Section/Region Officer Training

2020-2021
ASHE Mission Statement

Provide a forum for members and partners of the highway industry to promote a safe, efficient and sustainable transportation system through education, innovation and fellowship
ASHE Organization

• National Board of Directors
• 20 National Committees
• 8 Regions (5 Operational)
• 44 Sections, 16 States
• Includes Government, Consultant, Contractors, Suppliers and other supporters of Transportation
ASHE Key National Contacts

• President (2020-2021) – Tim Matthews (Tmatthews@dot.ga.gov)
• Administrative Assistant – Nancy Morisi (nmorisi@ashe.pro)
• National Secretary – Tom Morisi (ashenationalsecretary@ashe.pro)
• National Treasurer – Frank O’Hare (ashenationaltreasurer@ashe.pro)
• Regional Contacts – Officers and Committee Chairs
ASHE National Directors

• Northeast Region – Don DiZuzio, Kathryn Power, Rob Prophet
• Mid-Atlantic Region – Michael Bywaletz, Roger Carriker
• Great Lakes Region – Frank Bronzo, Jim Shea
• Southeast Region – Scott Jordan, Jason Hewatt
• Southwest Region – Nikole Cao
• 1st Vice-President – Leigh Lilla
• 2nd Vice-President – Stan Harris
ASHE Committees

- Executive
- Budget Audit
- Constitution/By-Laws
- Membership
- National Conference
- New Sections
- Nominating
- Operations and Oversight
  Resource Center
  Society History
  National Project Awards

- Outreach
- Partnerships
- Professional Development
- Public Relations
- Scanner
- Strategic Plan
- Student Chapter
- Technology
  Website
  Cloud
  Database
ASHE Sections – Key to Society

Healthy Sections are the key to ASHE. Most ASHE activity takes place at the Section level including:

• Over 380 annual events/meetings
• More than 9,555 Professional Development Hours awarded
• $250,000+ in scholarships awarded!
ASHE Section/Region Officers

- President
- Vice-President
- Secretary
- Treasurer
- Immediate Past President
- Other Directors
ASHE Section President Duties

- Preside over Section Meetings
- Ex-officio Member of Committees
- Chair Section Board of Directors
- Appoint Committee Members
- General Oversight of Section Affairs
ASHE Section Vice-President Duties

• Preside over Meetings in absence of President
• Participate in Section Board Meetings
• Other Duties as Directed by President
ASHE Section Secretary Duties - General

• Responsible for Preparing, Maintaining and Keeping all Section Records, including Section Roster maintenance
• Record and Distribute Meeting Minutes
• Handle Section Correspondence
• Principle Liaison with National Secretary
• Coordinate with Section Membership committee and Treasurer
ASHE Section Secretary Duties - Membership

• New Members
  • Review applications and forward to National along with Initiation Fee
    • National Office: 610 Radcon Street, Johnstown, PA 15904
    • Email: ashenationalsecretary@ashe.pro or nmoris@ashe.pro
  • Membership Fee: Submit total fee of $45.00 along with Membership Application
    • Fee includes $25.00 Initiation and Current Year Assessment $20.00.
    • Note that Section dues are additional and vary by Section.
  • National will return to the Section Secretary a membership certificate and pin for each new member.
ASHE Section Secretary Duties - Membership

• Membership Transfers
  • Notify National Secretary via email at ashenationalsecretary@ashe.pro
  • No fee to transfer member
  • National will make adjustments in the National Database

• Member Drops
  • Provide the National Secretary with a list of members to be dropped at anytime during the year. This mostly occurs at Assessment time.
ASHE Section Secretary Duties - Database

• National Membership Database – **The only official ASHE members are those registered in the national Database.**
  - Sections may access/update database at [http://database.ahse.pro/sections](http://database.ahse.pro/sections)
  - Select Section name from pulldown and input password obtained from National Secretary
  - Section may updated all data but cannot add or drop members. They can also create member lists and export roster to Excel spreadsheet
  - Update Member information including address/employer/telephone number/email address – both work and personal

• The Secretary shall regularly review the National Database and notify the National Secretary of any discrepancies.
ASHE Section Secretary Duties - Database

