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# **Affiliate Association Policy Manual**



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## Introduction

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The United States Bowling Congress (USBC) has provided for affiliate associations in the USBC Bylaws (Article II, Section B). As a result, small membership associations meeting specific criteria will be eligible to operate as affiliate associations without having to meet all of the requirements of a USBC chartered regular association. Ultimately, USBC reserves the right to authorize chartered affiliate associations.

Note: Unless otherwise stated, the term “association” refers to an affiliate association in this manual.

The purpose of allowing for affiliate associations is to provide an opportunity for associations with small membership numbers to continue to operate, without having to meet all of the requirements of a USBC standard association.

To be eligible to operate as an affiliate association, one of the following conditions must be met:

1. Total membership of less than 250 for non-merged associations, or 750 for merged associations serving men, women, and youth.
2. Must not be within 100 miles of any neighboring association.
3. Special permission is granted from USBC Headquarters.

The *USBC Affiliate Association Policy Manual* has been revised to include all of the official governing documents for affiliate associations.

Changes may not be made to this *USBC Affiliate Association Policy Manual*, with the exception of determining the association name (requires USBC Headquarters approval), local adult dues, council size and adding addendums as indicated in this book.

Any additional provisions/policies/duties/etc., provided they are not in conflict with the USBC National Bylaws, this *USBC Affiliate Association Policy Manual*, and federal/state/local laws, may be adopted by the council, and added as an addendum to this manual.



## Definitions

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**Addendum to the Affiliate Association Policy Manual:** Includes information needed to handle the association affairs. Items stating “add an addendum to this manual” must be included in this manual. Information may be included at the end as additional addendum items or the association may have an Association’s Operation Manual for those additional items.

**Adult member:** An individual who holds a USBC adult membership.

**Association’s Operations Manual:** A manual created and maintained by the association, which contains information on the day-to-day procedures and operations and is not included in the *Affiliate Association Policy Manual*. Said item(s) may not be in conflict with *USBC Bylaws*, the *Affiliate Association Policy Manual* and/or federal/state/local laws.

**Council:** The governing body of the association which is elected by the association’s voting body. The council’s purpose is to manage the association as a board of directors.

**Plurality vote:** The largest number of votes cast for a given candidate. The candidate(s) receiving the most votes is (are) elected.

**State delegate eligibility:** If provided by the state association’s bylaws, affiliate association may elect delegates to the state meeting. These are members, at least 14 years of age at the time of election, unless state laws mandate a specific age and they serve a one-year term.

**Youth Representative:**

Youth Representatives consist of the following:

- a. Youth members, at least 14 years of age.
- b. One adult representative from each USBC youth league.
- c. One center representative from each center having at least one USBC youth league.



## Chapter One: Association Structure

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This chapter details USBC requirements for associations regarding charters, purpose, tax exemption, name, jurisdictional area, fiscal year, and dissolution.

USBC is the representative, legislative, and executive body with complete and final jurisdiction over chartered associations, its members, leagues, and tournaments.

### Section A. Purpose

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The purpose of the association is to:

1. Provide equal opportunity for all in the sport of bowling without regard to race, religion, age, gender, disability, or national origin.
2. Promote the game of American Tenpins.
3. Conduct and support bowling competition.
4. Engage in other activities permitted by an organization classified as tax exempt under section 501(c)(3) of the Internal Revenue Code (IRC).
5. Provide services and benefits to its members.

### Section B. Charter

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USBC issues charters to associations that meet requirements established by the board of directors. Chartered associations are subject to the authority of USBC. USBC approves the geographic areas in which chartered associations may operate. The USBC Board may revoke the charter of an association at any time if it determines the association is not acting in compliance with USBC National Bylaws, *USBC Affiliate Association Policy Manual*, rules or is not in compliance with such requirements as USBC may establish, in its sole discretion, from time to time. Requirements for chartered associations include but are not limited to:

1. Acceptance of, and adherence to, the *USBC Bylaws*, the terms of the charter, and the authority of the USBC Board;
2. Maintenance of *USBC Affiliate Association Policy Manual* and avoidance of any rules or policies conflicting with *USBC Affiliate Association Policy Manual*.
3. Compliance with requirements in the *USBC Bylaws* or *USBC Affiliate Association Policy Manual*, including such requirements as are added or revised from time to time.
4. Acting in the best interest of USBC and the sport of bowling.
5. Provide services for all of its membership constituents.
6. Comply with the 501(c)(3) status and adhere to federal, state and local laws as well as the filing of required tax forms. Every USBC association will be under the national group exemption and classified as tax exempt under Section 501(c)(3) of the Internal Revenue Code and must comply with IRS requirements.

### Section C. Association Name

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1. The name of the association is subject to USBC approval.
2. Any change or modification of the association name must be approved by USBC Headquarters and adopted by the association's voting body.



3. The association name will be as follows:
  - a. (Name of local) USBC (Serving men, women, and youth).
  - b. (Name of local) USBC BA (Serving men and women).
  - c. (Name of local) USBC WBA (Serving women).
  - d. (Name of local) USBC Youth (Serving youth).

#### **Section D. Jurisdiction/Location**

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1. The association's jurisdictional boundaries shall be determined at the time of initial chartering and shall be approved by USBC Headquarters.
2. Jurisdictional boundaries describe the area, including the centers, assigned to an association. The association will then provide services to the members in the centers in that area. Boundary examples include county lines, state roads, rivers, mountains, etc.
3. USBC Headquarters shall decide all questions of jurisdiction. The association(s) involved in a jurisdictional boundary dispute shall submit their recommendation(s) to USBC Headquarters for a decision. Any appeal of the decision shall be submitted to USBC Headquarters according to USBC appeal procedures.
4. Any modification of the boundaries must be approved by USBC Headquarters.
5. Jurisdictional boundaries shall include at least one certified bowling center.
6. The following may not serve in the same center:
  - a. Merged and non-merged adult associations, (or otherwise).
  - b. Two merged associations (affiliate or otherwise).
7. A youth association will determine if it will merge with the BA and WBA adult associations in the same jurisdictional boundaries. This merger must include both adult associations. The youth association has the option of merging or remaining non-merged.
8. A merged association serving men, women, and youth in the same jurisdiction as a non-merged youth association may either compete for the youth membership or make an agreement that the youth association will provide programs and services for the youth in the area.

