

The Onboarding Experience



2024 USBC CONVENTION

E•X•P•E•R•I•E•N•C•E
is everything

Mike Larsen- Sr. Director of Association Services
David Fields- Regional Manager South

A **Future** FOR
THE **Sport**

Board Member Orientation



New Board Orientation

Orientation is important because:

- It lays a foundation for the new director's entire tenure
- First impressions are important since they establish the basis for everything that follows.
- Without orientation, a new director sometimes feels uncomfortable in his/her new position and takes longer to reach his/her full potential.

New Board Orientation

- Provides the new director with concise and accurate information to make him/her more comfortable in the position
- Encourages confidence and helps the new director adapt more quickly
- Contributes to a more effective, productive board
- Promotes communication between the board and the new director
- Improves director retention

Orientation Recap

- Transfer of Knowledge
- Establish Focus
- Understand roles and responsibilities
- Align Expectations

Today's Volunteer

- "We need people to help at our tournaments"
- "We need younger people"
- "Three of us do all the work"
- "The new board members never come to the meetings"

Hope



**SOUTHERN
NEVADA**

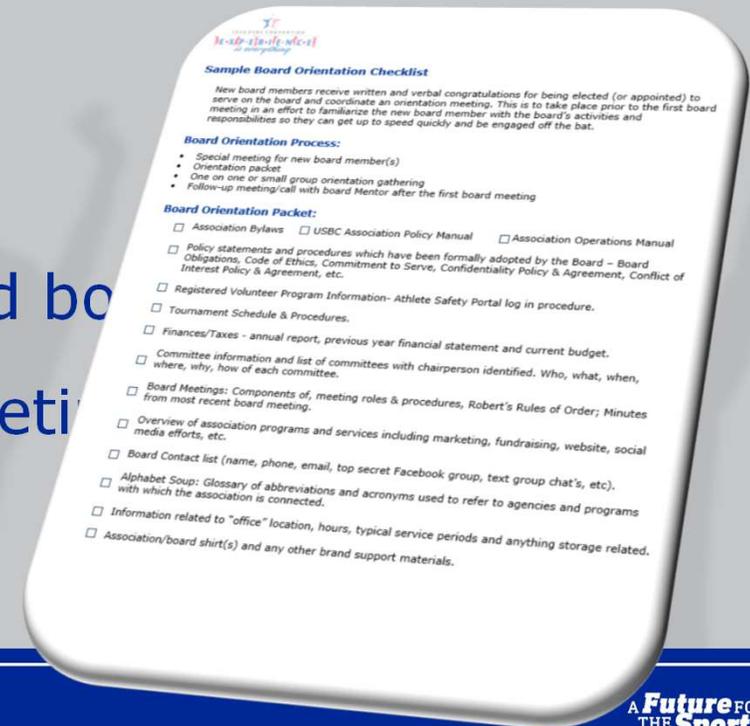
Tammi Duffy - VP

Expectations

Board Member Orientation

Sample Board Orientation Checklist

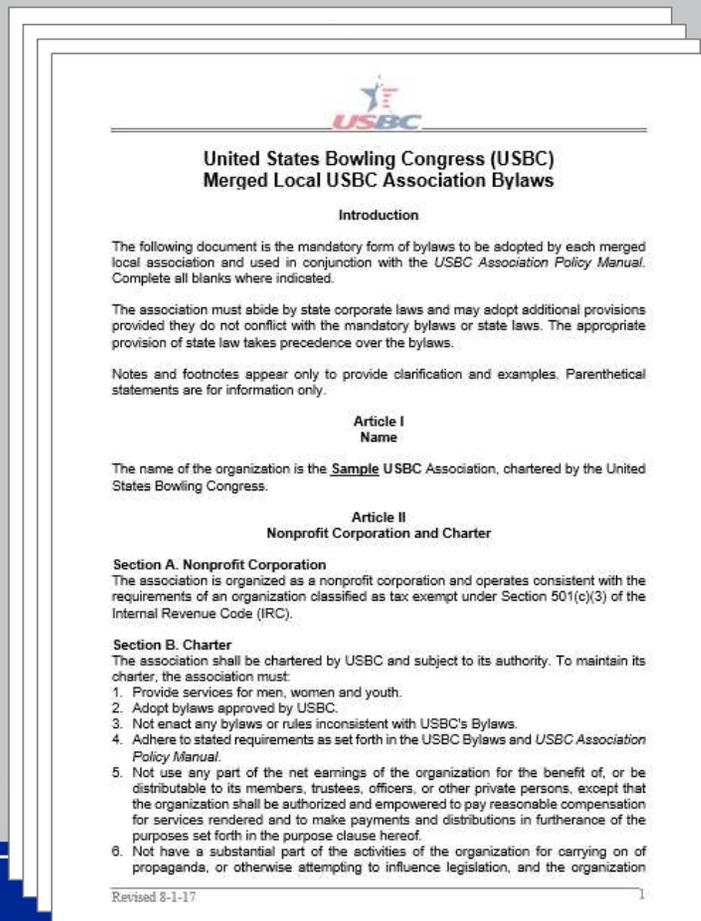
- Board Orientation Packet
- Board Orientation Meeting
- Personal contact with experienced board member
- Follow-up contact after board meeting



