becoming a Harmony Fellow the member ceases to pay annual Society dues, but may still be responsible for district and chapter dues, if any.

2.4. Active Non-Member Status

If a female is actively participating or is interested in participating in a chapter (i.e. Director, Assistant/Associate Director, or through the Flexible Board Option, etc.) and they're not interested in becoming a Society Associate, a special active non-member ID# may be obtained by contacting the Society Chapter Leadership and Education Department (chapters@barbershop.org). This is specifically for reporting purposes for the chapter.

2.5. Application Process for Members

2.5.1. Membership Application Process (New, Reinstate, Dual, Transfer)

The chapter secretary (in cooperation with the member and possibly with another member of your chapter leadership) is responsible for the sending of all new, reinstated, dual, and transfer member application forms to the Society office.

For New, Reinstating or Dual Members, as part of the procedure, the secretary should:

- Add them electronically to [the BHS Member Center](#) entering their Name, Email, and Date of Birth. The member will receive an email inviting them to finish their application including payment.
- Or have them complete a paper application found here:

www.barbershop.org/membership-documents

For Transfer Members, as part of the procedure, the secretary should:

- Complete a paper application and the appropriate sections and submit to the Society offices. Currently, BHS does not accept transfer applications electronically via the Member Center.

For New, Reinstating or Dual Members (continued)

- For reinstatements or dual members using a paper application, complete the appropriate sections. It is important that all applicable sections are completed (i.e. years of past service, previous member number, name of their last chapter)
 - *Note: The sponsor of a reinstated member will receive a Man of Note credit only if the reinstated member has been out of the Society at least two (2) years before reinstatement.*
 - *Note: There is no fee for transferring membership to a new chapter.*
 - *Note: There is a dual enrollment fee of \$10 annually.*
- Applicants and members should enter credit card info on form or make checks payable to “Barbershop Harmony Society”
 - *Note: If paying by check, there is a \$10 fee. We encourage you to pay online through [the BHS Member Center](#).*
 - *Note: Canadian chapter members make payments for Society and District Dues to the Society in Canadian dollars at the applicable exchange rate. Chapter dues are paid directly to the chapter for chapter dues.*
 - *Note: For credit card payments, the Barbershop Harmony Society accepts MasterCard, Visa, Discover, or American Express.*
- If using the paper application, once payment and the complete application are in the hands of the Chapter Secretary, a temporary receipt should be given to the individual that would serve as proof of membership until the member receives a membership card.
- Applications and payment method should be mailed to the Barbershop Harmony Society Offices
 - By Scanned E-Mail to customerservice@barbershop.org OR
 - By facsimile to 615.313.7615 OR
 - By Post Mail to:
Barbershop Harmony Society
c/o Membership Applications
110 7th Avenue N
Nashville, TN 37203-3704
- For new members, once the application has been processed by the Society, a new member kit will be sent to the respective Chapter Secretary for distribution (for new and reinstating members only).
- For all dual memberships and transfer of memberships a membership card will be sent to the respective Chapter Secretary also for distribution.

2.5.2. New Member Kit

A new member kit contains the new member’s Membership Card, Membership Certificate, lapel pin (including a Person of Note award, if applicable), a copy of our Barberpole Cat I book, and welcoming information from the Society. It is mailed by the Society office directly to the chapter secretary once the application has been processed.

- 2.5.3. Distribution of Membership Kit, Membership Certificate, Card and Lapel Pin**
A chapter leader and/or chapter secretary should present the New Member Kit, membership certificate (it is recommended that it be framed) and lapel pin to the new or reinstated member at a ceremony during the chapter meeting. The Person of Note award, if applicable, should be presented to their sponsor at the same time. Be sure the chapter secretary signs the membership certificate before it is framed and presented. Chapter Secretaries should use the membership card to determine the member's identification number and enter their number on the chapter's copy of their application, as a part of the chapter records.
- 2.5.4. Frank H. Thorne Chapter “At Large”**
Men who are unable or who do not wish to participate actively with a local chapter may join the Frank H. Thorne Chapter at Large. A member of this chapter pays applicable district and Society dues and fees directly to the Society office. For more specific information about the Frank H. Thorne chapter, please consult the Society policy document, located on the Society’s online [Document Center](#).

2.6. Membership Dues

- 2.6.1. Annual Society Dues**
For the most up-to-date dues price for the society, please consult the Society Website or most recent BHS Membership Application.
- 2.6.2. Annual District Dues**
The Society collects the district dues when it invoices the member at their time of annual renewal. The district dues amount collected is remitted to the district treasurer. For the most up-to-date dues price for the District, please consult the Society Website.
- 2.6.3. Annual Chapter Dues**
The Society office handles all renewal dues for U.S. chapters by e-mailing and mailing a dues invoice directly to the member. Canadian chapter membership dues are collected by the chapter. A membership application is sent to the Society office for a new member. Canadian member renewals for district and Society dues are renewed through the Society.
- 2.6.4. Special Dues Categories**
The Society has special membership categories providing reduced dues for youth and senior members who qualify, and a single lump sum payment for a Life Membership. The chapter secretary should check with the district secretary for current district policy regarding reduced, discounted or Life Member district dues.
- 2.6.5. Life Membership**
Life Membership in the Society is available for a one-time fee of twenty-five (25) times the current Society Regular Member dues rate. Life members continue to pay chapter and district dues annually, where applicable, and will be renewed in the usual manner. Life Membership fees are not refundable.

2.7. Membership Activities and Programs

2.7.1. Dual Membership

A dual member is a member of one chapter who joins a second, or more, chapters. In this case, the member completes a Membership Application form, the chapter officially accepts the dual member and the chapter secretary collects a \$10.00 enrollment fee from the new dual member as well as, if applicable, chapter and district (if the chapter is in a district different from their original district) dues. Dual members will receive a membership card for the new chapter added, after payment and will not receive a New Member Kit. Members keep their membership number and will keep the same dues expiration date as their original chapter. No one may receive Man of Note credit for their enrollment as a dual member.

2.7.2. Person of Note Award

Through this program, chapter members are recognized when they sponsor new and reinstated members (so long as the reinstated member has been out of the Society for two (2) years before reinstating). The program began in 1958, and Man of Note credits, and changed to Person of Note golden note pins in June of 2018. No credit is given for enrolling dual or transfer members.

The Person of Note is solely decided by the new member, and each member can only have one person of note. If a new member does not designate a person of note by their own choice, then no Person of Note shall be awarded.

Golden Note Lapel Pins are awarded as follows:

- Numbered lapel pin for credits 1–25
- Numbered lapel pin for subsequent increments of five credits: 30, 35, 40, etc.

2.7.3. Resignations/Non-Renewal

Chapters do not need to report resignations. If a member is not reported as a renewal, a member will automatically drop from the active records after their dues expiration date. However, they are not permanently removed. They have a designated time frame (six-months) to renew their subscription as a member.

2.7.4. Follow-Up on Non-Renewing Members

The loss of a non-renewing member should always prompt a follow-up because retaining members is an important aspect of continued membership growth and general health of the chapter.

Most of the time, the non-renewing member is unaware that their membership has lapsed. We recommend that chapter secretaries and chapter development vice-presidents are responsible for contacting non-renewing members, thanking them for having been members and learning what the chapter might learn from their experiences. The lapsed member may, or may not, renew later, but they will talk to others. It is preferable for them to leave your membership with a positive last impression.

