



## **Affiliated Association Program**

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# *Ohio State Beekeepers Association*

## **OSBA Affiliated Association Program**

This is a brief overview of the OSBA Affiliated Association Program. This program is intended to help extend benefits to beekeeping associations in Ohio at a greatly reduced cost. In addition, it's structured to foster better communication and cooperation between OSBA and local associations. This overview is not meant to supersede or replace the requirements in the Application or Renewal forms. If you have any questions, please contact OSBA.

### **Benefits:**

- Obtain 501(c)(3) Tax Exempt Status under the OSBA Group Exemption.
  - Donations to your association and membership fees may be tax deductible. Consult your tax advisor.
  - Individuals and corporate donors are more likely to support organizations with 501(c)(3) tax status.
  - Access to many grants only available to 501(c)(3) organizations.
  - Save the \$400 to \$850 filing fee plus the cost of document preparation.
  - Approval time may be much faster.
- Liability insurance is provided at a greatly reduced cost.
- Officer and Director insurance provided at a greatly reduced cost.
- Web Hosting
- OSBA will file the 990 form with the IRS.
- OSBA will file the yearly report with the Ohio Attorney General required for ALL nonprofits.
- OSBA will update the statutory agent and file the continued existence form with the Ohio Secretary of State every 4 years to ensure the Affiliate's status does not laps.
- Affiliated associations may nominate a seat on the OSBA Board (currently a nonvoting position).

### **Summary of the Basic Requirements:**

- Must be a beekeeping association or club in Ohio with one or more objectives common to OSBA. (Education, research, promoting beekeeping, etc.)
- The affiliated association may or may not be incorporated.
- The affiliated association must have its own EIN number. (OSBA can advise you how to obtain an EIN if you do not have one)
- The affiliated association must have a Constitution or Bylaws that meet the IRS requirements for 501c3 nonprofit organizations.
- The affiliated association may not be involved in significant political efforts. Political efforts are allowed, but should be a small (10% or less) of your overall budget.
- The fiscal year must be the same as OSBA. January 1st to December 31st.
- Contact information for executive officers and board members must be submitted. A mailing address is required.
- Must maintain a bank account (savings or checking) in the Associations name with at least two signers on the account.

- Submit the affiliate association's annual financial report and upcoming year's budget.
- Pay yearly membership fees. These fees primarily cover the OSBA's additional expense due to liability insurance, Officer and Director insurance and other costs incurred by OSBA and is based in part on the membership size of the affiliate. Dues are subject to change each year because it reflects our increased insurance cost due to carrying the affiliates.
- Complete and submit the Application Form to apply to become an OSBA Affiliated Association. (Note that applying does not guarantee acceptance.)

**Annual Requirements:**

- By October 31st of each year:
  - Complete and submit the Affiliated Association Program Renewal Form
  - or Notify OSBA if the club no longer wishes to be an affiliate association.
- By January 15<sup>th</sup> of each year:
  - Submit a copy of your end of year financial report to the OSBA Treasurer for the annual 990 IRS filing
- By February 1<sup>st</sup> of each year:
  - Pay in full the Affiliate’s membership fees. Invoices will be sent out the first week of January.
- Maintain financial records of all income and expenses in order to complete the annual forms. You must individually record details of any contribution of \$250 or more.

Dates of the annual requirements are hard as there are fixed reporting dates we must adhere to with the IRS and other agencies.

**Affiliate Membership Fees:**

Membership fees are by the calendar year and are as follows for 2018.

Fixed yearly fee: \$80.00  
 Fee per affiliate member: \$1.25  
 Ohio Attorney General Registration Fee: \*

Income less than \$5,000	\$0.00
From \$5,000 to less than 25,000	\$50.00
From \$25,000 to less than \$50,000	\$100.00
Over \$50,000	\$200.00

\* The Ohio Attorney General Registration Fee is set by the state and is required for all non-profits.

Fees will be reviewed yearly and *are subject to change*. Fees will be prorated to the nearest month for Affiliates joining mid-year.

