This PowerPoint Presentation is aligned with:

- 2010 Chapter Secretary Manual
- 2010 Chapter Secretary EXHIBITS Manual
- 2009-2010 Proposed LA/COTS Instruction Schedule
- Individual instructor handouts
LEADERSHIP

“A good objective of leadership is to help those who are doing poorly to do well and help those who are doing well to do even better.”

Jim Rohn
Course Description

The Secretary Track prepares new or veteran chapter secretaries to handle the numerous operational functions of the chapter. The class covers all areas of chapter operation in overarching areas of: the role of the chapter secretary, membership record keeping and function, legal responsibilities and requirements, and communication services to chapter members and between the chapter, district and Society. He will also be trained to utilize the Society web page [www.barbershop.org](http://www.barbershop.org) links to the Document Center and EBIZ areas to complete chapter operational functions on-line. Leadership training is imbedded in the chapter secretary curriculum and will encourage and provide tools and positive leadership skill sets to be used when working with the membership and fellow chapter officers.
Course Objectives

Each chapter secretary will be able to:

- Demonstrate how to navigate the www.barbershop.org web site and locate documents and forms.
- Demonstrate the process of completing and submitting the Membership & Transfer application form.
- Describe the factors determining the correct membership classification.
- Describe the show clearance and licensing process.
- Describe the need and claim process for liability/bonding insurance.
- Outline the legal documents that should be stored by each chapter.
- Describe the reasons why the Youth Policy and Incorporation are needed.
- Describe the various roles of the CS in efficient chapter operation.
- Outline the CS priorities and proper relationships with the CP and CT.
- Outline the process for transferring to a new chapter.
- Identify the qualities of a leader.
- Identify the ways a CS can be an effective chapter leader.
- Describe the four different EasyDues plans available to the members.
- Outline how a chapter roster can be generated by using the Society web site.
- Discuss and demonstrate the fundamentals of Parliamentary Procedure.
Distinctions of Powerful Leadership

# Listening – really listening

# Creating an exciting vision

# Enrolling others in your vision

# Being unstoppable
Leadership vs. Management

**Leadership**
- Inspires a shared vision
- Provides a purpose
- Promotes values
- Creates change
- Creates an environment where people can motivate themselves
- Challenges the process
- Models the way
- Encourages the heart

**Management**
- Plans
- Organizes
- Produces orders
- Implements systems
- Conforms to goals
- Controls
- Allocates resources
- Focuses efforts
MODULE #1

Secretary Role & Membership

Session 1 (40 minutes)
Class Introductions/Chapter Secretary Job Description
• Introductions
• Role of Chapter Secretary
• Roberts Rules of Order, Quorum, Motions, & Meeting Responsibilities

Session 2 (40 minutes)
Membership Reporting – Part 1
• The Membership Application
• Membership Classifications
• New Member Membership Process
• Dues Structure
Session #1
Introductions

Welcome to Chapter Secretary Leadership Training!

To be shared with others…

• Your name and where you’re from?
• Number of years in barbershopping?
• Number of years as a chapter secretary?
• Two highlights of my barbershop life?
• What do I hope to get from this training?
Role of the Chapter Secretary

- Serves as the business manager/Operating Officer for the chapter
- Maintains and updates all chapter membership records
- Provides “behind the scenes” operational support so other members can enjoy their hobby to the fullest
- Handles the announcing, writing and distribution of minutes for all chapter meetings
- Registers others in the chapter for schools, contests, and other district- and Society-sponsored activities
- Communicates with all levels of the Society
- Makes sure the chapter stays legal and maintains the legal files
- Handles licensing paperwork and clearances for shows
- Strives to keep other chapter officers on task
- Assists the chapter treasurer and helps to keep the chapter financially in the black
- Orders chapter supplies and merchandise
- Provides leadership and is an active participant in chapter meetings and activities
Secretary’s Yearly Schedule
(see page 6 Chapter Secretary Manual for additional details)

Monthly
• Processes all Membership Applications and distribute membership cards and items to new members
• Processes dual membership and transfer requests
• Verifies Society invoices with treasurer
• Announces chapter board meeting
• Writes, publishes, and distributes meeting minutes
• Notifies members of monthly renewal
• Notifies Chapter Development officer of members failing to renew their membership.
• Distributes renewed membership cards

Annually
• Jan – Bonded members in minutes
• Jan – Remind CP to appoint nominating and Financial Review committees
• Mar – Contest Entry for spring contest
• Apr – Verify Continued Existence Certificate (incorporation) and fee to State or Province
• Apr – Share info on International
• May – Verify Audit and IRS 990 forms filed (in U.S.) by chapter treasurer
• Aug – Contest Entry submitted
• Oct – Hold chapter elections
• Oct – Complete Chapter Leadership Report to Society
• Oct – Complete chapter officer registration to COTS
• File show clearance (BMI/ASCAP in U.S; SOCAN in Canada) forms
A leader is...

- ... a visionary
- ... sets an example
- ... builds supportive relationships
- ... understands what motivates every member of the team
- ... empowers others to reach their full potential
- ... understands the power of communication
Build the team through leadership

• **Leadership** — Who is the leader and what qualities make the person a leader?
• **Decision making** — How were decisions made?
• **Planning** — Were you prepared adequately?
• **Effective following** — Were members good followers?
• **Evaluative progress** — Did the group evaluate progress as a group?
Robert’s Rules of Order

Robert’s Rules of Order (revised) is an excellent resource to assist your chapter in running their business meetings -- however --

Your meetings do not need to follow strict Parliamentary Procedures (found in Robert’s Rules of Order) to be run effectively.

• Use consensus, rather than motions, whenever possible
• Use motions, in writing, when dealing with all money matters
• It’s unnecessary to list makers of a motion and second or voting results, unless a roll call vote is called for or a dissenting vote wants to have his vote recorded in the minutes
• Insist on written reports from chapter vice-presidents or committee chairmen; delivered well in advance of the meeting
• Always publish your agenda ahead of the meeting
Why use Parliamentary Procedures?

Parliamentary Procedures allow for...

... everyone to be heard at a meeting;
... a decision-making process without confusion;
... a fair hearing of an issue/motion;
... flexibility to address most meeting situations;
... protection of the rights of everyone; and,
... democratic process at meetings.
Quorum & Motions

Quorum
A quorum is the minimum number of officers or members required at a meeting in order to conduct business

At Chapter Board Meeting
50% (or more) of voting officers present

At Annual Membership Meeting
30% (or more) of all general membership present

Types of Motions

• Main motions
• Subsidiary motions
  - Amendments to the motion
  - Motions to table
• Privileged motions
  - Personal privilege
  - Point of order
• Incidental motions
• Motions to reconsider
  - Requires 2/3 majority and special requirements to reconsider
Your role at Chapter Board Meetings

- **YOU** are the recording secretary and you take minutes.
- **YOU** are the voice of reason and procedures.
- **YOU** represent the members and have a voice in deliberations.
- **YOU** are the man “in the know”.
- **YOU** accurately share information with the members.
- **YOU** share information from the district and Society.
- **YOU** work closely with the chapter president and treasurer.
Meeting Responsibilities

BEFORE the meeting
• Announce to the membership that the meeting will take place, its time and location.
• Design and publish the agenda with the chapter president,
• Seek input from the chapter membership.
• Copy and make available all documents and reports needed for the meeting.
• Prepare a membership status report.

DURING the meeting
• Record accurate minutes.
• Provide input during meeting discussions.

