



## CHAPTER SEVEN: ASSOCIATION OPERATIONS

### Section A. Association Manager

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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. For more see Bonding Chapter Fourteen.
6. Must be a USBC member.
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. Will be appointed to serve as a youth league officer if no youth league officers are RVP compliant.

**Note:** Adult/youth officers, 18 years of age and older must be Registered Volunteers.

### Finances

The association manager is responsible for the day-to-day accounting of the association, reporting to the membership and board, and is responsible for filing of taxes.

He/she must comply with established bookkeeping procedures and accounting of assets and disbursements, as approved by the board, which must include:

1. Receive and issue a receipt for all funds paid to the association within 10 days, i.e., a local association would send a receipt to league secretaries for receipt of dues.
2. Deposit 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 are not bonded through USBC.
3. Ensure all withdrawals have two signatures. (Two members of an immediate family cannot cosign for withdrawals.)
4. Pay all bills authorized by the board, including but not limited to:
  - a. Youth funds
  - b. Youth Leaders Chapter funds
  - c. Tournaments
  - d. SMART
  - e. Membership dues to USBC via WinLABS/Youth Process and/or as required by USBC.

Must ensure there are two signatures on the invoice/warrant.

5. Provide:
  - a. The president with all records for monthly verifications.
  - b. All documentation for the examination of the organization's financial documents.
  - c. A report of financial transactions as requested by the board or USBC Headquarters.
  - d. A financial report, in writing, at every board and delegate/youth representative/ membership meeting.
  - e. A written year-end financial report at a board and the delegate/youth representative/ membership meeting.



6. Ensure all required financial reports are filed. See [Tax Requirements](#) on the Association Resource Center (ARC).
7. Prepare a budget for board approval, if required.
8. Maintain the operating costs within the approved budget. If additional funds are needed make a request to the board for their approval.
9. Establish a procedure for retention of records that must include the financial records, to be approved by the board.

### Meetings

1. Report to the board/delegates/youth representatives/members at every meeting and as needed.
2. Distribute meeting notifications, as designated in the bylaws
3. Maintain the association's operations manual, if applicable.
4. Receive, compile and file committee reports.
5. Record and maintain meeting minutes.

### Processing

1. Maintain a record of, verify and submit, within 20 days of receipt to USBC the pin fall and number of games for all members who have participated in a league, regardless of the number of games bowled. (Local)

**NOTE:** Official averages for adults are 21 games and youth are 12 games. Regardless of the number of games bowled, USBC must have all games entered into WinLABS or USBC approved processing system and transmitted to USBC.

2. Provide each league secretary a list of all league members and their National ID numbers for submission of averages. (Local)
3. Provide membership records and submit to USBC when requested and in a format specified by USBC.
4. Submit the association's delegates/alternates credentials to USBC - Associations and, in the case of the local associations, submitting delegates/youth delegates/alternates credentials to the state, within the specified formats and dates.
5. Process membership and remit USBC national and state dues (adult) to USBC within 20 days of receipt. (Local)
6. Transmit all board member information to USBC within 20 days of election and maintaining the accuracy of the information.
7. Within 7 days of receipt by the local association all USBC award applications must be processed using USBC's processing system. State associations would have an agreement for processing with one local association; or send all award applications to:
  - a. Each respective association.
  - b. USBC - Awards.
8. Run the appropriate reports in WinLABS to assist the association in managing member's awards.
  - a. Honor score awards that are sent to the association's mailing address, but have not been received in a timely manner, must be reported to USBC within:
    - 1) 30 days of the date shipped for plaques and trophies.
    - 2) 60 days of the date shipped for rings.
  - b. Honor score awards shown to have been shipped to the association, but not received, and not reported within the above timeframe will be charged to the association.



- c. USBC will charge the association for replacements when the award is processed incorrectly by the association.
- 9. Enter Youth Leaders Chapter information (identifying youth leaders and their titles) in WinLABS within 20 days of receipt, if there is a Youth Leaders program in the association's jurisdiction. (Local).
- 10. Distribute/present all national awards within seven days of receipt of an award shipped to the association.

