

National Tooling & Machining Association Chapter Requirements and Guidelines

This document describes the requirements and guidelines to be considered by NTMA local chapter board of directors. The purpose is not to regulate chapter activity beyond normal non-profit law, but rather to introduce ideas and guidelines that can open the door for strong industry representation through the NTMA brand, both locally and throughout the nation.

NTMA Chapter Requirements

1. Chapter must be a non-profit, tax-exempt organization in good standing with both the state and federal governments.
2. Tax identification numbers must be on file at NTMA headquarters.
3. If required, NTMA chapters must file tax returns each year and ensure that a copy of each return is kept at the association chapter office.
4. NTMA chapters must operate under chapter approved bylaws.
5. Chapter has mailing address and phone number.
6. Chapter has paid or volunteer staff that oversees chapter business.
7. Chapter has a bank account.
8. Chapter has a chapter approved budget.
9. Chapter must comply with NTMA Code of Regulations Article VII, as published in the NTMA Membership Directory.
10. Chapter has clearly defined procedures for money management.¹
11. Chapter holds regular elections and holds board of directors meetings, and member meetings, at least as often as required by state law.
12. Chapter maintains adequate records and has a record retention policy.²

For more information on non-profit laws and regulations, visit www.irs.gov/charities/nonprofits.

Be sure to contact legal, accounting and insurance counsel, and local, state and federal government officials for assistance.

¹ Sample Internal Controls document can be found at www.ntma.org under Benefits, then Chapter Management.

² Contact your accountant and/or attorney for recommended record retention applicable to your association, taking into consideration local, state, and federal laws as well as your organization's needs. A sample form can be found at www.ntma.org Chapter Management section.

NTMA Chapter Guidelines

Strongly Recommended Activities

1. Chapter has a clear, meaningful written mission statement, which reflects its fundamental purpose, values and people served.
2. It is in the Chapter's best interest to send its Trustee, an Alternate Trustee, or Substitute Trustee, to each and every National meeting where a Board meeting is scheduled. It is recommended that the Chapter budget appropriately to support this activity.
3. Chapter should be committed to the strategic planning process. Chapter has set at least three goals and how/when it plans to measure success.
4. Chapter aligns with at least two goals established by National organization. For example, a goal to promote participation in government affairs through using the national Legislative Action Center.
5. The chapter is encouraged to include NTMA in their newsletter distribution.

Structure

1. Chapter has at least four member meetings a year.
2. Chapter has at least four board meetings a year.
3. Chapter has an annual meeting of membership with notice of meeting sent at least one month prior, or in accordance with state law.
4. Chapter has a local website and links to the NTMA national website.
5. Chapter has, at minimum, a quarterly newsletter, printed or electronic.
6. Chapter has an employee manual, if applicable.
7. Chapter has a written Policy Manual (board driven).³
8. Chapter has determined staff needs and has structured the relationship properly. Relationship should be documented and submitted to NTMA headquarters.

Fiscal Management

1. Chapter has a working budget and is sent to NTMA headquarters at the beginning of fiscal year.
2. Budgets, and resource needs, are shared with and understood by Board members, staff, and volunteers.
3. Chapter has clearly defined procedures for money management including excess funds raised.
4. Funds are raised and used in an ethical manner, and in accordance with any applicable state registration laws, through activities that are consistent with the mission of the organization.

³ Guidelines for creating one can be found at www.nonprofitcenter.com

5. Chapter recognizes that fundraising activities may be subject to specific state or federal regulations and has received professional advice on managing those activities.

Board Development

1. The chapter has a President, Vice President, Treasurer, Secretary, and Trustee.
2. The chapter has a nominating committee.
3. Board members serve without payment.
4. The roles of the board are clearly stated and communicated.
5. Treasurer reviews financial reports monthly and presents balance sheet in regular communication to Board members. Adjust budget as needed.
6. Board members receive orientation. Orientation includes information on the organization's mission, bylaws, policies, practices, and programs, as well as their governance roles and responsibilities as board members.⁴
7. Number of board members is current with what is required in bylaws and state law.
8. Chapter sends incoming officer to the NTMA Fall Conference for leadership development seminar.
9. Chapter has an antitrust policy which is communicated to and signed by the Board members.⁵
10. Chapter has a conflict of interest statement which is communicated to and signed by Board members.

Marketing

1. Chapter has a local and national membership packet.
2. Chapter has a list of potential members in their area.
3. Chapter understands its role in helping NTMA headquarters serve its members.
4. Chapter has established clear benefits for members.
5. Chapter clearly defines different types of members.
6. Chapter does at least one member survey every two years.

⁴ Resources for samples and guidelines available through [www.ntma.org/benefits/chapter management](http://www.ntma.org/benefits/chapter-management) and www.nonprofitcenter.com

⁵ See Sample NTMA Chapter Procedural Guidelines, available on www.ntma.org

Volunteer Involvement

1. The chapter has at least four committees.
 - i. Executive Committee
 - ii. Membership
 - iii. Programs
 - iv. Nominating
2. Committees should have at least three members and a chair that is a board member.
3. Committee should be clearly defined in mission and duties.

Strategic Alliances

1. Chapter should be aware of strategic alliances with other nonprofits in the community.
2. Chapter should be aware of educational programs that support the goals of the chapter.