Examples:

An affiliate with 50 members and \$3,000 in yearly income will pay:  $\$80 + 50 * \$1.25 = \$192.50$

An affiliate with 100 members and \$10,000 in income for the year will pay:  $\$80 + 100 * \$1.25 + \$50 = \$355$

### **Steps to Prepare and Enroll in the OSBA Affiliated Association Program:**

Note: OSBA will assign your association a mentor to help walk you through the process of setting up and collecting the necessary information to complete the Application Form. Some steps

- If you do not have a constitution and/or bylaws, your association will need to adopt one (Contact OSBA for sample constitutions). Ensure that your constitution includes the IRS Approved Language required for 501(c)3 organizations.
- If you do have a constitution you must amend it with the IRS Approved Language.
- Review and have membership approve the Articles of Affiliation that outlines the activities allowed by a 501(c)3 and your association's relationship to OSBA.
- File your Articles of Incorporation with the Ohio Secretary of State to establish the Association's name (Cost approximately \$99)
- Obtain an EIN number with the IRS (Cost: free.) See <https://www.irs.gov/businesses/small-businesses-self-employed/apply-for-an-employer-identification-number-ein-online>
- Open a bank account in the Association's name with 2 signers.
- Make a list of the contact information for all officers of your association.
- Determine who will act as the primary contact or statutory agent for the association. Typically, this is the president.
- Make a list of club activities you have completed in the past year and are planning for the upcoming year. This is necessary to determine that your activities are permitted under the 501(c)3 designation and do not conflict with the purpose stated in the Articles of Affiliation.
- Prepare your yearly financial report for the most recent fiscal year and current year up to the date of your application.
- Take a count of members of your association and the estimated number of those who are also members of OSBA.
- Review, complete and submit the Affiliated Association Program Application form with the application fee.

The program chairman will review your application within 30 days and will contact the primary contact for any additional information or clarifications needed and the final determination of acceptance or rejection. Incomplete or inaccurate forms will delay acceptance.

Yearly membership fees will be invoiced after acceptance and will be NET 20.

**Affiliate Program Contact:**

Tom Rathbun

OSBA Affiliate Chair

Tom Rathbun

4865 County Road 175

Clyde, Ohio. 43410

[vice-president@ohiostatebeekeepers.org](mailto:vice-president@ohiostatebeekeepers.org)

419.603.1749



## Are you ready to apply for the OSBA Affiliate Program?

Please, read all questions before beginning the process to familiarize yourself with steps for enrollment; specifically questions 1, 9 and 10, which contain specific qualifiers.

1. Does your Ohio beekeeping Club/Association share one or more objectives common to OSBA? (Education, research, promoting beekeeping, etc.)  
**Yes-** Go to #2  
(Your organization may or may not already be incorporated.)  
**No-** Your organization is not eligible for the OSBA Affiliate Program
  
2. Do you have a constitution and/or by-laws?  
**Yes** – Go to #3  
**No** – Create a club constitution including IRS approved language
  - Meet with Club Executive leadership to draft constitution and/or Bylaws
  - Present governing documents to club membership for review
  - Adjust governing document(s) if appropriate
  - Conduct membership vote for official adoption of document(s)
  
3. Does your constitution contain IRS approved language? (Language explained in Appendix)  
**Yes** – Go to #4  
**No** – See IRS Approved Language in Addendum
  - Meet with Club Executive leadership to draft necessary changes
  - Present club membership proposed change to language for review
  - Adjust governing document(s) if appropriate
  - Conduct membership vote to update governing documents to reflect IRS Approved Language
  
4. Have you decided who will act as primary contact or statutory agent for your organization? (Typically, this is the president. If you club is already registered with the state this is a good time to confirm or change the currently listed statutory agent. See Addendum.)  
**Yes** – Go to #5  
**No** – Select person. Go to #5
  
5. Have you filed your Articles of Incorporation with the Ohio Secretary of State?  
**Yes** – Go to #6  
**No** –

- Complete required filing document (Link to required paperwork is in Appendix. Fee is approximately \$99.00)
- Receive filing confirmation

6. Do you have an EIN number?

**Yes** – Go to #7

**No** - Complete the EIN application (This can be done online and received the same day. See link information in Addendum.)

7. Do you have a club bank account in the Club/ Association’s name?

**Yes** – Go to #8

**No** – Select a financial institution and open an account in the Club/Association’s name with a minimum of 2 signers. See Addendum for specifics.

8. Does the Club /Association bank account have at least 2 signers?

**Yes** – Go to #9

**No** – Go to financial institution and add additional signer(s)

9. Is your recordkeeping fiscal year January 1<sup>st</sup> to December 31<sup>st</sup>?

**Yes** – Go to #10

**No** – Make necessary change to recordkeeping fiscal year of Jan 1 – Dec 31

Prepare a copy of your most recent fiscal year report.

Complete current year fiscal report to date.

(OSBA board members assigned to your application can assist you with any necessary specifics.)