Board Orientation Packet



Board Orientation Packet



Local / State Association Bylaws

Board Orientation Packet



Board Orientation Packet





Financial

Establishing a Procedure for the Handling of Funds
 On the whole, overseeing the financial responsibilities of an association is one of the most important responsibilities of the board. To significantly decrease the risk of funds being misplaced or mishandled, the balances.

Approving the Financials
 The most important of it be federally insured. To be federally insured by a federally insured, a seal.

Associations are not maintained at an insured.

Designating Board Members
 In choosing who will requirements, as well signatories on an association's immediate family members. Associations are encouraged however, as this allow still be withdrawn.

An association may file expedient manner. For are chosen to act as a board must not authorize.

Ensuring All Money
 Being able to verify meticulous records of issuing a receipt for all been deposited will be.

To verify all money have been issued. Further verify that deposits with the association manager.

Revised 8/1/10



Tax Requirements

Relevant IRS Forms

NOTE: USBC Headquarters is not responsible for misinterpretation of information in this section. Associations should contact the Internal Revenue Service (IRS) or a tax advisor experienced with tax-exempt organizations.

Form	Description
990, 990-EZ, 990-N	Used for filing the association's annual information (e.g., revenue and expenses). A 990, 990-EZ or 990-N is REQUIRED for all associations regardless of gross revenue.
990-T	Used to report an association's unrelated business income.
941/944	Used to report employment taxes withheld from employee's wages (941 - quarterly)(944 - annually).
1099-MISC	Used to report any compensation paid (\$600 or greater) to an individual that is not an employee of the association.
W-2	Used to report any wages paid to an employee.

More information on the forms above can be found by reviewing the instructions for each, which are available at www.irs.gov.

Additional information about each of the above listed Forms is provided below.

Form 990, 990-EZ, 990-N (Annual Information Return)
 All tax-exempt organizations are required to file an annual information return regardless of gross receipts. See the chart below to determine which annual information return is required for your association (Form 990, Form 990-EZ or Form 990-N). These forms are reviewed by the IRS and the public to determine how a non-profit organization disperses and uses its funds and assets.

****Until the 2008 tax year, no annual information return was required by an association with gross receipts less than \$25,000. As of 2008 and forward all associations are required to file an annual information return (Form 990, 990-EZ or 990-N).**

Board Orientation Packet

Committee Information

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. Committee Information includes:

- Committee Reports
- Committee Types (Standing & Optional)
- Removal From a Committee

Reports

All committees should give regular reports of their activities to the board; a progress report during committee tasks and a final report upon completion of said task. A committee report should describe the following:

- Procedures used to gather data
- Information or facts obtained
- Conclusions drawn from information
- Recommendations (if requested)

Once developed, the committee report must be adopted by a majority of the committee members. The written report is then submitted to the association board. It is also customary for committees to present reports at the association's annual meeting. These reports outline the committee's accomplishments from the previous year, as well as its future tasks.

Whether a committee report is presented verbally to the board generally depends on whether a copy of the report was included with the board meeting notice. Written reports should be submitted to the board at least 3 days prior to the meeting for inclusion with the notice. If the written report is not submitted with the meeting notice, the chair of the committee distributes the report at the meeting and verbally presents a summation of the report. The board is then asked to accept the report. The board may choose not to have a committee report presented verbally if it is included with the meeting notice, as it is assumed it has been read.

