



ASSOCIATION MANAGER – EVALUATING

The board has authority over the association manager and should continually evaluate his/her performance to ensure he/she continues to meet expectations.

The board should, at a minimum, review the association manager's performance annually. However, it is recommended the board meet with the association manager on a more routine basis to keep the lines of communication open. To assist the association a Sample Performance Review is included at the end of this document.

Circumstances may arise when an individual fails to meet expectations and is dismissed from his/her position. To protect the association, the board should document any performance issues. This cannot be stressed enough!

Documentation of all performance items (both good and bad) should start from the day of the association manager's selection/appointment.

To properly document, the board should summarize all meetings and performance evaluations in a written format. For instance, the board could keep a running dialogue in a computer file and add to it after every meeting with the association manager, like a diary or journal.

The association manager should know what they are being evaluated on. The board or a committee should:

1. Set expectations/goals upfront. They should be quantifiable and measurable, with due dates.
2. Conduct reviews monthly, quarterly, etc.
 - a. During these meetings, make the individual aware of both good and bad performances, and what he/she can do to improve.
 - b. Board/committee should ask what they can do to help with any shortcomings.
 - c. Check progress on goals.
 - d. Renegotiate dates, if necessary.

Furthermore, to protect the association, it is recommended the board or committee adheres to the following:

1. A progressive discipline policy should be set up and placed in the association's operations manual, if applicable (i.e. verbal warning, written warning, suspension, termination). The policy should be written so at any point, one of the progressive steps may be skipped at the discretion of the association board.
2. Develop and use an "Action Report" to document any discipline. This should be completed by the person issuing the discipline, including the violation and discipline implemented. It should then be signed by the association manager and a copy made for both the association manager and the association records.



3. Verbal warnings should be done with a third party in the room, if possible. Written documentation should be completed, dated and signed by the documenter.
4. Indicate that further infractions could be cause for further disciplinary action, up to and including termination, when any warning is given.
5. A decision to terminate is made by the board. If the decision is to terminate, a spokesperson for the board or committee would let the association manager know, with more than one person in the room, the decision was made by the board, not naming any individuals.
6. A letter of termination should be forwarded to the terminated association manager, listing when benefits, if any, will end. The letter may also indicate when final salary will be paid if any is due.
7. The board should check with the federal and state Departments of Labor to ensure compliance with any regulations regarding the dismissal of an employee.
8. If the association manager is dismissed, it is an association related matter, and all information is to be kept confidential. There is no process to appeal a termination to USBC Headquarters.

SAMPLE PERFORMANCE REVIEW FOR THE ASSOCIATION MANAGER

The purpose of the performance review is to gather data regarding job activities performed by the Association Manager. This highlights some of the day-to-day operations and responsibilities. Whether this individual is selected, appointed or hired, they are considered an employee of the association and are accountable to the board and to USBC through a job description and compliance of the USBC bylaws and policies. The use of this suggested performance review format is optional. Regardless of whether it is used or not, however, an evaluation is strongly encouraged. You may consider completing the form prior to reviewing the Association Manager to assist you in a more objective evaluation during the review.

The Association Manager reports to the association president and/or board. His or her responsibilities may include, but are not limited to:

1. Overseeing the daily operations of the association.
2. Providing administrative support.
3. Coordinating services necessary to comply with the USBC bylaws and policies.
4. Working in conjunction with the board and adhering to National USBC and association bylaws.
5. Implementing and monitoring the strategic/action plan and its progress, as applicable. Reports progress toward specific goals to the board quarterly.
6. Responsibility for the overall finances of the association, which include:
 - a. Preparing a budget for board approval, as applicable.



- b. Submitting written financial reports at all board and association meetings.
 - c. Submitting an audited, year-end financial report.
 - d. Staying within the budget.
7. Overseeing volunteer activities.
 8. All association correspondence.
 9. Overseeing the use of WinLABS/web based membership processing to enter and transfer information to USBC Headquarters.
 10. Notifying each league secretary, in writing, of the programs and services offered by the association.
 11. Notifying each league secretary and board member, in writing, of the date and time for the association annual meeting.
 12. Submitting reports to USBC Headquarters and the state association as requested.
 13. Operating tournaments, either as Tournament Manager, or supervisor of the Tournament Manager.

Updated 04-30-20



SUGGESTED ASSOCIATION MANAGER - PERFORMANCE REVIEW

ADMINISTRATIVE

1. Were the amendments/bylaws revised and given to each board member? Yes No

If no, please explain: _____

2. Were responsibilities delegated to someone else? Yes No

If yes, to whom: _____ Explanation: _____

3. Were the agenda, minutes and financial statements distributed prior to the meetings? Yes No

If no, please explain: _____

Comments:

AWARDS

1. Were all awards processed and distributed to in a timely manner? Yes No

If no, please explain: _____

2. Were Hall of Fame certificates printed and ready prior to the banquet? Yes No

If no, please explain: _____

Comments:

FINANCES

1. If required, were the annual incorporation fees paid to the Secretary of State? Yes No

If no, please explain: _____

2. If applicable, were the proper tax forms filed with the Internal Revenue Service? Yes No

If no, please explain: _____

- 990 and Schedule A (annual information return) or 990 EZ or 990N
- 990T (if gross revenues on unrelated business income was \$1,000 or more)
- 1099 (independent contractors or tournament winners who earned over \$600)



- 941 (if wages of \$100 or more are paid to an employee annually)
- Other

3. Was the annual audit conducted? Yes No

If no, please explain: _____

4. How often were deposits made? Within 7 days Longer than 7 days

5. Were the finances reviewed quarterly? Yes No

If no, please explain: _____

6. Were all scholarship monies issued through the association deposited into SMART within 30 days? Yes
No

If no, please explain: _____

Comments:

7. Were Youth Leaders Chapter (if applicable) funds deposited and withdrawn within the proper time frames?
Yes No

PROCESSING

1. Were memberships/leagues processed and transmitted within 20 days? Yes No

If no, please explain:

2. Were averages processed within 15 days of receiving them? Yes No

Comments:

TOURNAMENTS

1. Were the entries for the championship tournament(s) distributed to the members within the approved time frame? Yes No

If no, please explain: _____

2. Were the championship tournament prizes paid within 30 days? Yes No

If no, please explain: _____

3. Were members notified regarding qualifying for the national events (if applicable)? Yes No

If no, please explain: _____



(Team USA Trials; USBC Junior Gold Championships; USBC Senior Championships; Pepsi USBC Youth Championships, etc.)

TRAINING/EDUCATION

1. Were all leagues notified when workshops were held? Yes No
2. Was the board provided tools/training/mentoring? Yes No

If yes, how and what: _____

Comments:

REVIEW COMMITTEE QUESTIONS

Customer Service

1. Does the Association Manager return telephone calls within 24 hours? Yes No

Comments:

2. Does the association provide an answering machine and if so, is there a recording giving direction as to when to expect a return call? Yes No
3. Does the center(s) know how to contact the Association Manager? Yes No
4. Have there been any complaints regarding the Association Manager handling problems, questions, etc.? Yes No

Comments:

Leadership

1. Is the Association Manager prepared and organized for all meetings? Yes No
2. Were meeting notices sent as required? Yes No
3. Does the Association Manager delegate duties? Yes No To whom?

4. Did/does the Association Manager train a backup in case of an emergency? Yes No

Comments:
