

## **Club Guidelines**

These guidelines are intended as a helpful tool for not only the club president but the members of the club as well. They do not supersede the ADDC Bylaws and Standing Rules or any other procedures established at the Regional or ADDC level.

### **General**

1. Your Club Charter should be framed or sealed in plastic to protect it. If the club should disband the Charter should be returned to ADO.
2. Keep a list of your Club's Charter Members and active members at the time of chartering.
3. Keep interim organization correspondence prior to chartering.
4. Obtain IRS Form SS-4 and apply for a Tax I.D. number and retain for future reference. This is part of the charter process.
5. Execute Form 1024 when necessary information becomes available and file with the IRS to obtain tax exempt status for the Club. The Association is tax exempt under Code 501(c)(6) as a Business League, and does not qualify for state sales and use tax exemption. Contact the Regional Director or the ADDC Tax Exempt Committee if assistance is required. **IMPORTANT:** Retain the IRS Tax Exemption letter permanently. Maintain financial records in accordance with the IRS requirements in your state. If in Canada, records should be kept in compliance with governmental regulations.
6. Furnish a copy of the Club Bylaws to each member.
7. It would be beneficial to maintain a member data (activity) page. This information will be invaluable in selecting future committee chairmen, club officers and candidates for Regional Director or Association Officer.
8. Do not print financial information in club bulletins.
9. Do not release the club roster to anyone other than club members.
10. Maintain a club scrapbook or historical files.
11. Contact the ADDC Program Chairman or regional representative for program speakers and ideas.
12. Delegate duties to other members. By assigning tasks to other members they learn how the Club and Association function. Each year should be a training ground for members who may be interested in a chairmanship or officer position the next year.
13. Encourage questions from the membership. If unsure of the answer, seek assistance within the Association through the Regional Director.
14. Keep the membership informed on what is happening within the Local Club, Region,

and Association.

15. Communications with the Regional Director should be in writing.
16. For the first two (2) years keep copies of everything and share with other members as needed. By that time, officers and members will feel comfortable with Regional and Association requirements and will be better able to distinguish what belongs in the club's permanent files and what can be discarded.
17. Be flexible and do what is best for the club and its members.
18. Workshops and joint meetings for outgoing and incoming officers and committee chairmen will provide continuity.
19. Transfer at least two (2) years of records to the successor in each club office and committee, and arrangements should be made for the permanent retention of important and historical material. Note: All minutes of the board and membership meetings are the permanent record of the club and should be kept permanently.

#### **What a Club Can Expect on the Regional Level**

1. A January orientation newsletter to the Club Presidents will be sent from the Regional Director.
2. The Monthly ADDC Regional Director's Newsletter will be posted to the ADDC website by the 30<sup>th</sup> of each month.
3. Assistance from the Regional Director on any matter.
4. Information from the ADDC Committee Regional Representatives as required.
5. The club should be kept fully informed on Regional matters which will promote understanding and participation.
6. The Annual Regional Meeting, which is held in the Spring, will offer opportunities to learn more about the petroleum and allied industries, other clubs' activities, and discuss ADDC and Regional business matters.

#### **What is Expected from a Club on the Regional Level**

1. The Club should be represented at the Regional Meeting.
2. The Club President or Delegate should present a club activity report at the Regional Meeting.
3. Send copies of the New Officer Form (ADO31) to the ADO, Regional Director and others as instructed, promptly after election.
4. Send a copy of the ADDC Membership Transmittal List to the Regional Director and others as instructed.

5. Submit Regional Fund dues, if applicable, as instructed in the Region Fund Resolution.
6. Advise the Regional Director of any changes in club officers or board members and regular meeting dates during the year.
7. Complete IRS Form 990 filing by May 15 and send a copy to the Regional Director and the ADDC Tax Exempt Committee Chairman.
8. Cooperate with all ADDC Committee Regional Representatives by furnishing information at the time and in the form requested. All correspondence to the ADDC Committee Regional Representatives should be copied to the Regional Director.
9. Keep club members fully informed of Regional matters which will promote understanding and participation.
10. Encourage attendance at Regional Meetings.

#### **What a Club Can Expect on the Association Level**

1. The monthly ADDC President's Newsletter will be posted to the ADDC website by the 30<sup>th</sup> of each month.
2. The two (2) issues of the ADDC official publication, *The Desk and Derrick Journal*, will be posted to the ADDC website. The monthly issue of the *ADDC Insight*, will be posted to the ADDC website.
3. The minutes of the ADDC Board's Budget & Planning Meeting and the Pre-Convention Board Meeting will be posted to the "members" section of the ADDC website.
4. Communications from the ADDC committees will be posted to the "members" section of the ADDC website.
5. Committee guidelines, ADDC forms, member directories, helpful tools for clubs and members as well as other information is located on the ADDC website, "members" section. It is prudent to become familiar with the website.

#### **What is Expected from a Club on the Association Level**

1. Submit the Association Membership Transmittal List, Membership Applications and dues to the ADO before the February 1 deadline and monthly thereafter, with copies to the Regional Director and others as instructed.
2. Submit the New Officer Form (ADO31) to the ADO immediately after election with copies to the Regional Director and others as instructed.
3. Send the Club Tax Exempt number to the ADDC Treasurer, Regional Director and Tax Exempt Committee Chairman upon receipt from the IRS.
4. Send the Program Report to the ADDC Program Committee Regional Representative after presentation, as instructed, with a copy to the Regional Director.

5. The Club should be represented at the annual convention.
6. Keep club members fully informed on Association matters which will promote understanding and participation.
7. Incorporate any ADDC Bylaws amendment(s) approved at the annual convention into the Club Bylaws as needed.
8. As set out in the ADDC Standing Rules, obtain ADDC Board approval through the Regional Director for any items using any ADDC logo or trade stamp, whether it is a sales item or a giveaway item.
9. Encourage attendance at the ADDC Convention.

### **Suggested List of Important Files – Club Level**

1. Club Bylaws and other club documents affecting the club rules, policies and procedures.
2. Interim organizational correspondence prior to chartering.
3. Minutes of Club Board Meetings. (Permanent File)
4. Minutes of Club Meetings. (Permanent File)
5. Club financial statements and budgets. (Maintain for the time period set by the government regulatory agency)
6. Membership Lists.
7. Membership Dues Transmittal and Applications.
8. Membership Activity Data Sheets.
9. Pertinent Club Committee reports.
10. Recent issues of your Club Bulletin.
11. Master index of Club files and file retention schedule.
12. Leadership Guidelines for Club Officers, and club committees. The President should keep original guidelines together and provide copies to respective committees. Guidelines for ADDC committees are located on the ADDC website.
13. Current Newsletters of ADDC Regional Director and Association President.
14. Pertinent ADDC Committee reports and general information.
15. Association Bylaws and Standing Rules including the General Information Section.

16. Master index of ADDC and Regional files and file retention schedule.

**Association Distribution Office**

The Association Distribution Office (ADO) is the permanent office of the Association of Desk and Derrick Clubs. This office is administered by the Association Board of Directors and its employee reports directly to the ADDC President.

Email:            [ado@addc.org](mailto:ado@addc.org)

Web site:        [www.addc.org](http://www.addc.org)