
Chapter Seven: Association Operations

Section A. Association Manager Duties

1. Acts as the ex officio, non-voting secretary/treasurer of the board.
2. Has voice only, does not count towards the quorum and cannot make or second motions at board meetings, unless he/she is also a director. He/she may be excused from board meetings based on the issue/discussion at hand.
3. Has voice and vote at membership meetings, if a current member of the association.
4. Is selected/appointed by and accountable to the board and USBC.
5. Must be a minimum age of 18, unless state laws mandate a specific age, and be USBC bondable.
6. Is not required to be a member of the association; however, it is suggested.
7. Is not eligible to serve concurrently as an officer of the association.
8. Is eligible to serve as a director. (Not recommended due to possible conflicts of interest.)
9. Authority and duties:
 - a. **Reporting**
 - 1) To USBC Headquarters as required.
 - 2) To the board/delegates/youth representatives/members at every meeting and as needed.
 - 3) A financial report, in writing, at every board and delegate/youth representative/membership meeting.
 - 4) A written year-end financial report at a board and the delegate/youth representative/membership meeting.
 - b. **Financial.** Complying with the established bookkeeping procedures and accounting of assets and disbursements, as approved by the board, which must include:
 - 1) Receiving and issuing a receipt for all funds paid to the association within 10 days, i.e. to league secretaries for receipt of dues. (local only)
 - 2) Depositing association funds, and if applicable, Youth Leaders Chapter funds in the association's account, in a financial institution which must be federally insured or its equivalent, within seven days of receipt. Non-board members handling/depositing association or youth leaders funds are not bonded through USBC.
 - 3) Ensuring all withdrawals have two signatures. (Two members of an immediate family cannot cosign for withdrawals.)
 - 4) Providing the president with all records for monthly verifications.
 - 5) Ensuring all required financial reports are filed. (IRS, payroll taxes, state taxes, etc. Refer to Section F of this chapter.)
 - 6) Providing all documentation for the association examination of the organization's financial documents.
 - 7) Preparing a budget for board approval, if required. (Note: The finance committee reviews and monitors the budget, if applicable.) He/she is accountable to maintain the operating costs within the approved budget. If additional funds are needed, he/she must make the request per the board's approved policy.
 - 8) Establishing a procedure for retention of records that must include the financial records, to be approved by the board.

- 9) Providing a report of financial transactions as requested by the board or USBC Headquarters.
 - 10) Paying all bills authorized by the board.
 - 11) Paying all invoices/warrants from youth leaders funds that are submitted and approved by the Youth Leaders Chapter. Must ensure there are two signatures on the invoice/warrant, one of which must be an adult advisor.
 - 12) Submitting scholarship funds to USBC Headquarters for administration by SMART within 30 days of the completion of the league/tournament/event, including academic or meritorious accomplishments.
- c. **Other**
- 1) Handling association correspondence, including distributing information to and from USBC Headquarters to the respective board, proprietors and members.
 - 2) Ensuring board members have a current copy of the association's bylaws.
 - 3) Distributing meeting notifications, as designated in the bylaws.
 - 4) Maintaining the association's operations manual, if applicable.
 - 5) Receiving, compiling and filing committee reports.
 - 6) Recording and maintaining meeting minutes.
 - 7) Managing the association championship tournament(s) and all other association tournaments. The association manager is the tournament manager, or acts as the supervisor of the tournament manager.
 - 8) Managing the State Pepsi USBC Youth Championships (and all associated qualifying levels, if applicable). The association manager is the tournament manager, or acts as the supervisor of the tournament manager. (State)
 - 9) Distributing all prize funds within 30 days following the close of the tournament, except when USBC Headquarters has authorized delay in payment.
 - 10) Maintaining a record of and submitting tournament scores to USBC Headquarters as specified.
 - 11) Ordering association supplies and maintaining proper inventory levels on awards.
 - 12) Selecting/appointing individuals for additional non-board positions, if these positions have been approved by the board. Positions could include, but are not limited to, office assistant, clerk, awards chairman, etc.
 - 13) Maintaining a record of, verifying and submitting to USBC Headquarters the pinfall and number of games for all members who have participated in a league. (Local)
 - 14) Providing each league secretary a list of all league members and their National ID numbers for submission of averages. (Local)
 - 15) Providing membership records and submitting to USBC Headquarters when requested and in a format specified by USBC Headquarters.
 - 16) Ensuring lane certification and dressing inspections are completed and submitted to USBC Headquarters in a timely manner.
 - 17) Submitting the association's delegates/alternates credentials to USBC Headquarters and, in the case of the local associations, submitting delegates/youth delegates/alternates credentials to the state, within the specified formats and dates.
 - 18) Processing membership and remitting USBC national and state dues to USBC Headquarters within 20 days of receipt. (Local)
 - 19) Performing an upload of WinLABS backup twice per year. (The first one must be completed after "starting new season" in WinLABS).