10. Do your Club/Association’s activities include political efforts?

**Yes** – Go to # 11

**No** – Go to # 12

11. Are your Club’s/Association’s political efforts in excess of 10% of your budget?

**Yes** – To become an affiliate your political efforts must be 10% or less of your budget. Go to #12

**No** – go to #12

12. Do you have a list of all executive officers and board members contact information? (Full name, mailing address, phone number, email address)

**Yes** – Go to #13

**No** – Compile list. Go to #13

13. Do you have a list of club/association activities completed in the past year and those planned for the coming year?

**Yes** – Go to #14

**No** – Compile list. Go to #14

14. Do you have the number of members of your Club/Association?

**Yes** – Go to #15

**No** – Gather membership information. Go to #15

15. Proceed to the OSBA Affiliate Program Application Form.

To complete the form have the following documents prepared which will need to be submitted with the application document:

- 1) Signed copy of Constitution and/or By-laws
- 2) Signed copy of Articles of Affiliation
- 3) List/Description of club activities
- 4) Financial Reports (previous year, and year to date)
- 5) Copy of current bank statement (past 90 days)
- 6) Non-refundable application fee of \$25.00 in the form of check or money order, made payable to Ohio State Beekeepers Association



## Addendums

\*\*Creating a Constitution with required language: see section IRS Approved Language

\*\* Filing Articles of Incorporation (Cost \$99)

<http://www.sos.state.oh.us/sos/upload/business/forms/532B.pdf>

\*\*Update Statutory Agent (Cost \$25)

<http://www.sos.state.oh.us/sos/upload/business/forms/521.pdf>

\*\*Obtaining an EIN number with the IRS (Cost: free.)

See

<https://www.irs.gov/businesses/small-businesses-self-employed/apply-for-an-employer-identification-number-ein-online>

\*\*Opening a Bank Account –

- EIN
- A letter from the bee club that they have the permission of the President (even if the president is opening the account) to open an account for the club.
- Articles of Incorporation
- Articles of Affiliation and Bylaws may or may not be required
- Account signers will each need to have their drivers' license and provide their SSN (to prove who they are—the club account will not be held under the signer's SSN, but by the EIN of the club.)

\*\*Check with your financial institution for details and any additional requirements.

\*\* An OSBA board member will be assigned to your club to assist you complete the application process and answer questions you may have.

## **Sample Constitutions:**

### **New BEEKEEPERS ASSOCIATION CONSTITUTION AND BYLAWS**

#### **NAME, PURPOSE AND LOCATION**

The name of this organization shall be XXXXX. It is a non-profit unincorporated association formed under the laws of the State of Ohio, with the purpose to assist and educate beekeepers, to maintain our individual rights as beekeepers, to encourage beekeeping as a hobby and as an industry, to promote natural beekeeping and methods, and to create a positive public image of beekeeping. The offices of XXXX shall reside in the County of XXXXX, Ohio.

#### **MEMBERSHIP AND DUES**

Individuals who are interested in beekeeping and subscribe to the objectives of this organization may join by paying dues.

There shall be four categories of Membership in the XXXX as follows:

Regular Member – an annual dues-paying member, entitled to all benefits of the Association and voting privileges.

Associate Member – Immediate family or a youth member (ie. 4-H, Scouting, etc.) who does not pay dues. Entitled to Association benefits but does not have voting privileges. NOTE: Associate membership is typically limited to immediate family and youth only; exceptions must be approved by the Executive Committee.

Life Member – A regular member who has prepaid a minimum of 10-years dues in advance; or a member who is 65 or older, who has been a paying Regular member for at least 10 years, who has contributed significantly to the Association and has been awarded “Life Member” status by the Executive Committee. Life members are relieved from paying dues but are entitled to all benefits of the Association and voting privileges.

Professional Member – a business entity which sponsors beekeeping through contributions to XXX and are approved by the Executive Committee. Professional members shall be entitled to 1 regular membership (with all benefits of the Association and voting privileges). Professional members may also be permitted to advertise in Association publications (ie. Newsletter, Web site) with approval of the Executive Committee

The Executive Committee shall set the dues for each category of membership annually. Dues shall be due and collected based on the calendar year commencing in February of each year.

The current dues structure for membership shall be published in appropriate XXXX publications no later than the 1st day of February of each year.

Only members in good standing (dues paid) may vote at any meeting, and only the primary member of a Family membership is entitled to vote. Members in arrears (dues not paid) for ninety (90) days shall be dropped from the rolls.

### **THE EXECUTIVE COMMITTEE**

The Executive Committee shall be the governing body of the Association and shall be responsible for managing the property of and conducting the business and all other affairs of the Association. The Executive Committee may delegate business and affairs to the membership or to committees, but retains overall governing responsibility and authority. The Committee shall consist of up to nine (9) Committee Members; such officers being the President, Vice-President, Secretary, Treasurer, Newsletter Editor, the immediate Past President, Webmaster, plus two members from the general membership

A President, Vice-President, Secretary, and Treasurer shall be elected by ballot at the last meeting of the calendar year. Officers are elected to serve a term of one year.