2.8. General Renewal and Late Renewals of Membership

2.8.1. U.S. Membership Renewals

The Society office sends membership dues invoices directly to the member by e-mail (if the member has an e-mail address on record) approximately 60 days, 45 days, and 15 days before each member's dues expiration date. A mailed notice is sent approximately 30 days before each member's dues expiration date. In addition, notices are also sent by email approximately 30, 60, 90 and 180 days after the member's dues expiration date, if they haven't yet renewed. Chapter Secretaries should also monitor member's renewals via [the BHS Member Center](#) roster.

Members should pay the Society office directly and may charge their dues on a credit card. Paying by check or money order is an option, but for an additional \$10 processing fee. Quarterly, the Society will send the chapter treasurer a check for all chapter dues money collected along with a list of members who renewed during the quarter. The chapter treasurer should provide a copy of this list to the chapter secretary. Membership cards will be mailed to the chapter secretary for appropriate presentation to the renewed member. If a member pays by check, their membership is considered valid for contest purposes when the chapter secretary notifies Society headquarters that the member has paid and BHS has acknowledged that notification.

2.8.2. Canadian Membership Renewals

A member with a Canadian address will receive their renewal notice by e-mail (if the member has an e-mail address on record) approximately 60 days, 45 days, and 15 days before each member's dues expiration date. A mailed notice is sent approximately 30 days before each member's dues expiration date. In addition, notices are also sent by email approximately 30, 60, 90 and 180 days after the member's dues expiration date, if they haven't yet renewed. Canadian member statements show his dues owed in Canadian funds based on the current exchange rate.

Paying by credit card is the preferred method for membership renewal. A Canadian member wishing to pay their dues by credit card (Visa, MasterCard, Discover or American Express) may pay online through [the BHS Member Center](#) and the payment will be made in US funds at the daily rate computed by the credit card. Their membership card will be issued on receipt of payment and forwarded to the chapter secretary.

If payments must be made by cash or check, the member may pay their chapter secretary in appropriate Canadian funds. The chapter secretary will forward the appropriate funds and the appropriate renewal notices to the Society Office. Exchange rates are posted on the Society web site (www.barbershop.org/membership-documents), and are updated quarterly. Membership cards will be issued and sent to the chapter secretary when payments are received.

2.8.3. Late Renewals of Membership

The designation "late renewal" applies only if the member renews after their expiration date, but within six (6) months following their expiration date. If their renewal reaches the Society office following the expiration date, it will be considered late. Late renewals follow the renewal procedure.

- The expiration date always extends one (1) year from the member's previous expiration date, regardless of whether they are an on time renewal or late renewal.
- A late renewing member is not given a full year of membership from the time they renews.
- A member who renews after being out of the Society for more than 6 months is classified as a "reinstated" member and will pay the \$10 enrollment fee.

2.9. Monthly Recurring Payments (previously EZDues)

2.9.1. How the Plan Works

When you join the Barbershop Harmony Society, paying your dues is easy! Two payment options are available: you can make an annual payment or you can sign up for recurring monthly payments. Some prefer the convenience of paying monthly while some prefer the savings of paying annually; the choice is entirely yours.

How to make your first payment:

You can sign up for membership via members.barbershop.org or with the form provided by your singing community leader. Under "payment options", choose your desired payment frequency (yearly or monthly). The form will calculate the price of Society and any applicable District, Chapter, and Chorus dues based on your choices. Submit your payment information and your first year or month is paid for right away.

Yearly subscribers:

- Can also choose a one-time payment instead of recurring annual payments
- Receive a 25% savings on the Society portion of your dues as compared to monthly subscribers
- If you choose recurring, one year from your join date, your next renewal payment will be automatically deducted from your supplied payment method, and your expiration date is pushed forward a year

Monthly subscribers:

- Only have the option of recurring payments
- One month from your join date, your next monthly payment is automatically deducted from your supplied payment method, and your expiration date is pushed forward a month

As long as you keep your payment information current, you are ALWAYS up-to-date with your membership dues.

Please Note: Dues are fully earned when paid, and there shall be no refund of any portion of the

dues in the event of the resignation, death, suspension, or expulsion of a member.

2.9.2. Frequently Asked Questions

- How much is monthly versus yearly?

Membership Classification	Yearly Price	Monthly Price
Member	\$180	\$20
Senior Member	\$135	\$15
Youth Member	\$90	\$10

*This chart shows Society annual dues as of 2024, and should be used as an example. Please verify with the Society website, <https://members.barbershop.org/s/article/Monthly-Recurring>, for updated rates.

Lifetime Members and 50+ Year Members do not pay Society dues, but may still be responsible for district, chapter, and/or chorus dues.

- **How can I pay?**

We accept VISA, MasterCard, Discover, and American Express. We can also do an automatic bank draft; please supply a voided check to enroll. eChecks are the best option as it reduces the need to update your payment information as frequently.

- **When should I expect the money to be withdrawn from my account?**

Payments recur on the “monthiversary” of your join date. For yearly, they recur on the anniversary of your join date.

- **Can I choose the date of my recurring payment?**

Unfortunately, not at this time. We recommend that you submit your original payment on a day that best suits you for recurring payments.

- **What if I need to update my payment information?**

For a changing or expired credit/debit card, you can update it by following [THIS TUTORIAL](#). If you need to update your bank account information, or would like to switch from a bank account to a card, or vice versa, please contact Community Care at Customerservice@barbershop.org

- **Will my recurring payments ever change?**

Since your payments are determined by the combination of your BHS, district, chapter, and chorus dues, your payments may change if any of these dues rates increases/decreases, or if you drop or add subscriptions. If Society dues rates were to change overall, you will be notified.

- **Can current members switch to recurring payments?**

Yes, current members can change their payment frequency (to monthly or to yearly) and/or choose recurring during their normal renewal time.

- **What if I don't want to make payments anymore?**

You can cancel anytime by contacting our Community Care team. Once your payments have been cancelled, your member benefits will run out at the end of that billing cycle.

- **What if my membership classification is going to change? When will my monthly payments change?**

Our membership database recognizes when you are approaching a change in membership classification (Youth to Regular or to Senior status) and will adjust your dues amount as soon as you qualify for the change. This way you aren't charged any more or any less than you would owe!

- **When will I receive a member card?**

Recurring members will receive a welcome card when first joining. Every year after that, we'll send a card around the anniversary of your join date unless you opt out using the paperless option.

- **For any other questions or assistance, please email Community Care at customerservice@barbershop.org or call 800-876-7464**

2.10. Reinstated Members

When an individual from your chapter, or another chapter, presents a membership card that expired more than six (6) months ago, or states that they were once a member of your chapter or another chapter, the chapter secretary should:

- Add them to your chapter through [the BHS Member Center](#) OR
- Ask them to complete a BHS Membership Application
- Follow the application process [See Section 2.5].
- After acceptance by the chapter, collect dues and reinstatement fee (\$10.00).
- Report as a reinstated member on the Membership Application form.
- Identify their former chapter and past years of service.
- Include their old identification number, if available.

The Society sends the chapter secretary a new membership kit. The expiration date will be one year after the reinstatement application was signed by the applicant.

2.11. Transferred Members

A member in good standing of one chapter who wishes to transfer membership to another chapter must complete the new member application process of the chapter into which they seek to transfer.

The following is the transfer procedure:

- Member submits paper application to chapter into which he wishes to transfer by completing the relevant sections of the BHS Membership Application. A copy of the Membership Application is retained by the new chapter and a copy is sent to Society Offices.
- Like new, reinstated, or dual members, a chapter should approve a transfer application. Upon approval and submittal of application, the Society sends the chapter secretary a new membership card, completing the transfer. The expiration date remains the same when a member transfers from one chapter to another. Renewal and late renewal policies apply when a member renews from one chapter to another. A membership certificate is not sent for transferring members.