- 20) Transmitting all board member information to USBC Headquarters within 20 days of election and maintaining the accuracy of the information.
- 21) Ensuring member's awards are fulfilled within seven days.
- 22) Entering Youth Leaders Chapter information (identifying youth leaders and their titles) in Win-LABS within 20 days of receipt, if there is a program in the association's jurisdiction. (Local).
- 23) Overseeing volunteer activities.
- 24) Performing other duties as prescribed by the board, the *USBC Bylaws*, *USBC Association Policy Manual*, and the association's operations manual, as applicable.

Section B. Performance Reviews

1. The association manager reports and is accountable to the board and USBC Headquarters.
2. Federal and state laws on employment must be taken into consideration.

Section C. Processing and Distributing Awards

USBC local associations are required to:

1. Fulfill and distribute all national awards within seven days of receipt of the completed application.
2. Submit high score awards applications to USBC Headquarters electronically, or as specified by USBC, within seven days of receipt of the completed application.

For member history purposes, USBC associations should transmit all earned national awards information (high score and locally fulfilled) to USBC Headquarters within seven days of the completed application.

Section D. IRS and Tax Information

The following lists some of an association's requirements for filing Internal Revenue Service (IRS) and state forms. Associations may be required to file additional forms. Contact the local IRS office, State Department of Revenue, or a tax consultant.

It is the responsibility of the **entire board** to ensure all legal documents are filed and all taxes are paid as legally required. This will include Form 990, 990-EZ, 990-N, 999-T, 1099, W2, 941 and any others as applicable. Must comply with federal, state and/or local laws in regards to small games of chance.

The following is from the IRS website: <http://www.irs.gov/charities/article/0,,id=184445,00.html>

2008 Tax Year (Filed in 2009 or 2010)	Form to File
Gross receipts normally \leq \$25,000	990-N
Gross receipts $>$ \$25,000 and $<$ \$ 1 million, and Total assets $<$ \$2.5 million	990-EZ or 990
Gross receipts \geq \$1 million, or Total assets \geq \$2.5 million	990

2009 Tax Year (Filed in 2010 or 2011)	Form to File
Gross receipts normally ≤ \$25,000	990-N
Gross receipts > \$25,000 and < \$500,000, and Total assets < \$1.25 million	990-EZ or 990
Gross receipts ≥ \$500,000, or Total assets ≥ \$1.25 million	990

2010 Tax Year and later (Filed in 2011 and later)	Form to File
Gross receipts normally ≤ \$50,000	990-N
Gross receipts > \$50,000 and < \$200,000, and Total assets < \$500,000	990-EZ or 990
Gross receipts ≥ \$200,000, or Total assets ≥ \$500,000	990

Section E. Association Tournaments

This section describes the association requirements for conducting tournaments.

1. Required Tournaments

a. Merged Associations:

- 1) Open tournament (men and women).
- 2) Women’s tournament.
- 3) Youth tournament.

If state public accommodation laws allow, the association may offer a men's only and a women’s only championship tournament rather than the open tournament. USBC will not be responsible for any consequences resulting from actions of any association that does not comply with state laws.