AFTER the meeting
• Promptly prepare and publish minutes.
• Share the minutes and information with the bulletin editor.
• Answer questions coming from the chapter membership.
SAMPLE Agenda
Anytown (C-001) Chapter Board of Directors Meeting
January 15, 2010

1. Call to Order/"The Old Songs"
2. Review and set the Agenda
3. Secretary's Report
   Action: Motion needed to accept
4. Treasurer's Report
   Action: Motion needed to receive
5. Functional Vice-President Written Reports – Consent Agenda
   - Chapter Development (Membership)
   - Music and Performance
   - Marketing and Public Relations
   - Program
6. Standing Committee Written Reports – Consent Agenda
   - Spring Show
   - Audit Committee
7. Special Committee Written Reports – Consent Agenda
   - Singing Valentines
   - Installation Dinner
   Action: Motion to receive Consent Agenda Reports
8. Communications Report
9. Old or Unfinished Business
   - Singing Valentines Music
   Action: Motion to spend $45.00 to purchase Singing Valentine music by Music Librarian
10. New Business
    - Bonding
    Action: Motion for bonding a list of members handling money in 2006
11. Announcement/Good of the Order
    Bob Smith is in the hospital.
    Harry Jones' wife passed away over the holidays
12. Date, time and location of next meeting
13. Adjournment/"Keep The Whole World Singing"

Anytown (C-001) Chapter Board Meeting Minutes

The January 15, 2010 Board of Directors Meeting of the Anytown Chapter (C-001) was called to order by Bill Jones at 7:04 p.m. with the singing of "The Old Songs."

The agenda was reviewed by the Directors and set for the meeting.

The following Board members were in attendance: Bill Jones (President), Larry Gray (Secetary), Steve White (Treasurer), Sam Smith (Chapter Development), John Doe (M&P), and Jim Johnson (Board Member at large). The following Board members were not present: Jim Powell (Program) and Herb Thayne (Board Member at Large). Guests present were: Ken Tuckfield (Chicken) and Ben Dover.

Secretary's Report
- Larry Gray reported that a quorum of directors was present.
- Motion - MISAPermission: The Minutes of the December 15, 2009 Board meeting were accepted (copy attached).
- Gray reported that currently the club has 44 members. Len Aweyback has failed to renew his membership at the end of the 4th Quarter. All other members whose dues were due on December 31 have renewed. Bunk Wheat has been placed on the suspension list due to non-payment of dues.
- Gray reminded the Chapter President that an Audit and Nominating Committee needs to be appointed.

Treasurer's Report
- Steve White reported that since his last report the club had income of $549.00. Expenditures of $777.35 and a balance of $4,323.86 in the checking and savings accounts.
- Motion - MISAPermission: The January 15, 2010 Treasurer's Report is received (copy attached)

Consent Agenda Items
Written reports (copies attached) were received from Chapter Development, Music and Performance, Marketing and Public Relations, Spring Show Committee, Audit Committee, Singing Valentines Committee, and Installation Dinner Committee.
- John Doe reported that members need to submit and pass a tape in order to sing on the Spring Show and only quartets who sing at contest will be allowed to sing on the show.
- Bob Snow reported that there will be a program to establish pick-up quartets and practice the songs for Singing Valentines.
- Motion - MISAPermission: Receive the reports of the Consent Agenda (all reports attached to these minutes)

Communications:
Bill Jones read a letter from the Shady Park Nursing Home thanking the chapter for singing over the holidays.

Old and Unfinished Business
John Doe (M&P) sought authorization for purchase of sheet music from the Harmony Marketplace for Singing Valentines.
- Motion - MISAPermission: Authorize Music Librarian to purchase sheet music for "Swear and Loving" not to exceed $45.00.

New Business
The Board of Directors discussed officers and chairmen that need to be voted during 2010.
- Motion - MISAPermission: Authorize the bonding of Steve White (Treasurer) Sam Spade (Show Ticket Chairman), Bob Frazier (Show Treasurer) for 2010.

Announcement/Good of the Order
- Bob Smith is in the hospital and will be there for about three weeks. Harry Jones’ wife passed away
- Motion - MISAPermission: Authorize the purchase of flowers and cards for Bob Smith and Harry Jones not to exceed $25.00 each.

Bill Jones set the next meeting for the Directors on February 12, 2010 at his home beginning at 7:00 p.m.

The meeting was adjourned with the singing of "Keep The Whole World Singing" at 8:15 p.m.

Respectfully submitted,
/
Harry Gray
Chapter Secretary
Board Meeting Minutes Template

Chapter, #

The Barbershop Harmony Society

Minutes for _______ meeting of the □ Board of Directors or □ Executive Board.

The meeting was called to order by __________ at __________

On the ______ day of __________, 20___ at _______ p.m.

The following directors were present:

The following directors were absent:

Guests:

A. Secretary Report

There □ was □ was not a quorum of voting directors present.

The minutes of the meeting held on __________, 20___ were read (copy attached). There was a motion to approve the minutes.

- The current number of members in the chapter is _______. The following members have not renewed their membership:
  - __________
  - __________

- The following members have been suspended for non-payment dues:
  - __________

B. Treasurer's Report

The treasurer's report for the past quarter was read (copy attached). There was a motion to approve the Treasurer's Report.

C. Consent Agenda (Written reports attached)

1. Chapter Functional Vice Presidents (added items not in written report)
   - Chapter Development (Membership):
     - __________
     - __________
     - __________

2. Standing Committees (added items not in written report)
   - Nominating:
   - Audit:
   - Show:
   - Community Service:
   - Interchapter:
     - Other: __________

3. Special Committees (added items in written report)
   - Other: __________
   - Other: __________

D. Communication received since the last meeting was read and action taken as follows (copy attached)

E. Old or Unfinished Business

   - __________
   - __________
   - __________

F. New Business

   - __________
   - __________
   - __________
   - __________
   - __________

G. Announcement/Good of the Order

   - __________
   - __________
   - __________

The next meeting of the Directors will be held on __________, 20___ at _______ p.m. at the following location:

The meeting adjourned at _______ p.m.

Chapter President

Chapter Secretary

Attachments:
The new form:

• Replace all previously used forms;
• Is a one sheet/one sided form;
• Handles all applications for regular, seniors, student, dual and transfer memberships; and,
• Will help to lead the way for online application processing in the future with application fees paid using a credit card.
Combined Purpose Application Form

New/Dual Member...
- Complete Sections I, II, & IV
- No fees required

Transfer Member...
- Complete Sections I, III & IV

TIPS:
- Neatness Counts… Print or Type
- Be accurate with information
- Be complete
- Explore payment options with applicant
- Sign the Application (Applicant AND Chapter Secretary)
- Always make a copy for Chapter records
- File in an organized way
- Send to Society immediately with fees
- Follow-up if no response (a phone call) from the Society Membership Department within two weeks.
2010 Membership Classifications

All members join the Society under one of the following classifications. Further details about each classification can be found in the Chapter Secretary Manual. 2.3 & 2.4.

**MEMBERS OF THE SOCIETY**

- **Regular Member (RG)** - a member who is neither a student nor senior member
- **Youth Member [Y1]** – a member who is new who is under 26 years old and his dues are waived for one year (does not affect district and chapter dues)
- **Youth Member [Y2]** – a member under 26 years old and pays 50% of the current annual dues of a regular member
- **Senior Member [SN]** - a member who's 70-years old and a member for 10 years
- **Life Member [LF]** - a member who pays 20X the current dues rate
- **Life Senior [LS]** - a member who pays 20X the current dues rate and is a senior
- **Regular Senior/50-year [R5/S5]** - a regular or senior member who has been a member for 50 years or more.
- **Regular/Student 6-month [R6]** - a regular or student member who has joined under a special membership promotion of 18-month membership for a 12-month fee
- **Regular Promotional [RP]** - a member who joins under a promotional rate not covered by other classifications.

**NON-MEMBERS OF THE SOCIETY**

- **Active Non-member** – a female person active in your chapter as a director, assistant director or who acts in chairmanship role, but is not a member of the Society.
Application for Student/Senior Society Dues Reduction Form
Cancellation of Student Society Dues Reduction Form

Mark all appropriate boxes...

☐ Application for Student/Senior Reduced Dues Rate
☐ Cancellation of Student Reduced Dues Rate

Send to: Barbershop Harmony Society, Membership Services Department, 7830 Sheridan Road, Kenosha, WI 53143

Date ____________________, 20 ___

This form must accompany the Member Renewal Card or Member Renewal Notice for each member eligible for 50% reduction of Society dues. Provide information as indicated (Please Print)

☐ (Renewal Only) Member is 70-years old or older and has been a member of the Society for ten (10) or more years at the time of current expiration date.

☐ Member is a full time student as of the date of expiration date (Renewal) or as of this date (New, Reinstated, Late Renewal, or Dual).

☐ Member is no longer a full-time student as of __________ (Renewal, Late Renewal, or Dual).