- The BHS Customer Service Team will reach out to the chapter from which the member transfers to ensure all outstanding debts are satisfied, etc. A chapter should only disapprove a transfer in accordance with provisions of the Society Bylaws. Failure to respond to the request within thirty (30) days is considered approval, but it is preferable to reply to Society as quickly as possible.

2.12. Renewals when transferring from another chapter

Occasionally, a member requests a transfer just before their membership expires. In such cases, it is likely that their membership will expire by the time the transfer is complete. If the member's card shows that their membership expires in a month, the chapter secretary should:

- Complete the BHS Membership Application
- Collect applicable renewal dues from the member and send the payment to the Society office along with the Membership Application

The Society office will process the transfer and the renewal at the same time.

2.13. Chapter Dues Escrow

2.13.1. Chapter-Based EZDues Program

SOME chapters have a "Pay As You Sing" program for members. With this option, members pay dues weekly or monthly. The chapter treasurer or designee collects and keeps account balances for each participant. When the participant's renewal is due, the chapter treasurer coordinates with the participant to arrange for payment of the accumulated funds to the Society, from the participant's chapter account. It is important for the chapter secretary to provide the chapter treasurer with correct information about renewal dates and members participating in this program.

2.14. Chapter Roster

The chapter secretary is responsible for keeping an up-to-date chapter roster. This roster can be utilized for facilitating communication amongst members, as well as general updates for chapter leadership on current chapter status.

For easy access, a chapter secretary can download and print a chapter roster from [the BHS Member Center](#). The roster is a list of all current members. There is also a "Former Member" option that includes past members.

The chapter secretary should provide this information to any relevant chapter leaders for follow-up and information purposes (i.e. Chapter President, Chapter Treasurer or VP of Chapter Development).

2.15. Member Information & Personnel Changes

A chapter secretary should report all member address and information changes to the Society, by contacting the BHS Customer Service Team or encouraging the member to update their profile in [the BHS Member Center](#).

2.15.1. Reporting a Member Death

In the case of a member who dies, the chapter secretary should e-mail or phone the Society Customer Service Team. Upon receipt of notice of the death of a member, the Society Chief Executive Officer/Executive Director will send a personal condolence letter to the next of kin, and all Society mailings to the member will be discontinued, except for *The Harmonizer*, which, at the option of the next of kin, will be mailed until the deceased member's regular membership expiration date. There will be no refund of dues or fees.

Note: It is essential that information sent to the Society office regarding a member's death be accurate to ensure that the Society's response to the next of kin is appropriate.

3. Board Responsibilities

3.1. Call to Meeting or Announcing Meetings

Regular meetings of the chapter board of directors must be held consistent with state or provincial law. The Standard Chapter Bylaws of the Barbershop Harmony Society require that meetings must be held at least quarterly. The chapter president is responsible for scheduling meetings in advance and on a regular basis to encourage maximum attendance (i.e. the first Tuesday of each month, the fourth Wednesday, etc.). The chapter secretary is responsible for inviting chapter members to attend. He should make an announcement at a chapter meeting just prior to the board meeting so that all members are aware of the meeting location and time.

3.2. Meeting Agenda Composition

The chapter secretary should assist the president in preparing 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](#).

3.2.1. Expectations

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.

3.3. Meeting Minute Composition

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](#).

3.3.1. Important Details in Minutes

The minutes should record all the important approved actions (motions), consensus decisions, policies established or changed, and reports presented at the meeting. It is also the responsibility for the secretary to record action items in the minutes, to whom the item was assigned, and to follow-up on the action item at future meetings until the task is completed. Based on current practice, it is unnecessary to report the maker and second of a motion or the resulting vote, unless a roll call vote is called for or a minority voter requests that it be so noted. The names of board members attending and not attending are included. It is important to remember that all officers, whether they attend or do not attend the board meeting, are responsible for all actions taken by the board. Include the date, time, and location of the next meeting and note that all members are encouraged to attend.

3.3.2. Actions for spending Chapter Money

It is strongly recommended that all actions requiring the spending of chapter money be approved by the board of directors through a motion and noted in the minutes specifically authorizing the expenditure and the person(s) authorized to spend the funds.

3.3.3. Treasurer's Report

The chapter treasurer should submit a complete financial report at each chapter board of directors meeting, and at other times as requested by the chapter president. The chapter secretary should retain a copy of the monthly treasurer reports in the chapter legal file.

The treasurer's report should not simply state the amount in the bank, but must include explanations about financial activity (monthly expenditures and income). Since the financial report is not necessarily audited, it is "received" instead of "approved" by the board of directors.

3.3.4. Current Member Roster/Status

In cooperation with appropriate chapter officers, the chapter secretary should report the names of renewed members, members dropped for non-payment of dues and those whose memberships will come due at the end of the quarter. At this time, he should also report members who have missed meetings or activities without an excuse for follow-up. A template Chapter Attendance Record form may be used for this purpose and is downloadable from the Society online [Document Center](#).

3.4. Publishing and Distribution of Meeting Minutes

To enhance chapter communication, the chapter secretary should distribute copies of the minutes to members (consider editing them into a more readable form for the bulletin). Keep the bulletin editor informed so that board actions are not misunderstood or misquoted. This also helps to avoid lengthy business discussion at regular meetings and may encourage inactive members to take a more active role. The minutes are not approved

until the following Board of Directors meeting, but an unofficial (noted) copy may be distributed. The chapter secretary should solicit input and correction to the minutes prior to final approval by the board of directors.

3.5. Robert's Rules of Order

It is helpful if chapter secretaries are familiar with "Robert's Rules of Order" in order to assist the chapter president and other chapter officers when needed. For most chapters, "Robert's Rules of Order for Small Boards" would be most appropriate. A quick reference guide is available on the Society online [Document Center](#) for your reference.

Some examples of use of Robert's Rules of Order include:

- Debatable motions must receive full debate. Debate can only be suspended by a two-thirds vote of the members present.
- Use general consent when possible. When the group is in agreement, a formal vote or a formal motion may be unnecessary, except when spending chapter funds.
- When a member begins discussion of a subject without making a motion, the chair may interrupt the dialogue to help the member frame a motion.
- The chair restates the motion before voting so that the proposal is clear to the members.
- Restate the motion on the floor whenever discussion is wandering from the subject.
- Main motions require a second, can be debated, can be amended and require a simple majority vote.
- An amendment to a motion is voted on first.

3.6. 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.

3.7. 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.

4. Legal Matters

4.1. Chapter Secretary Responsibilities

There are a number of practices, procedures and legal policies that are designed to protect each chapter and keep it running effectively and smoothly. The chapter secretary should be aware of them. The Society Bylaws, Statements of Policy, Rules and Regulations, and other governing documents are available for download in the Society online [Document Center](#).

4.2. Youth Policy & Forms

Youth (including members) under 18-years of age participating in chapter activity must have the appropriate forms on file for chapter activities. Please reference Section 2.2 of this manual or contact the Society Offices for further questions.

4.3. Insurance

4.3.1. General Information about Insurance

The Society carries commercial general liability (bodily injury, property damage) and accidental death and dismemberment (AD&D) policies. The primary purpose of the coverage is to protect the Society, districts and chapters from third party claims and judgments arising out of negligence on the part of the Society, districts or chapters. It does not provide personal coverage for any individual chapter member or officer arising out of their own negligence. Information about limits and exact coverage can be found on the Society online [Document Center](#).