**NOTE:** This scenario will be detailed throughout this manual as “merged with a youth association.”

9. Associations shall only be affiliated with one merged state association or a non-merged BA, WBA, and/or youth state association, with the exception of a merged with a youth state association.

#### **Section E. Association Dissolution**

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Associations dissolved include, but are not limited to, those that have merged with another association, have not completed the charter process with USBC or have had their charters revoked by USBC.

At the direction of the former association board, prior to merging, all assets remaining after payment and discharge of its duties, obligations, and liabilities will be distributed proportionately. This board determines the division of the assets including trusts. No portion of the assets is distributed to any



organization not described in Internal Revenue Code (IRC), Section 501(c)(3) of 1986, as amended.

For all other associations dissolved, all assets remaining after payment of its lawful obligations shall be distributed in accordance with the requirements of the Internal Revenue Code (IRC), Section 501(c)(3) and regulations promulgated thereunder.

USBC has the authority to enforce any/all distributions provided they meet the requirements described in IRC, Section 501(c)(3) of 1986, as amended. Failure to distribute could be cause for suspension from USBC.

Upon dissolution, all of the organization's assets remaining after payment of its lawful obligations shall be distributed in accordance with the requirements of Section 501(c)(3) of the Internal Revenue Code and regulations promulgated thereunder. For example: If an association dissolves, it must distribute its assets to another 501(c)(3) organization such as another USBC association, the Bowlers to Veterans Link, Susan G. Komen for the Cure, or the International Bowling Museum and Hall of Fame.

Any association that is liquidated, dissolved, or terminated must file a final IRS Form 990 by the 15th day of the fifth month after the liquidation, dissolution, or termination.

Any association that enters into a merger effectively dissolves on the day the new merged association begins.

#### **Section F. Non-Profit Status**

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A non-profit organization is one that directs all of its revenues to its stated purpose. USBC's purpose is expressed in its mission statement:

To provide benefits, resources and programs that enhances the bowling experience.

As a non-profit organization, all business and non-business related revenue must be reported to the IRS by filing the appropriate tax forms.

Although associations are non-profit organizations, they can still generate more income than expenses at the end of a fiscal year. The result is more appropriately called a surplus than a profit.

Non-profit status is based more on an association's purpose rather than its year-to-year financial situation.

#### **Section G. Fiscal Year**

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The fiscal year for all associations is August 1 through July 31.



**Section H. Indemnification**

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Council members and other authorized volunteers, employees, or agents shall be indemnified against claims for personal and individual liability arising in connection with their positions or service on behalf of the association to the full extent permitted by law.



## Chapter Two: Dues/Membership Processing

### Section A. Dues Structure

1. Membership is valid as established in the *USBC Bylaws*, and described in the *USBC Playing Rules & Commonly Asked Questions* book.
2. Each individual shall pay national, state (where applicable), and local dues (adults)/local processing fee (youth), except as provided in Rule 100e, Traveling Leagues and Rule 100l, Mail-o-Graphic Leagues.
3. Associations will use one of the following dues structures as applicable to its membership:
  - a. **Non-merged adult** associations: The BA/WBA members, by two-thirds vote, determine and adopt local adult standard dues, if any.

The annual adult standard membership dues are as follows:

<b>Local</b>	\$ _____. (Cannot exceed \$10.)
<b>State</b>	\$ _____. (Cannot exceed \$1.)
USBC	<u>\$10.00.</u>
Total	\$ _____

- b. **Youth Standard.** The annual youth standard membership dues are as follows:

Local Processing Fee	\$ 2.00
State dues	\$ 0.50
USBC	<u>\$14.50</u>
Total	\$17.00

For more information on dues structure, membership and benefits of being a member, see “Join USBC” on BOWL.com or Chapter 1 of the *USBC Playing Rules & Commonly Asked Questions* book.

4. Decisions adopted at the USBC Annual Meeting or the applicable state association annual meeting which affect dues amounts are made automatically and require no further action by the association.
5. The council may waive all or part of local adult dues/youth processing fees for:
  - a. Members of other USBC associations (affiliate or regular) having a reciprocal agreement with the association.
  - b. Members processed by bowling centers within the association’s jurisdiction.
  - c. Other groups, such as seniors, military, etc., as determined by the council.
6. The association cannot charge additional non-dues assessments.
7. Merged associations and non-merged BAs must charge the same local association dues to men and women.
8. Merged associations may, at the maximum, only charge for local adult dues when a youth member joins an adult league or the association may waive all or part of its remaining local dues.
9. Associations will accept payment of annual membership dues in any form approved by USBC Headquarters.



## **Section B. Distribution of State Dues**

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State dues shall be distributed by USBC Headquarters as follows:

1. **Merged State Association** – USBC Headquarters remits all youth and adult dues to the merged state association.
2. **Non-Merged State Association**
  - a. Youth dues go to the state youth association.
  - b. Men's dues go to the state BA.
  - c. Women in a merged association choose the state WBA, BA, or both. If choosing both, she must pay the corresponding dues for both.
  - d. Women in a non-merged association will pay the corresponding state dues.\*
3. **Merged and Non-Merged Youth State Associations (Youth)**
  - a. Youth dues go to the merged state association.
  - b. If merged state and state youth association are competing – youth choose the merged, youth only, or both. If choosing both, they must pay the appropriate dues for both.\*\*
  - c. If merged state and state youth association are not competing – youth dues go to the state youth association.

\*Women who join the local and state WBA and also want to bowl in the BA must join the local and state BA and vice versa.

\*\*Merged with a youth association: Merged associations represent men, women, and youth, and youth associations represent youth in the same jurisdictional area. Youth who join a competing merged or youth association and also want to bowl in the other must apply and pay the appropriate state dues and local processing fee. (This situation arises when a BA and WBA merge and the youth association remains separate.)

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## Chapter Three: Council

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This chapter explains the council structure, authority, duties, eligibility, terms, resignations, removals, vacancies, bonding, conflicts of interest, as well as individual officer requirements and responsibilities.

The management and governance of the association is vested in the council.