_________________________  ___________________________  ____________________
Member’s Name           Member’s Number           Date of Birth

_________________________  ___________________________
Verified (Chapter Secretary)  Chapter  Chapter Code #
This document certifies that

has been accepted as a member in good standing of the

chapter of the
BARBERSHOP HARMONY SOCIETY

and that he is hereby granted all rights and privileges in accordance with the bylaws of his chapter and 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 whereof, this certificate has been signed and presented

[Signature]

EXECUTIVE DIRECTOR/CEO

CHAPTER SECRETARY

DATE

10/16/2009

2009-2010
LA/COTS Training

26
Annual Dues for 2010

$101.00
2010 Dues Structure

- Regular [RG] Society Dues - $101.00
- Life Member [LF] Dues – 20 X annual dues of a Regular [RG] member
- Seniors [SN] Society dues - $50.50
- Youth [Y2] Society dues - $50.50
- Dual Membership Society dues - $101.00 (paid only once no matter the number of chapters a member belongs to)
- Multi-year dues - 3-years – Save 5%, 5-years – Save 10%, and 8-yers – Save 15%
- Frank H. Thorne Chapter dues - $101.00 + district dues
- District dues - $xx.xx
- Chapter dues – varies
MODULE #2
Membership & Legal Requirements

Session 3 (30 minutes)
Membership Reporting – Part 2
- EasyDues payment options
- Renewals
- Lapsed Membership
- Transfers
- Rosters and personnel changes

Session 4 (30 minutes)
Legal Requirements – Part 1
- Youth Policy Requirements
- ASCAP/BMI/SOCAN & show clearance
- Insurance, Bonding & other options
- Chapter Incorporation
Session #3

4 EasyDues Payment Options

EasyDues Annual Payment
- Member pays his full dues upon receipt of the invoice from the Society.

EasyDues New Member Installment Plan
- Plan designed for NEW members only.
- Member pays $10 Enrollment fee upon joining.
- New member either pays one-half the dues upon joining with balance dues 6-month later or has 1/6th of his dues paid monthly with Autodraft payment through checking account or credit card payment.
- Completes Autodraft payment form and submits it with Application, if he chooses to pay in six increments.
- Upon full payment member receives New Member Kit, Membership Certificate, lapel pin, and membership card with expiration date 12 months from the end of the 6-month installment membership.

EasyDues Autodraft Plan
- Monthly prepayment plan collected via Visa/MasterCard credit card only.
- Put into effect for the following year after you pay the current year’s invoice.
- Autodraft application in CS Exhibits Manual.
- Beginning in 2008 no AutoDraft EastDues using share draft from checking account for new members.

Easy Dues Escrow Plan
- Sometimes called “Pay As You Go Joe”.
- Member pays a portion of his dues weekly or monthly to the chapter treasurer or his designee.
- Chapter treasurer or designee issues a receipt for cash received from the member.
- When renewal notice is received by the member he submits this notice to the chapter treasurer who issues a check to cover the amount on the notice. The member sends the check to the Society.
- Major disadvantage of this plan is that it requires a large amount of bookkeeping for the chapter treasurer.
AUTODRAFT ENROLLMENT FORM

Please charge my membership dues on a pro-rated monthly basis to my:

1. Credit Card
   - [ ] MasterCard Credit Card Number ___________________________ EXPIRATION DATE _____
   - [ ] VISA Account Credit Card Number ___________________________ EXPIRATION DATE _____
   - [ ] AMEX Credit Card Number ___________________________ EXPIRATION DATE _____
   - [ ] Discover Credit Card Number ___________________________ EXPIRATION DATE _____

2. Checking Account – a voided blank check is enclosed

Name (print): ________________________________________________

_____ I am a new Society member

_____ I am a current Society member

Member No. _____________________________________________

Signature _____________________________________________

Date: _______________________________________________
Leadership Linkages

Ways to show leadership in your chapter...

Tell members about the various options for paying their dues or programs that will save them money on their annual dues.
Annual Renewals

**U.S. Chapters**
- 6-8 weeks before expiration date the member receives a renewal notice by e-mail or U.S. mail.
- Member sends his annual dues to the Society or may renew online using a MasterCard, Visa, American Express, or Discover credit card.
- New membership card is sent to the chapter secretary.

**Canadian Chapters**
- 6-8 weeks before expiration date the member receives a renewal notice by e-mail or Canadian postal mail.
- Member pays dues in CDN funds to chapter treasurer or may renew online with MasterCard, Visa, American Express, or Discover credit card.
- Chapter Secretary sends renewal card to Society.
- New membership card is sent to the chapter secretary.
Use ebiz to renew membership

- Go to Member’s page on www.ebiz.barbershop.org.
- On the ebiz page click on the large red easy button.
- Member must pay with a credit card: MasterCard, Visa, American Express, Discover Card.
- Posting will take a few days, but once paid your membership is renewed.
- Consider EasyDues payment options.
From: membership@barbershop.org  
Date: Fri, November 18, 2005  
To: billthesinger@xxx.com  
Subject: Barbershop Harmony Society Dues Renewal

Hi Bill,

This email notification is your first notice that your Barbershop Harmony Society Dues are up for renewal. You can now renew online with your Visa or MasterCard on the Society’s Members Only site (http://www.barbershop.org/members) or using the link listed below. Please make sure that your address information is up-to-date. If you have already mailed your payment, please disregard this message.

You make use this secure link to go directly to the Online Dues Payment Page: https://secure.barbershop.org/members/duesPay.asp....

If you wish to pay by check, you may print out this message and mail it along with payment to: The Barbershop Harmony Society  
Dues Renewal  
7930 Sheridan Rd  
Kenosha WI 53143

Name: Bill Jones  
Member Number: 987987

Here is a summary of your membership items that are due:
C-001 Anytown (RG) Expires 20051231 Billed $50.00 Paid: $0.00 Due: $50.00
District EVG Dues (RG) Expires: 20051231 Billed $27.00 Paid: $0.00 Due: $27.00
Society Dues (1 Year) (RG) Expires: 20051231 Billed $82.00 Paid: $0.00 due: $82.00

Total due: (US) $159.00

Remittance: (US Funds ONLY)  
[] Visa  [] MasterCard  [] Check or Money Order
Card Number: ________________________________  
Expiration: _______/_______  
Amount: ________________________________  
Signature: ________________________________
Lapsed Memberships

**Late Renewal**

Member dues that are **less than 6-months late**

- Member pays dues and adds a $3.00 late charge fee to amount owed.
- Renewed membership card is sent to chapter secretary.
- There is no new expiration date… so, member needs to be reminded that it may appear to him he gets fewer months before next renewal.

**Reinstated Membership**

Member dues that are **more than 6-months late**

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

Ways to show leadership in your chapter...

Follow-up on members who fail to renew and thank them for participating in the barbershopping experience and ask them how the chapter could have better met their needs.
Roster & Personnel Changes

**Chapter Roster**

Publishing a chapter roster regularly is a duty of the chapter secretary

- Publish a roster quarterly after renewals have been processed.
- Generate a chapter membership list from Society's "Members Only" page.
- Ask members to review their information and update, if necessary.
- Society web page link to "Members Only" can generate a final roster for you, or you can use the information to construct your own Roster in Word or Excel.
- Distribute to the membership.

**Officer Changes**

Notify the Society and District Secretary of officer changes

- Not necessary to notify Society or District Secretary of changes for the general membership.
- Notification is intended for chapter officer personnel changes or changes in officer’s information profile.
- Complete and submit a Report Change form or notify Society and District Secretary by e-mail.
- Notify the Society Immediately in the case of a member who passes away.
ebiz CAN ASSIST YOU!