Further, it cannot be overemphasized that chapters are not fully covered by the Society Liability Insurance program unless they're in compliance (including but not limited to filings with the IRS/CRA, maintaining incorporation status with the local state/province, etc.)

The Society liability insurance coverage is required and automatic on an annual basis and protects the chapter or district for all chapter or district functions during the insured year, which is January 1 through December 31. The Society prepays the annual premium for all chapters and districts and in turn bills each year. The cost is determined and announced annually.

4.3.2. Certificates of Insurance

To obtain a certificate of insurance, visit the Society online [Document Center](#) for downloadable forms as well as a documented procedure for securing the certificate. It is important that requests for certificates (in any occasion) are given well in advance of its need.

4.3.3. Filing a Claim

In the event the chapter receives notification of a possible liability claim, contact the Society office immediately. Give the time, date, place of accident, the name of the person or persons involved, and other pertinent details. Any third parties involved in any accident or incident should be given the name, address and telephone number of the Society's insurance agent, but in no event should statements (written or otherwise) be given to, or details discussed with, anyone other than the Society office or properly identified representatives of the Society's insurance carrier. The staff will follow-up expeditiously.

4.3.4. Other Insurance Questions & Contact

For frequently asked questions, visit the Society online Document Center. All other questions around insurance can be directed to the BHS Customer Service Team or the BHS Director of Finance/Chief Finance Officer.

4.4. Dishonesty/Fraud Coverage

The BHS insurance policy includes dishonesty / fraud coverage in the amount of \$20,000 (BHS Members/Associates) / \$10,000 (non-members) and covers all chapters and districts. This protects each chapter and district in the event their money or property is misappropriated by an officer, director, show chairman, ticket chairman, ticket seller, dues collector or anyone acting in a similar capacity. Claims are subject to a per claim deductible of \$1,000 and require documented proof of loss from the chapter or district.

In the past, the BHS fidelity bonding service required a board of directors to expressly authorize (by name and position) any individual holding positions in which money or property is handled in order to be covered under the bond (normally accomplished by listing the individuals by name and position in the minutes of the board meeting). This requirement is no longer mandated. However, as a best practice, the board of directors should identify those members/volunteers who are authorized to handle monies and funds on their behalf to limit access to those funds. Other procedures with dual controls to validate and reconcile revenues received against tickets issued and attendance may be considered to identify potential discrepancies early.

This required and automatic coverage is provided on an annual basis. The Society pays the premium in advance and bills each chapter and district on an annual basis.

4.5. Property Insurance

Society insurance for property owned by a chapter is available by contacting the BHS Customer Service Team (customerservice@barbershop.org)

4.6. Precautions & Safety

The Society, its districts and its chapters have a responsibility to provide safe facilities for the general public, non-members and members. Each chapter can help secure safe facilities through self-inspection. Chapters should discuss with its members an Emergency Evacuation Plan from the meeting location and with the facility's auditorium manager (i.e. Location and best route to storm shelter and fire exits) at a performance/show venue.

4.6.1. Inspecting Facilities & Venues

The chapter president or their designee, should appoint a member whose duties include premises inspections. They conduct inspections well before any event and on the day of the event. Contact a facility representative at non-owned event locations to correct any potential hazard.

4.6.2. Liabilities

It is a common belief that the management or owner of the building or other facility is responsible for safety at that facility. However, this does not mean that the chapter, district or Society using the facility (as the case may be) has no responsibility. As the user of a facility, a chapter or district will be responsible for the

negligence of its officers, members and others acting on its behalf, and may have some legal responsibility for the condition of the premises during the use. Additionally, most leases or rental agreements will contain a clause that shifts the liability for accidents, occurring during the use of the facility, from the management or owner to the user of the facility, in this case, the chapter or district.

4.7. Chapter Legal Files

The chapter secretary must keep abreast of legal status and requirements and maintain a legal file that he can refer to and store important documents for chapter operation.

4.7.1. Incorporation Documents

The chapter secretary must maintain and guarantee incorporation of the chapter in its State or Province. The Society is committed to the policy of each chapter being incorporated. The failure of a chapter to be incorporated may be grounds for suspension of the chapter charter.

The Society Bylaws and Statements of Policy require that all chapters be incorporated in U.S. states or Canadian provinces for the following reasons:

- Incorporation provides chapter members individual protection from a possible lawsuit that might be brought against the chapter as a result of damage or injury for which the chapter might be deemed liable.
- A corporation's liabilities, either under contract or tort, are limited to the assets of the corporation. Individual members of the corporation have no personal liability to third persons. If a chapter is not incorporated, all members may be held personally liable for claims against the chapter and debts incurred by the chapter. In the U.S., incorporation is required as a condition of the Society's tax-exempt status. As a result of proving to the Internal Revenue Service (IRS) that the Society, its districts and chapters are both educational and charitable in nature, IRS has ruled that the Society and all of its subordinate units are exempt from the payment of income tax under Section 501(c)(3) of the Internal Revenue Code. The IRS has also ruled that contributions to the Society and its subordinate units are deductible for income tax purposes under Section 170 of the Internal Revenue Service.
- BHS requires that chapters incorporate and state, in the "purposes" clause of the articles of incorporation, the specific purposes for which the chapter was organized as set out in the Standard Chapter Bylaws. All chapters are required to adopt the Standard Chapter Bylaws. Chapters may not vary or amend the Standard Chapter Bylaws without prior approval of the Society Governance and Bylaws Committee.

4.7.2. Statement of Continued Existence (for U.S. Chapters)

Some states require non-profit corporations to file a Statement of Continued Existence annually. More commonly, states require corporations to file an annual report that lists the most recently elected officers and directors. In both instances, a small filing fee may be required. The information provided is used to keep state records up to date. The filing of continued existence is frequently done in April of each year, but may vary by state. If the chapter secretary is unsure whether the chapter incorporation records are up-to-date, he should contact the office of the secretary of state or state corporation commission for information and assistance on state requirements for report filings.

4.7.3. Resident Agent

Most states and some provinces also require corporations to name and maintain a "resident agent" who is a resident of the state where the chapter is incorporated and who is designated as the person upon whom legal process or notices may be served. The designation of resident agent is usually filed with the office of the secretary of state or state corporation commission, and many states require that the designation be confirmed (or updated) at the time of the Statement of Continued Existence or annual report is filed.

Generally, it is not required that the resident agent is a qualified member of the chapter, but it should be a qualified person who maintains contact with the chapter. Some chapters have assumed that it is required that the current chapter secretary be designated as the resident agent; however, other chapters have designated another person who is no longer a member, or is no longer in contact with the chapter. Both of these situations present problems for the chapter. In one case the designation of resident agent will have to be changed and a new filing made (and fees paid) each time the chapter secretary changes; in the other, the designation is outdated and ineffective.

The Society strongly recommends that chapters make a more permanent arrangement for their resident agent, such as an attorney or businessman who is a chapter member and can be counted upon to remain active for a long time, or who may not be a member but who is a friend of the chapter and will remain in contact with the chapter.

4.7.4. Records of Community Service (For U.S. Chapters)

In the United States, the Society, and their affiliated districts and chapters, have special status as a Non-Profit Educational Organization 501(c)(3). A requirement for this status includes sharing our hobby with others through gratis performances ("sing-outs"), community service and performances and activities that educate and promote barbershop harmony and the Harmony Foundation to the public. It is very important to keep a continuing and accurate record of these activities in the permanent chapter legal files that can be shared with the IRS (if requested).