### Section A. Structure

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1. The council is the elected governing body of the association. It functions similar to a Board of Directors.
2. The council is comprised of council members, elected by the association's voting body. Officers are elected by and from the council members.
3. The council shall have a minimum size of four council members and a total size as determined by the association's voting body.
4. **The total number of council members is \_\_\_\_\_.**
5. Any increase or decrease in total council size shall become effective August 1, following adoption, unless otherwise specified.
6. No individual may be elected to more than one voting position on the council.
7. Life or other honorary members are not members of the council unless elected by the voting body as a council member.
8. USBC shall have the authority to suspend, expel, or otherwise discipline for cause, council members of any chartered association.

### Section B. Authority and Duties

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The council's duties include but are not limited to:

1. Enforcing the USBC National Bylaws.
2. Complying with this *USBC Affiliate Association Policy Manual*.
3. Electing the association officers.
4. Establishing a procedure for the handling of funds which includes:
  - a. Approving the financial institution(s), which must be federally insured or its equivalent.
  - b. Designating council members, at least 18 years of age, to sign for withdrawals. All withdrawals must have two signatures. Two members of an immediate family cannot co-sign for withdrawals (refer to Section I of this chapter for definition of family members).
  - c. Ensuring all money is deposited within seven days.
  - d. Authorizing all expenditures that can include electronic transfers of routine bills. (Electronic transfers and routine bills only need initial authorization.)
  - e. Ensuring the president verifies all association accounts monthly. It is recommended the president notifies the board when the verification has been completed.
  - f. Ensuring all required financial reports are filed (IRS, payroll taxes, state taxes, etc. Refer to Chapter 8).
  - g. Ensuring scholarship funds are handled as specified by USBC Headquarters. (Refer to Section M of this chapter.)

5. An annual financial review of all of the association's accounts. This committee/group of three must have at least one non board member. This group will provide a written report to the council and that report should contain, but is not limited to: deposits made within seven days, dual signatures on checks, filing of the 990 by December 15<sup>th</sup>.
6. Approving a procedure for retention of records that must include the financial records. The established procedure should be included as an addendum to this manual.
7. Overseeing the transfer of association records and property to the:
  - a. Successor to a position, or employee, no later than their first day on the council or start of employment.
  - b. Council within two weeks of the individual's ending date on the council.
8. Implementing USBC programs as requested.
9. Ensuring the association has an active e-mail account, to be maintained by the association manager or another individual appointed by the council. The e-mail account must be entered in the association's WinLABS database and transmitted to USBC Headquarters.
10. Selecting/appointing the association manager.
11. Approving use of membership records. Membership records are the property of USBC and the association, and are provided to USBC Headquarters as requested.
  - a. The membership list must be retained by the association and the mailing must be made by the association or a bonded mailing service.
  - b. If a center requests a mailing to one or more individuals, the council must receive written approval from each center prior to doing the mailing. If a center does not provide written approval, his/her center's bowlers must be excluded from the mailing.
  - c. Association mailings, such as state or local tournament promotions, or mailings done by the association on behalf of another entity (state association, tournament group, etc.) not within the association's jurisdiction, does not require approval from the centers.
12. The association may set a date for league secretaries to submit averages but this date may not be earlier than March 1. Averages as of the date set shall be considered the final season averages except in the case of bowlers in a league that has not bowled 10 weeks of its schedule as of that date. In that case, the averages at the end of the league schedule are official.
  - a. Provide each league secretary with the National ID number of each participant in the league prior to the end of each league's scheduled or association cut off date.
  - b. Process all averages, including pin total and number of games bowled in WinLABS or a system approved by USBC.
13. Re-rating the league average of a member when there is evidence the bowler's average does not represent the bowler's true ability.
14. Conducting suspension and reinstatement hearings if directed by USBC Headquarters.
15. Rendering a final decision on all protests and disputes within the association unless appealed to USBC.
16. Providing other reports as required by USBC Headquarters.

### Section C. Council Eligibility

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A candidate for the council must be:

1. A USBC member in good standing at the time of election and throughout his/her time on the council as follows:
  - a. A candidate in a merged or non-merged adult association must be a member of the association.
  - b. A youth candidate in a merged or non-merged youth association must be a member of the association.
  - c. An adult candidate in a non-merged youth association must be a USBC member.
2. A minimum age of 14, unless state laws mandate a specific age. Any member of the council authorized to handle funds, sign contracts, or acting as a signatory on association accounts must be a minimum age of 18 to meet bonding requirements. Bond coverage does not extend to anyone under the age of 18.
3. Bondable by USBC, if at least 18 years of age.
4. Elected without regard to race, color, religion, gender, disability, national origin, or age, other than the minimum age.
5. Reasonably representative of the membership constituency.

### Section D. Elections

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1. **Council:**
  - a. Council members are elected at an association membership meeting.
  - b. The election shall be by plurality vote, unless the use of majority vote is adopted by the members. **Council members are elected by \_\_\_\_\_ vote.**
  - c. An association is permitted to conduct annual council elections. Procedures for annual elections would be included as an addendum to this manual, and:
    - 1) May include a stagger system.
    - 2) Must specify a term length for each position.
    - 3) May specify a maximum number of terms.
    - 4) Must follow all applicable policies outlined in this *USBC Affiliate Association Policy Manual*.
  - d. Should no protocol exist for annual elections, associations shall adhere to the following:
    - 1) Annual elections are not required; however, an election must be held if requested (Refer to Chapter 4, Section B for how an election may be requested).
    - 2) An election shall be either:
      - a) To elect all council positions.
      - b) To fill vacant positions.
    - 3) Frequency of election – Positions on the council shall be subject to election a maximum of once per season (except in the case of vacancies).
  - e. Notice for election – Meeting notice must indicate that a council election will be held.
  - f. The election of council members may be held on a single ballot.
  - g. Elected individuals will begin service as council members August 1, following election, unless otherwise specified in an addendum to this manual.
  - h. Voting will be by ballot if there is more than one nominee for each position.



