

Secretary's Class
Spring Convention (Stockton)
Officer's Training
Friday - March 20, 2026, 1:00-3:00 PM

Secretary's Monthly To Do List

January

Appointment of "Financial Handlers"

During the first meeting of the board (for a calendar year), individuals appointed by the board who are expected to handle money in any capacity for the chapter throughout the year should be annotated in the minutes as an official record for your chapter. BHS carries a fidelity bond, protecting your chapter.

For questions related to insurance or Fidelity Bond, please contact the BHS Chapter Leadership & Education Team at chapters@barbershop.org

February

Spring District House of Delegates Meeting

If your chapter selects an alternate delegate to the HOD meeting, record the name in the Chapter Board Meeting Minutes and report the alternate to the District Secretary.

March

Incorporation Status

Verify your chapter's incorporation status with your state or province (equivalent agency).

Post to the Compliance Filings & Reports section of the BHS Member Center the date to which your chapter's incorporation is good. If "perpetual", enter 1/1/2099.

Verify your chapter's Registered Agent (RA) information with your state or province and update, if necessary. Changes to your Registered Agent should be approved by your chapter Board and reflected in the minutes of a Chapter Board Meeting. Check your state/province requirements for qualifications of RA, some require that the RA be either a current board member or an attorney.

May

Receive a copy of the Annual Financial Review

Post to your Chapter Profile in the BHS Member Center: Compliance Filings & Reports section.

File in the chapter's official record and keep it for a minimum of seven years.

Receive a copy of the acknowledgment of filing IRS or CRA forms, and file with chapter records.

Post to your Chapter Profile in the BHS Member Center: Compliance Filings & Reports section.

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File in the chapter's official record and keep it for a minimum of seven years.

September

Send Required Notices for the Annual Meeting

Send required notices to the membership of the Annual Chapter Meeting and the proposed slate. (Standard Chapter Bylaws require notification at least two weeks prior to the meeting)

If your chapter selects an Alternate Delegate to the Fall District House of Delegates Meeting:

Record the name of the alternate in the minutes of a Chapter Board Meeting.

Report it to your District Secretary

October

Annual Chapter Meeting

If there are any nominations opposing the slate, prepare written ballots for the contested position(s) for use that the Annual Chapter Meeting as required by Standard Chapter Bylaws.

Record minutes of the Annual Chapter Meeting.

CRITICAL – Report in your Chapter Profile in the BHS Member Center (Leader Section) the elected slate of new officers.

If you don't report them in the Future Leader section when the new year rolls around your officers will be left out of the communications loop and you will be unable to update anything in or post to your Chapter Profile in the BHS Member Center because your authority to edit that information expires when the computer thinks you are out of office, usually 12/31/20XX. At a minimum, report the new secretary, even if it is you.

File any changes in the make-up of your Chapter Board with your State/Province, Incorporations Section (or equivalent agency).

Register incoming officers for your District Leadership Academy.

November

Assist incoming Secretary.

Assist the incoming Secretary in transition to office.

The incoming Secretary should attend Leadership Academy Officer Training (*if available*).

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Election of Officers

- Chapter elections must be held no later than October 15

- Chapter elections are held to coincide with the annual membership meeting, a requirement for continued existence as a not-for profit incorporated organization.

- Candidates must be announced two weeks prior to the annual membership meeting.

The announcement of candidates and annual membership meeting shall be by written notice through email, letters to those without e-mail, or chapter bulletin.

Elections are to be conducted with secret ballot unless the slate of officers is uncontested.

Reporting Officers

- The chapter secretary must report the new officers on the Chapter BHS Member Center Profile no later than December 15.
- When an officer resigns or is replaced, the chapter's BHS Member Center profile should be updated right away.