If an open and women’s championship tournament is offered, the association may offer a men’s only championship tournament if state public accommodation laws allow.

Contact an attorney for more information on public accommodation laws and advice on what specific practices are permitted in your state.

b. Non-merged Associations:

- 1) USBC BA. An open tournament for men and women.

If state public accommodation laws allow, the association may offer a men’s only and women’s only championship tournament, in addition to the open tournament. USBC will not be responsible for any consequences resulting from actions of any association that does not comply with state laws.

Contact an attorney for more information on public accommodation laws and advice on what specific practices are permitted in your state.

- 2) USBC WBA. Women’s tournament.
- 3) USBC Youth. Youth tournament.

c. State Associations. In addition to the above, merged and/or non-merged youth associations must conduct a State Pepsi USBC Youth Championships. (Refer to Item 9 of this section.)

2. Tournament Operation

- a. An annual championship tournament shall be conducted unless:
 - 1) The USBC national or state association championship tournament is held in the association's jurisdiction. The association board is given the authority to determine if it should forego the local tournament for that year. Refer to BOWL.com.
 - 2) Specific permission to forego the tournament can be granted by USBC Headquarters-Rules.
- b. All USBC members must have an equal opportunity to participate in tournaments of equal design and quality.
- c. The association manager is responsible for the operation of the association championship tournament(s) and all other association tournaments, either as tournament manager or as supervisor of the tournament manager.
- d. One tournament may be conducted with divisions for open (men and women), women and/or youth.
- e. Tournament scores must be submitted to USBC Headquarters as specified.

3. Certification

- a. Association championship tournaments are certified through Tournament Certification on BOWL.com.
- b. If the association conducts additional tournaments, they must be certified with USBC, including modified formats and scholarship tournaments. Scholarship funds must be submitted to USBC Headquarters for administration by SMART. Fund-raising events to benefit named charities do not have to be certified (Bowl for the Cure®, etc.).

Associations may apply for tournament certification by completing the application on-line at BOWL.com, through the Tournament Certification On-line Program.

4. Rules

- a. The championship tournament shall be governed by the following:
 - 1) Article V of the mandatory association bylaws.
 - 2) *USBC Playing Rules* book.
 - 3) *USBC Association Policy Manual*.
- b. Tournament rules:
 - 1) Are adopted by the board or a committee (more than one member) appointed by the board. A majority vote is required to adopt or change the tournament rules.
 - 2) Shall not conflict with USBC rules. The following rules do not apply:
 - 300 b, Item 1
 - a) 300 c, Item 1(b)
 - b) 301 a
 - c) 303 Item e
 - d) 309 Item b, 1 and 2 (applies for scholarship tournaments) Tournament management is required to submit financial statement in accordance with USBC Rule 309 when certifying on-line. The association shall maintain for at least one year, a prize list with the name and score of each prize winner, the prize issued and a financial statement listing all prize receipt disbursements.
 - 3) The following formats are not available for the annual association championship tournament:
 - a) Pro-Am Tournament. Rule 301e
 - b) Mail-o-Graphic. Rule 302
 - c) Modified Formats. Rule 303