- i. Nominations from the floor will be accepted.
- j. Mail, absentee, and proxy voting are not permitted.
2. **Officers:**
  - a. Officers are elected by and from the council.
  - b. The election shall be by plurality vote, unless the use of majority vote is specified. **The officers are elected by \_\_\_\_\_ vote.**
  - c. To serve as an officer, an individual must be a current member of the council.
  - d. The council shall:
    - 1) Hold an election to fill any vacated officer position (as often as necessary).
    - 2) Hold an election for all officer positions at the discretion of the council (maximum of once per season).
  - e. The officers of an association consist of a president and vice president. The members may, if it so chooses, allow for additional vice presidents and/or a sergeant at arms. If these additional positions are allowed, they shall be included in an addendum to this manual.
  - f. Should an officer position become vacated, a current officer may run for election for another officer position without resigning his/her present officer position. If defeated, the individual retains his/her current position.
  - g. Officer positions shall be voted on separately and consecutively beginning with the highest position to be filled.

### **Section E. Terms**

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Council members remain in office until:

1. An elected successor takes office.
2. The individual resigns.
3. Removal for ineligibility or cause.
4. Death.

### **Section F. Election Protest**

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Any and all protests must be voiced during the meeting at the time of the infraction, i.e., during the election process. If a protest is voiced during the meeting and *no action* is taken by the presiding officer/board, then a protest may be filed in writing to USBC Headquarters within 15 days of the meeting. If no timely protest, the election stands.

### **Section G. Resignation and Removal**

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1. **Resignation.** A council member may resign his/her position by providing written notice of resignation to the president, or in the case of the president, to the council.
2. **Removal for Ineligibility.** A council member who is no longer eligible to serve on the council may be removed by a two-thirds vote of the council when a quorum is present.
3. **Removal for Cause.** When a council member is accused, in writing, of failure to properly perform the duties of his/her office or otherwise engaging in improper or unfair activities or conduct, the council may conduct a meeting following the Removal From Office Procedure outlined in the Suspension and Reinstatement Procedures in the *Association Policy Manual*.



## Section H. Bonding

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1. USBC maintains a policy of bonding, burglary, and holdup insurance for all chartered affiliate associations. The bonding, burglary, and holdup insurance coverage is available through a policy of insurance issued to USBC by an independent licensed insurance company.

USBC affiliate associations, with the exception of those located on US Military Bases in foreign countries, are automatically covered for \$10,000. Additional coverage can be obtained without cost, upon written request to USBC Headquarters or through the WinLABS program.

The policies of insurance provide coverage for misuse of funds by an affiliate association officer and bonds all association council members for loss of funds due to burglary and/or holdup.

2. Funds from all association tournaments, conducted by a non-council member appointed by the association manager, are not bonded until received by a member of the council.
3. Requirements for Bonding:
  - a. **Family Members.** Two members of an immediate family cannot co-sign for withdrawals. (Immediate family members include: mother, daughter, sister, wife, husband, son, brother, father, stepsister, stepmother, in-laws, etc. Even though members of an immediate family are not residing in the same household, it would not be permissible for them to act as signatories on association accounts.)
  - b. **Age.** Any member of the council authorized to handle funds, sign contracts, or acting as a signatory on association accounts must be a minimum age of 18. Bond coverage does not extend to anyone under the age of 18.

## Section I. Hierarchy of Governing Documents

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Associations are governed by the documents in the following order. Should a higher ranking document contradict with a lower ranking document, the information in the higher ranking document should be adhered to.

1. Federal/state/local laws, including Articles of Incorporation, if incorporated.
2. USBC National Bylaws.
3. *USBC Affiliate Policy Manual*.
4. *Association's Operations Manual*, if applicable.
5. *Robert's Rules of Order, Newly Revised* (most recent edition), if applicable.

## Section J. Diversity

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1. USBC will provide equal opportunity for all in the sport of bowling without regard to race, religion, age, gender, disability, or national origin.
2. An association should ensure the council and its committees are representative of its membership.

## Section K. Life Members

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Individuals who have been recognized by their former ABC and/or WIBC associations as honorary members will retain their titles of Life Member or Member Emerita of the former ABC and/or



WIBC association. These honorary members are not members of the council unless they are elected to one of the council positions.

The council will have the authority to determine if it will develop its own recognition program and/or honorary memberships. If the association determines that Life Membership is to be part of its recognition program, those members could receive special discounts, etc., but not to include automatic council participation.

### **Section L. Conflict of Interest**

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The council shall not engage in any acts constituting a conflict of interest. Council members have a legal responsibility to the association and its members and may be held responsible for failing to honor these obligations. A council member must:

1. Be looking out for the association's and members' interest, not his/her own interests.
2. Not experience personal gain from his/her position as a member of the council.
3. Not participate in the decision making process if the decision affects that individual.  
Example: If voting on a host center for the association tournament, any interested board member(s), especially a proprietor member of the board, should not vote and should excuse themselves from the discussions.
4. Maintain confidentiality in any matter the council deems as confidential.

Additional information may be found within the *Conflict of Interest Policy & Disclosure Form* on the Association page of BOWL.com under Forms and Manuals.

### **Section M. Expenses**

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Legitimate business expenses can be reimbursed, with council approval. Such expenses must be documented, including receipts.

### **Section N: Other Requirements**

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1. **Registered Volunteer Program**  
Specific roles or positions within the USBC Youth program that require registration include:
  - a. Local non-merged youth association board members.
  - b. Association manager in merged associations and non-merged youth associations.
  - c. Non-family members who serve as overnight trip chaperones.
2. **Record Retention**  
Associations are required to maintain:
  - a. All required records of all former organizations.
  - b. Records as described in the Record Retention Guide on the Association page on BOWL.com, under Forms and Manual.
3. **Supply Distribution**  
Associations must develop a supply distribution system that best fits the needs of the leagues.
4. **Logos**
  - a. The USBC logo is trademarked. Any use of the USBC logo must comply with information included in the *USBC Graphics Standards Manual* (also known as the *USBC Style Guide and Association Leaders' Brand Guide*). The guide is available at BOWL.com on the Association/branding page. Associations may not license the use of



- the USBC logo or marks (i.e. related graphics such as the logo for BOWL.com, USBC tournaments, departments, etc.) to any third party. If such licensing is desired, please e-mail [marketing@bowl.com](mailto:marketing@bowl.com).
- b. The USBC Association Logo options template must be used when designing and creating a new logo. Submit your logo to USBC Headquarters ([marketing@bowl.com](mailto:marketing@bowl.com)) for approval before printing or digitizing your association logo.
  - c. When creating new (or reordering existing) association apparel, pins, etc. that includes a logo, your USBC association logo must be used. If logos are not used on these items, it is acceptable to only use your USBC association name without the logo.
  - d. The primary and secondary USBC youth logos are trademarked, and may not be altered. All use of USBC youth logos must comply with information included in the *USBC Youth Characters Official Graphics Standards and Style Guide* and use of the logo(s) must be approved by USBC by e-mailing a request to [marketing@bowl.com](mailto:marketing@bowl.com).

