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## Chapter One: Association Structure/Non-Profit Status

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### **Tax Exempt Structure**

All USBC chartered associations operate under its 501(c)(3) tax status; therefore being exempt from federal income taxes. It is important that all associations abide and uphold the Purpose Statement found in the USBC, state and/or local bylaws. If an association fails to meet this condition, the IRS may revoke the tax-exempt status, and/or USBC may revoke the association's charter.

### **Asset Distribution**

To maintain tax-exempt status, USBC associations must ensure that the organization's assets are permanently dedicated to an exempt purpose. None of the association's net earnings can benefit a private individual or specific association group.

### **Association Dissolution**

Upon dissolution all of the organization's assets remaining after payment of its lawful obligations shall be distributed in accordance with the requirements and regulations of Section 501 (c)(3) of the Internal Revenue Code.

The association must file a final IRS Form 990 by the 15<sup>th</sup> day of the fifth month after the liquidation, dissolution or termination. Any association that enters into a merger effectively dissolves on the day the new merged association begins.

See Chapter 3 of the USBC Association Policy Manual for further information.

### **Association Legal/Non-Profit Structure**

All USBC associations are required to maintain corporate status as required by the association's state government. This ensures that the association's existence is legally recognized and limits the board and association's liability. Whether the association is incorporated or not, an individual committing a wrongful act as a board member can still be held personally liable.

To avoid personal liability:

- Be familiar with your association's Articles of Incorporation and bylaws.
- Make sure the association complies with federal and state laws.
- Avoid relationships that place you in a conflict of interest.
- Attend association meetings (board/committee) so you are aware of current association activities.

In addition, associations file corporate documents (i.e. Articles of Incorporation, amendments, corrections, annual reports, name changes, mergers and change in registered agent, etc.) with the Secretary of State's corporate section or its equivalent.

**Additional information may be found on the Association page of BOWL.com under Forms and Manuals:**

- Association Governance Structure
- Jurisdictional Structure
- Non-profit Structure



- Tax Exempt Status
- Tax Information and IRS



## **Chapter Two: Membership and Dues**

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### **Memberships**

Several membership options are available for joining USBC. With few exceptions, all require the payment of dues and adherence to USBC regulations.

Currently available membership packages:

- Standard
- Associate
- Basic (Youth)
- Collegiate
- High School (Youth)
- Junior Gold (Youth)
- Sport Bowling
- USBC Life Membership

To purchase USBC Youth membership the individual may not have reached his/her 20<sup>th</sup> birthday on or before August 1 of the current bowling season. The age is waived for anyone authorized as mentally challenged.

**Descriptions benefits and cost for the above membership categories may be found on the Membership page of BOWL.com under “join USBC”.**

### **Dues**

It is important that all dues and bowler information are submitted to USBC Headquarters promptly to ensure the bowler quickly receives the support and benefits of the national organization.

### **Adult Membership Dues**

The dues a bowler submits are directed to three applicable areas: the local association, the state association and USBC Headquarters. When dues are paid through a local association, the association manager transmits the state and national portions of the dues to USBC Headquarters via WinLABS within 20 days of receipt of the dues. USBC Headquarters will then transmit the state’s portion to the appropriate state association.

### **Youth Membership Dues and Processing Fees**

The dues a youth bowler submits are directed to two applicable areas: the state association and USBC Headquarters. The local processing fee stays with the processing office i.e., the local association or bowling center. When dues are paid through a local association, the association manager transmits the state and national portions of the dues to USBC Headquarters via a web based application on Bowl.com within 20 days of receipt of the dues. USBC Headquarters will then transmit the state’s portion to the appropriate state association.



**State Dues Distribution:**

**Merged State Association:** If merged adult and youth it receives the appropriate amount of dues for men, women and youth, regardless of the status of the local association.

**Merged State Association competing with Non-merged Youth:** If the merged state is competing with a non-merged youth association, regardless of the status of the local association, the youth members will select which state association to join, with the option to join both. Adults pay the adult state dues.

**Merged State Association not competing with Non-merged Youth:** If the merged state is not competing, all youth dues go to the Non-merged Youth Association, regardless of the status of the local association. Adults pay adult state dues.

**Non-Merged State Association:** Regardless of the local association's status:

- Adult men's dues are received by the state BA.
- The state youth association receives youth dues.
- Women are to select either the state BA or state WBA or both.

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## Chapter Three: Board of Directors

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The responsibility of compliance with USBC, federal, state and local laws rests on the Board of Directors. The Association Manager is responsible for seeing that requirements are met; but he/she answers to the Board.