Any vacancy occurring on the Committee between elections of the Association shall be filled by affirmative vote of the remaining Executive Committee. A Member so selected shall serve until the next election.

At the first meeting of the Executive Committee following the last general meeting of the calendar year, the Committee shall organize itself and organize any sub-committees and appoint sub-committee chairs. These Chairs shall attend Executive Committee meetings as business requires. The Executive Committee shall make rules for its own governance.

The Executive Committee shall meet once every 4 months (at least 2 times per year). Special Meetings may be called by the President or by any three officers provided notice is given to each other officer at least five days prior to the Special Meeting, its purpose clearly stated and no other business conducted at such meeting. A quorum of the Board shall be required to conduct any business of the Association, such quorum being at least three officers. Meetings may be conducted in a physical location or 'virtually' via teleconference or other electronic means.

No Director, Officer, Committee Member, or any volunteer member working on behalf of the XXX shall be held liable for any of their actions accepting gross negligence and shall be indemnified and held harmless from any consequences of their actions.

### **DUTIES OF OFFICERS**

It shall be the duty of the President to preside at meetings of the Association, coordinate its activities, and perform all duties usually pertaining to this office. A Presidential nominee must have been a member in good standing for at least the past beekeeping season. It is preferred that the President held a seat on the Executive Board the prior year.

In the absence or disability of the President, the Vice-President shall perform all the duties of the President. The Vice-President shall also serve as the Chair of the Nominating Committee and act as the primary election official, supervising nominations, elections and balloting.

The Secretary shall perform such duties as are usual to this office; shall keep the minutes of all proceedings and record the same, maintain historical documents and conduct routine Association correspondence.

The Treasurer shall take membership applications for new membership and keep a roster of members; receive all funds of the Association and deposit the same in a two signature checking account in a federally insured bank or Credit Union. The Treasurer will disburse funds not already budgeted for only as authorized by a majority vote of the membership at any meeting of the organization, provided a quorum is present, maintain accurate records of income and disbursements and make these records available to any member on request. The Treasurer shall make an annual report of receipts and disbursements and perform such duties as are usual to this office.

The Executive Committee shall also be responsible either through its Members or its sub-committees or special assignments to publish and mail, or email, a newsletter to all members; to interact with the media, educators, public officials or the general public to disseminate information on the Association and on beekeeping; to ensure the membership is informed of known pending or existing legislation affecting beekeepers, of beekeeping techniques, diseases or any scientific or technical matter affecting beekeeping.

The Executive Committee shall present to the membership, for its approval, at the first scheduled meeting of the Calendar year (usually February), a budget for the upcoming year. Once approved, the Officers shall authorize expenditures in accordance with the budget and may exceed budget line items by not more than 10% without approval of the membership. In any case the Officers may not expend any funds in excess of \$100 without approval of the membership.

#### **- COMMITTEES**

At the first organizational meeting of the Executive Committee, the Officers shall propose and organize sub-committees and recommend Chairs to each sub-committee. Committees and Chairs will be approved by a majority vote of the members at a general meeting.

The standing committee of this association shall be An Auditing Committee to report on the correctness of the Treasurer's accounts, to ensure that expenditures are consistent with the budget and other authorizations and to conduct an audit at least annually in the month following elections, or at any time the Treasurer's duties are passed to another member.

The Executive Committee shall propose other special committees as needed or as may be directed by majority vote of the members present at any meeting, provided a quorum is present.

## **MEETINGS, PROCEDURES AND QUORUM**

The Meeting Calendar shall be established and published by the Executive Committee no later than the third week of January of the calendar year. Meetings are typically held each month except for December and January, but this may vary by vote of the members. Elections and other year-end business should be conducted during the final meeting of the calendar year (typically November).

Special Meetings of the membership may be called by the President or, in his absence, by the President-elect; or upon application of 25% of the members, the President shall call such a meeting. Notice of time, place and purpose of the meeting together with a statement of business to be voted upon, shall be given in writing, personally, mailed, or emailed to each member, not more than 20 days or less than 10 days before the meeting. No other business shall be transacted except that for which the meeting was called.

5% of the membership in good standing, present and in person shall constitute a quorum for the transaction of business.

Members in good standing shall be entitled to one vote. Elections shall be by ballot and plurality of votes cast shall elect. All other matters shall be by a majority vote of members present in person and voting unless otherwise provided by law or in these Bylaws.

Nominations may be made from the floor provided that the nominee is present and consents to the nomination or has given such consent in writing when not present.

Robert's Rules of Order, as revised, shall govern all proceedings of this Association.

The calendar year shall also be the fiscal year.