The *USBC Graphics Standards Manual* and *USBC Youth Characters Official Graphics Standards and Style Guide* can be obtained by logging on to the Association page of BOWL.com or e-mailing [marketing@bowl.com](mailto:marketing@bowl.com).

Additional information may be found on the Association page of BOWL.com under Forms and Manuals.

#### 5. Recognition

Associations are required to:

- a. Maintain records of all those previously honored, such as:
  1. Hall of Fame members.
  2. Honorary members.
- b. Solicit input and submit names of individuals deserving national, state, and/or local recognition.  
Provide USBC Headquarters with appropriate information, as requested.

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## Chapter Four: Elected Officers

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This chapter details the specific officer positions, authority and duties.

### Section A. President

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Authority and Duties:

1. Presides at all council and membership meetings.
2. Acts as spokesperson for the association.
3. Obtains financial records from the association manager and verifies the association accounts monthly.
4. Appoints committees, with council approval, and has the authority to remove committee members. If a replacement is needed, appoint a person, with council approval.
5. In a non-merged youth association, appoints two adult council members, at least 18 years of age, as adult advisors to the Youth Leaders Chapter (if there is a chapter in the jurisdiction) with approval of the council and youth leaders board.
6. May attend president-appointed committee meetings in an ex-officio, non-voting capacity, unless the council directs otherwise, and it is included as an addendum to this manual.

### Section B. Vice President

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Authority and Duties:

1. Presides at all meetings when the president is absent.
2. Performs other duties as prescribed by the council or requested by the president.

## Chapter Five: Association Operations

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### Section A. Association Manager

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1. Acts as the ex-officio, non-voting secretary/treasurer of the council.
2. Has voice only, does not count towards the quorum and cannot make or second motions at council meetings, unless he/she is also a council member. He/she may be excused from council meetings based on the issue/discussion at hand.
3. Has voice and vote at membership meetings, if a current member of the association.
4. Is selected/hired by and accountable to the council and USBC.
5. Must be a minimum age of 18, unless state law mandates a specific age, and be USBC bondable.
6. Is not required to be a member of the association; however, it is suggested.
7. Is not eligible to serve concurrently as an officer of the association.
8. Is eligible to serve as a council member. (Not recommended due to possible conflicts of interest.)
9. Authority and Duties:
  - a. **Reporting**
    - 1) To USBC Headquarters as required.
    - 2) To the council/members at every meeting and as needed.
    - 3) A financial report, in writing, at every council and membership meeting.
    - 4) A written year-end financial report to the council.
  - b. **Financial** - Complying with the established bookkeeping procedures and accounting of assets and disbursements, as approved by the council, which must include:
    - 1) Receiving and issuing a receipt for all funds paid to the association within 10 days (i.e. to league secretaries for receipt of dues).
    - 2) Depositing association funds, and if applicable, Youth Leaders Chapter funds, in the association's financial institution(s), which must be federally insured or its equivalent, within seven days of receipt. Non-board members are not bonded through USBC.
    - 3) Ensuring all withdrawals have two signatures. (Two members of an immediate family cannot cosign for withdrawals.)
    - 4) Providing the president with all records for monthly verifications.
    - 5) Ensuring all required financial reports are filed (IRS, payroll taxes, state taxes, etc.)
    - 6) Providing all documentation for the association examination of the organizations financial documents.
    - 7) Preparing a budget for council approval, if required. He/she is accountable to maintain the operating costs within the approved budget. If additional funds are needed, he/she must make the request per the council's approved policy.
    - 8) Establishing a procedure for retention of records that must include the financial records, to be approved by the council. The procedure should be included in an addendum to this manual.
    - 9) Providing a report of financial transactions as requested by the council or USBC.
    - 10) Paying all bills authorized by the council.
    - 11) Paying all invoices/warrants from youth leaders funds that are submitted and



approved by the Youth Leaders Chapter. Must ensure there are two signatures on the invoice/ warrant, one of which must be an adult advisor.

- 12) Submitting scholarship funds to USBC Headquarters for administration by SMART within 30 days of the completion of the league/tournament/event, including academic or meritorious accomplishments.

**c. Other**

- 1) Handling association correspondence, including distributing information to and from USBC Headquarters to the respective council, proprietors, and members.
- 2) Distributing meeting notifications, as designated in this *USBC Affiliate Association Policy Manual*.
- 3) Maintaining the *USBC Affiliate Association Policy Manual*, and if applicable the *Association's Operations Manual*.
- 4) Receiving, compiling, and filing committee reports.
- 5) Recording and maintaining meeting minutes.
- 6) Distributing all prize funds within 30 days following the close of the tournament, except when USBC Headquarters has authorized delay in payment.
- 7) Ordering association supplies and maintains proper inventory levels on awards.
- 8) Maintaining a record of, verifying, and submitting to USBC Headquarters the pinfall and number of games for all members who have participated in a league.
- 9) Providing each league secretary a list of all league members and their National ID numbers for submission of averages (Refer to Section B of this chapter).
- 10) Providing membership records and submitting to USBC Headquarters when requested and in a format specified by USBC Headquarters.
- 11) Ensuring lane certification and dressing inspections are completed and submitted to USBC Headquarters in a timely manner.
- 12) Submitting the association's adult/youth delegate(s) credentials to the state (if applicable) within the specified formats and dates.
- 13) Processing membership and remitting USBC national and state dues to USBC Headquarters within 20 days of receipt.
- 14) Performing an upload of WinLABS backup twice per year. (The first one must be completed after "starting new season" in WinLABS.)
- 15) Transmitting all council member information to USBC Headquarters within 20 days of election, and maintaining the accuracy of the information.
- 16) Ensuring members' awards are fulfilled within seven days.
- 17) Entering Youth Leaders Chapter information (identifying youth leaders and their titles) in WinLABS within 20 days of receipt, if there is a program in the association's jurisdiction.
- 18) Overseeing volunteer activities.
- 19) Performing other duties as prescribed by the council and this *USBC Affiliate Association Policy Manual* and all addendums.