- Helps keep chapter membership records organized
- Readily shows which members have lapsed membership
- It will help you with rosters
- Gives an accurate count of membership in the various membership classifications
- Easy to read and interpret
- Can assist you to determine which members are eligible to compete
- Provides capabilities to find information about members who:
  - have dropped out of the hobby
  - live within your area, but are not affiliated with a chapter
  - need current information to update their membership profile
# Anytown Chapter Roster (C-001)

<table>
<thead>
<tr>
<th>Member#</th>
<th>FirstN</th>
<th>LastN</th>
<th>Nickname</th>
<th>SpouseN</th>
<th>Address 1</th>
<th>City</th>
<th>State</th>
<th>ZIP</th>
<th>Phone#</th>
<th>E-mail Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>987654</td>
<td>Bill</td>
<td>Anderson</td>
<td>Bill</td>
<td>Marry</td>
<td>1234 Center St.</td>
<td>Anytown</td>
<td>WA</td>
<td>98111</td>
<td>234-1234</td>
<td><a href="mailto:BillA@aol.com">BillA@aol.com</a></td>
</tr>
<tr>
<td>986432</td>
<td>Stan</td>
<td>Baxter</td>
<td>Bax</td>
<td></td>
<td>2341 Center St., B-37</td>
<td>Anytown</td>
<td>WA</td>
<td>98111</td>
<td>234-2456</td>
<td><a href="mailto:StanBarr@msn.com">StanBarr@msn.com</a></td>
</tr>
<tr>
<td>978541</td>
<td>John</td>
<td>Doe</td>
<td>John</td>
<td>Claire</td>
<td>3424-1st SW</td>
<td>Anytown</td>
<td>WA</td>
<td>98112</td>
<td>123-2345</td>
<td><a href="mailto:Joe@comcast.net">Joe@comcast.net</a></td>
</tr>
<tr>
<td>978543</td>
<td>Ben</td>
<td>Dover</td>
<td>Ben</td>
<td>Cleo</td>
<td>234-15th Ave., Apt. 3</td>
<td>Anytown</td>
<td>WA</td>
<td>98110</td>
<td>456-5645</td>
<td><a href="mailto:BShop37@aol.com">BShop37@aol.com</a></td>
</tr>
<tr>
<td>879675</td>
<td>Harry</td>
<td>Gray</td>
<td>Harry</td>
<td>Sue</td>
<td>5400 Main St.</td>
<td>Anytown</td>
<td>WA</td>
<td>98111</td>
<td>456-7654</td>
<td></td>
</tr>
<tr>
<td>879890</td>
<td>Jim</td>
<td>Johnson</td>
<td>Jim</td>
<td>Sue</td>
<td>1435 Baxter Rd.</td>
<td>Anytown</td>
<td>WA</td>
<td>98111</td>
<td>456-1232</td>
<td><a href="mailto:Johnson234@aol.com">Johnson234@aol.com</a></td>
</tr>
<tr>
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<td>Bill</td>
<td>Jones</td>
<td>Bill</td>
<td></td>
<td>RR 37, Box 255</td>
<td>Ruraltown</td>
<td>WA</td>
<td>98122</td>
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<td><a href="mailto:billsinger@msn.com">billsinger@msn.com</a></td>
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<td>999998</td>
<td>Harry</td>
<td>Jones</td>
<td>Harry</td>
<td>Grace</td>
<td>35 Sudden Valley Dr.</td>
<td>Anytown</td>
<td>WA</td>
<td>98112</td>
<td>349-1749</td>
<td><a href="mailto:lead.singer@aol.com">lead.singer@aol.com</a></td>
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<tr>
<td>898989</td>
<td>Larry</td>
<td>Peters</td>
<td>Larry</td>
<td>Sarah</td>
<td>8745 W. Wright St.</td>
<td>Anytown</td>
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<td>James</td>
<td>Powell</td>
<td>Jim</td>
<td>Mandy</td>
<td>4678 Wright St.</td>
<td>Anytown</td>
<td>WA</td>
<td>98111</td>
<td>345-8521</td>
<td><a href="mailto:JPPowell@nwlink.net">JPPowell@nwlink.net</a></td>
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<tr>
<td>879999</td>
<td>Robert</td>
<td>Smith</td>
<td>Bob</td>
<td>Samantha</td>
<td>1647 Oak Ave.</td>
<td>Anytown</td>
<td>WA</td>
<td>98111</td>
<td>123-6754</td>
<td><a href="mailto:mitty223@aol.com">mitty223@aol.com</a></td>
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<tr>
<td>888888</td>
<td>Samuel</td>
<td>Smith</td>
<td>Sam</td>
<td></td>
<td>2233 Maple Ave., Apt. 23</td>
<td>Anytown</td>
<td>WA</td>
<td>98111</td>
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<tr>
<td>877778</td>
<td>Samuel</td>
<td>Spade</td>
<td>Sam</td>
<td>Elizabeth</td>
<td>5464 Center St.</td>
<td>Anytown</td>
<td>WA</td>
<td>98112</td>
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<tr>
<td>898988</td>
<td>Herbert</td>
<td>Thyme</td>
<td>Herb</td>
<td>Marilyn</td>
<td>345 Walnut St., Soace 334</td>
<td>Anytown</td>
<td>WA</td>
<td>98111</td>
<td>349-5834</td>
<td><a href="mailto:HThyme@msn.com">HThyme@msn.com</a></td>
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<tr>
<td>999888</td>
<td>Ken</td>
<td>Tuckyfriedchicken</td>
<td>Ken</td>
<td>Cora</td>
<td>2324 Center St.</td>
<td>Anytown</td>
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<td>234-8675</td>
<td><a href="mailto:chickenman@msn.com">chickenman@msn.com</a></td>
</tr>
<tr>
<td>888889</td>
<td>Steven</td>
<td>White</td>
<td>Steve</td>
<td>Mary Lou</td>
<td>RR 15, Box 201</td>
<td>Ruraltown</td>
<td>WA</td>
<td>98122</td>
<td>456-5835</td>
<td><a href="mailto:SteveW@Aol.com">SteveW@Aol.com</a></td>
</tr>
</tbody>
</table>
Session #4
Society Youth Policy

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

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

Page 2

Youth [Name]: ____________________________ Date of Birth: ___/___/___ SS# __________

Activity: ____________________________ Location: ____________________________ Date(s): ____________________________

Supervisor(s) [Name(s)]: ____________________________

Acceptance of Responsibility by Supervisor(s)

I, the Supervisor(s) named and designated above, hereby accept responsibility for, and agree to perform, the supervision of the conduct and actions of the Youth as a participant in the Activity. I understand that my responsibility shall cover all aspects of the Youth's participation in the Activity, including (but not limited to) participation in any associated travel. I agree that my responsibility shall continue for the entire duration of the Activity, or until I rescind this Acceptance by written notice to the Chapter, District, or SPERBSQSA officer (or designated representative) in charge of the Activity. I understand that my failure to provide effective supervision of the Youth, or my rescission of this Acceptance, may result in the denial or immediate termination of the Youth's participation in the Activity. [If more than one Supervisor is named, the foregoing statements and agreements are separately made by, and shall separately apply to, each.]

__________________________ (Signature)

__________________________ (Signature)

Supervisor(s)

[Printed Name(s)]: ____________________________

DATE: ____________________________

Acknowledgment by Youth

I, the Youth named above, understand that my participation in the Activity is conditioned upon the supervision of my conduct and actions by the Supervisor(s) named above. I understand that my failure to accept and comply with such supervision, or the failure of such Supervisor(s) to provide the same, may result in the denial or immediate termination of my participation in the Activity.

__________________________ (Signature)

Youth

[Printed Name]: ____________________________

DATE: ____________________________

1 Signed copy of Forms to be retained in Chapter/District file.

2 If not applicable.
Chapter Insurance

**Liability Insurance**
- Each chapter automatically carries general liability insurance (bodily injury, and property damage).
- Protects the chapter, district and Society from third-party liability claims.
- Does **not** cover chapter members.
- Limit of the policy is $10 million for each occurrence.
- The annual fee for the liability insurance is invoiced on the December Society statement to the chapter.
- Chapters may **not** opt out of this insurance policy.

**Bonding Insurance**
- Each chapter is automatically covered by Bonding Insurance.
- Those covered by Bonding Insurance must be written into the minutes at the January meeting of the chapter board or at subsequent meetings when another individual becomes known who handles money.
- Chapter is covered to $50,000 for losses by an individual misappropriating funds.
- Chapter may **not** opt out of this coverage and fee is paid in December.
- There is $1000 deductible on each claim.
Certificate of Liability Insurance

- Required for most facility rentals
- Contact agent to receive one certificate specific for your event
- Outlines proof of coverage
- Certificate will change on January 1, 2010
Optional Insurance

Chapter Property Insurance
- Recommended for chapters with risers, sound equipment and uniforms.
- Recommended for chapters with vehicles or trailers to transport risers, uniforms and other chapter property.
- Contact Society Insurance agent or a local agent.