## **AMENDMENT**

These Bylaws may be amended at any meeting by a two-thirds vote, a quorum being present, provided notice of such amendments and the nature thereof shall have been mailed or emailed to the membership at least ten days prior to the date of the meeting

## **- DISSOLUTION**

Should the club vote to disband, all general funds remaining after debts and other accounts are settled will be donated to XXXXX as recognition for all their past support of the XXXX.

## **Sample Constitution II Constitution and By-Laws**

### Article I.

#### Section 1. Name of Organization

This organization shall be known as the XXX, and its location will be at the residence of the Secretary-Treasurer.

### Article II.

#### Section 1. Goal

The goal of this organization will be to promote the general welfare of all phases of the beekeeping industry and related interests, as well as the advancement of apiculture and pollination.

### Article III.

#### Section 1. Membership

The membership will be open to any resident of XXXX and neighboring counties who are primarily interested in apiculture and all its phases.

The membership fees for regular members will be an amount set forth by the current board of directors. Any new member joining the organization at the November meeting will be paid up for the following year. Lifetime memberships can be purchased at the regular fee times 10.

Any member who is 70 or older and has belonged to the Association for 10 years is granted Life Membership, and is exempt from paying membership fees.

### Article IV.

#### Section 1. Officers

The officers of this Association shall consist of President, Vice President, Secretary and Treasurer.

#### Section 2. Duties of Officers

President. The duties of the President shall be to preside at all meetings of this Association.

Vice President. The duties of the Vice President shall be to assist the President and preside at any meeting during the absence of the President.

### Article IV (cont.).

Secretary. The Secretary shall keep a record of all proceedings at all meetings and send a copy to all the board members via email. Keep a record of all paid members and update the list as needed. Create any sign up sheets needed throughout the year.

Treasurer shall also keep the list of active membership. Keep a record of all monies collected for the Association and all monies disbursed, and prepare an annual report for the first meeting of each year. There will also be an annual audit performed during the November meeting by a committee of three (3) members appointed by the President.

Article V.

Section 1. Quorums

A quorum, in order to function properly, shall represent at least one-third (1/3) of the regular membership on the active list, not including the officers of the Association.

Section 2. Election of Officers

The election of officers shall be held yearly at the November meeting of the Association, by ballot. It shall require a majority vote of a quorum to elect any officer. Should any vacancy occur in any office by resignation or any other reason, the same shall be announced by the presiding officer at the next regular meeting, and the members then shall proceed to fill such vacancy by a regular election.

Article VI.

Section 1. Meetings

The regular meetings shall be held by designation of the membership. The specific dates shall be selected at the November meeting.

Section 2. Other Meetings

The President may call special meetings of this Association at any time he may deem it essential, or upon a written request of any ten (10) regular members. Notice of these special meetings is to be given to the membership at least two weeks in advance.

A field meeting may be held at the option of the members. The date and place of such a meeting is to be set and decided at any regular meeting or by the officers, with consent of the membership.

Article VII.

Section 1. Amendments

Amendments may be made at any regular meeting, but shall be submitted in writing, bearing the signatures of not less than five (5) regular members; said proposals for amendments shall be read at a previous meeting before action can be taken upon. A majority of a quorum shall vote in favor of any amendment before said amendment shall be declared adopted at the time of its second reading.

Article VIII.

Section 1. Committees

The following committees may be appointed by the President with the consent of the membership, for the promotion of better understanding of our aims and purposes.

Membership Committee  
Question Forum Committee  
Publicity Committee  
Ways and Means Committee  
Program Committee  
Honey Festival Committee



Local Fair Committee  
Honey Queen Committee

Section 2. Executive Committee

An Executive Committee of six (6) or more shall be composed of the President, Immediate Past President, Vice President, Secretary-Treasurer, and two (2) or more regular members, the latter to be voted on by the membership.

The Executive Committee shall be empowered to act upon matters that pertain to the general business of this Association and, upon such action, report to the membership at the following regular meeting.

A quorum, in order to function properly, shall represent at least 2/3 of the Executive Committee.



# *Ohio State Beekeepers Association*

## **IRS Approved Language**

The Internal Revenue Service requires the association bylaws include specific language in order for the association to be considered a nonprofit, exempt organization as described in section 501(c)(3) of the Internal Revenue Code. The five paragraphs below the line are IRS-approved 501(c)(3) language that must be included in your associations' organizing document (constitution or bylaws) to demonstrate that your organization is, indeed, a non-profit public-benefit organization.

The **exact wording** in all five sections below are **all** required by the Internal Revenue Service: they include a purpose, inurement, lobbying, notwithstanding, and dissolution clauses. The sections may be included separately within different articles of your constitution or bylaws or they may be added as one, complete amendment as appears below.