**Section B. Performance Reviews**

---

1. The association manager reports and is accountable to the council and USBC Headquarters.
2. Federal and state laws on employment must be taken into consideration.



**Section C. Processing and Distributing Awards**

USBC local associations are required to:

1. Fulfill and distribute all national awards within seven days of receipt of the completed application.
2. Submit high score award applications to USBC Headquarters electronically, or as specified by USBC, within seven days of receipt of the completed application.

For member history purposes, associations should transmit all earned national awards information (high score and locally fulfilled) to USBC Headquarters within seven days of the completed application.

**Section D: IRS and Tax Information**

This chapter lists some of the association's requirements for filing Internal Revenue Service (IRS) and state forms. Associations may be required to file additional forms. Contact the local IRS office, State Department of Revenue, or a tax consultant.

It is the responsibility of the **entire council** to ensure all legal documents are filed and all taxes are paid as legally required. This will include Form 990, 990-EZ, 990-N, 999-T, 1099, W2, 941 and any others as applicable. Must comply with federal, state and/or local laws in regards to small games of chance.

Additional information may be found within the *Tax and IRS Information*, *Tax Exempt Status*, and *Tax Requirement* documents on the Association page of BOWL.com under Forms and Manuals.

<b>2010 Tax Year and later (Filed in 2011 and later)</b>	<b>Form to File</b>
Gross receipts normally ≤\$50,000	990-N
Gross receipts > \$50,000 and < \$200,000, and Total assets < \$500,000	990-EZ or 990
Gross receipts ≥ \$200,000, and/or Total assets ≥ \$500,000	990

**NOTE:** USBC Headquarters is not responsible for misinterpretation of information in this chapter. Associations should contact the Internal Revenue Service (IRS) or a tax advisor experienced with tax exempt organizations.

**Section E. Tournaments**

Affiliate associations are not required to host an association championship tournament.

If the association chooses to host an association championship tournament, the tournament must comply with all USBC requirements unless otherwise approved by USBC Headquarters.

1. **Tournaments** – If the association conducts a championship tournament, the following is required based on association type:



a. **Merged Associations:**

- 1) Open tournament (men and women).
- 2) Women's tournament.
- 3) Youth tournament.

If state public accommodation laws allow, the association may offer a men's only and a women's only championship tournament rather than the open tournament. USBC will not be responsible for any consequences resulting from actions of any association that does not comply with state laws.

If an open and women's championship tournament is offered, the association may offer a men's only championship tournament if state public accommodation laws allow.

Contact an attorney for more information on public accommodation laws and advice on what specific practices are permitted in your state.

b. **Non-merged Associations:**

1. USBC BA – An open tournament for men and women.

If state public accommodation laws allow, the association may offer a men's only and women's only championship tournament, in addition to the open tournament. USBC will not be responsible for any consequences resulting from actions of any association that does not comply with state laws.

Contact an attorney for more information on public accommodation laws and advice on what specific practices are permitted in your state.

2. USBC WBA – Women's tournament.
3. USBC Youth – Youth tournament.

2. **Tournament Operation**

- a. All members must have an equal opportunity to participate in tournaments of equal design and quality.
- b. The association manager is responsible for the operation of the association championship tournament(s) and all other association tournaments, either as tournament manager or as supervisor of the tournament manager.
- c. One tournament may be conducted with divisions for open (men and women), women and/or youth.
- d. Tournament scores must be submitted to USBC Headquarters as specified.

3. **Certification**

- a. Association championship tournaments are certified through Tournament Certification on BOWL.com.
- b. If the association conducts additional tournaments, they must be certified with USBC, including modified formats and scholarship tournaments. Scholarship funds must be submitted to USBC Headquarters for administration by SMART. Fund-raising events to benefit named charities do not have to be certified (Bowl for the Cure®, etc.).
- c. Tournament management is required to submit the financial report on line once the tournament is completed.

Associations may apply for tournament certification by completing the application online at BOWL.com through the Tournament Certification Online Program.

4. **Rules**

- a. The championship tournament shall be governed by the following:

- 1) *USBC Playing Rules Book.*
  - 2) *This USBC Affiliate Association Policy Manual.*
  - 3) The council.
  - b. Tournament rules:
    - 1) Are adopted by the council or a committee (more than one member) appointed by the council. A majority vote is required to adopt or change the tournament rules.
    - 2) Shall not conflict with USBC playing rules. The following rules do not apply:
      - a. 300 b, Item 1
      - b. 300 c, Item 1(b)
      - c. 301 a
      - d. 303 Item e
      - e. 309 Item b, 1 and 2 Tournament management is required to submit financial statement in accordance with USBC Rule 309 when certifying on-line and for scholarship tournaments. The association shall maintain for at least one year, a prize list with the name and score of each prize winner, the prize issued and a financial statement listing all prize receipt disbursements.
    - 3) The following formats are not available for the annual association championship tournament:
      - a. Pro-Am Tournament - Rule 301 e
      - b. Mail-o-graphic - Rule 302
      - c. Modified Formats - Rule 3
      - d. Can limit the number of players classified as professional bowlers to two on a four or five-player team and one on a three-player or doubles team.
      - e. Cannot require an average to have a minimum number of games in excess of 21 games.
5. **Entering Averages**
- a. A member who competes in leagues in other associations must enter with his/her highest league average unless the tournament rules state that only averages established in leagues under its jurisdiction are to be used.
  - b. Averages established in USBC summer leagues, which start their schedules after March 15 for the summer season, shall be accepted as official. Unless the tournament rules state otherwise, averages established in leagues, which start their schedules after March 15 for the summer season, shall be accepted when a member does have a winter season average.
6. **Average Adjustment**
- The tournament manager or an authorized representative may adjust an entrant's average upward prior to bowling. Such adjustment may be appealed to USBC Headquarters within 10 days of the date of bowling or prior to the payment of prizes, whichever comes first.
- If the entrant chooses not to bowl with the adjusted average, the entry fees shall be refunded.
7. **Format**
- The tournament consists of any or all of the following and shall decide the association champions in the following events:
- a. Five, four or three-player teams.
  - b. Two-player teams. (doubles)
  - c. Singles events.
  - d. All-events.
8. **Consolidated Tournaments**

Local associations adjacent to each other may consolidate their annual association championship tournament provided the councils/boards of the adjacent associations approve such consolidation.