**Commonly Asked Question – Chapter Seven, Section A**

**7A/1 Can I use the information in WinLABS for personal use?**

Regardless, if WinLABS is on your personal computer, or one the association purchased, the program and all information is the property of the association and USBC and cannot be used for personal use unless authorized by the association board.

**7A/2 I am no longer the association manager, but WinLABS is on my personal computer. What should I do?**

The program and information are the property of the association and USBC; consequently, once the transition is complete and the new association manager has the WinLABS data, you must delete the database and program. Any continued use of the program or information could result in possible suspension charges.

**7A/3 Is the association manager considered an employee or independent contractor?**

Per the IRS, the determination as to whether a worker is an employee or independent contractor is essentially made by examining the right to control whether the employer can control how, when and where the person performs services.

An *employee* is an individual who *performs services that are subject to the will and control of the association*, both what must be done and how it must be done. An association may allow employee discretion and freedom of action, but if the association maintains the legal right to control both the method and the result of the services, then the worker should be classified as an employee.

It is important to note that worker classification is not based on how the worker is paid (wage vs salary), how often the worker is paid, or whether the person works part-time or full-time. For more information, please refer to the [Tax Requirements](#) document on BOWL.com.

**7A/4 What is:**

- **Volunteer**
  - A person who gives time and generally is not compensated financially. Examples: tournament manager, tournament worker, fund-raiser help.
- **Contract Employee**
  - Someone who is not an actual employee of the association but is contracted with the association to do some work. Examples: fixes things, web designer, social media consultant, "some" tournament managers.
- **Employee**
  - Selected or hired by the association. Positions such as association manager, assistants, office help.

**Commonly Asked Question – Chapter Seven, Section A****7A/5 Is there a guide to how much and when we should pay our association manager?**

Each association creates their own pay structure based on their association income/expenses and budget constraints. Please check your state laws regarding compensation when deciding how often to pay your association manager.

**7A/6 I just got appointed to serve as a youth officer because our youth league doesn't have anyone who is RVP compliant. What should I do now?**

You should work with the youth league to get the league supervisor, or someone else associated with the league to be a Registered Volunteer. Once they are a Registered Volunteer, they can take the office position back. In the meantime, you are the youth officer and responsible for the duties of this position.

**7A/7 If we do not give out a 1099, does that mean the person does not have to report the income?**

No. All income must still be reported to the IRS.

**7A/8 When giving out a 1099, what should the association look at?**

- Different ways you give out money, i.e. brackets, prizes, volunteer help
- Combination of all money earned between Jan-Dec.
- Tournament prize winnings. (This would include every tournament bowled and each event within the tournament.)
- Volunteer money given for helping at an event.
- Money earned while helping the association.

**7A/9 What do we NOT take into consideration when giving out a 1099?**

- The person's willingness to accept a 1099.
- Reimbursement of business or out of pocket expenses
- Donations given back, such as a donation back to the association to keep the funds under \$600 or donation back towards youth scholarships.

**7A/10 Our association gives our volunteers a small amount of money per event they work. Between tournament winnings and volunteer work, one was over \$600. Does the volunteer money count?**

Yes, all money paid to an individual, (Jan-Dec) are added together and if the whole amount is over \$600, a 1099 must be given.

- Example – if they earned \$400 in total tournament winnings and \$300 as a volunteer, they should receive a 1099 form for \$700.

**7A/11 We have a husband/wife who won \$1,500 in our tournament and have assured us they file jointly. Can we give one 1099 for the two of them?**

No. Even if they both won equally and file jointly, the IRS requires a 1099 for each person on their winnings.

**7A/12 We have an individual who won \$300 in all events from one tournament and in another tournament, he won \$200 in team event and \$300 in singles. Do we give him a 1099?**

Yes, over the course of 12 months, this person is receiving \$800 from the association. All winnings for the year (Jan-Dec) are added together and if someone has over \$600, a 1099 must be given.