- 4) Can limit the number of players classified as professional bowlers to two on a four or five-player team and one on a three-player or doubles team.
 - 5) Cannot require an average to have a minimum number of games in excess of 21 games.
5. **Entering Averages**
- a. A member who competes in leagues in other associations must enter with his/her highest league average unless the tournament rules state that only averages established in leagues under its jurisdiction are to be used.
 - b. Averages established in USBC summer leagues, which start their schedules after March 15 for the summer season, shall be accepted as official. Unless the tournament rules state otherwise, averages established in leagues, which start their schedules after March 15 for the summer season, shall be accepted when a member has a winter season average.
6. **Average Adjustment**
- The tournament manager or an authorized representative may adjust an entrant's average upward prior to bowling. Such adjustment may be appealed to USBC Headquarters within 15 days of the date of bowling or prior to the payment of prizes, whichever comes first.
- If the entrant chooses not to bowl with the adjusted average, the entry fees shall be refunded.
7. **Format**
- The tournament consists of any or all of the following and shall decide the association champions in the following events:
- a. Five, four or three-player teams.
 - b. Two-player teams. (doubles)
 - c. Singles events.
 - d. All-events.
8. **Consolidated Tournaments**
- Local associations adjacent to each other may consolidate their annual association championship tournament provided the boards of directors of the adjacent associations approve such consolidation.
- The boards of directors of the adjacent associations shall determine the management of the consolidated association championship tournament.
9. **Sectionals**
- The state association may conduct the annual championship tournament using a maximum of two (2) sectionals with the permission of USBC Headquarters. In state associations using the sectional format, the association shall have the option of determining the state champions of each event via a championship roll-off or the sectional winners of each event declared sectional champions. The rules must list the option used.
10. **Eligibility**
- a. To participate in an association tournament an individual must be a member.
 - b. **Adults.** To be a member, the individual must apply through the appropriate association and pay the appropriate dues — i.e. local, state, and National.
 - c. **Youth.** All youth members participating in youth leagues in bowling centers located within the jurisdictional boundaries of a merged or a non-merged youth association are permitted to bowl in the championship tournament even if their original

- membership was not processed through the association. If applicable, the following members must pay the state dues and local processing fee unless otherwise waived through a reciprocal agreement with the association:
- 1) Youth moving from state to state must pay state dues and the local processing fee.
 - 2) Youth moving from one local association jurisdiction to another must pay only the local processing fee.
- d. Those eligible to bowl in a non-merged state WBA are:
- 1) All women in a merged local association who join the state WBA.
 - 2) All women in a non-merged local WBA.
- Women who belong to a non-merged local BA are not eligible unless they join the non-merged local WBA and pay appropriate local and state dues. The non-merged local WBA could supply the member with a multiple membership card designating she is a member of the WBA.
- e. Those eligible to bowl in a non-merged state BA are:
- 1) All men and women in a non-merged local BA.
 - 2) All men in a merged local association. Women in a merged local association are not eligible unless they join the non-merged state BA and pay appropriate dues.
- Women in a non-merged local WBA are not eligible to participate in the state BA tournament unless they join the non-merged local BA and pay appropriate state (if applicable) and local dues. The non-merged local BA could supply the member with a multiple membership card designating she is a member of the BA.
- f. Associations may adopt additional tournament eligibility requirements provided they do not conflict with USBC rules. Tournament rules may require:
- 1) An individual to be a member of the association no more than 30 days prior to the date the player participates in the tournament.
 - 2) Members who are eligible for another association championship tournament to bowl a predetermined number of games, not more than 21, in a league within its jurisdiction.
- Members of multiple associations (state or local) who do not bowl the required number of games in any association will be eligible for the association tournament through which their USBC national dues were paid.

NOTE: Eligibility cannot be restricted for individuals who have a current average of 21 or more games in a league within its jurisdiction or members who do not hold membership in another association

11. State Pepsi USBC Youth Championships

USBC local merged and non-merged associations shall encourage and assist coaches of USBC certified youth leagues to conduct qualifying levels of the State Pepsi USBC Youth Championships. The qualifying levels will be outlined in the State Pepsi USBC Youth Championships Tournament rules.

USBC merged state associations serving men, women and youth and non-merged state youth associations that are not in direct competition with a merged association shall appoint the State Pepsi USBC Youth Championships tournament manager as directed by USBC Headquarters.

Non-merged state youth associations that are in direct competition with the merged state association shall assist the merged association by forwarding to them any funds, records or supplies held in trust for the State Pepsi USBC Youth Championships Tournament. A merged state must conduct State Pepsi USBC Youth Championships Tournament for all eligible state youth members.

Protests and appeals must be filed in writing stating the grounds for the protest/appeal. Refer to *USBC Playing Rules* book, Rule 329.