Liability Insurance for Members
- Available to cover members as separate coverage.
- Contact Society Insurance agent or a local agent.

Brochures for various plans are available online at www.barbershop.org Document Center
Insurance Claims Process

- Contact Director of Finance Administration at the Society.
- **Share the following information:**
  - Name, address and phone number of the individual(s) involved
  - Date and location of the incident
  - Pertinent details of the accident or incident
- **Insurance Agent for the Barbershop Harmony Society is:**
  The Crichton Group for: Acc’t #17891
  3011 Armory Drive, Suite 250
  Nashville TN 37204
  1 (615) 383-9761
  attn: Phil Barnes

**IMPORTANT**
Do not make any statements (written or otherwise) to anyone except the Barbershop Harmony Society’s insurance agent or investigating police officials.

- The Society and its insurance agent will do any follow-up.
7 Habits of Highly Effective People

Personal Leadership
1. Be productive and have a vision
2. Begin with the end in mind
3. Put first things first

Interdependent Leadership
4. Think Win/Win
5. Seek first to understand and then to be understood
6. Synergize – Build relationships and work together

Balanced Self-renewal
7. Preserve and enhance your greatest asset – YOU!

Stephen R. Covey – The 7 Habits of Highly Effective People
ASCAP/BMI/SESAC/SOCAN

BMI/SESAC Clearance
• Show clearance form used by U.S. Chapters and submitted to the district secretary and then returned

ASCAP Licensing
• Submitted online at Society web site www.ebiz.barbershop.org after show is completed by U.S. chapters.

SOCAN Licensing
• Initially submitted with details about the show to district secretary for clearance by Canadian chapters.
• Completed form, after the show, is submitted directly to SOCAN along with the computed fees.
BMI/SESAC Show Clearance Process

• Complete BMI/SESAC form and fees from table on the form.
• Send the completed form to your district secretary.
• District secretary returns a signed copy of the form back to the chapter clearing the show date and places the show date on the district calendar.
• The chapter is free to finalize venue and talent contracts.
• Signed form is stored by chapter secretary in chapter legal file.
APPLICATION FOR SHOW CLEARANCE BMI AND SESAC LICENSE

The ________ Chapter ________ of the ________ district requests a show clearance and BMI License and SESAC License for ________.

Our chapter show will be held at ___________ which has the capacity of ________ seats.

The highest ticket price for our concert will be $_________ and we will present ________ performance(s).

A check is enclosed in the amount of $________ payable to S P E B S Q S A, Inc. which represents our fee for the BMI License and for the SESAC License. (See attached rate schedule to determine fee.)

We understand that upon receipt of our chapter's copy of this form, endorsed by the district secretary, our show clearance and BMI License and SESAC License have been granted.

__________ Chapter

__________ District

Form 3016

[Signature]

BMI
National Director Musical Administration

[Signature]

SESAC
Delegate General Licensing

BMI/SESAC Rate Per Concert

Highest Price of Admission (exclusive of tax)

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<th>Seating Capacity</th>
<th>$6.01-$10.00</th>
<th>$11.01-$15.00</th>
<th>$16.01-$20.00</th>
<th>$21.01-$25.00</th>
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</tbody>
</table>
ASCAP Licensing Process

All performances in the United States, where the public is asked to pay admission, must be licensed by ASCAP.

It is the responsibility of the chapter to follow licensing procedures. Failure to do so could result in copyright infringements, possible monetary penalties and/or cancellation of the show.

1. Register your show on the Society website members section www.barbershop.org/ascap after the show is done.
2. Any chapter who has a show will annually pay $201.00. If the fees for the year exceed that amount you will be billed by ASCAP. If your fees for the year do not rise to the amount, you will have to pay the minimum $201.00 fee.
3. There are special rates for benefit shows.
4. There are special additional fees for scripted shows or shows dedicated to a specific composer.
5. Keep a copy of all completed forms in the chapter legal file.
SOCAN Licensing Process

All performances in CANADA, where the public is asked to pay admission, must be licensed by SOCAN.

It is the responsibility of the chapter to follow licensing procedures. Failure to do so could result in copyright infringements, possible monetary penalties and/or cancellation of the show.

1. Complete SOCAN Licensing form and mail to your district secretary.
2. The district secretary will sign the form, clearing the show and placing it on the district calendar, and send it back to the chapter secretary to hold until the show is done.
3. Every song performed on the show must be listed on the Programme of Musical Works Performed form and accompany the submission of the SOCAN Licensing form.
4. Compute the fees owed to SOCAN and send the completed licensing form and fee directly to SOCAN for processing.
5. Keep a copy of the completed form in the chapter legal file.

Please note: The SOCAN Licensing form in Ontario District is different. Contact the Ontario District Secretary if your chapter is in Ontario District.
Application for Show Clearance and SOCAN License #14022-39 (4a)

1. The ____________ Chapter_________ of the ____________ District requests a show clearance and
   SOCAN License for ________________. Our performance will be held at ____________.  
   We will present _____________________________________________ at ticket prices(s) of $__________ and $__________.
   (name) (number) (name) (dates) (location) (number) (amount)

2. The applicant shall furnish programmes showing the titles and other available particulars of the musical selections performed at all concerts.
   Name of venue: ____________________________ Actual attendance: ____________________________

3. Fees:
   Events charging admission: 3% gross receipts from ticket sales (excluding taxes) or $20.00 per event whichever is greatest ____________
   Events without admission: Where no admission is charged, the minimum fee of $20.00 per day applies ____________
   G.S.T. calculated at 5% of fee(s) Registration # R101077931 ____________
   Total Fee ____________

4. Chapter will compute the fees and send the SOCAN form and fees by cheque (in Canadian Dollars) directly to SOCAN.

5. We understand that upon receipt of our chapter’s copy of this form, endorsed by our district secretary, our show clearance has been granted.
   ____________ for ____________ Chapter.  
   ____________ for ____________ District.  
   Date ____________ (signature) (name) SOCAN 41 Valleybrook
   Date ____________ (signature) (name) Don Mills, ON M3J 2SL
   Drive CANADA

---

PLEASE NOTE IF YOUR CHAPTER IS IN ONTARIO – Ontario District’s SOCAN Form is slightly different. Contact the Ontario District Secretary for a copy of the appropriate SOCAN Licensing form.

---

For Canadian Chapters

- Complete after show or performance
- Fees are determined and sent directly to SOCAN
- Keep a copy for your chapter records

It’s the chapter responsibility to:
- Clear the show date with the district secretary.
- Keep accurate records of attendance and admissions charges.
- Accurately records ALL songs performed.
- Complete and compute the SOCAN fees.
- Send the fees and form directly to SOCAN
Please complete and return with completed SOCAN Form
Return to: SOCAN, 41 Valleybrook Dr., Don Mills, ON M3B 2SL CANADA

PROGRAMME OF MUSICAL WORKS PERFORMED

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<thead>
<tr>
<th>File #</th>
<th>Location of Performance</th>
<th>Date of Performance</th>
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</table>

<table>
<thead>
<tr>
<th>Title of Work (Full Name)</th>
<th>Composer (Full Name)</th>
<th>Author (Full Name)</th>
<th>Publisher (Full Name)</th>
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</tr>
</tbody>
</table>

Signed Approved

Date
Chapter Incorporation

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

Incorporation protects individual members from lawsuits brought against the chapter.

- Contact the Secretary of your State or Province to determine if your chapter is incorporated. Often this can be done online.
- Incorporation must be confirmed annually (usually in April) by receiving a Certificate of Continued Existence and the payment of an annual fee to the State or Province.
- Review with the chapter treasurer to determine if the annual fee has been paid.
- Each chapter needs a Resident Agent to monitor the continued annual incorporation of the chapter.
Leadership Linkages

Ways to show leadership in your chapter...