The Board of Directors is to be aware of management responsibilities, such as, but not limited to:

1. Maintaining compliance with chartering requirements.
2. Submission of appropriate tax forms, on time, to the appropriate body.
  - a. 990, 990-EZ or 990-N
  - b. 990-T
  - c. Payroll taxes
  - d. Withholding taxes/Classification
  - e. Form W-2
  - f. Form SS-4
3. Conducting tournaments
4. Reporting to the membership/delegation
5. Conducting Association/Board Meetings

**Note:** If the association provides services to USBC youth, no alcohol or tobacco may be present at meetings that involve the youth. When the meeting is conducted with a corresponding event, i.e. banquet; the no alcohol, no tobacco requirement is only pertinent to the meeting portion of the event. The bar, if possible, should be outside the room where the event is held and if not, closed during the event.

6. Awareness of bonding, burglary and hold-up insurance from USBC
7. Considering the need for liability insurance
8. Developing a policy for authorizing non-board positions
9. Maintaining proprietor relationships
10. Developing an Association Representative Program
11. Developing a Recruitment/Education Program
12. Supporting the Registered Volunteer Program (merged and youth associations)
13. Complying with the Americans with Disabilities Act

Though not a requirement, it is a sound business practice to have a budget, an operations manual and a business/strategic plan.

Additional information may be found on the Association page of BOWL.com under Forms and Manuals:

- Alcohol and Tobacco Restrictions/Youth
- Americans with Disabilities Act
- Association Manager - Selecting/Appointing, includes sample job description and application
- Association Manager – Evaluating, includes sample performance review
- Awards, Local
- Awards, National



- Board - Makeup
- Board - Obligations and Duties
- Confidentiality Policy and Agreement
- Conflict of Interest, sample included
- Marketing the USBC Brand
- Office Help – Authorizing Other Non-board Positions
- Officers
- Problem Solving
- Programs and Services for USBC
- Proprietor Relations
- Registered Volunteer Program
- Tournament
- USBC Ambassador Program
- Volunteer/Membership Recruitment/Retention Plan

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## Chapter Four: Association Manager

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All associations must have an association manager who is responsible for the day-to-day management of the organization and compliance with the USBC Bylaws, *National Supplement* and *USBC Association Policy Manual*.

The position serves as secretary-treasurer, is ex officio and, unless duly elected as a director, does not vote. There is no term limit for the association manager. This position cannot be changed to provide for a secretary, treasurer, secretary/treasurer or executive director and cannot serve concurrently as an officer.

It is the local association's responsibility to process USBC awards for its members. This includes those awards earned in a certified state tournament.

The association manager may or may not be paid. Regardless, the individual is considered an employee of the association and is accountable to the board and USBC Headquarters.

This individual, who must be a minimum of 18 years of age, should have knowledge of bowling; management, office, and organizational skills; and basic computer skills. Other skills should include knowledge of parliamentary procedure, marketing and public relations experience, and any other skill required by the board. The board selects and, if necessary, dismisses the association manager. For information regarding selecting and evaluating an association manager, the information may be found on the Association page of BOWL.com under Forms and Manuals

The association manager, with board approval, may have authority to select other individuals to assist in fulfilling his/her duties such as an office assistant, etc. Association managers opting to do so are still responsible for seeing that all responsibilities are carried out. Assistants may receive compensation, with board approval.

The association manager supervises and evaluates all staff and files performance review reports to the board. Additionally, the association manager appoints, manages and evaluates all volunteers and files written reports, as directed by the board.

Day-to-day management of the association includes a wide variety of responsibilities, each of which are listed in the *USBC Association Policy Manual* and the *Association Guidelines* on the Association page of BOWL.com under Forms and Manuals.

The association manager is expected to see to it that each of these responsibilities is carried out.

To assist the association manager in this role, additional information may be found on the Association page of BOWL.com under Forms and Manuals:

- Averages
- Awards, Local
- Awards, National
- Board-Authorizing Other Non-board Positions
- Budgets





- Certification/Lane Inspection
- Communications Plan, Development and Implementing
- Financial
- Marketing the USBC Brand
- Membership Lists
- Operations Manual
- Ordering Supplies
- Problem Solving
- Proprietor Relations
- Registered Volunteer Program
- Strategic Plan, Development and Implementing
- Tax Requirements
- Tournaments
- WinLABS/Processing On-line

## **Chapter Five: Enhancing Membership and Association Performance**

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USBC provides many programs and services that if used correctly can enhance membership and increase the association's performance and perception by the public. Local and state associations are a key link in getting these services to the members; therefore, they are vital to the implementation. The association can also provide additional programs, i.e. Halls of Fame, local awards, etc.