### **Article \_\_\_\_\_ Amendment to the Constitution**

#### **Requirements to be exempt as an Organization**

#### **described in section 501(c)(3) of the Internal Revenue Code**

**Section 1.** Said organization is organized exclusively for charitable, educational, or scientific purposes, including, for such purposes, the making of distributions to organizations that qualify under section 501(c)(3) of the Internal Revenue Code, or the corresponding section of any future federal tax code.

**Section 2.** No part of the net earnings of the organization shall inure to the benefit of, or be distributable to its members, trustees, officers, or other private persons, except that the organization shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in the purpose clause hereof.

**Section 3.** No substantial part of the activities of the organization shall be the carrying on of propaganda, or otherwise attempting to influence legislation, and the organization shall not participate in, or intervene in (including the publishing or distribution of statements) any political campaign on behalf of or in opposition to any candidate for public office.

**Section 4.** Notwithstanding any other provision of these articles, the organization shall not carry on any other activities not permitted to be carried on (a) by an organization exempt from federal income tax under section 501(c)(3) of the Internal Revenue Code, or the corresponding section of any future federal tax code, or (b) by an organization, contributions to which are deductible under section 170(c)(2) of the Internal revenue code, or the corresponding section of any future federal tax code.

**Section 5.** Upon the dissolution of the organization, assets shall be distributed for one or more exempt purposes within the meaning of section 501(c)(3) of the Internal Revenue Code, or the corresponding section of any future federal tax code, or shall be distributed to the federal government, or to a state or local government, for a public purpose. Any such assets not so disposed of shall be disposed of by a Court of Competent Jurisdiction of the county in which the principal office of the organization is then located, exclusively for such purposes or to such organization or organizations, as said Court shall determine, which are organized and operated exclusively for such purposes.



# Ohio State Beekeepers Association

## Affiliated Association Program Application Form

**1. Association Name:** \_\_\_\_\_

**2. Federal Employer Identification Number (EIN):** \_\_\_\_\_ - \_\_\_\_\_

(Note: Your association must have an EIN assigned by the IRS in order to complete this form.)

**3. Is your association a private foundation?** Please initial the appropriate box below.

(Note: Associations are generally not a "Private foundation" within the meaning of the tax code. A determination by the IRS that your association is a private foundation will jeopardize your ability to be an affiliated association and receive tax-exempt status.)

Our association is not a private foundation.

Our association is a private foundation.

**4. Contact Information:** (Please PRINT)

The IRS requires the listing of an address for each association for which the 501(c)(3) tax exempt status is sought. If the association does not have a permanent address, the address of the current president should be used. This address will be used for all official communication by OSBA, the Ohio Secretary of State, Ohio Attorney general and the IRS. The address may not be a PO Box.

Name/Title: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Telephone Number: \_\_\_\_\_ Email: \_\_\_\_\_

**5. Association Information:**

Website: \_\_\_\_\_

Facebook page: \_\_\_\_\_

Email Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_

**6. Officers Contact Information:** Attach any additional officers not listed below on a separate page.

President:

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Telephone Number: \_\_\_\_\_ Email: \_\_\_\_\_

Vice-President:

Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Telephone Number: \_\_\_\_\_ Email: \_\_\_\_\_

Treasurer:

Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Telephone Number: \_\_\_\_\_ Email: \_\_\_\_\_

Secretary:

Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Telephone Number: \_\_\_\_\_ Email: \_\_\_\_\_

**7. Club Bylaws/Constitution:** Please attach a copy of your associations Bylaws and/or Constitution and initial the box to indicate compliance.

We have reviewed the **IRS-APPROVED LANGUAGE** document and have checked to make sure that our club bylaws have all the language required by the IRS. **A copy of our associations Bylaws and/or Constitution, as approved by our association and signed and dated by our club president and another officer, is attached to this document.**

**8. Club Activities.** Please initial each box below.

- a) Our club has agreed to the Articles of Affiliation. **A copy of the Articles of Affiliation, as approved by our club and signed by our association president, is attached to this application.**
- b) We affirm that the major portion of our associations activities in the past year have been to pursue nonprofit, educational purposes as stated in the Articles of Affiliation.
- c) **Attached is a list with descriptions of the activities** of our association that relate to the primary purpose of our non-profit organization as outlined in the Articles of Affiliation.

Note: Attach a detailed description of the associations activities including how each activity furthers the EDUCATIONAL purpose(s) of your 501(c)(3) affiliation. (Include such things as educational programs/tours, scholarships, awards, classes or other projects that educate the public and civic projects.)

**9. As the authorized representative for this association,** I affirm that our beekeeping association understands that: Please initial the appropriate box below.