Educate your chapter members regarding programs and procedures that will help them enjoy their bobby more.
MODULE #3
Key Three Joint Meeting – CP, CO, & CT

Session #5 (60 minutes)
Joint/Combined Meeting
• Priorities of the Chapter President
• Priorities of the Chapter Secretary
• Priorities of the Chapter Treasurer

Session #6 (50 minutes)
Legal Requirements – Part 2
• Copyright Law
• Chapter Legal Files
• Show talent contracts
• Chapter elections
Session #5
Priorities of the President
Priorities of the Secretary

- Membership recordkeeping and processing
- Youth Policy recordkeeping
- Incorporation follow-through
- Show Clearances and submission of appropriate licensing applications (ASCAP and BMI/SESAC [U.S.] and SOCAN [Canada])
- Liability/Bonding Insurance for chapter
- Meeting responsibilities
Priorities of the Treasurer
MODULE #4

Legal Requirements (Continued)

Session #6 (50 minutes)

Legal Requirements – Part 2

- Copyright Law
- Chapter Legal Files
- Show talent contracts
- Chapter elections and Annual Meeting of the corporation.
Session #6
Copyright Law

IT IS AGAINST THE LAW TO...

• reproduce the copyrighted works in copies and recordings;
• prepare derivative works based on the copyrighted work;
• perform the copyrighted work publicly;
• distribute the copyrighted work publicly; and
• display the copyrighted work publicly.

It is YOUR duty to remind your chapter officers of these copyright restrictions.
Copyright Infringement

$50,000 per copy of printed or recorded material

If you have questions regarding copyright law, process for making audio tapes, video tapes, DVDs, printed sheet music contact Barbershop Harmony Society (Joe Liles) at 1-800-SING (7464).
Permission to arrange

Please complete one form per song or medley, and submit to library@barbershop.org or mail to Barbershop Harmony Society, 110 - 7th Ave. N, Nashville, TN 37203.

[Form fields for song title, writer(s), copyright date, current publishers, number of copies, arranger name, person submitting/filing, email, phone, Choose payment method, etc.]

Generally, the fee is $60 per song, with 5 copies included. Additional copies are $2.65 each or $2.49 for 40+ copies. Medleys are generally $30 per song, with 5 copies included. Additional copies of medleys are $3.15 each or $2.91 for more than 40 copies. Processing time is usually 30-60 days but can be longer, especially if medleys or multiple publishers are involved.

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Chapter Legal Files

Store all chapter legal documents together in a file box or cabinet at a safe location
The chapter secretary is responsible for maintaining the chapter legal file

- Incorporation records
- Certificate of Continued Existence
- Resident Agent Certificate
- Chapter Charter
- Chapter Bylaws
- Chapter Rules and Regulations
- Chapter membership reports
- Membership applications

- Chapter Statement of Policy
- Copy of transactions and meeting minutes
- Insurance and bonding records
- Year-end treasurer report and IRS 990 forms
- Annual financial reports
- Director contracts
- Show talent contracts
How long do I keep our chapter records?

• In general, keep documents and records for your chapter FOREVER

• Review Table 3 (Section 4.8.6) in the 2010 Chapter Secretary Manual

• Discuss with your Chapter Board of Directors the best way to store your chapter records

• Explore saving your documents electronically and store in a safe location
Preparing for a natural disaster

As chapter secretary you are responsible for the safekeeping of ALL chapter records and files

- Plan ahead for a disaster.
- Consider scanning your documents and storing them on a CD ROM.
- Store your chapter documents in a location safe from the elements.
- Keep chapter records and legal file according to the table in the 2007 Chapter Secretary Manual (4.8.6, Table 3)
Leadership Linkages

Ways to show leadership in your chapter

Be the conscience for your chapter and be concerned they stay legal by maintaining an organized and up-to-date legal file.
Is your U.S. chapter prepared for a visit from the IRS?

- All legal documents for your chapter in order
- Financial reports and records and minutes in order

**VERY IMPORTANT**
- A running formal list of service and community activities your chapter has participated in
Show Talent Contracts

**IMPORTANT**
NEVER sign any contracts with talent or venue until the show date is cleared by district secretary.

- Get everything in writing!
- Utilize talent contract to finalize and clarify details.
- Stipulate a deadline to return signed contract
- In Canada, withhold payment of fee until list of songs is given.
- In U.S., remind chapter treasurer of IRS 1099 form responsibilities for reporting fees paid to talent in excess of $600.
- File contracts in chapter legal file.

---

### Information Request For Chapter Show Appearances

The ______________________ Chapter is holding its annual show on (date) at the (name of chapter) (name of auditorium) Show time is ___ p.m.

We would like to have the quartet supply information relative to all expenses for:

- one appearance on one show
- two appearances on one show
- two shows on the same night
- two shows on successive nights
- Other appearances as follows (chapter dinner, radio & TV, etc.):

As a guest artist on our show, you will be required to:

(a) be backstage 30 minutes before the show.
(b) provide the chapter with the necessary publicity material and glossy pictures.
(c) abide by the rules of the auditorium where the show is held (no smoking, drinking, etc.).
(d) limit your performance on stage to the time allotted by the chapter.
(e) notify the chapter if your quartet has any change in personnel prior to the show date.
(f) request written permission from the chapter, if district and chapter policy permits, to sell recordings if it is your practice to conduct such sales.
(g) notify the chapter of any arrival time and mode of transportation.

The ______________________ quartet (U.S. quartet tax reporting number ________ ) hereby agrees to appear on the (chapter name) (date of signing) chapter show as listed above.

We agree to reserve these dates for your chapter for ________ days from ________ awaiting your confirmation.

Our fee for this guest appearance is as follows:

<table>
<thead>
<tr>
<th>Item</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel</td>
<td>$______</td>
</tr>
<tr>
<td>Housing &amp; Meals</td>
<td>$______</td>
</tr>
<tr>
<td>Talent Fee</td>
<td>$______</td>
</tr>
<tr>
<td>Other Expense</td>
<td>$______</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$______</td>
</tr>
</tbody>
</table>

* For U.S. quartets, regardless of the amount paid, under backup withholding a chapter must withhold 20% of the payment if the tax reporting number is not provided. (The tax reporting number can be a social security number or an employer identification number.)

The ______________________ chapter hereby contracts for the ______________________ quartet to appear as a guest artist at the time, place and expense as shown above.

SIGNED FOR THE QUARTET

(Chapter Show Chairman or Talent Coordinator) (date)

SIGNED FOR THE CHAPTER

(Chapter Show Chairman or Talent Coordinator) (date)

This contract is signed by both parties with the understanding that no tape recording will be made until all requirements of the Society’s recording policy have been met. Copies of this policy may be obtained from the international office of SPEBSQSA, 7300 Sheridan Road, Hinsdale, IL 60523.
Chapter Elections

- Chapter elections must be held by October 15.
- Chapter elections are held to coincide with the annual membership meeting, which is a requirement for continued existence as a not-for profit incorporated organization.
- Candidates must be announced twice in the two-weeks prior to the annual membership meeting.
- The announcement of candidates and annual membership meeting shall be done by written notice through e-mail, letters to those without e-mail or chapter bulletin, and verbally at chapter meeting/rehearsal.
- Elections are to be conducted with secret ballot, unless the slate of officers is uncontested.
- The chapter secretary must report the new officers online no later than December 15.
- Failure to report new officers is grounds for suspension of the chapter charter.
How to be a good leader

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

Winning Jack Welch, CEO – General Electric
MODULE #5
www.barbershop.org & ebiz

Session 7 (30 minutes)
Society Online Services
• Contest entry, Officer reporting, and signing up for COTS/LA Training.
• The Society website and Document Center
• The Member’s area on the website
• Understanding and navigating ebiz

Session 8 (50 minutes)
Society Online Services
• Procuring a password
• Practical use of the website by going online at www.barbershop.org in class.
• Learning what ebiz can and cannot do.
• The future of ebiz for the chapters and chapter secretary
New Leadership Reporting

Update Chapter Officers Information
Back to menu

1. Choose an office and enter the member number of the person holding that office.
2. Select "[Delete]" for the office to remove a person from the list
3. You can show a chapter member list if you need to find the member number of one your members.
4. Make sure you press "Save" at the bottom of the form to save your changes
5. PROBE Membership is encouraged and is a legitimate chapter expense. Visit PROBE online at http://www.harmonize.com/probe/ or contact Secretary/Treasurer Dick G # to enroll chapter officers.
6. If your director is not a member and you don’t know his/her ID, drop a note to membership@spebsqa.org and give their name and your chapter number.