Types

Committees are classified into two different groups - standing (mandatory) committees and optional (suggested) committees.

Each committee has a chair and recording secretary - the chair is chosen is dependent upon whether the committee is standing or optional. The chair is responsible for scheduling committee meetings and making sure reports are given at board and membership/delegate meetings. The recording secretary takes the meeting minutes.

Members of the youth committee or optional committees do not have to be USBC members or members of the board. For example, an association may find it beneficial to include a certified public accountant on the finance committee or a parent on the youth committee, despite the individual not being a member of the association. However, if they are not a board member, the committee member would not have a vote on decisions, just voice.

Standing Committees (Mandatory)

According to Robert's Rules of Order, Newly Revised, a standing committee is required to report at the annual meeting, or as needed, on everything referred to it during the year.

The standing committees are:

- Finance / Audit
- Youth (merged only)

Finance

The purpose of the Finance Committee is to assist with the association's finances and audit(s). This committee is responsible for reviewing and monitoring the annual budget, if applicable, and other financial matters.

Youth (Merged Only)

The Youth Committee is a standing committee designed to monitor the programs and services provided to youth members. All merged associations are required to have a Youth Committee.

The Youth Committee's responsibilities are defined in the USBC Bylaws and USBC Association Policy Manual. Should the board give additional responsibilities to the Youth Committee, they would be defined in the association's operations manual, if applicable.

Authority

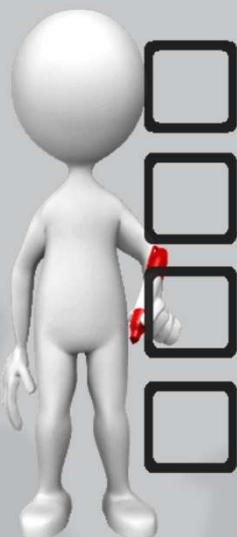
The Youth Committee monitors, promotes, reviews, and recommends youth programs and services. The board uses that information to make final decisions.

While the Youth Committee is not a decision making body, its work can have an impact. Each member of the Youth Committee has a responsibility to the youth members they represent. To ensure the interests of youth members are recognized, the Youth Committee should be proactive in presenting its recommendations to the board.

Because members of the Youth Committee will have a great deal of knowledge and experience regarding youth activities, the board is encouraged to seek the expertise of the Youth Committee whenever decisions are to be made which will affect youth members. For instance, the board could ask the Youth Committee to develop...



Board Orientation Packet



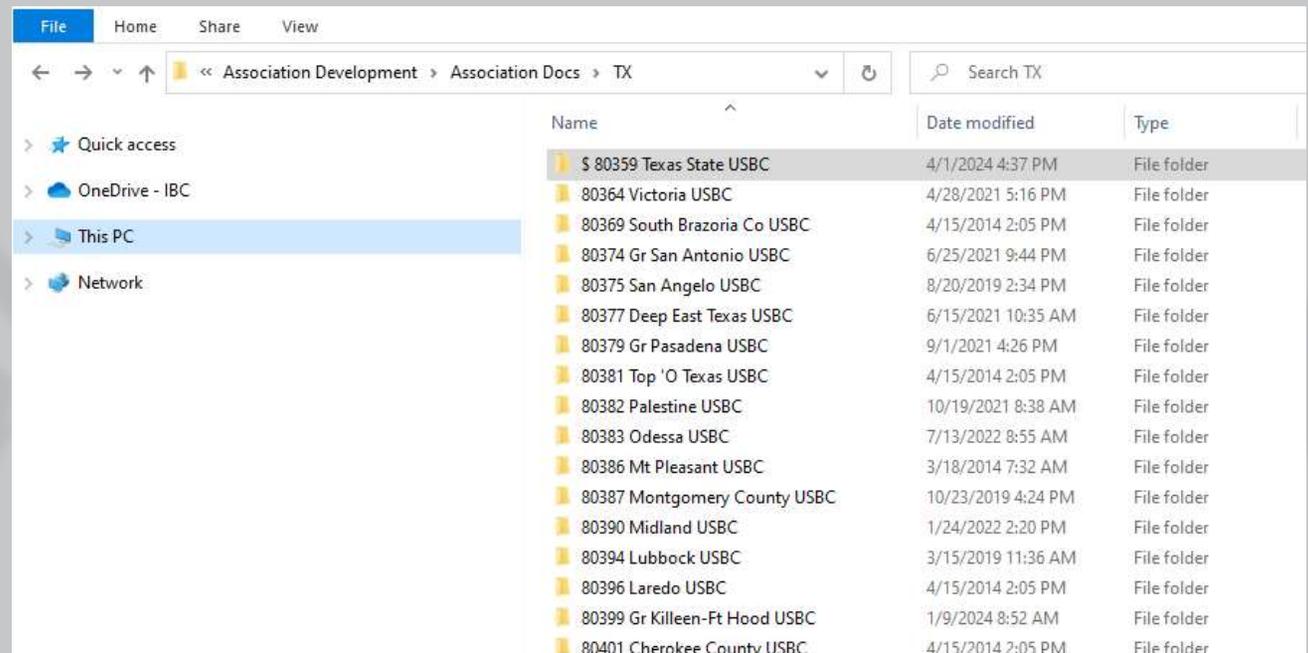
- Minutes from most recent Board meeting
- Tournament schedule and procedures
- Board contact information
- Additional services (social, fundraising, etc)
- Alphabet Soup: acronyms & abbreviations
- Listing of facilities owned/rented
- Association shirt - brand materials