• Individual Members may also update personal information via National website at www.ashe.pro
  • Click on Membership pulldown then on “Update Member Info”
  • Log in with username and password
    • Username = Member ID Number
    • Password = Zip Code for main mailing designation
ASHE Section Secretary Duties - Assessment

• ASHE’s fiscal year is June 1 to May 31
• On or about June 1, the National Secretary takes a snapshot of the National Database, recording the membership for each Section. This establishes the Annual Assessment amount.
• On or about August 1, National will forward invoice to each Section.
• Invoice is payable upon receipt but no later than October 1 of the fiscal year.
  • 10% penalty will be charged to Sections who have not paid Assessment by October 1.
ASHE Section Secretary Duties - Assessment

• The following information must be returned to National when submitting Assessment payment
  • Completed invoice noting number of drops and number of new members. Note that invoice will adjust automatically to provide for a new total based on drops and new members.
  • Complete list of those members being dropped from the Section.
  • Completed Membership Application for those new members being added to the Section.
ASHE Section Secretary Duties - Orders

• The following items are available for purchase from National. Contact the Administrative Assistant at nmorisi@ashe.pro.
  • Replacement Member Pins: Cost = $5
  • Lifetime Member Pins: Cost = $5
  • Section Past President Pins: Cost = $75
  • Region Past President Pins: Cost = $75
  • Replacement Banners: Call ahead for pricing. Typical cost is approximately $350
ASHE Section Secretary Duties – Misc.

• Prepare and submit to Region Secretaries a report in the requested format prior to each National Board meeting. Typically this occurs four times per year.

• Submit IRS Form 990 (current version), when completed by Section Treasurer to the National Treasurer no later than June 15.

• Invoice Section membership annually for application dues.

• As soon as the Section Slate of Officers is available, please provide a list to the Region Secretary. Information should include name, position, mailing address, work or cell phone number and email address. Region Secretary will then forward to National.
ASHE Section Secretary Duties – Misc.

- Assure scanner articles are submitted by the deadline date established for your Section.

- Arrange for Section Banner to be taken or mailed to the hosting National Conference site or had carried via a Section member attending the National Conference.

- Sections offering CEU credits at their technical sessions must, by December 20, provide National with a list of those individuals receiving CEU credits.
ASHE Section Secretary Duties – Closing

• All information provided here can be found in the Operations & Resource Center under Operations, Section Secretary Duties (D19)

• If you ever need any help with anything at all, please contact us:
  • Tom Morisi, National Secretary, ashenationalsecretary@ashe.pro.
  • Nancy Morisi, Administrative Assistant, nmorisi@ashe.pro.

• We are always here to help!
ASHE Section/Region/Conference Treasurer Duties

• ASHE is classified by IRS as a 501 (c) 6 Organization – NOT 501 (c) 3. National Treasurer can provide information on differences

• All levels of organization must adhere to IRS requirements

• See IRS publication 557 for IRS requirements (available from National Treasurer)

• Accurate financial records are essential to maintaining Tax-Exempt status

• Sections are responsible for following state and local laws pertaining to non-profit organizations.
ASHE Section/Region/Conference Treasurer Duties

• Manage Section funds including receipts, safekeeping and disbursement
• Manage Section bank accounts
• All accounts must have a Federal Identification Number (EIN)
• All existing Sections have EIN – New Sections and Conferences must obtain
• Obtain EIN by completing Form SS-4, available from financial institutions or via internet. Contact ASHE National Treasurer for assistance unless you want to do your own taxes and deal with the IRS!
• Account should be listed as American Society of Highway Engineers (Region or Section name)
• Account information must be provided to National Treasurer and National Secretary
ASHE Section/Region/Conference Treasurer

Duties

• Section bank accounts should have name “ASHE – XXX Section” or “American Society of Highway Engineers – XXX Section”. Example: American Society of Highway Engineers – Kansas City Section, or ASHE – Kansas City Section, or 2023 ASHE National Conference.

• Section accounts must have at least two Section Officer’s listed on signature card and all checks must be signed by two Officers.