Click Here To Copy Officers From 2005
Please note: This will overwrite and replace any existing entries you have for 2006.

Do Not Use Your Enter Key. Use Mouse and Click Please.

C-057 Bellevue officers for 2006

<table>
<thead>
<tr>
<th>Office</th>
<th>Member Number or ID</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Choose an office]</td>
<td>Look-up</td>
<td>click &quot;Save&quot; to show name</td>
</tr>
<tr>
<td>[Choose an office]</td>
<td>Look-up</td>
<td>click &quot;Save&quot; to show name</td>
</tr>
<tr>
<td>[Choose an office]</td>
<td>Look-up</td>
<td>click &quot;Save&quot; to show name</td>
</tr>
<tr>
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<td>Look-up</td>
<td>click &quot;Save&quot; to show name</td>
</tr>
<tr>
<td>[Choose an office]</td>
<td>Look-up</td>
<td>click &quot;Save&quot; to show name</td>
</tr>
<tr>
<td>[Choose an office]</td>
<td>Look-up</td>
<td>click &quot;Save&quot; to show name</td>
</tr>
</tbody>
</table>

Now reported online at www.ebiz.barbershop.org Members link.

Reporting is to be completed by December 15.

The basic leaders for most chapters are:

- President
- VP Chapter Development
- VP Music & Performance
- VP Mktg./PR (25+ members)
- Secretary
- Treasurer

Additional officers/leaders are at the discretion of the chapter
Quartet Registration

- NOT a chapter secretary duty to register quartets, however, chapter secretary can distribute registration forms and answer questions
- Quartet completes hardcopy form or online at www.ebiz.barbershop.org
- There is an annual fee of $40 to initially register or maintain registration of your quartet.
- Quartets must have a name that is not the same of past Society International Quartet Champions or currently used by a registered quartet.
- Registered quartets receive a card and registration number.

Please fill out this form completely. Enclose a remittance of $40.00 Annual Registration Fee (U.S. funds only). The fee is payable by check, MasterCard or Visa and may be mailed to address above, or registrations can be handled at www.ebiz.barbershop.org.

- NEW QUARTET REGISTRATION
- District in Which Quartet Intends to Compete

<table>
<thead>
<tr>
<th>First Choice</th>
<th>Second Choice</th>
<th>Third Choice</th>
</tr>
</thead>
</table>

CONTACT MAN

<table>
<thead>
<tr>
<th>Name(s)</th>
<th>Membership number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address</td>
<td>City, State, Zip</td>
</tr>
<tr>
<td>Phone number</td>
<td>Phone number</td>
</tr>
<tr>
<td>Email address</td>
<td>Email address</td>
</tr>
</tbody>
</table>

QUARTET PERSONNEL

<table>
<thead>
<tr>
<th>Tenor</th>
<th>Member #</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead</td>
<td>Member #</td>
</tr>
<tr>
<td>Bar</td>
<td>Member #</td>
</tr>
<tr>
<td>Bass</td>
<td>Member #</td>
</tr>
</tbody>
</table>

QUARTET RENEWAL

<table>
<thead>
<tr>
<th>Quartet Name</th>
<th>Quartet No.</th>
</tr>
</thead>
</table>

PAYMENT INFORMATION

<table>
<thead>
<tr>
<th>Name/membership #</th>
<th>Amount</th>
</tr>
</thead>
</table>

Please be aware of the following:
- All members of the quartet must be enrolled on the membership records at the Society Office. If a membership is questionable for inclusion in the quartet registration, it will be verified.
- To assure their validity, the quartets must supply supporting materials. All names must be verified for quartet registration.
- The Quartet registration will be returned if all requirements are not met and verified.
- This form must be completely filled out or it will be returned.
Characteristics of an effective team

- Encouraging and supportive
- Expression of concern
- Listening skills
- Solicitation of ideas
- Building consensus
- Trust
- Equal participation
- Appropriate use of power and influence
- Willingness to disagree
Who do I contact at HQ?

• Printed in each issue of the Harmonizer.
• Accurate at the time of printing.
• Always ready and at your fingertips when you get that special question from a member or need immediate assistance.
Session #8
NEW Society IT System Means Change and Opportunity

- New look to the web home page
- Redesigning of web page documents
- Greater information access for chapters and districts
- Greater capacity to store information about members, chapters, district and Society programs and activities
• Provides ready access to member to update his information and services like: Pay fees or dues or order things from the Harmony Marketplace.
• Provides services to the chapter secretary and chapter president.
• Secure!
• Easy to navigate even for a computer challenged.
ebiz page – Members

TIPS

• Fill in as much known information as possible.
• Partial “key words” are okay, if you are not sure of exact spelling.
• Names O’ (i.e. O’Reilly) enter last name as “O” and remainder of last name.
• More information included narrows the search.

10/16/2009 2009-2010 LA/COTS Training
ebiz page – Quartets

TIPS

- Enter name of the quartet **EXACTLY** the way it is spelled.
- Partial “key words” is okay, if you are unsure of exact spelling.
- Be careful. Some quartets deliberately misspell their names.
- Active (paid-up annual registration) registered quartets listed only.
- May locate multiple quartets within a specific geographic location (City/Postal Code).
TIPS

- Intuitive approach to finding a specific chapter
- You can obtain a list of all chapters in a specific geographic area or district
- Use of partial “key words]” in name or nickname of chorus is okay.
Society Web Page – Document Center

New Champions Crowned
The Anaheim Convention results are in. See results and scores.

What is Barbershop Harmony?
Explore this truly American art form

Where can I see it?
See upcoming performances in your area
Society Web Site  www.barbershop.org

Document Center
• Does not require password to access.
• Provides access to forms and documents in Word or PDF format
• Acrobat Reader for PDF files is downloadable to your computer at no charge
• Many manuals and booklets are downloadable to your computer/printer on this site.

ebiz for members
• Does require password to access.
• Provides access to reports, lists and specialty entry/registration forms of specific importance to the chapter secretary.
• Provides access to member profiles that can be updated by the member or chapter secretary. A verification posting sent after each profile is updated to CS and member.
Contest & COTS Registration

**Contest Entry**
- Contest Entry Form is completed online at [www.ebiz.barbershop.org](http://www.ebiz.barbershop.org)
- Entry is automatically sent to the District Representative of Contest and Judging for your district, the Convention General Chairman and the contest CAs
- There is a deadline for submission of the Contest Entry form (CJ20) and it varies from district to district. Contact your district Representative of Contest and Judging for the deadline and special rules.

**COTS/LA Registration**
- Information about COTS should be received from your district’s COTS Coordinator in October.
- Coordinate the list of chapter officers attending and complete and submit the COTS registration form.
- The payment for COTS is a legitimate chapter expense that will require a motion at your chapter board meeting authorizing the expenditure.
- Encourage all chapter officers to attend COTS; both new and veteran officers.
- The billing for COTS will be on the Society monthly invoice to the chapter.
Certification of songs sung at contest

• Submitted as part of contest entry process
• Chapter Secretary certifies that songs and arrangements are legal according to copyright law.
• Submits song titles, composer, arranger and proof that songs were purchased legally and arranger was paid for services
• Re-enters contest online if the songs chorus plans to sing change.
Certification of paid-up members at contests

- It is vital that the chapter secretary is able to determine and certify that each member of his 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.
## CONTEST ENTRY PROCESS

### Contest Details

- **Quartet**
- **Chorus**
- **VLQ**

### Convention Details

- **Convention Name**: International Chorus Preliminaries and District Quartet Convention
- **Convention Start Date**: 10/30/2009
- **Convention End Date**: 11/1/2009
- **CJ20 Cutoff Date**: 10/20/2009
- **Convention Type**: District Only
- **Note to Entrant**: Quartets -- Be prepared to state whether your quartet is a novice quartet (by District Contest Rules) when you complete the contest entry (CJ20) Form, which will be confirmed by the EGV DRCJ.