**Commonly Asked Question – Chapter Seven, Section A****7A/13 State association databases in WinLABS are non-transmitting. How do State associations submit Board of Director information to USBC HQ?**

State associations submit their information each season by emailing the State Officers & Directors Report form to their Regional Manager or to [associationservices@bowl.com](mailto:associationservices@bowl.com). This should be done at the beginning of each season, and whenever a change of board members takes place due to resignations or appointments.

**7A/14 How much bonding coverage does each association receive?**

Associations automatically receive \$10,000 in bonding coverage each year.

**7A/15 How does my local association go about getting a larger bonding amount than the automatic \$10,000, and what is the cost?**

Local associations can request an additional amount up to \$1M through their WinLABS program. The additional bonding coverages do not carry over from season to season so bonding amounts over \$10,000 must be requested at the beginning of each bowling season. There is no charge to associations for additional bonding coverage.

**7A/16 How does a local association request additional bonding coverage?**

Local associations go into your WinLABS program, then to Association Properties, Bonding (section), provide bank name, input new bonding amount, and transmit. (Note: Bank name needs to be the same as the bank used in the association's EFT Agreement on file with USBC.)

**7A/17 How does a state association request additional bonding coverage?**

State associations must request additional bonding coverage each season by emailing [bonding@bowl.com](mailto:bonding@bowl.com) or their Regional Manager.

**7A/18 How do we determine the proper amount of bonding coverage we should have for our association?**

To calculate your bonding coverage amount, you should add together all funds that would go through your association each year. (If all association money were in your account at the same time, how much would that be?) Include all income from membership, tournaments, fundraising, savings accounts, other events, etc.

**7A/19 What is the maximum amount of bonding coverage we can get for our association?**

USBC's bonding company has a maximum amount of \$1million, per association. Any amount needed above that would need to be purchased as an additional bonding plan through another company.

**Section B. Tournaments**

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1. Manage 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.
2. 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 for each tournament conducted.



3. Manage 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)
4. Distribute all prize funds within 30 days following the close of the tournament, except when USBC – Rules has authorized delay in payment.
5. Maintain a record of and submit tournament scores to USBC - Rules as specified.

6. **Required Championship Tournaments**

- a. Open tournament (men and women).
- b. Women’s tournament.
- c. Youth tournament.
- d. **State Association.** State Pepsi USBC Youth Championships.

Associations shall encourage and assist coaches and league officials of USBC 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.

7. **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.
  - 2) Specific permission to forego the tournament must be granted by USBC -Rules.
- b. All USBC members must have an equal opportunity to participate in tournaments of equal design and quality.
  - 1) Associations should put equal effort into their championship tournaments regardless of the number of entries.
  - 2) Any added monies should be added to each championship tournaments proportionate to entries.
  - 3) Tournament formats should be decided upon based upon feedback and the needs of the bowlers in the association.
- 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 - Rules as specified.

8. **Format**

- a. **Championship.** The association champions can be in any or all of the following events:
  - 1) Five, four or three-player teams.
  - 2) Two-player teams. (Doubles)
  - 3) Singles events.
  - 4) All-events.
- b. **Men’s only.** 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.

- c. **Consolidated Tournaments.** Two or more associations may consolidate their annual association championship tournament provided the boards of each association approves. The boards shall determine the management of the consolidated association championship tournament.

Consolidated tournaments are then operated as one event with one prize fund.

- d. **Sectionals.** The association may conduct the championship tournament in sectionals and have the option of determining the champions of each event via a championship roll-off or the sectional winners of each event declared sectional champions. The tournament rules must list the option used.

## 9. Certification

- a. Association championship tournaments are certified through the [Online Tournament Certification \(OTC\)](#) system on [BOWL.com](#).
- b. If the association conducts additional tournaments, they must be certified with USBC, using the OTC system, including modified formats and scholarship tournaments. Fund-raising events to benefit named charities do not have to be certified (Bowl for the Cure®, etc.).
- c. Scholarship funds must be submitted to SMART within 30 days of the end of the event.
- d. Submit financial report online within 30 days of the end of the event.