Where do you keep the packet?

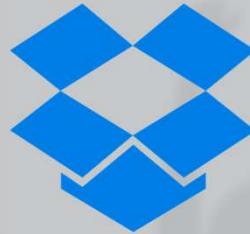
Document Storage

- USBC “Cloud”



Document Storage

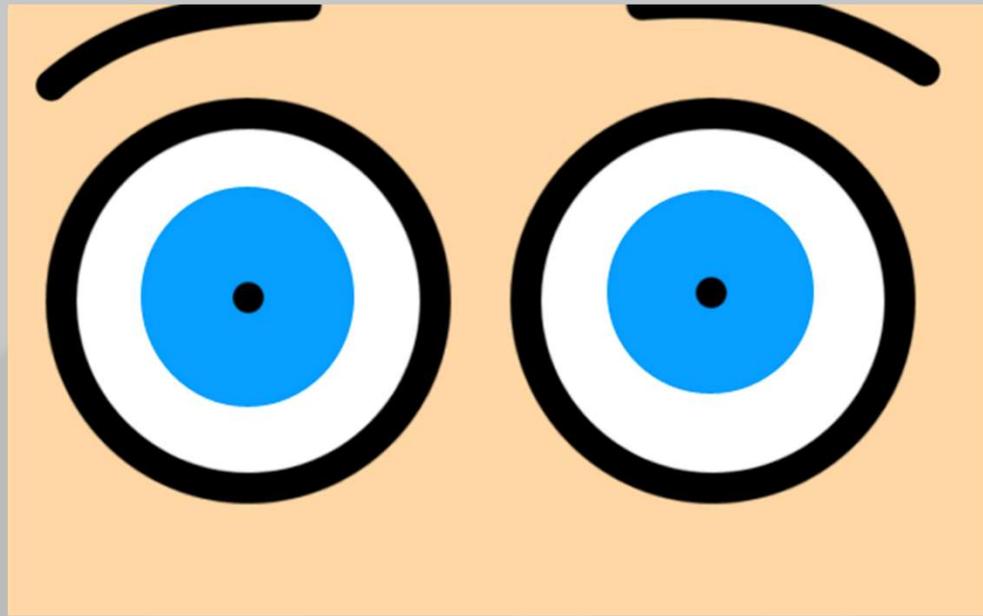
- USBC “Cloud”
- Google Drive – 100GB for \$1.99/month
 - Techsoup.org
- Dropbox – 2GB free
- OneDrive – 5GB free





Imagine that...

Mentor



Contact with a Mentor

- Having a mentor makes it more comfortable to ask questions for the new board member
- More personal relationship
- Insight into board dynamics and processes
- Committee interest
- Less formal

Action

- What – Host a board orientation this summer/fall
- Who – Your President & AM or veteran board leader
 - Mentor
- When – Prior to the first board meeting this fall
- Where – Casual environment, convenient
- Why – This is the best opportunity to improve your board's new volunteers by working with them on an orientation

Research shows...

Very few people are born with the natural aptitudes and skills desired to serve on your association's board.