- a) Our association will be relieved from having to file IRS Form 1023, Application for Recognition of Exemption Under Section 501(c)(3) of the IRC, and form 1024 Application for Recognition of Exemption Under Section 501(a).
- b) Our association will be subject to the general supervision of the Ohio State Beekeepers Association as outlined in the Articles of Affiliation.
- c) Our association will be required to submit a financial report for its most recently ended fiscal year to the Ohio State Beekeepers Association on or before the deadline specified by the Ohio State Beekeepers Association Affiliated Association Program Chairperson.

Yes, I understand.

No, I do not understand.

**10. Financial information:** Please indicate fiscal year: \_\_\_\_\_

- Attached is the financial report for our association's latest fiscal year.
- Attach copy of the associations bank statement (black out the actual account number)

**11. Association Statistics:**

Number of members: \_\_\_\_\_ Approximate percentage of OSBA members: \_\_\_\_\_

**12. Application fee:**

- Attached is the non-refundable application fee of \$25, made payable to the Ohio State Beekeepers Association.

Note that upon acceptance in the Affiliated Association Program, the yearly membership fees will be due in full or membership in the program will be revoked. OSBA will submit an invoice for the yearly membership fees.

**13. Signature:**

**I attest that to the best of my knowledge, the above information is correct.**

With the submission of this application, I affirm that our association wishes to be included in the Ohio State Beekeepers Association Affiliated Association Program. (This form must be signed by the association president).

Signature: \_\_\_\_\_

Print Name: \_\_\_\_\_

Title: \_\_\_\_\_ Date: \_\_\_\_\_

**14: Submit this completed application with the attachments listed below:**

- Signed copy of the Association Constitution and/or Bylaws as stated in item 7 above.
- Signed copy of the Articles of Affiliation as stated in item 8a above.
- List/Description of Activities as stated in item 8c above.
- Financial Report as stated in item 10 above.
- Application Fee of \$25 as stated in item 11 above.

**Mail to:**

Ohio State Beekeepers Association  
Rod Pritchard, Treasurer  
955 Murnan Road  
Galloway, OH 43119



# Ohio State Beekeepers Association

## Articles of Affiliation

Beekeeping Association: \_\_\_\_\_

Date: \_\_\_\_\_

We, the undersigned, have this day associated ourselves together voluntarily under these Articles of Affiliation.

### Article I - Affiliation

1. Agreement of Affiliation. Acceptance of these Articles of Affiliation shall constitute a formal affiliation between the Ohio State Beekeepers association, hereinafter referred to as OSBA and the beekeeping association seeking affiliation with OSBA.
2. Record of Affiliation.
  - a. A copy of the bylaws of the Affiliated Beekeeping Association shall be attached to the Agreement of Affiliation to establish a full record of the affiliation.
  - b. To maintain a full and lawful record of affiliation, an "Annual Affiliation Renewal Application" shall be completed by the Affiliated Beekeeping Association each year and filed with the OSBA Affiliated Beekeeping Association Chairperson.
    - i. All parts of the application must be properly completed.
    - ii. Supporting documents as indicated on the application shall be attached.
    - iii. Signatures of officers authorized by the Affiliated Beekeeping Association shall be affixed in the appropriate places.
    - iv. The completed packet shall be returned to the OSBA Affiliated Beekeeping Association Chairperson by February 1st of each year.
  - c. The Affiliated Beekeeping Association shall maintain a detailed description of its purposes and activities, including the sources and receipts and the nature of expenditures, to comply with the rules set forth by the IRS.
3. Terms of Affiliation. These Articles of Affiliation, along with the Bylaws and Constitution of OSBA shall govern the communication and collaboration between OSBA and the Affiliated Beekeeping Association.
4. Duration. The Affiliated Beekeeping Association shall maintain affiliation with OSBA until such time as the affiliation is terminated, according to the conditions set forth in Article VII.

### Article II - Purpose

1. The primary purpose of the Affiliated Beekeeping Association shall be the same as the primary purpose of OSBA:
  - a. To provide education to beekeepers and the general public.



- b. To promote beekeeping.
  - c. To support beekeeping research.
2. The primary purpose of the Affiliation between OSBA and the Affiliated Beekeeping Association shall be to coordinate and centralize the work of the various Beekeeping Associations, now or hereafter organized, under the general supervision of OSBA.