• Prepare periodic financial reports as may be required by National.

• Reconcile receipts from ticket sales, registrations, etc. with attendance.

• Work with Section committees to establish procedures for maintaining records.

• Prepare a list of cash disbursements, showing check number, date, payee and amount for approval by Section Executive Board at its regular meetings.

• Record all expenses and income, along with net income.
ASHE Section/Region/Conference Treasurer Duties

• Adhere to Generally Accepted Accounting Principles (GAAP).
• Perform monthly reconciliation of bank accounts.
• The Treasurer shall be accountable to the Board of Directors or the Conference Committee.
• Request an annual independent review of Section/Region/Conference financials to Section/Region Directors or Conference Committee.
ASHE Section/Region/Conference Treasurer

Duties

• Responsible for completing reports and forwarding to National by dates shown:

  January 15 – IRS Form 1099 – Income Paid to Individuals. Section files with individual and IRS, copy National. Scholarship recipients are exempt.

  January 15 – Contributions – Written Acknowledgement (copy National)

  June 15 – Year End Financial Report (Form 990)

  July 15 – Advertising Income Report
ASHE Section/Region/Conference Treasurer Duties

• IRS Form 1099

Must be filed for individuals who received money for various duties or travel expenses in excess of filing requirements.

Examples include compensation paid to a Section Secretary or fees paid to free-lance editor or designer of web site.

Complete and file IRS form 1099 and send copy to National Treasurer.

Form requires Name, SSN, Home Address, Amount Paid, Salary/Payment, Expense Insurance, Travel Expenses (or Per Diem).
ASHE Section/Region/Conference Treasurer

Duties

• Contributions to ASHE in excess of $250.00 in value (goods and services) must be acknowledged by Section in writing.

• Sections that use sponsorship income to offset cost of producing Section publications (newsletters, etc.) are to report this income to National by July 15 for the preceding year.

• When requested, supply form W-9, Request for Taxpayer Identification Number and Certification. Form to be signed by a Section officer. Examples can be obtained from National Treasurer. Do not use the National EIN on the W-9.
ASHE Section/Region/Conference Treasurer
Duties

• IRS Form 990
  Report includes total income and expenses for the year.
  Must submit to National Treasurer in pdf format by June 15.
  Send copy to the Region’s National Board Members.
  Complete on form approved/provided by National
  Form must indicate Section/Region/Conference name and must
  be signed by a current officer.
  Unsigned 990’s will be returned.
# ASHE IRS Form 990 - Data Sheet

## Treasurer's Report as of May 31, __________

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Checking Account Balance</td>
<td>$</td>
</tr>
<tr>
<td>Investment Account Balance</td>
<td>$</td>
</tr>
<tr>
<td><strong>TOTAL ASSETS (Sum of Above):</strong></td>
<td>$</td>
</tr>
</tbody>
</table>

## Audit as of May 31, (Previous Year):

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Checking Account Balance</td>
<td>$</td>
</tr>
<tr>
<td>Investment Account Balance</td>
<td>$</td>
</tr>
<tr>
<td><strong>AUDIT TOTAL:</strong></td>
<td>$</td>
</tr>
</tbody>
</table>

## Cash Received to May 31:

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Member Initiation Fees</td>
<td>$</td>
</tr>
<tr>
<td>Annual Membership Fees</td>
<td>$</td>
</tr>
<tr>
<td>Dinner Ticket Sales</td>
<td>$</td>
</tr>
<tr>
<td>Investment Income</td>
<td>$</td>
</tr>
<tr>
<td>Checking Account Interest</td>
<td>$</td>
</tr>
<tr>
<td>Other Income</td>
<td>$</td>
</tr>
<tr>
<td><strong>TOTAL RECEIPTS:</strong></td>
<td>$</td>
</tr>
</tbody>
</table>