4.7.5. Permanent Chapter Records

The chapter secretary should retain the following documents as part of the chapter's permanent files: It is strongly recommended that these documents be kept together in a file box that can be maintained and passed to the next chapter secretary. Electronic formats are also encouraged in case the documents are kept poorly or accidentally destroyed. The files should contain the following:

- State or provincial Incorporation and Statement of Continued Existence papers,
- Original Chapter License,
- Original Chapter Charter,
- Chapter Bylaws (or Standard Chapter Bylaws furnished by the Society),
- Chapter Rules and Regulations,
- Chapter statements of policy, including performance policy, director's contract etc.,
- Copy of all transactions and minutes since chartering,
- Resident agent or statement of continued existence,

- Insurance papers,
- Year end treasurer forms, including IRS 990/CRA forms (tax return),
- Annual financial reports, and
- A running list of gratis performances, community service and community activities that the chapter has participated in, if requested, by the IRS (US chapters).

4.7.6. Storage of Chapter Records

It is the responsibility of the chapter secretary to properly store and protect all chapter records until they are legally destroyed or discarded. The chapter documents may be stored as hard copy or electronically. It is strongly recommended that a **copy** (hard copy or electronic) of all records and documents be stored in a location that will protect the documents from man-made (i.e. fire) or act of God (i.e. flood, hurricane, tornado, earthquake, etc.) catastrophes. A suggested location could be a fireproof or fire resistant file, a home safe or Safety Deposit Box in a bank. Storing chapter records electronically has certain advantages. They take up less space when stored, may be organized keeping each year’s records together for easy reference, and can be retrieved easily or copied in the event of a disaster that may destroy the originals.

There are costs associated with providing adequate protection of chapter records, but they far outweigh the costs of time and energy trying to restore or reconstruct records lost after a catastrophic occurrence.

4.7.7. Disposal of Chapter Records

The following table helps determine the required length of time that chapter documents or records should be stored in the chapter legal files before discarding. Some of these items may be difficult to find, but starting now to compile your chapter legal file, will be beneficial in the long run for your chapter.

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.

4.8. Copyright Information

The Copyright Act of 1976, which took effect January 1, 1978, protects the rights of copyright owners. The purpose of the law is to encourage and protect creativity and expression of ideas, and to give the creator of a work an incentive to share it with the public. Copyright is an intangible right arising out of the creation of a work, such as a book, a painting, or a musical composition. Ownership of the copyright is separate and distinct from ownership of a physical copy of the work. The owner of the copyright of a song may sell a copy of the song to someone else, but that does not give the purchaser the right to make copies of that copy; that intangible right belongs exclusively to the copyright owner, and it is protected by law. "Copyright" actually consists of five exclusive rights:

- 1) To reproduce the copyrighted work in copies or recordings;
- 2) To prepare derivative works based upon the copyrighted work;
- 3) To distribute the copyrighted work publicly;
- 4) To perform the copyrighted work publicly;
- 5) To display the copyrighted work publicly.

We are concerned primarily with rights 1–4.

- **Right No. 1** means no one may make a copy, or give permission to make a copy, except the copyright owner. This would include machine or handmade copies, and recordings of any kind. Under the Fair Use exemptions of copyright law, however, one audio and/or video copy of a performance may be made for evaluation, rehearsal or archival purposes. If performers are recorded at a show or contest, each quartet or chorus may be given a copy of its segment. The recording may not be sold for a profit, however, and any fee charged must be limited to the actual cost. If it is desired that more than one copy be made (to sell or give away) permission must be obtained from the copyright holder and proper fees paid. This would include obtaining a mechanical license for audio recordings, and a synchronization license for video recordings. If copies of a piece of music have been ordered and paid for, but are not available for an imminent performance, emergency copies may be made for use until the ordered copies arrive, but **all of the emergency copies must be destroyed** as soon as the ordered copies arrive--otherwise they then become illegal copies unless a separate copy fee is paid for them. If a legally obtained copy of a piece of music is lost, damaged or destroyed, it may not be replaced by another photocopy, unless the proper copy fee is paid to the copyright holder. Copying any piece of music in order to avoid purchasing a copy is an infringement of the copyright. **Permission to make legal copies of music, and information concerning the fees and procedures can be obtained from the Society Offices.**
- **Right No. 2** means simply that no one may make an arrangement of a copyrighted work without the permission of the copyright holder. A parody is a derivative work, and would require permission. Minor editing or alterations of purchased copies is permitted, so long as the fundamental character of the work is not distorted--and so long as no new copies are made. *When permission to make an arrangement is given, that arrangement becomes the property of the copyright holder, and NOT the arranger.* If someone else wishes to obtain a copy of that arrangement, permission to make copies must be obtained from, and a copy fee paid to the copyright holder. Information concerning procedures and fees for permission to make arrangements can also be obtained from the Librarian of the Old Songs Library at the Society office.

- **Right No. 3** means the copyright holder has the exclusive right to make and distribute audio, video, and recordings of the work. Recordings may be made if permission has been obtained--called a "mechanical license"--and the proper fees paid.
- **Right No. 4** means simply that the copyright holder has the exclusive right to perform the work in public, and to license others to perform it. ASCAP and BMI are the agents for the copyright owners of most of the music performed at Society events. The Society has made arrangements with ASCAP, BMI/SESAC and SOCAN to issue licenses for performances at chapter and district events.

Copyright infringements, in addition to violating the Society Canons of Ethics and policies, are also violations of civil and criminal copyright laws that could result in fines up to \$250,000 and imprisonment up to five years, and penalties ranging up to \$50,000 **per copy**, plus costs and attorney fees.

All chapters/choruses and quartets, as part of their official entry form for BHS contests, must certify that songs sung in competition are legal arrangements and comply with ASCAP, BMI/SESAC and SOCAN rules and regulations, copyright laws and Society policy.

5. Communications

5.1. Utilizing Online Tools & Services

It is the hope of the Barbershop Harmony Society that all chapter leaders utilize the diverse array of resources and tools available on the Society web site including but not limited to:

- [the BHS Member Center](#)
- Online [Document Center](#)
- [Harmony University Online](#)
- [Healthy Chapter Initiative Website](#)

Chapter Secretaries can streamline their work in managing chapter business by utilizing these online tools

5.2. Utilizing the BHS Member Center

All members of the Barbershop Harmony Society and associates may gain access to [the BHS Member Center](#) through the Society *Members Only* section or directly by visiting members.barbershop.org utilizing their email address provided to BHS. If a member or associate does not have an email address, contact the BHS Customer Service Team.

Chapter officers (Chapter Presidents, Secretaries, and Treasurers) have different permissions and fewer restrictions to various tools in [the BHS Member Center](#) while the general member's access is more restrictive. If never logged into [the BHS Member Center](#) before, a password can be retrieved directly by visiting [the BHS Member Center](#) and using the "Forgot my Password" function.

5.2.1. Services provided through [the BHS Member Center](#)

A chapter secretary may view the records and profiles of the members of their chapters and produce informational documents useful for chapter rosters, determining the current membership status of chapter members, update the officers & leaders for the chapter, the dues prices for the chapter, the meeting location & visitor information for the chapter, as well as the compliance financial filings & reports for the chapter. Members may update their profile information,

access their dues information, handle their membership renewal online and have access to other Society informational services.

