

Section/Region Officer Training

2023-2024



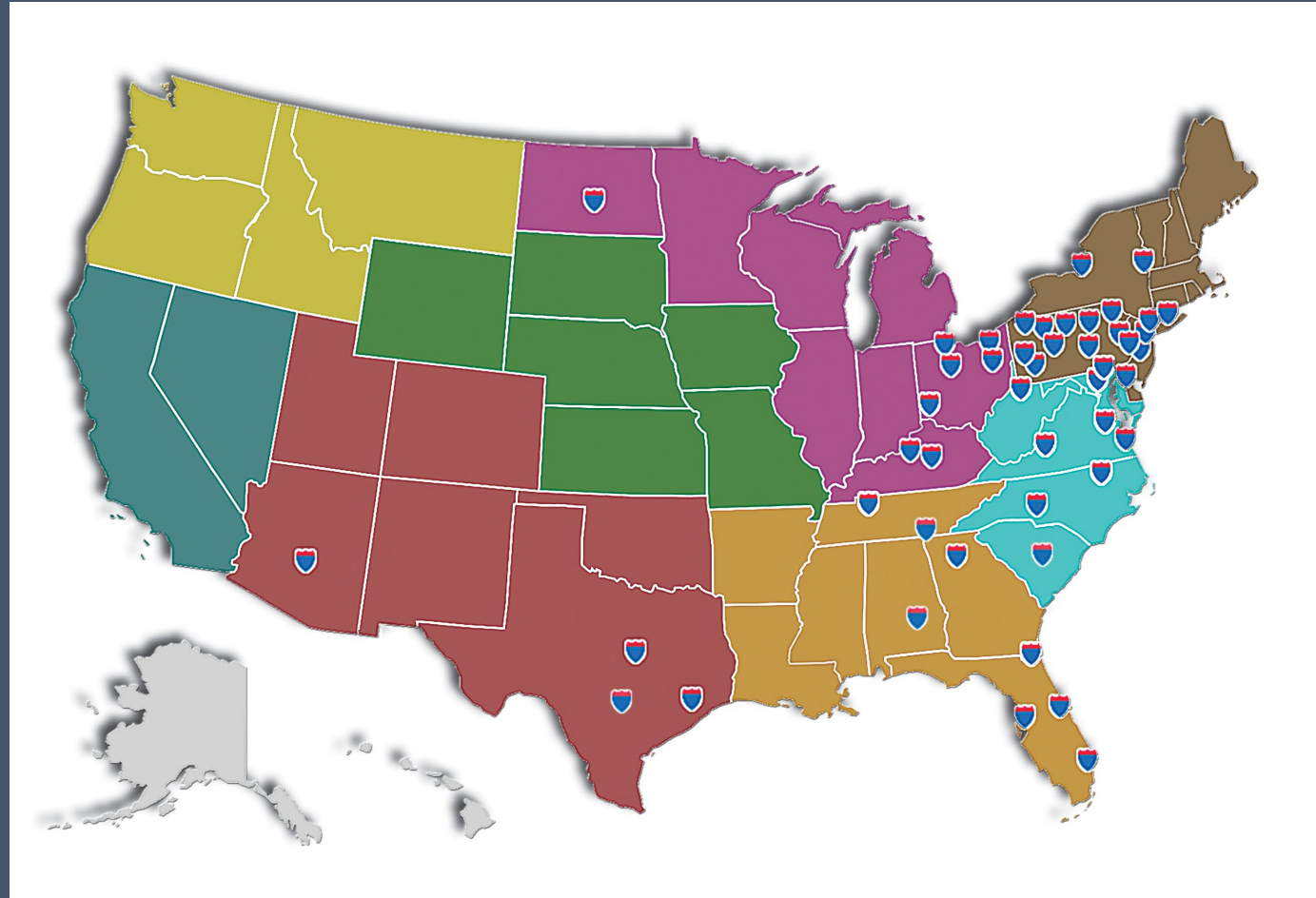
ASHE Mission Statement

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)
- 49 Sections, 19 States
- Includes Government, Consultant, Contractors, Suppliers and other supporters of Transportation





ASHE

2023-2024 Fiscal Year

Executive Committee

Stan Harris, PE
President
Donato DiZuzio, PE
1st Vice President
Jim Shea, PE
2nd Vice President
Leigh Lilla, PE
Immediate Past President
Dave Greenwood, PE
Operations Chair
Frank O'Hare, PE, PS
Treasurer
Tom Morisi
Secretary

Nancy Morisi
Administrative Asst.