The councils/boards of the adjacent associations shall determine the management of the consolidated association championship tournament.

#### 9. Sectionals

Associations outside the United States may conduct their annual championship tournament using a sectional format with the permission of USBC Headquarters. Associations using the sectional format shall determine the number of sectionals. The association shall have the option of determining the association champions of each event via a championship playoff or declare the sectional winners of each event sectional champions.

The rules of each event must list the options used.

#### 10. Eligibility

- a. To participate in an association tournament an individual must be a member.
- b. **Adults** - To be a member, the individual must apply through the appropriate association and pay the appropriate dues, i.e., local, state, and national.
- c. **Youth** - All youth members participating in youth leagues in bowling centers located within the jurisdictional boundaries of a merged or non-merged youth association are permitted to bowl in the championship tournament even if their original membership was not processed through the association. If applicable, the following members must pay state dues and local processing fee, unless otherwise waived through a reciprocal agreement with the association:
  - 1) Youth moving from state to state must pay state dues and the local processing fee.
  - 2) Youth moving from one local association jurisdiction to another must pay only the local processing fee.
- d. Those eligible to bowl in a non-merged state WBA are:
  - 1) All women in a merged local association who join the state WBA.
  - 2) All women in a non-merged local WBA.  
Women who belong to a non-merged local BA are not eligible unless they join the non-merged local WBA and pay the appropriate local and state dues. The non-merged local WBA could supply the member with a multiple membership card designating she is a member of the WBA.
- e. Those eligible to bowl in a non-merged state BA are:
  - a. All men and women in a non-merged local BA.
  - b. All men in a merged local association. Women in a merged local association are not eligible unless they join the non-merged state BA and pay appropriate dues.  
Women in a non-merged local WBA are not eligible to participate in the state BA tournament unless they join the non-merged local BA and pay appropriate state (if applicable) and local BA dues. The non-merged local BA could supply the member with a multiple membership card designating she is a member of the BA.
- f. Associations may adopt additional tournament eligibility requirements provided they do not conflict with USBC rules. Tournament rules may require:
  - 1) An individual to be a member of the association no more than 30 days prior to the date the player participates in the tournament.



- 2) Members who are eligible for another association championship tournament to bowl a predetermined number of games, not more than 21, in a league within its jurisdiction. Members of multiple associations who do not bowl the required number of games in any association will be eligible for the association tournament through which their USBC national dues were paid.

**NOTE:** Eligibility cannot be restricted for individuals who have a current average of 21 or more games in a league within its jurisdiction or members who do not hold membership in another association.

- g. Protests and appeals must be filed in writing, stating the grounds for the protest/appeal. Refer to *USBC Playing Rules* book, Rule 329.

#### 11. **State Pepsi USBC Youth Championships**

Associations shall encourage and assist coaches of USBC certified youth leagues to conduct qualifying levels of the State Pepsi USBC Youth Championships. The qualifying levels will be outlined in the State Pepsi USBC Youth Championships Tournament rules.

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## Chapter Six: Meetings

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This chapter details USBC requirements for holding meetings. Included is information regarding who may attend, who may vote, quorums, meeting notice, and the recording of proceedings.

### Section A. General Meeting Requirements (council and Membership Meetings)

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1. Meetings involving youth members may not involve the use of tobacco products or alcoholic beverages.
2. Minutes (All board and association meetings)
  - a. Minutes must be kept for all meetings of the association.
  - b. Minutes of the previous meeting shall:
    - 1) Either be read (not recommended) or a written copy provided to all attendees of the meeting.
    - 2) Be approved at the next meeting.
    - 3) Be filed (paper or electronic) permanently.
3. Mail, absentee, and proxy voting are not permitted.

### Section B. Membership Meeting

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1. Associations are not required to hold an annual membership meeting. A meeting must be called, however, if requested:
  - a. In writing, by at least 10 members.
  - b. In writing, by at least 3 members of the council.
  - c. By the president.
2. The following actions require a membership meeting to:
  - a. Hold an election for the council.
  - b. Increase or decrease the total size of the council.
  - c. Vote on any changes in local adult dues.
  - d. Elect adult/youth delegates and alternates to the state annual meeting (as applicable).
3. Voice and Vote:
  - a. All members are eligible to attend with voice.
  - b. All members at least 14 years of age, unless state law mandates a specific age, are eligible to attend with voice and vote.
  - c. Non-merged youth associations shall allow council members and youth league officials to attend with voice and vote. (All adult representatives must be USBC members.)  
For some items requiring a membership vote there are specific voting responsibilities. Each of these items are listed in this *USBC Affiliate Association Policy Manual* (reference Chapter 2, Section A – adult dues, and Chapter 10, Section C – adult and youth delegates).
4. Notice – Written notice of a membership meeting shall be sent, and should be at least 15 days prior to the meeting. Notice shall be forwarded to:
  - a. The council.
  - b. League secretaries (for merged and non-merged adult associations).

- c. Youth league supervisors (for merged and non-merged youth associations).
5. Quorum – A quorum is the number of voting members who must be present in order for business to be legally transacted. Quorum size shall be one greater than the current number of members on the council.
6. Change in Dues
  - a. When a vote is to be taken regarding a change in adult dues, written notification of the proposed change shall be sent to the council and each league secretary, 15 days in advance of the meeting, and must specify the amount and reason for the change.
  - b. Written notification of any adopted change in dues, and the reason for the change, shall be sent to the council and league secretaries.
  - c. All adult dues changes shall be effective August 1, following adoption, unless otherwise specified.
7. Action - A majority vote of those members and council members present and voting (and youth league officials in a non-merged youth association), at a properly noticed meeting, when a quorum has been established, is required to take action, unless otherwise provided by law, the *USBC National Bylaws*, or this *USBC Affiliate Association Policy Manual*.