5.2.2. Responsibilities to the Members of the Chapter

Chapter secretaries are strongly encouraged to teach chapter members how to use [the BHS Member Center](#) to update their own membership profile. Any update to a member's profile will affect all mailing lists (i.e. *The Harmonizer* mailings, emails used by the Society, chapter, district, etc.) and any inquiries sought by other members using [the BHS Member Center](#). It's wise to verify the member's profile information on a regular basis.

5.2.3. Confidentiality of Information

Any and all usage of personal information that can be contained within the Society's [the BHS Member Center](#) database (or other databases) is strictly for internal barbershop business only. **Information may never be extracted and shared to anyone for marketing or spamming purposes beyond Society-related marketing.** The chapter secretary is the first line of defense in maintaining that practice to continue to be in compliance with the Society's code of ethics and member's personal wishes. For more information about the BHS Data Privacy Policy, please visit: members.barbershop.org/pages/data-privacy

5.3. Chapter Bulletin & Newsletters

The chapter secretary must maintain lines of communication with chapter members and the district as well as the Society office. Sharing the minutes of the chapter board meeting with all the members is one way of communicating with the chapter members. The best way to do this is through the chapter bulletin or newsletter. The chapter secretary can even format the minutes for the bulletin/newsletter to save the editor having to retype the document. If the chapter does not have a bulletin or newsletter, the secretary should issue the minutes shortly after the board meeting along with perhaps a calendar of events.

5.4. Society Electronic Publications

LiveWire is an electronic weekly bulletin published by the Society with news from Society headquarters. It is available to each member who opts to receive it and has the capability to receive e-mail. Information in LiveWire may be shared with the chapter bulletin editor or the members.

Other Communications may be distributed to chapter or chorus leaders on occasion, specifically with information or training relevant to their work. If someone is not receiving communications and would like to, ensure that the chapter [BHS Member Center](#) profile is up to date.

6. Harmony Marketplace

Harmony Marketplace is the Society's merchandise & sheet music operation. Available supplies including merchandise, sheet music, learning tracks, etc. may be obtained by visiting the Barbershop Harmony Society web site: www.shop.barbershop.org.

Any individual may order directly from the Harmony Marketplace and charge it to their own credit card. There is not a 'bill my chapter' option. We strongly recommend that each chapter determine the best way to purchase from the Harmony Marketplace on behalf of the chapter. Most often, chapters determine that a chapter officer, or music librarian can purchase chapter supplies and resources from the Harmony Marketplace, and be reimbursed. Additional information, including FAQ's can be found on the Society web site.

7. Performance Licensing & Show Clearances

7.1. General Information

Under copyright law, the owner of the copyright in a musical work has the exclusive right to license others to perform the work publicly. Under a "Fair Use" exemption in the copyright law, however, live performances without commercial advantages to anyone are exempt, and do not require a license. A performance is not exempt merely because it is by or for a "non-profit" organization.

Under the terms of the exemption, a live performance of a musical work is "without commercial advantage to anyone" if:

- No payments are made to any performers, promoters, or organizers,
- There is no direct or indirect admission charge.

If an admission is charged, the performance may still be exempt (so long as no payments are made to performers, promoters, or organizers) if the proceeds (after deducting the reasonable costs for producing the performance) are used exclusively for educational, religious, or charitable purposes.

Accordingly, the following events would not require a license:

- Division, district and international quartet and chorus contests where convention registrations are sold;
- Any function or event where attendance is strictly limited to Society members and their immediate families (wives, children, parents);
- A function from which the chapter donates the entire net proceeds to a charitable or educational organization, and no performance fees or payments of any kind are made to any performers, promoters or organizers.

Though a specific license may not be required for the above mentioned events, a report may still be due to ASCAP, BMI/SESAC, or SOCAN/Entandem. See below sections for further reference.

7.2. Chapter Responsibilities for Show Clearances

It is the responsibility of all chapters to follow all procedures completely. Failure to pay proper license fees could result in copyright infringements and possible repercussions to the chapter, district and the Society.

To avoid having more than one show on the same night in the same vicinity, chapters must obtain a show clearance in your respective district, by submitting the appropriate licensing application form as soon as the date of the show has been determined.

An e-mail or call in advance to submitting your licensing application, to the district secretary, may be helpful to determine the availability of show dates. Most districts have restrictions regarding chapters that are near each other holding shows on the same date. Chapters should NOT sign any contracts with talent or a facility until the date has been cleared by the district secretary (*Note: Failure to do this may leave the chapter open to penalties or unwanted fees from talent or a show facility*).

7.2.1. U.S. Chapter Responsibility

Copies of completed the BMI/SESAC License Application form and a check (made payable to “Barbershop Harmony Society” for the indicated fee per performance should be forwarded to the respective district secretary. They will review the application submitted and forward the approved forms and check to Society Headquarters, and return a copy to the chapter secretary indicating that the clearance has been granted.

7.2.2. Canadian Chapter Responsibility

Copies of Section 1. of the SOCAN/Entandem Show License Application should be submitted to your District Secretary for approval of the show dates being requested prior to the performance. Within 30 days of the event, the chapter secretary must complete and submit the remaining sections of the SOCAN/Entandem Report Form to the SOCAN/Entandem office, with a copy to the Society office. Along with the license form, the chapter secretary must send a check (payable to Entandem), or contact Entandem for credit card, for the applicable fee (in Canadian dollars) and a completed SOCAN/Entandem Report Form. The chapter secretary should request song information from outside performers well in advance, to ensure obtaining accurate information on a timely basis for this report.

7.3. SOCAN/Entandem Show Clearances (Canadian Chapters)

The Society of Composers, Authors and Music Publishers of Canada (SOCAN) is a Canadian performance rights organization that represents the performing rights of more than 135,000 songwriters, composers and music publishers.

There is a new form to use for SOCAN reporting. Please use the most up-to-date SOCAN/Entandem Report Form. Payment is also be sent to Entandem on behalf of SOCAN. Entandem prefers that payment and reporting is done electronically. Please retire any earlier report versions for SOCAN. Please contact your district (or assignee) for local assistance. Do not send reports or payments to BHS.

Canadian chapters are responsible to applicable SOCAN/Entandem show licensing for performances by the chapter. The definition of a performance is identified in Tariff Number 4 published in the Canada Gazette. This Tariff is updated annually. In some cases the SOCAN fee may be paid by the facility in which the performance is conducted, and then charged back to the chapter as a renter of the facility. Please be aware that as a non-profit organization, the chapter is eligible for a rebate of the Goods and Services Tax (GST) charged.

7.4. BMI/SESAC and ASCAP Clearances (U.S. Chapters)

7.4.1. BMI/SESAC Licensing

The Society has blanket agreements with BMI (Broadcast Music Inc) and SESAC (a third licensing group representing gospel and other contemporary songwriters and publishers) whenever any part of their repertoire is performed during a chapter function for which there is an admission charge (including free will/benefit concerts). Failure to obtain a license may constitute an infringement of copyright law and the payment of damages. By agreement with BMI and SESAC, the Society is authorized to issue licenses on their behalf, and a procedure has been established, through the districts. The chapter secretary should make and keep a photocopy of approved licenses for the chapter's records.

The chapter secretary completes the BMI/SESAC Licensing Application form and computes the fee based on the fee table shown on the form. If there are multiple shows, the fee is multiplied by the number of performances.

The completed form and fee is sent to the district secretary for processing as soon as the date of the performance is determined to finalize the show date on the district calendar. The district secretary signs the completed form, clears the performance by placing it on the district calendar, returns a copy of the BMI/SESAC form to the chapter secretary, and sends the remaining copies (minus one copy for their records) and fee to Society headquarters for final processing.

