

Chapter Officer Tasks and Due Dates

Please Note: This document is **UNOFFICIAL**. It was created by Jesse Heines with the assistance of Jim Brunner as a guide to assist NED Chapter Officers in scheduling required tasks. Please report corrections or additions to Jesse at jesse@jesseheines.com.

This is Version 2.01, updated July 15, 2021.



Tasks *With* Specific Due Dates

All dates below are deadlines. That is, the task must be completed by the date listed.

Due Date	Responsible Officer	Task
Jan. 15	President	appoint a Nominating Committee to propose chapter officers for the next year's Chapter Board
	President	appoint a Financial Review Committee to review the previous year's books
Jan. 31	Treasurer	file IRS 1099 forms for the previous year's payments greater than or equal to \$600 to any individual
	Treasurer	file IRS 1096 form for the previous year
May 1	Financial Review Committee	report back to the Chapter Board
May 15	Treasurer <i>US Chapters</i>	file IRS form 990-N, 990-EZ, or 990 (<i>see Notes on page 2</i>) for the previous year and post a copy to your BHS Chapter Member Center Profile
	Treasurer <i>Massachusetts Chapters</i>	if your chapter is a 501(3)(c) organization, file a Public Charities Report for the previous year with the Massachusetts Attorney General's Office
	Secretary	file the Annual Financial Review for the previous year through the Chapter Profile section of the BHS Member Center
Jun. 15	Treasurer <i>Canadian Chapters</i>	file your CRA filings for the previous year and post copies to your BHS Chapter Member Center Profile
Sep. 15	Nominating Committee	report back to the Chapter Board
	President	set the date for the Annual Chapter Meeting

table continues on next page

Due Date	Responsible Officer	Task
Oct. 1	President	present the slate of nominated officers for the next year to the chapter membership
Oct. 15	President	conduct the Annual Chapter Meeting, including the election of officers for the next year
Nov. 15	Secretary	file the appropriate organization incorporation paperwork for the current year for your state or province and send this to the Society as well
Dec. 31	Secretary	report new chapter officers to the Society by posting them in the Member Center
Dec. 31	Secretary	file ASCAP Annual Report Form (<i>see Notes</i>)

Tasks *Without* Specific Due Dates

When	Responsible Officer	Task
Before any show sponsored by the Chapter	Secretary <i>US Chapters</i>	file Application for Show Clearance BMI and SESAC License (<i>see Notes</i>)
	Secretary <i>Canadian Chapters</i>	file Application for Show Clearance SOCAN License (Form 3016) (<i>see Notes</i>)

Notes

IRS Form Requirements

- IRS Form 990-N can be used by Chapters with gross receipts less than \$50K (this form can be submitted online as an "e-Postcard")
- IRS Form 990-EZ can be used by Chapters with gross receipts greater than \$50K and less than \$200K and total assets less than \$500K
- IRS Form 990 must be used by Chapters with gross receipts greater than \$200K or total assets greater than \$500K

Applications for Show Clearances and ASCAP Annual Report and Related Forms and Fee Schedules

- Show clearances should be filed as early as possible, *not* the week or two before the show

- Prudence suggests that you secure the date and event clearance with the District before contracting with a venue or paid talent
- All forms can be found at
 - <https://www.barbershop.org/docs/music/copyright-and-legal/show-clearance-forms>

References

- The Business Of Barbershop: An At-A-Glance Chapter Business Guide for BHS Chapter Presidents, Secretaries, and Treasurers
 - <https://drive.google.com/file/d/0B06bQhVih7-DQ2hLWkIkaTQ2NWs/view>
- BHS Chapter President Manual
 - https://drive.google.com/file/d/1C7dTMMqZi-12deNc_THvhpfidDgh7TIw/view
- BHS Chapter Secretary Manual
 - <https://drive.google.com/file/d/0B06bQhVih7-DQ0NMclNkdDM0MGc/view>
- BHS Chapter Treasurer Manual
 - https://drive.google.com/file/d/1Em9vcO6Lv-g7hHmGJ4_PI-LRiKX7dAYT/view
- BHS Canadian Chapter Treasurer Responsibilities Checklist
 - <https://drive.google.com/file/d/0B06bQhVih7-DTWZTQ0M1cWRtaGs/view>

Please report corrections or additions to Jesse at jesse@jesseheines.com. Thank you.