National Board



Regional Board



ASHE Key National Contacts

- President (2023-2024) – Stan Harris (sharris80uk@gmail.com)
- Administrative Assistant – Nancy Morisi (nmorisi@ashe.pro)
- National Secretary – Tom Morisi (ashenationalsecretary@ashe.pro)
- National Treasurer – Frank O’Hare (ashenationaltreasurer@ashe.pro)
- National Treasurer Elect – Sam Mody
- Region Contacts – Officers and Committee Chairs



ASHE National Directors

- Northeast Region – J.T. Lincoln, Glen Kartalis, Rob Prophet
- Mid-Atlantic Region – Michael Bywaletz, Nimish Desai
- Great Lakes Region – Kathy Johnson, David Stills
- Southeast Region – Scott Jordan, Jason Hewatt
- Southwest Region – Nikole Cao
- 1st Vice-President – Don DiZuzio
- 2nd Vice-President – Jim Shea



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
- 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 10,000 Professional Development Hours awarded in 2023 (10,000+ in pre-COVID years)
- \$3,700,000 in scholarships awarded to date!



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 nmorisi@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>
 - Select Section name from pulldown and input password obtained from National Secretary
 - Section may update 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 hand 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.
- Account should be listed as American Society of Highway Engineers (Region or Section name)
- EIN & 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.
- Reconcile receipts from ticket sales, registrations, etc. with attendance.
- Work with Section committees to establish procedures for maintaining and reviewing 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

- 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 - **\$600.00 and over as of 1/1/2024**

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 website.

ASHE's accountants can prepare this form.

Form requires Name, SSN, Home Address, Amount Paid, Salary/Payment, Expense Insurance, Travel Expenses (or Per Diem), Section Mailing Address, Section Treasurer's Name



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 and by a reviewer.

Unsigned and incorrect 990's will be returned.



ASHE IRS FORM 990 – DATA SHEET
TREASURER'S REPORT AS OF MAY 31, 2023

Send to: ASHENationalTreasurer@ashe.pro and Copy: nmorisi@ashe.pro in pdf file format on or before June 15th.

Checking Account Balance:	<u>\$12,091.19</u>
Investment Account Balance:	<u>\$132,473.52</u>
TOTAL ASSETS (Sum of Above):	<u>\$144,564.71</u>

AUDIT AS OF MAY 31, (Previous Year):	
Checking Account Balance:	<u>\$10,430.98</u>
Investment Account Balance:	<u>\$132,401.10</u>
AUDIT TOTAL:	<u>\$142,832.08</u>



CASH RECEIVED TO MAY 31:	
New Member Initiation Fees:	<u>\$426.86</u>
Annual Membership Fees:	<u>\$1,331.36</u>
Dinner Ticket Sales:	<u>\$43,097.14</u>
Investment Income:	<u>\$72.42</u>
Checking Account Interest:	<u>\$0.00</u>
Other Income:	<u>\$12.00</u>
	<u>\$</u>
TOTAL RECEIPTS TO MAY 31, _____:	<u>\$44,939.78</u>

DISBURSEMENTS TO MAY 31:	
New Member Initiation Fees to National:	<u>\$450.00</u>
Annual Membership Fees to National:	<u>\$2,360.00</u>
Office Supplies, Equipment, Software, etc.:	<u>\$105.62</u>
Printing:	<u>\$0.00</u>
Postage, Fax, Copying, Telephone:	<u>\$11.60</u>
Dinner and Meeting Expenses:	<u>\$30,749.29</u>
Other Expenses:	<u>\$6,122.60</u>
Scholarships	<u>\$3,408.04</u>
	<u>\$</u>

TOTAL DISBURSEMENTS TO MAY 31, 2023 : \$43,207.15

TOTAL ASSETS: (Balance Must Equal Total Assets Above) \$144,564.71

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

	Darin Hettich	Franklin Section	6/15/2023
Treasurer Signature	Printed Treasurer Name	Section/Region/Conference	Date
	J.T. Lincoln	Franklin Section	6/15/2023
Reviewer's Signature	Printed Reviewer's Name		Date

REVISED 2/7/2023

ASHE's Fiscal Year

June 1st to May 31st

FY = Fiscal Year
FYE = Fiscal Year Ending



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: <https://ashe.pro/organization/officers-directors/>
- ASHE documents on web site at: <https://ashe.pro/resource-center/documents/>
- 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



ASCE

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/UCntTwnZuJOTisGXH0jR7S5A>





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*

• Communication • Education
• Networking • Fellowship

Just \$70* /yr or less to join
www.ashe.pro
*varies by Section

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



Why join?
ASHE Bring a Colleague
Make a Friend

We Help Build Bridges. Follow Us!

Like-Share-Post
Transportation-related news
ASHE news, events and happenings



LinkedIn

Communication • Education • Networking • Fellowship

Just \$70* /yr or less to join
www.ashe.pro
*varies by Section

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



Closing

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

Dave Greenwood

Chair, Operations and Oversight Committee

greenwoodda@cdmsmith.com

