

STATE SOCIETY OF PROFESSIONAL ENGINEERS

BEST PRACTICES TASK OUTLINE

Membership Database

- 1) Maintain a perpetually current list of members, dues paid and member years.
- 2) Regularly check NSPE's on line rosters against your local database.
- 3) Maintain a clearly written description for each type of membership and discounts your state offers.
- 4) Understand the dues billing process.

Money & Finance

- 1) Secure a Tax Identification Number "TIN" for your State Society.
- 2) Open a checking account in the name of your State Society using the TIN.
- 3) Maintain an accounting system using either QuickBooks or Peachtree.
- 4) Have a quarterly review of your accounting by a CPA.
- 5) Adopt a simplified budget at the annual meeting of your State Society.
- 6) Reconcile the checking account monthly.
- 7) Annually file IRS Form 990 [Informational Tax Form].
- 8) At the end of your fiscal year, have a CPA close the books and produce annual statements.

Sales & Marketing

- 1) Develop a tri-fold brochure about your State Society for use in promoting your organization. A template is available from NSPE.
- 2) Develop a simple website and link to the NSPE national website. A simplified template is available from NSPE.
- 3) Contact each member monthly. Assign every member to a member of your board of directors.
- 4) Create an endless list of opportunities to serve so every member can find a place to contribute his/her time to the organization.

Government Affairs

- 1) Know your state licensure laws. Get a copy of the law and know it.
- 2) Develop a list of no more than three issues that can be addressed by government
- 3) Maintain a list of state legislators containing all contact information.
- 4) Find out who among your members knows members of the legislature and important government employees.
- 5) Develop a list of chief staff persons for each legislator. Have contact information for each person.
- 6) If you have a Political Action Committee (PAC), know the rules and get into strict conformity with those rules.

Documentation

- 1) Have a copy of the Articles of Incorporation by which your State Society was incorporated in your state. Know where the original document is. Some Societies will also have a “Constitution.”
- 2) Make sure all officers and directors have a current copy of the State Society Bylaws.
- 3) Know the whereabouts of the IRS letter that gave your Society its EIN.
- 4) Know the whereabouts of your State’s letter that gave your Society a State tax number.
- 5) Know the whereabouts of the IRS “Letter of Determination” that gives your State Society its exemption from federal income taxes.
- 6) Have in the files copies of all past years’ Form 990 “Informational Tax Returns.”
- 7) Know the whereabouts of any federal trademark certificates issued from the Patent & Trademark Office.
- 8) Have a file of all federal copyrights filed at the Copyright Office of the Library of Congress.

Relationships

- 1) NSPE: maintain the list of your representatives to NSPE and their contact information.
- 2) NSPE: maintain a list of key NSPE staff and their principal responsibilities so you can efficiently get answers to your questions.
- 3) ASAE (American Society of Association Executives): have a member of your board maintain a membership to ASAE. It is a good resource for any non-profit organization.
- 4) Corporate: Know which local/state organizations fund events and projects related to your State Society and make regular contacts with their point persons.
- 5) Media: Develop a list of newspaper, radio, TV outlets. Know who their reporters are and how to contact each.

Risk Management

- 1) Conduct an annual assessment of risk exposure.
- 2) Purchase insurance only for risks that can’t be otherwise managed
- 3) Conduct annual board training on all areas that impact risk management
- 4) Conduct regular tax and anti-trust training for board members