Here are some ideas/resources that can be found on BOWL.com to assist associations:

1. [www.BOWL.com](http://www.BOWL.com): This is USBC's official Web site and is a tremendous resource for associations and members.
2. USBC Member Rewards – This program helps all members save valuable dollars.
2. Charities: Komen for the Cure – Bowl for the Cure and Bowlers to Veterans Link – BVL.
3. Coaching
4. Collegiate and High School Bowling
5. Junior Gold
6. Sport Bowling
7. USBC Ambassador Program
8. Education/Workshops: Contact USBC @ 800-514-BOWL, ext. 8242
9. Bowling Information Center: 800-514-BOWL, ext. 3151
10. Rules/Bonding/Tournament Certification: Contact Rules@bowl.com

The local or state associations should also consider providing:

1. Education and Training/Workshops
2. Board Training
3. Evaluations for board members and association programs
4. Recognitions
5. A Volunteer/Membership Retention/Recruitment Plan

Additional information may be found on the Association page of BOWL.com under Forms and Manuals.

- Association Representative Program
- Awards, Local
- Awards, National
- Education, Training, Evaluations, Recognition and Other Services
- Programs and Services for USBC
- Volunteer/Membership Recruitment/Retention Plan

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## Chapter Six: Meetings

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The association must conduct at least one annual meeting per season and at least the minimum number of board meetings as required by state law.

Meetings are conducted in compliance with USBC Bylaws; *Robert's Rules of Order, Newly Revised* and state corporate law.

### **Types of Meetings**

There are five basic types of association meetings: annual meeting, board meeting, special meeting, committee meeting and removal meetings. Below is a brief description of each.

#### **Annual Meeting (Membership/Youth Representative/Delegate Meeting)**

The association may want to consider holding the annual meeting in the same month every year. At this meeting, the state delegates/youth delegates or local members/youth representatives elect the officers, directors and/or delegates. In addition, the members will debate and vote on any proposed amendments to the association bylaws. Finally, the members will receive reports and may discuss projects, concerns, and other issues that they would like the board to address during the next year.

If an issue is raised that cannot be adequately addressed at the annual meeting, a special meeting may be called for that specific issue. At a special meeting, any additional information on that issue can be presented and the attendees can approve or disapprove the action.

#### **Board Meeting**

The board meets, at a minimum, as often as required by state law. The board oversees the operations of the association and acts on matters that the members have brought forward.

#### **Special Meeting**

A special meeting is conducted when an important matter of business needs to be addressed, and cannot wait until the next board or membership/delegate meeting. A special board meeting can be held if requested by a board member and if a majority of the board approves. A special membership/delegate meeting may be called by the president or upon written request of three board members or at least twenty-five members/delegates. Only the items listed on the notice for a special meeting can be discussed.

#### **Committee Meeting**

All committees should meet separately to discuss and take action on their specific responsibilities. Committees are formed for ongoing tasks such as conducting the association audit, selecting award recipients, and recruiting new members. Some committees are formed for specific projects and are then dissolved.

**Removal Meeting**

A removal from office is handled at a board meeting when a written complaint is filed asking for the removal of a board (Youth Committee) member. The process used can be found in the Suspension and Reinstatement section of the *USBC Association Policy Manual*.

Additional information may be found on the Association page of BOWL.com under Forms and Manuals:

- Committee Information
- Delegates
- Meeting Components
  - Ballots
  - Elections
  - Minutes, sample
  - Protests
  - Quorum
  - Reports
  - Tellers
  - Voting
- Meeting Efficiency
  - Ground Rules
  - Location
  - Notice
  - Purpose
  - Use of Parking Lots
- Meeting Roles
  - Presiding Officer
  - Association manager and more
  - Who Votes? (Easy to use chart for merged associations)
- Parliamentary Procedure
  - Meeting Actions
  - Motions

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## Chapter Seven: Committees

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The responsibilities/tasks of the Board are accomplished by an effective and efficient system of committees that have a clearly defined purpose, expectations and limitations.

The President with Board approval, except for the Youth Committee, appoints committees. They should be composed of an odd number and have a clear understanding of the goal(s) of the association and where the committee's work fits in. The president has the authority to remove committee members from president appointed committees.

The President is an ex officio member of all president appointed committees. As an ex officio member the President has the same rights as other committee members, except without a vote. The President is not obligated to attend committee meetings and is not counted in determining the number for the quorum. The Association Manager is not an ex officio member of any committee, but can be appointed.

There are only two Standing Committees: Finance and Youth. The president, with board approval, appoints the Finance Chair. It is highly recommended there be a separate Audit Committee.

Additional information may be found on the Association page of BOWL.com under Forms and Manuals:

- Committee Information (Includes);
  - Committee Reports
  - Committee Types
    - ♦ Standing
      - Finance Committee
      - Youth Committee
    - ♦ Optional
      - Audit Committee, samples included
      - Nominating Committee, samples included
  - Removal from a Committee