For the exact procedure for sending completed BMI/SESAC forms to your district, please consult your District Secretary as each district has their own approval and processing guidelines/procedures. The most up-to-date BMI/SESAC Licensing Application form can be found on the Society online [Document Center](#) or by contacting your District Secretary.

7.4.2. ASCAP Licensing

The Society has established a blanket agreement with the American Society of Composers, Arrangers and Publishers (ASCAP). All Society districts and chapters are covered by this agreement. The contract continues on an annual basis until terminated by either party. By agreement an annual fee is paid by the BHS on behalf of all performing chapters in the Society. Annual fees paid by chapters is determined by Gross Ticket revenue for the calendar year. Gross revenue means all monies received by the chapter from the sale of tickets at their concerts. Gross Revenue typically, does not include the following: per ticket entertainment, amusement or sales taxes; commissions or fees paid to automated ticket distributors (such as Ticketmaster); per ticket theater restoration or other facility fees; parking fees when included in the ticket price; or revenue from the sale of merchandise.

Chapters that do not produce shows during the year may not need to pay ASCAP fees for

the year. However, ASCAP has a separate reporting form and fee structure for Free/Benefit concerts that chapters may need to utilize for reporting. A free or benefit concert or show is defined under Section 110(4) of U.S. Copyright Law, which is held to raise money for a specific bona fide, charitable institution or cause not affiliated in any way with the Society to which all the proceeds from the concert, after deducting reasonable costs producing the show or concert, are donated.

At the end of each year, chapters who must report to ASCAP should complete the respective forms and send to the Society Office (% ASCAP Reporting) with a check made payable to "Barbershop Harmony Society". The most up-to-date ASCAP reporting forms can be found on the Society online [Document Center](#).

7.5. Chapter Responsibilities for Printed Programs

Laws, as well as Society best practice, require all Society chapters and other units to follow copyright laws strictly. All printed programs that are distributed at any contest, show, afterglow or other performance sponsored by the Society, District or Chapter shall contain prominent Copyright Notice informing persons attending the event of this policy and of the enforcement provisions provided.

The following is the form of copyright notice approved for use by chapters in programs:

Copyright law strictly limits the use of audio or video recording devices during any performance. No audio or video recording device, whether or not in use, is permitted in the place of performance without prior permission of the Barbershop Harmony Society. Any persons found in possession of any such device will be required to leave immediately, and the tape, film or other recording media will be confiscated and any unauthorized recording erased or destroyed. Our enforcement of the copyright law protects you and us, but most important, it protects the copyright owners who have made our performance possible. Your cooperation and support are appreciated.

7.6. Chapter Show Appearance Information Requests

The Information Request for Chapter Show Appearance form can be a valuable tool for the chapter in negotiations with talent for their show. This form provides guidance to the chapter to pinpoint the expenses for talent in the budget and may serve as the solicitation of bids for show talent and, when the terms are agreed upon, as a contract.

Chapters are strongly encouraged to use this form or some other written agreement as the contract with show talent, so that the chapter and the talent will have a clear understanding of their responsibilities, financial and otherwise.

For the most up-to-date form, please visit the Society online [Document Center](#).

8. Chapter Leadership Elections & Reporting

8.1. Elections

In accordance with the Standard Chapter Bylaws (Article V), the chapter's annual meeting and officers must be held prior to October 15. There must be an announcement of nominees for each chapter office and a general notification of the annual election must be sent to all chapter members at least two (2) weeks prior to the election. All candidates must be members in good standing of the Society, district and chapter.

8.1.1. Required Officers

A chapter is required to have specific officers as described in the Standard Chapter Bylaws. Required officers are Chapter President, Secretary and Treasurer. The Secretary and Treasurer can be the same person. Chapters may elect other officers to conduct the affairs of the chapter. All elected officers will take office on January 1 of the next year.

8.1.2. Voting

Voting for uncontested positions are done by majority vote of those members present. The election for any contested positions must be by written ballot prepared by the chapter secretary. Any member running in opposition to the slate of nominees must provide notice to the chapter secretary one (1) week in advance of the meeting.

8.2. Reporting Leadership

Officers (voted upon by the members) and leaders (voted on or appointed) must be reported to the Society through a chapter profile in [the BHS Member Center](#) no later than December 1 annually. Any updates throughout the year to chapter leadership should be reported also in [the BHS Member Center](#).

8.3. Additional Leadership

In addition to the required and elected officers of the chapter, chapters may designate a number of members to fulfill specific chapter roles in the chapter and may report these as well to keep them in communication with the Society.

Below are examples of additional roles within a chapter (examples):

Common Board Level Positions:

- Chapter Development
- Executive Vice President
- Marketing & Public Relations
- Member Development
- Music & Performance
- Program & Activities
- Youth in Harmony

Other Common Chapter Leaders:

- Chorus Director
- Chorus Associate & Assistant Director
- Chorus Assistant Director
- Chorus Manager
- Webmaster
- Music Library

9. Other Reporting to Society

9.1. Chapter Contact for Public Website

The Society's web site hosts a map and "chapter locator" general members of the public to find a local chapter in their area. Chapter Secretaries should ensure that information listed on their Chapter [BHS Member Center](#) profile is the appropriate contact information.

9.2. Meeting Locations & Visitor Information

Chapter secretaries should ensure that the most up to date meeting location and visitor information is posted on a chapter [BHS Member Center](#) profile. The chapter secretary, chapter treasurer and chapter president may change this information in [the BHS Member Center](#) without contacting the Society Offices.

9.3. IRS 990 or CRA Filings

Chapter secretaries should work with their chapter treasurer to ensure that the most-up-to-date IRS (U.S. Chapters) or CRA (Canadian) filings are included and uploaded to their chapter profile in [the BHS Member Center](#). For Canadian chapters, if your local province does not require that you file a CRA filing, chapter secretaries or treasurers should upload a note to their chapter profile in [the BHS Member Center](#) stating such.

9.4. Financial Review Filings

The Society requires that all chapters conduct an annual 'Financial Review'. A financial review is not an audit. A Financial Review shares similar, but reduced goals of an audit, and is not conducted with the same level of investigation or analysis as an audit. More information including required forms and the "Chapter & District Financial Reviews: A User's Guide" a guide on how to complete a financial review, can be found on the Society online [Document Center](#).

Chapter secretaries should work with their chapter treasurer to ensure that the most-up-to-date financial review filings are included and uploaded to their chapter profile in [the BHS Member Center](#).

9.5. Incorporation Filings

Chapter secretaries should ensure that the most up-to-date incorporation information is included and uploaded to their chapter profile in [the BHS Member Center](#). If a chapter is required to file annually with their local state or province, secretaries should ensure that the respective report is uploaded as soon as filed with their state or province. If the chapter is not required by their local state or province to file annually, ensure the appropriate expiration date is listed (either do not include an expiration if perpetual, or other appropriate date).

10. Contest Entry

10.1. Contest Entry

All quartets and choruses entering a district or international contest must complete an Official Contest Entry form through the [the BHS Member Center](#).

Quartets are responsible for completing and submitting their own entry forms online.

Choruses often designate the chapter secretary to complete and submit the entry form online. There is a deadline for the submission of the Official Contest Entry form. The deadline varies from district to district and is based on Society Contest and Judging Rules and District Contest Rules. Your district's specific deadline can be determined by contacting the District Vice President of Contest and Judging (DVP C&J) or sometimes referred to as the District Representative for Contest & Judging (DRCJ).

