



The URISA Headquarters office is staffed with association professionals who are skilled in managing associations and their programs. URISA staff is fully capable of assisting chapters in a variety of ways, in order to allow volunteers to concentrate on putting together effective programs.

Financial Management

Tax Compliance

Incorporation assistance

Advice on handling cash receipts and standard financial practices

Credit card processing

URISA tried unsuccessfully to obtain group exemption status several years ago. Therefore, each chapter needs to apply for its own exempt status. In the U.S., URISA is a 501(c)(3) organization; most chapters are 501(c)(6) organizations. This is applied for on Form 1024 with the IRS.

In the US, if an organization has gross receipts of more than \$25,000, it is required to file a Form 990EZ or Form 990. Note that each state has different filing requirements for non-profit organizations.

URISA employs a Certified Public Accountant with a strong background in U.S. nonprofit financial management who is willing and able to assist with your financial questions. URISA also undergoes an annual audit.

Insurance

Directors and Officers Coverage – Several years ago, URISA's D&O policy was amended to add, as Insureds, each of its chapters if it's Officers - specifically President, Vice President, Treasurer and Secretary are all members of URISA. This limitation comes from the URISA bylaws (section 205, item 4), which state that chapter officers as listed above are required to be members in good standing of URISA.

The D&O policy provides coverage for directors, officers, employees and volunteers while acting on behalf of URISA or their chapter and within their scope of authority. This policy responds to claims arising out of business decisions/actions, not bodily injury or property damage claims.

Our package policy has also been modified to provide limited liability coverage (bodily injury and property damage) for chapters. This includes:

Club & Chapter business activities (not otherwise excluded)

Host Liquor Liability

Meeting/Convention Liability (there may be an additional charge)

Volunteers as additional Insureds

No coverage is provided for any type of sporting activities or shows and no auto insurance coverage is available to the chapters.

Note: Certificates of Insurance should be obtained from vendors and anyone providing services, including caterers, bus charters, contractors and professional service providers.

COMMUNICATION SERVICES

Conference Calls - *Several chapters have set up accounts with URISA's Conference Call provider, TelSpan. Because of the quantity of business URISA does with TelSpan, they offer very competitive rates to us. URISA arranges for the account codes and you set up the calls yourself. URISA receives an invoice from TelSpan every month and will simply invoice your chapter for reimbursement of the charges.*

Online Surveys – *URISA has an annual account with SurveyMonkey.com and has ample experience in designing surveys to meet your marketing and informational needs. If your chapter wishes to conduct a survey, URISA staff can help.*

Email Broadcasts – *A number of chapters have also used URISA's email broadcast capabilities to promote events and programs. Simply email the text you wish to distribute and the email list of recipients and URISA can turn it around fairly quickly.*

Press Releases – *URISA staff maintains a press list of industry publications and groups. If you have some important information to share with the greater community, send it along to URISA and they will send out the announcements to the press contact list.*

URISA Website – *The URISA website includes blogs, forums and RSS feeds, along with a page for each chapter. Don't forget to use those vehicles to announce events and programs.*

Contacts – *When approaching a communication campaign, be sure to contact URISA for lists of URISA members in your area.*

MEMBERSHIP SERVICES

URISA staff members are experts in membership database management and Headquarters utilizes a robust database system in its daily activities.

In order to keep the members you have, it is important to not only serve them well, but also to make the renewal process as painless as possible. From generating dues renewal invoices to payment processing, the URISA staff can handle this often cumbersome and time-consuming yearly activity.

Manage membership roster
Manage membership renewals
Accounting processing for membership

Marketing Management

To recruit new members to your organization, you must first offer a reason to participate (whether it be educational programs or networking opportunities not available elsewhere) and then offer an easy way to get involved. This could take the form of a simple one-page membership application or a more detailed membership brochure. It is important to point out all of the benefits of membership and it always a good idea to include "testimonials" from current members. Make payment options as convenient as possible and include a phone number and/or email address for questions.

Design assistance - *Whether you just want a 'second pair of eyes' to look over your marketing materials or web content before you publish them or want complete design services, URISA staff can assist.*

Mailing - *If you have a mass mailing, take advantage of URISA's nonprofit mailing status to save considerable money on postage costs.*

URISA Workshops

URISA Certified Workshops are the best way for chapters to provide high-quality education for their members. The content is already proven, annually-reviewed and updated. When budgeting for a URISA workshop, Chapter leaders should consider facility costs, refreshments, printing costs and the workshop licensing fee. Peruse the workshop offerings and contact URISA for instructor information (<http://www.urisa.org/workshops/license>).

Once a workshop, instructor, and date are confirmed, you must license the workshop from URISA. URISA will provide certificates, a master workbook file for printing and will assist with promoting your event. URISA can even handle registration (online and manual) and payment processing for your workshop.

Chapters can use workshops to generate revenue or to simply cover expenses.

Web Services

Web Hosting - For those chapters just starting out, or without the volunteer capacity to maintain a website, URISA will host and make updates to your page.

MEETING SERVICES

URISA has assisted chapters with registration for one-day events and full conferences and has served as Conference Manager for full conferences, handling everything from contract negotiations to program development. Looking for a speaker to talk about a specific topic? Ask URISA for suggestions and contact information.

Event Registration Services

URISA can perform a variety of services for your events (workshops, seminars) or full conferences including:

Registration – online or manual entry, credit card or checks
Name Badges
Confirmation notices
Accounting
Invoicing
URISA staff member to run registration

Exhibitor Services

URISA staff has had ample experience with both the sale and management of exhibit booths at conferences. The Marketing Department has close contacts with the vendor community and keeps current with the frequent changes in this industry.

Sales of Booths
Negotiating Decorator contracts
Sale of Sponsorships
URISA staff member to coordinate onsite

Logistical Services

Negotiating hotel contracts
Site selection assistance
Insurance assistance
AV Coordination
Meeting Room Management
Conference social event and food/beverage coordination
Program coordination

Marketing Services

A number of printed and electronic pieces are typically used to promote attendance and participation at conferences, including Save the Date, Call for Presentations, Exhibitor Prospectus, Preliminary Program, Final Program, and Conference Proceedings. URISA can coordinate these for you or simply review your materials.

As you can see, URISA can assist or lead many of your chapter functions, for no or little cost. Even for services that are much more substantial (conference management, for example), you will find URISA's fees to be much more competitive than an outside firm.

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