## 10. Rules

- a. The championship tournament shall be governed by the following:
  - 1) Article V of the mandatory association bylaws.
  - 2) *USBC Playing Rules*.
  - 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:
    - a) 300c, Item 1(b)
    - b) 301a
    - c) 303b Item 5
    - d) Youth Rules 319a, 319d and 319e, unless adopted into the tournament rules.
  - 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 3
  - 4) Can limit the number of players who are identified as professionals or who apply for membership in any professional bowling organization during the calendar year preceding the event and up through their dates of competition 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 (adult), 12 (youth) games.





### 11. 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. An official USBC average includes averages established in winter and summer seasons. Unless tournament rules state otherwise, a bowler shall use his/her highest average regardless if established in winter or summer.

**Note:** An official average includes both summer and winter averages. For example, the summer 2018 averages would be part of averages for the 2017-18 season. Averages of 21 games or more (adult) and 12 games (youth) that appear on [BOWL.com](http://BOWL.com) are considered official. If leagues and tournaments want to restrict entering averages to a particular season, they should be specific as to what averages they are using.

### 12. Average Adjustment (Rerating) – Rule 319c

The tournament manager or an authorized representative may adjust an entrant's average upward prior to bowling. Such adjustment may be appealed to USBC - Rules within 10 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.

Report all rerates to [USBC – Rules](#) and follow-up with written notification to the bowler. For a list bowlers with rerated/adjusted average click [here](#).

### 13. Eligibility

- a. **Adults.** Must be a member of the association and have paid current association dues, including National and state (if applicable).
- b. **Youth.** All USBC Youth members are eligible. Associations may have a tournament rule restricting participation. However, any such limitation may not exclude any USBC Youth member who is bowling in a league within the associations' jurisdiction.
- c. Associations may adopt additional tournament eligibility requirements provided they do not conflict with USBC rules. Tournament rules may require the following criteria to be met prior to the date the player participates in the tournament:
  - 1) An individual to be a member of the association not 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 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 (adult), 12 (youth) or more games in a league within its jurisdiction or members who do not hold membership in another association.



**Commonly Asked Questions – Chapter Seven, Section B.****7B/1 Is my association required to hold a championship tournament?**

All associations (except Affiliates) are required to hold an annual championship tournament for their constituents. All associations, regardless of charter status are encouraged to hold championship tournaments.

**7B/2 What type of tournament are we required to hold?**

Open Championship, Women's Championship, and a Youth Championship tournament at a minimum. The state is also required to hold Pepsi State Championship.

**7B/3 Can we use scores from league for our championship tournaments?**

No. Championship tournaments are required to be a bowled event. Using scores from league would make it a virtual event, which is not allowed.

**7B/4 If we bowl our championship tournament on league night, can we use those scores for league play also?**

No. Leagues and championship tournaments must be bowled events. Using scores from tournament play for your league would make it a Mail o Graphic event, which is not allowed.

**7B/5 We want to hold our championship tournament during league nights, but we have more than one bowling center. Can we do this?**

Yes, please see 5B/3 and 5B/4. Also, this format would require prize money collected to remain with each center. The association can declare co-champions for each event or require the champions to have a playoff. Money collected in expenses could be used for lineage and prizes in the playoff.

**7B/6 Can we forgo our tournament for one year?**

Yes, the association may waive the open, women's and youth local championships if they are hosting either the state open, state women's, state youth or one of the national championship tournaments. This would be a board decision and should be reviewed carefully before deciding which, if any of the local tournaments they will waive.

**7B/7 What can we do to get interest back into our tournaments?**

Conduct a survey. If the format or timing of the championship is not successful, the association needs to look at modifications to present a quality event. We would suggest the association president appoint a committee to conduct a survey of members to identify issues that could increase participation. Committee members should include non-board members who are active in tournament competition. Find out:

- When do people want to bowl
- Team, Doubles and Singles vs. Doubles and Singles

Members of the association may not be aware of the competition the association offers. Special attention should be made to increase awareness and participation among this important group. Members should be encouraged to take part in the fun and excitement of tournament bowling

- **Incentives.** Look to provide incentives to centers and leagues to encourage members to participate in the championship event. Possible incentives could be a small trophy or award that is presented to the league with the most teams entered in the annual event.