10.1.1. Certification of Songs used in Competition

Chapters and quartets must certify that the songs being sung in competition at all Society, district, and division contests are legal arrangements that comply with ASCAP and SOCAN rules and regulations, copyright law and Society policy. The required certification is part of the contest entry process.

10.1.2. Certification of Members & Director performing in Competition

It is vital that the chapter secretary is able to determine and certify that each member of their competing chorus is a paid-up member of the Society. This is especially critical when a member's renewal comes due immediately prior to the spring, fall or International contests. Penalties for having non-members or non-paid-up members singing at a contest may be severe, up to and including disqualification of the chorus.

The expiration or "dues paid thru" data supplied by [the BHS Member Center](#) roster reflects the "up to the minute" data, processed through the Society Offices at the moment you download the file. It is not possible for the headquarters staff to "specially expedite" membership processing, therefore, it is critical that payments be made respective of the time elements involved in normal processing.

Note: BHS Contest and Judging Rules require that directors must be fully paid members of the Society, District and Chapter. Director fees are considered a legitimate chapter expense.

11. 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 Society Offices.

12. Quartets

12.1. Quartet Registration Forms

A quartet must complete the registration process through the Society office itself. No action by the secretary or the chapter is required. Quartets are encouraged to register online through the Society web site.

Quartets may also complete and submit the form. All four men must be current members of the Society (except for quartets participating in the Society Next Generation Contest). The quartet sends the completed form with the annual registration fee to the Society office. The quartet registration is valid for 12 months. The Society will notify the contact man when it's time to renew the registration. Notification occurs approximately 60 and then 30 days before the expiration. If the quartet does not renew its registration, another quartet can select their name. International, Collegiate, Youth, Next Generation, and Seniors champion as well as International quartet medalist, and District Quartet Champion names are not available regardless of their re-registration status.

Changes in quartet personnel should be reported immediately to the Society by the quartet.

Frequently Utilized Forms, References, & Resources for Chapter Secretaries

Each item below is a “click-able” 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 Secretary 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 Secretary should ensure that they have the most up-to-date copy of the Youth Policy.
- [Society Youth Participation Forms](#)
Each Chapter Secretary should ensure that they have the most up-to-date copies of the respective forms.
- [Society Youth Membership Forms](#)
Each Chapter Secretary should ensure that they have the most up-to-date copies of the respective forms.
- [BMI/SESAC Licensing Application Form](#)
For United States Chapters
- [SOCAN/Entandem Licensing Application Form](#)
For Canadian Chapters
- [ASCAP Reporting Form](#)
For United States Chapters
- [ASCAP Free/Benefit Reporting Form](#)
For United States Chapters

Other Resources available:

- [Chapter Attendance Log Template](#)
- [Sample Board of Directors Meeting Agenda](#)
- [Sample Board of Directors Meeting Minutes](#)
- [Information Request for Chapter Show Appearance Form](#)

BHS Contact for Chapter Leadership & Education

For all comments, concerns or further questions about this guide or resources, please feel free to contact the BHS Chapter Leadership & Education Team at chapters@barbershop.org or call 1.800.876.7464. You can also contact the BHS Customer Service Team at customerservice@barbershop.org or by calling 1.800.876.7464.

BHS Chapter Secretary Appendices

Appendix A. BHS Member Center Access for New Members

Upon receipt of their new member kit, new members should consider taking the time to visit the BHS “members only” website (also called the BHS Member Center). This site will allow them to renew their membership online, register/renew a quartet, update contact information, and much more.

The website address is: members.barbershop.org

To create a password, click the link that reads “Login” then “Forgot password”. You will only need the email address associated with the membership. An email will be sent to the email account that was provided to the Society on the member application.

If the member or associate does not have an email address, they will need to contact the BHS Customer Service Team (customerservice@barbershop.org or 800.876.SING).

Appendix B. Example Membership Certificate



This document certifies that

has been accepted as a member in good standing of the

BARBERSHOP HARMONY SOCIETY

and that he is hereby granted all rights and privileges in accordance with the bylaws of the Society, and he is entitled to harmonize at any time, day or night, subject only to the Code of Ethics and other rules and regulations of the Society and conforming always to the applicable laws pertaining to the preservation of the public peace.

*In witness hereof, this certificate
has been signed and presented*

EXECUTIVE DIRECTOR/CEO

DATE

Appendix C. Example Chapter Roster

Example, 4U Chapter Roster (Z-001)

Member ID#	First Name	Last Name	Spouse Name	Address	City	State or Province	ZIP	Phone #
987654	Bill	Anderson	Mary	1234 Center Rd.	Example	4U	98111	257-1111
986432	Stan	Baxter		2341 Center St., B-37	Example	4U	98112	123-4567
976541	John	Doe	Sue	3424-1st SW	Example	4U	98111	257-1111
888123	Ben	Dover		5464 Center St.	Example	4U	98112	123-4567
777123	Harry	Gray	Grace	2324 Center St.	Example	4U	98111	257-1111
877766	Jim	Johnson		35 Sudden Valley Dr.	Example	4U	98112	123-4567
668756	Bill	Jones	Mandy	4678 Wright St.	Example	4U	98111	257-1111
958438	Harry	Potter	Samantha	1647 Oak Ave.	Example	4U	98112	123-4567
857445	Larry	Soade		345 Walnut St., Space 334	Example	4U	98111	257-1111
488756	Steven	White	Mary Lou	RR 15, Box 201	Example	4U	98112	123-4567
789625	Robert	Xavier	Kris	5400 Main St.	Example	4U	98111	257-1111

Appendix D. Sample Safety Checklist for Chapters

The below is only an example checklist for chapter to utilize when canvassing general activity spaces. It is generally a Chapter/Chorus Manager's responsibility to ensure that these safety checks occur on an "as necessary" basis.

The Society and its chapters have both a moral and a legal responsibility to provide a safe facility for the general public, members, and non-members. Injuries, of course, distract from and interfere with the enjoyment of our music. Each chapter can help ensure safe facilities through self-inspection. Many self-inspection items are common sense. However, someone must exercise that common sense.

It is a common belief that the management or owner of a facility is responsible for safety at that particular facility. However, this is not usually true in a legal sense. The chapter or the Society is usually the 'responsible party' because most leases or rental agreements contain a clause shifting the liability to the renter, in this case the chapter and the Society.

Example items to be considered:

- Seating is sturdy and no seats or chairs are broken
- Adhesive strips are used to prevent slips on stairs
- Sufficient exits with lighted signs and properly operating doors. Including panic hardware
- Stairs are well-lit and handrails are secure and are in good condition
- Parking lots are well-lit and have no hazards (holes, etc.)
- Walking surfaces that are slippery (due to weather) are safe by the use of mats, mops, signs, etc.
- Spills of any kind are not present
- All cords are taped down to eliminate tripping hazards
- Walkways to and from a stage are well-lit.
- Loose carpeting and Curled carpeting are anchored and taped down.
- No stairs, scaffolding or catwalks have items 'stored' on them.
- Large sections of stationary glass are marked to prevent persons from walking into/through them
- The Front of stage is well delineated by methods similar to marking that edge with tape
- There is a functioning emergency evacuation plan that is 'public knowledge'
- Snow and ice is removed from exterior walking surfaces, with salt or sand applied.
- Fire alarms and sprinklers are serviced and tested
- Fire extinguishers have been tested within the last year
- Emergency auxiliary lighting is operating and has been tested

Most of these items can be covered by visual observation or by speaking to management of the facility. Unsafe conditions should be remedied before hosting an activity in the area.