## Disbursements to May 31:

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Member Initiation Fees to National</td>
<td>$</td>
</tr>
<tr>
<td>Annual Membership Fees to National</td>
<td>$</td>
</tr>
<tr>
<td>Office Supplies, Equipment, Software, Etc.</td>
<td>$</td>
</tr>
<tr>
<td>Printing</td>
<td>$</td>
</tr>
<tr>
<td>Postage, Fax, Copying, Telephone</td>
<td>$</td>
</tr>
<tr>
<td>Dinner and Meeting Expenses</td>
<td>$</td>
</tr>
<tr>
<td>Other Expenses</td>
<td>$</td>
</tr>
<tr>
<td><strong>TOTAL DISBURSEMENTS TO MAY 31:</strong></td>
<td>$</td>
</tr>
</tbody>
</table>

**TOTAL ASSETS: (Balance Must Equal Total Assets Above)** $   

I certify that the above is true and correct to the best of my knowledge.

<table>
<thead>
<tr>
<th>Treasurer Signature</th>
<th>Printed Treasurer Name</th>
<th>Section/Region/Conference</th>
<th>Date</th>
</tr>
</thead>
</table>
ASHE Section/Region/Conference Treasurer Duties

If you need help:

1. Region Treasurer
2. National Treasurer
3. National’s Accounting Firm – CPA Associates
4. National’s Law Firms

Questions submitted by Sections, Regions and Conferences to the National Treasurer are answered with copies to the appropriate National Board Members.
ASHE Region Officer Duties

• Regions established to improve efficiency and communication
• Duties of President, Secretary and Treasurer are similar to Section positions
• Region Secretary is primary conduit for communications between National and Sections
• National Directors assist with communication between Sections and National.
• Regions have same reporting requirements as Sections (IRS 1099, IRS 990, Advertising income, contributions, etc.)
ASHE Communication Plan

• Plan found on ASHE web site
• Communication generally flows from National to Regional Secretaries, then to Sections
• Region Secretary will compile responses and submit requested information back to National
• National Directors assist with communication between Sections and National.
• There are exceptions, see Communication Plan
ASHE Communication Tools

• Web site: http://ashe.pro
• National Officer contact info at: http://ashe.pro/oanddd.html
• ASHE documents on web site at: http://ashe.pro/resourcecenter.html
• ASHE Cloud – server.ashe.pro
Social Media 101 for ASHE Sections
SOCIAL MEDIA STATISTICS

96% On LinkedIn
84% On Facebook
61% On Twitter
45% On Instagram
34% YouTube

%AGE OF AEC FIRMS SURVEYED BY ZWEIG GROUP
ASHE NATIONAL SOCIAL MEDIA PLATFORMS

- **LINKEDIN**  
  https://www.linkedin.com/company/ashe-national/  
- **FACEBOOK**  
  https://www.facebook.com/ashenational/  
- **TWITTER**  
  https://twitter.com/ashe_national  
  @ASHE_NATIONAL  
- **INSTAGRAM**  
  https://www.instagram.com/ashe_national/  
  @ASHE_NATIONAL  
- **YOUTUBE**  
  https://www.youtube.com/channel/UCn7wnZufQ1GsGxH0jR7Q5A
FOLLOW & SHARE POSTS

- ASHE NATIONAL
- OTHER ASHE SECTIONS
- ASHE SCANNER
- MEMBER FIRMS
- LOCAL DOT
- LOCAL TRANSPORTATION AGENCIES
ENGAGE

- BOARD
- MEMBERS
- MEMBER FIRMS
- DOT
- TRANSPORTATION AGENCIES
- SOCIAL MEDIA CONTESTS
- CREATE A HASHTAG
ASHE National Initiatives

Why Join?

ASHE

Bring a Colleague

Make a Friend

Show why we are the Premier Networking Organization
 Invite co-workers to an event
 Share your enthusiasm for ASHE
 Make new personal and professional Friends

Just $70 /yr or less to join
www.ashe.pro

http://ashe.pro/membership/become-a-member/

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Transportation-related news
ASHE news, events and happenings

We Help Build Bridges.

Follow Us!

Communication, Education, Networking, Fellowship

http://ashe.pro/membership/become-a-member/
Closing

• Thank you for attending!
• Comments on Training can be sent to:

Stan Harris
Chair, Operations and Oversight Committee
Stan.harris@Stantec.com