- **Visit leagues.** Officers and directors of the association should visit every league to promote the event and solicit entries.
- **Sponsorship.** Commercial sponsorship has helped many organizations improve their special events. Many tournaments have found business sponsorships of their tournaments to be quite beneficial.
  - Determine a list of potential contacts. Assignments should be made to make sales calls. Some examples are restaurants, casinos and any local businesses that may benefit. Check with the center, they may have leads.
  - Be prepared. Know exactly what your tournament can offer the sponsor as well as what is expected of the sponsor. For example, participants could receive a coupon book with special promotions such as buy 1 get 1 free, 10% off total bill, etc. Tournament management should be willing to negotiate. Don't give up if you don't find the right sponsor immediately.
  - The sponsor(s) names can be used on the entry forms, poster, banner or other promotional materials.
  - Look for ways to involve your sponsor(s) in such things as the opening ceremonies, awards banquet or photographs with the champions. This will show you appreciated the sponsorship and are interested in making it worthwhile to both parties.
  - The sponsor can also be offered space in the promotional literature, yearbook, website, awards banquet program, etc.
  - Obtain commissions or sponsorship for rooms booked
- **Entries Promotion.** The best way to obtain entries is personal contact. Don't just drop off entry forms at the bowling center. Ask center management if you can make announcements or, even better, visit leagues, shake hands and hand out entry forms. Here are some additional promotional suggestions:
  - Posters and banners
  - Consider "themed" squads:
    - Friendship/Buddy
    - Scratch
    - Beginner
    - Charity
    - Senior
  - For non-local or out-of-state bowlers:
    - Obtain rate guarantee from hotels
    - Obtain discounts at restaurants/local businesses
  - Take reservations for next year. If possible, take "down payment" to hold the spots for next year.
  - Tournament or center website
  - Email - Its fast, easy and inexpensive
  - Social Media such as Facebook
  - Incentives:
    - Group or squad organizers. For example, a free entry or cash bonus to anyone who brings in a specified number of entries or the most entries.
    - Discounts for Early Registration/Payment

- Prizes for:
  - Strikes in a row
  - Strike out in 10th frame all 3 games
  - Clean game or series award
  - All spare game
  - Strikes in 3-6-9 or designated frames
  - Women's 200 games

**7B/8 If we do not give out a 1099, does that mean the person does not have to report the income?**

No. All income must be reported to the IRS.

**7B/9 We have a husband/wife who won the \$1,500 in our tournament and have assured us they file jointly; can we give one 1099 for the two of them?**

No. Even if they both won equally and file jointly, the IRS requires a 1099 for each person.

**7B/10 We have an individual who won \$300 in all events from one tournament and in another tournament, he won \$200 from team event and \$300 in singles. Do we give him a 1099?**

Yes, this person is receiving \$800 from the association. All winnings for the year (Jan-Dec) are added together and if someone has over \$600, a 1099 must be given.

### Section C – Other Duties

1. Order association supplies
2. Handle association correspondence, including distributing information to and from USBC to the respective board, proprietors and members.
3. Ensure board members have a current copy of the association's bylaws. Perform other duties as prescribed by the board, the USBC Bylaws, *USBC Association Policy Manual*, and the association's operations manual, as applicable
4. Oversee volunteer activities.
5. Select/appoint 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. In considering the possibility of authorizing additional positions (such as assistant association manager, office assistant, etc.) to assist in the day-to-day operations of the association, the board should take into account both the resources available, as well as whether there is a need for the position. The board:
  - a. Makes the decision if additional positions are necessary.
  - b. Determines salary maximum, if any.

The Association Manager:

- a. Develops job descriptions(s) and includes in association Operations Manual.
- b. Hires/selects the individual(s).
- c. Determines salary, if any, up to the maximum set by the board.
- d. Reports performance to the board.