### Chorus Name

<table>
<thead>
<tr>
<th>Chorus Name</th>
<th>Subscription End Date</th>
<th>Continue</th>
</tr>
</thead>
<tbody>
<tr>
<td>C057 Bellevue</td>
<td>Dec 31 2010</td>
<td>CONTINUE</td>
</tr>
</tbody>
</table>
CONTEST ENTRY PROCESS

Select from the following list of Directors

<table>
<thead>
<tr>
<th>PersonalID</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>101500</td>
<td>Danny Slavens</td>
</tr>
<tr>
<td>135507</td>
<td>Stuart Turner</td>
</tr>
<tr>
<td>239392</td>
<td>Donny Rose</td>
</tr>
</tbody>
</table>

If the Director is not in the above list, please enter the MemberID and click ADD.

Select Contest Sub-sessions

Select all applicable contest sub-sessions for your competition from below list.

If you click a check box and it does not result in a checked box, that is because the DRCJ will make that decision for you if you are eligible.

If you are entering both District and Division contests, select applicable contest sub-sessions from each.

EX: You are entering both District and Division contests, you see selection buttons for each. Select District and enter checks in each applicable box and Save, then Select Division and enter checks in each applicable box and Save.

Enter Contest:

- Chorus
  - International Preliminary Chorus
  - District Chorus
  - District Small Chorus
  - Most Improved Chorus
  - Scores for Evaluation Only
  - Mic Tester Only

Save  Save and Continue  Save and Finish Later  Save and Finish  Home
CONTEST ENTRY PROCESS

Song Entry Process

The next series of screens will permit you to enter all of the information required to satisfy the clearance requirements for the songs that you plan to sing in the contest. This process can be done quickly if you have all of the information with you when you start the entry process. You may enter as many songs as you want and are not penalized if you enter more than is required for your projected number of rounds but the system will warn you when you have not entered the required number of songs based on the types of contests you have selected in the previous entry screens. A one round contest requires 2 songs, a two round contest requires 4 songs, etc. and you will have to have the required number to compete.

Instructions about submitting song clearances

BHS Marketplace Songs or Medleys carried in the BHS Marketplace

You will only need the marketplace ID number that came with the song or medley when you purchased it. If you don’t know the ID number, you can enter all or a portion of the song title and it will search the marketplace song inventory for the arrangement ID number and you can select the correct one.

Other Sources

These instructions apply to songs that you did not get through the BHS Marketplace. You will need all of the detailed information provided at the time the arranger received the copyright clearance. If it is a medley or song arranged by you or acquired from another arranger, you will need all of the proof of copyright clearance information for all songs in the medley. If the arranger used a marketplace song as part of the medley, you can enter the marketplace ID in that medley submission.
CONTEST ENTRY PROCESS

Song Entry Process

Market Place  Other Source

Show Saved Songs  Finish Contest Entry  Exit To Finish Later

Click HERE to see songs previously saved in other conventions

Enter the ID for the Song Purchased:

Enter SongID or SongTitle and press search
Search for the Song Title:

Song Entry Process

Market Place  Other Source

Show Saved Songs  Finish Contest Entry  Exit To Finish Later

Click HERE to see songs previously saved in other conventions

Enter the ID for the Song Purchased: 6370

Enter SongID or SongTitle and press search
Search for the Song Title:

<table>
<thead>
<tr>
<th>Arrangement ID</th>
<th>Old ID</th>
<th>ProductID</th>
<th>Song Title</th>
<th>Medley</th>
<th>Arranger</th>
<th>Add</th>
</tr>
</thead>
<tbody>
<tr>
<td>6370</td>
<td></td>
<td>202467</td>
<td>Nobody's Sweetheart</td>
<td></td>
<td>1. Kiltmiller, Scott</td>
<td>Add</td>
</tr>
</tbody>
</table>
MODULE #5 (Alternative)
Grant Writing Seminar

Session #7 (30 minutes)
- Role of the chapter secretary in the grant writing process.
- What are you trying to achieve by writing a grant?
- What are the things a chapter secretary should NOT do?

Session #8 (50 minutes)
- What are the tools you’ll need?
  - Society Grant Writing Booklet
Session #7
Role of chapter secretary in grant writing process

• Member of the Grant Writing Team
• Resource for gathering information for the team and helping to keep things organized
• Provide input, as needed
• Provide proofreading support
• Provide suggestions for presentation of the finished product to the group providing the grant
• Provide follow-up support and liaison between the chapter and the funding group.
Gathering the team

- Seek direction from the chapter board. Have a realistic goal!
- Keep the team small in number.
- Gather a diverse group of members who could work well together.
  
  Leaders with common sense and can motivate the team.
  Visionaries that can see and seek the possibilities how a grant may assist the chapter and also promote our hobby.
  Writers who can prepare a document for presentation to the funding agency
  Front men who can interface in a positive way with the agency
  Proofreaders that can pick apart the document that will need to be prepared

- Seek “worker bees” that will commit time and effort to the project.
- Seek those with the qualities you seek for the project – don’t ask for volunteers, personally ask those you want!
- Provide a positive work environment.
- Find members that are positive about the outcomes.
What are you trying to achieve?

- It’s **not** about $$$$$$, but about building a reputation and a relationship!
- There is no free lunch – You must offer something of value in return.
- The funding agency must like you.
- You must like the funding agency.
- You must be flexible.
- You must reach a wide group of people.
- You must show a return for the funding agency… it’s **not** about the $$$$$
Preparing the ground work for a successful project

- Identify **potential funding agencies**.
- Research **the funding agencies**.
- Learn **when the funding agency decides on potential grant applications**.
- Meet **with the key people in the selection process**.
- Exceed **what the funding agency is seeking**.
- Listen **to the customer (the funding agency)**.
- Follow-through **on what you promise**.
- Seek feedback **from others to improve**.
- Sell **what you do best… BARBERSHOP SINGING**.
Session #8
Tools Needed for Grant Writing

• Society/HF Grant Writing Handbook.
• Library books on grant writing
• List of potential grant funding resources and leads
• Application for the grant
• Computer for word processing
• Location to meet regularly and develop the proposal.
What not to do!

• Don’t procrastinate… set and meet your deadlines and those of the funding agency.
• Submit a grant proposal with typos.
• Submit a grant proposal not meeting the specific goals and standards of the funding agency.
• Don’t just ask for $$$.
  Show the funding agency how you propose to earn the grant money by doing something that enhances the funding agency’s image in the community.
• Always give something in return for the grant money.
What to do!

- Build relationships everywhere.
- Connect barbershop singing with the funding agency... it’s like apple pie and mother.
- Promote barbershop singing, but also promote the funding agency.
- Get involved with the arts community... cast bread on the water.
- Enhance your visibility in the community.
- Read and bone-up on grant writing
- Start small with your proposal, be successful, and promote a larger proposal next time.
- Focus on the arts and youth... that’s hot
What happens if we don’t get the grant?

- Find out why… ask for feedback as to why your proposal was rejected.
- Keep trying and improving the product.
- Refine your presentation.
- Few organizations get grants the first time around… keep trying.
- Continually improve your standing in the local community and the arts community.
- Work for free as an entre for future funding of your projects.
- Build relationships! Know the people you’re trying to get a grant from.
- DON’T EVER GIVE UP
How did we do on the Course Objectives?

Each chapter secretary will be able to:

- Demonstrate how to navigate the [www.barbershop.org](http://www.barbershop.org) web site and locate documents and forms.
- Demonstrate the process of completing and submitting the Membership & Transfer application form.
- Describe the factors determining the correct membership classification.
- Describe the show clearance and licensing process.
- Describe the need and claim process for liability/bonding insurance.
- Outline the legal documents that should be stored by each chapter.
- Describe the reasons why the Youth Policy and Incorporation are needed.
- Describe the various roles of the CS in efficient chapter operation.
- Outline the CS priorities and proper relationships with the CP and CT.

- Outline the process for transferring to a new chapter.
- Identify the qualities of a leader.
- Identify the ways a CS can be an effective chapter leader.
- Describe the four different EasyDues plans available to the members.
- Outline how a chapter roster can be generated by using the Society web site.
- Discuss and demonstrate the fundamentals of Parliamentary Procedure.
Thank you!