### **Article III - Governing Authority**

1. Organization. OSBA is incorporated under the laws of the state of Ohio pursuant to the Articles of Incorporation filed 3/25/1969. The provisions of the Constitution and Bylaws of the Affiliated Beekeeping Association shall not be in conflict with the Constitution, Bylaws and Articles of Incorporation of OSBA.
2. Affiliate.
  - a. The Affiliated Beekeeping Association is an autonomous entity and is responsible for maintaining records in compliance with these Articles of Affiliation and all applicable Federal, state and local laws and regulations, including tax laws.
  - b. The Board of Directors of the Affiliated Beekeeping Association shall have the final authority in all matters pertaining to the operations of the Affiliated Beekeeping Association which are not governed by these Articles of Affiliation.
  - c. The Affiliated Beekeeping Association shall be subject to and participate in OSBA's general supervision and control.
  - d. The Affiliated Beekeeping Association shall participate in OSBA governance through membership and through voting at the annual OSBA meeting as prescribed in the constitution and bylaws of OSBA.

### **Article IV - Limitations of Activity**

1. The Affiliated Beekeeping Association shall not conduct or carry out any activities not permitted to be conducted or carried out by an organization exempt under Section 501(c)(3)) of the U.S. Internal Revenue Code and its Regulations as they now exist or as they may be amended.
2. The Affiliated Beekeeping Association certifies by signing this agreement that it is not currently, nor shall it become, a private foundation during its period of affiliation.
3. Notwithstanding any other provision of these articles, OSBA Constitution or OSBA Bylaws, neither OSBA nor the Affiliated Beekeeping Association shall be precluded from affiliating or collaborating with any other individuals or organizations.

### **Article V - Financial Relationship**

1. Budgetary Independence. The revenue and expenditures for OSBA and the Affiliated Beekeeping Association shall be separate and independent in nature, except for any specific collaborations for which a distinct funding stream has been identified for the purpose of a collaborative activity between OSBA and the Affiliated Beekeeping Association.

2. Affiliate Membership Dues. The Affiliated Beekeeping Association will be liable for any and all membership dues to the OSBA. Dues will be levied on an annual basis, the exact amount of which will be set forth in the bylaws of the OSBA.
3. Tax Reporting. OSBA will complete Form 990N and yearly filing with the Ohio State Attorney General. The Affiliated Beekeeping Association is required to provide the required information to complete these filings as well remitting as any associated fees.

#### **Article VI - Amendment of the Articles of Affiliation**

1. Proposing Amendments.
  - a. Amendment of these Articles of Affiliation may be proposed by a resolution of the OSBA Board of Directors.
  - b. The Affiliated Beekeeping Association may submit proposed amendments to these Articles of Affiliation through the OSBA District Director for their region.
2. Acceptance of Amendments. These Articles of Affiliation may be amended at an annual OSBA meeting by a two-thirds vote, provided that at least 30 days prior to the meeting all voting members shall have been sent a copy of the proposed amendments with rationale.

#### **Article VII - Termination of Affiliation**

1. Automatic Termination. The Affiliation as defined herein these Articles of Affiliation will be deemed terminated if the Annual Affiliation Renewal Application is not submitted as set forth in these Articles of Affiliation.
2. Proposing Termination. The Affiliation as defined in these Articles of Affiliation may be terminated at any time by:
  - a. recommendation of the OSBA Affiliated Beekeeping Association Chairperson due to the non-receipt of annual dues.
  - b. recommendation of the OSBA Affiliated Beekeeping Association Chairperson because conditions for the continued effectiveness of group exemption have not been fulfilled by the Affiliated Beekeeping Association.
  - c. written letter from the Affiliated Beekeeping Association stating its wishes to terminate the affiliation.
  - d. resolution of the OSBA Board of Directors.
3. Resolution of Termination.
  - a. Upon termination of the affiliation between the OSBA and the Affiliated Beekeeping Association, the OSBA Affiliated Beekeeping Association Chairperson will issue a written acknowledgement of said termination, one copy of which will be sent to the Affiliated Beekeeping Association and one copy included with the record of affiliation thereby closing the file.
  - b. Upon termination of the affiliation between the OSBA and the Affiliated Beekeeping Association, the OSBA Affiliated Beekeeping Association Chairperson will include the

Affiliated Beekeeping Association on the list of subordinates no longer to be included in the group exemption letter to the Internal Revenue Service.

- c. The Affiliated Beekeeping Association will cease to claim itself a non-profit, 501(c)(3) organization under the OSBA group exemption letter.

In witness whereof, we, the undersigned, pursuant to the authority conferred upon us by the Ohio State Beekeepers Association or the beekeeping association seeking affiliation with the Ohio State Beekeepers Association, have executed these Articles of Affiliation upon this, the

\_\_\_\_\_ day of \_\_\_\_\_, in the year \_\_\_\_\_.

Signed,

Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Title \_\_\_\_\_

Association Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

OSBA Affiliated Beekeeping Association Chairperson:

\_\_\_\_\_  
Signature: \_\_\_\_\_

Date: \_\_\_\_\_