### **Section C. Council Meetings**

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1. The Council shall meet:
  - a. At a minimum as often as required by state law.
  - b. If requested, in writing, by at least 3 members of the council.
  - c. If requested by the president.
2. Notice – Written notice for all meetings shall be sent to the council, and should be at least 15 days prior to the meeting.
3. Quorum – To conduct business at a council meeting, a majority of the current number of council members must be present.
4. Excused from Meetings – A council member, including the association manager, may be excused from any portion of a council meeting based on a conflict of interest.

Additional information may be found within the *Conflict of Interest Policy & Disclosure Form* on the Association page of BOWL.com under Forms and Manuals.

5. Voice and Vote:
  - a. All elected council members are entitled to voice and vote.
  - b. Association Manager - has voice only, does not count towards the quorum, and cannot make or second motions, unless he/she is also a council member.
6. Action - A majority vote of those council members present and voting, at a properly noticed meeting, when a quorum has been established, is required to take action, unless otherwise provided by law, or this *USBC Affiliate Association Policy Manual*.

### **Section D. Parliamentary Procedure**

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The most recent edition of *Robert's Rules of Order, Newly Revised*, governs all meetings.

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## Chapter Seven: Committees

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The finance committee is the only standing committee for affiliate associations.

Committees may be comprised of both members and non-members. Non-members serve with voice and no vote.

### Section A. Finance Committee

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1. Composed of at least three individuals, with one person as a non-board member.
2. Appointed by the president with council approval.
3. The chair is appointed by the President, with Council approval. Meets at least once per year.
4. Is responsible for:
  - a. Reviewing and monitoring the budget prepared by the association manager and approved by the board, if applicable.
  - b. Ensuring a yearly review of all financial documents and a written report submitted to the council. This may be done by an outside auditor or the Finance Committee. (Quarterly reviews are suggested.)

### Section B. Other Committees

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1. The president may establish other committees, with council approval.
2. The president appoints the chair and recording secretary of non-standing (optional) committees, unless a different procedure is outlined in the association's addendum to this manual.

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## Chapter Eight: Delegates

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### Section A. USBC Annual Meeting

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Affiliate associations are not eligible to send delegates to the USBC Annual Meeting.

### Section B. State Annual Meeting (if applicable)

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Affiliate associations are eligible to send locally elected delegates and/or youth delegates to their respective state annual meeting(s), unless the state bylaws indicate otherwise.

#### 1. Delegates

Delegates are defined as members who are elected to represent the association at the state Annual Meeting.

A delegate has significant responsibilities and he/she represents the state/local association members. As a representative of the association, the delegate should be prepared to vote on matters that are in the best interest of the association. Therefore, prior to attending the state Annual Meeting, the association board may want to discuss their views on pending legislation and/or candidates for the board.

The association may consider outlining additional delegate duties. For instance, the association could require a delegate to report back to the board and members at upcoming meetings. The delegate can summarize the activities at the annual meeting and disseminate any appropriate information.

When an association is financially supporting the delegate's trip, the association may require the delegate to provide documentation they attended events such as workshops, clinics, and/or the annual meeting. The delegate must keep receipts if the association will be reimbursing the delegate for certain expenses.

A delegate to the state association annual meeting votes on legislation (applicable state association bylaw amendments) and elects the state board. He/she also participates in the election of the delegate(s) to represent the state association at the USBC Annual Meeting.

#### 2. Credentials

Credentials for delegates/youth delegates/alternates to the USBC state annual meeting(s) shall be submitted in a format and by the deadline, as specified by the state association's bylaws and policies.

#### 3. State Delegates Representing Adult Membership/Youth Delegates/Alternates

a. Local associations elect delegates/alternates representing adults and/or youth delegates/alternates (if applicable), at least 14 years of age, unless state laws mandate a specific age, who meet the eligibility requirements as established in the state bylaws and this *USBC Affiliate Association Policy Manual* to attend state annual meetings.

##### b. Merged Local Associations

1) Adult members elect:



- a) Delegates/alternates representing adult membership to attend the merged state annual meeting.
  - b) Men and/or women members of the state BA as delegates/alternates to attend the non-merged state BA annual meeting.
  - c) Women members of the state WBA as delegates/alternates to attend the non-merged state WBA annual meeting.
- 2) Youth representatives elect:
- a) Youth delegates/alternates to attend the merged state annual meeting.
  - b) Youth delegates/alternates to attend the non-merged state youth annual meeting.
  - c) An individual who meets all eligibility requirements may be elected to serve as an adult delegate and as a youth delegate to the same state annual meeting. In such case, the individual may vote as an adult delegate on adult matters and as a youth delegate on youth matters, but shall never vote on any matter or election more than once.
4. **Non-merged Local Associations**
- a. Elect delegates/alternates representing adult membership or youth delegates/alternates to attend the merged state annual meeting.
  - b. BA. Elect men and/or women delegates/alternates to attend the non-merged state BA annual meeting.
  - c. WBA. Elect women delegates/alternates to attend the non-merged state WBA annual meeting.
  - d. Youth. Elect youth delegates/alternates to attend the non-merged state youth annual meeting.

Each delegate/alternate and/or youth delegate/alternate serves for one year beginning Aug. 1 preceding the annual meeting for which they are elected.

5. **Election**

Adult delegates, youth delegates, and alternates serve for one year, beginning August 1 preceding the annual meeting for which they are elected. Adult delegates, youth delegates, and alternates are elected:

- a. At a membership meeting.
- b. Nominations shall be taken from the floor.
- c. By plurality vote. The election shall be by ballot, except that a voice vote may be taken when the number of candidates does not exceed the number of positions to be filled.

Mail, absentee, and proxy voting are not permitted.

The election is to be held in compliance with state annual meeting requirements.

6. **Vacancies**

Vacancies are filled for the un-expired portion of each term by alternates in the order in which they were elected. If a vacancy still exists, the president fills the vacant position by appointment.

A position is only considered vacant if an elected individual, whose term has not expired, is unable to fulfill his or her duties.

Any appointee must meet the same eligibility requirements as elected positions.

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