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United States Bowling Congress

**2016-2017**

**BOWL.com/RULES**

# USBC ASSOCIATION POLICY MANUAL

## *USBC Association Policy Manual is:*

- A reference document which details the governance and structure of USBC associations. The information in this document provides a guide to the requirements for all associations to follow on how to run the association as well as how to meet those requirements.
- Designed to break out each of the operations of the association by role and explains the responsibilities of each role.
- Under the control of USBC and may not be changed. Associations should create their own Association Operations Manual to add the operational details specific to each association.

### **United States Bowling Congress**

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**USBC Mission Statement**

The USBC is the National Governing Body for bowling. Our mission is to provide services, resources and standards for the sport.

**USBC Vision**

Our vision is to continue to be the leading authority to the sport, servicing the needs of bowling.

**Our Promise**

Our promise is to celebrate the past, be mindful of the present and ensure bowling’s future through thoughtful research, planning and delivery.

## Chapter One: National Supplement-Membership/Governance

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### **Section A. Membership**

Membership in USBC is composed of adults and youth who have paid the appropriate USBC, and if applicable, state and local association dues. Valid membership entitles the bowler to participate in all USBC competition for which they are otherwise qualified.

Upon obtaining membership in USBC, each member agrees to be bound by USBC's final decisions involving the interpretation, application, and/or enforcement of the USBC Bylaws, USBC Playing Rules, and all matters concerning bowling as governed by the USBC, and each member further agrees that such final decisions of USBC shall be conclusive.

#### **How Obtained**

USBC Adult membership may be obtained through a league, tournament, chartered local association, or via BOWL.com.

USBC Youth membership may be obtained through a bowling center, league or tournament.

#### **When Paid**

Annual USBC membership dues shall be paid before:

1. **Adult:** Completion of the bowler's first series in league competition. (See Rule 101)
2. **Youth:** The bowler's third session of league competition. (See Rule 101)
3. **Tournament:** Prior to participation. (See Effective Date below and Rule 300c)

#### **Effective Date**

Upon receipt of a membership application and the appropriate dues, membership will be valid:

1. For the season starting August 1 through July 31.
2. Through October 1 of the following season for summer leagues and tournaments. Any youth members who turn 20 during the season:
  - a. Can complete a summer league that goes beyond July 31.
  - b. Are not granted the October 1 extension for tournament play.

For membership to be effective as of the date purchased in a league, the league secretary/bowling center must forward the league membership dues, application cards and league application to the local association/league processor (youth) within 30 days. Otherwise, membership benefits are not effective until the date received at the local association office/league processor (youth).

### **Section B. Types of Membership**

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#### **Youth Standard**

USBC Youth membership is available to individuals who have not reached their 20th birthday prior to August 1 of the current bowling season. USBC Youth membership dues may only be changed by the USBC Board based on recommendations from the IBC Youth Committee.

State/local associations are not allowed to charge youth dues. For Association Championship Tournament participation see the *USBC Association Policy Manual*, Chapter Seven, Section E, Item 10(b).

For individuals authorized as mentally challenged, the age requirement is waived

USBC Youth members are required to pay the Standard \$4 dues annually.



### Adult Standard

The maximum Standard National and State membership dues may only be changed by the USBC Delegation. When a bowler joins a local association, he/she shall join the applicable state association. Regardless of the number of state and local associations in which an individual holds membership, he/she shall pay current USBC national membership dues only one time.

Standard membership dues paid annually and are:

<b>National</b>	\$13.00
<b>State</b>	Not to exceed \$5
<b>Local</b>	Determined by the members of the local association at their Annual Meeting.

An adult bowler must pay dues in each association in which he/she applies for membership and/or bowls, except:

- As stated in Rule 100e, Traveling Leagues.
- As stated in Rule 100l, Mail-o-Graphic Leagues.
- If the associations have a reciprocal agreement to waive dues.

### Adult Basic

Basic membership is **year around** and is available to leagues that bowl 16 sessions or less, including position rounds and playoffs. Basic membership is \$10.00 (\$7 National, \$3 Local) **for each short season league joined**. A member may pay additional membership fees to become:

- A member of the State Association. A member can choose to pay the state dues.
- A USBC Standard member. A member can pay the difference between Basic and Standard dues to become a USBC Standard member. The association would void the Basic membership and process as Standard.

### Collegiate – Adult/Youth

USBC Collegiate membership is available to student-athletes participating on an intercollegiate team. Each intercollegiate team must complete an application for membership and submit the required dues for each student-athlete.

By purchasing a USBC Collegiate membership the student-athletes is entitled to participate in certified USBC Collegiate competition. In addition, the student-athlete will receive an adult or youth national membership. If USBC:

- Adult national membership is purchased the student-athlete can participate in adult national tournaments and any other tournament not requiring a specific local and/or state affiliation.
- Youth membership is purchased the student-athlete can participate in youth national tournaments and all other tournaments, unless the tournament is for a specific jurisdiction.

To participate in:

- Adult competition, the applicable adult state/local membership dues must be paid.
- Youth competition, local/state dues are not allowed.
- Junior Gold competition, a Junior Gold membership must be purchased.

Collegiate Bowling averages are not recognized for USBC competition.

### Special Olympics

Special Olympics membership is available for special needs bowlers competing in Special Olympics leagues, traditional USBC Adult or USBC Youth leagues. Special Olympics memberships may be purchased using the Special Olympics membership application which is available on the Forms &



Manuals page of BOWL.com. Special needs bowlers who are under the age of 20 are processed using the Youth Processing System. Those older than 20 are processed through WinLABS. The Special Olympics membership is \$10 which provides the special needs bowler the following:

- USBC Certified Average
- USBC Membership Card
- Access to the Special Olympics Awards package
- Ability to bowl in USBC certified tournaments
- Member and average records on BOWL.com

Special needs bowlers may participate in either USBC Adult or USBC Youth leagues without further national dues. The age requirement for participating in USBC Youth leagues is waived. However, they must remain compliant with USBC Rule 400, if participating in a youth league.

Special Olympics members may not participate in both adult and youth leagues at the same time.

Special Olympics membership options:

- Special Olympics only – receive the above benefits
- Special Olympics plus Local youth fee – receive the above benefits, plus any extra benefits being provided by the local youth association or bowling center (awards, banquets, etc.)
- Special Olympics plus local/state adult dues – receive the above benefits, plus the benefits for being a member of the local/state adult association.

### **USBC Lifetime**

Former ABC Lifetime and WIBC Permanent Membership will be recognized by USBC Headquarters. Membership dues will be credited by USBC to the appropriate state and local associations upon submission of a membership application each season. In addition, USBC will reimburse membership dues for one local association and one state association per season. **USBC does not offer Lifetime Membership at this time.**

### **USBC Hall of Fame**

USBC shall provide one national, one state association, one local association membership, per season, to all USBC National Hall of Fame Members upon submission of a membership application each season. Membership dues will be credited by USBC to the appropriate state and local associations upon submission of a membership application each season. When state and/or local dues are waived for USBC National Hall of Fame Members, USBC will credit the next association in which the person submits a membership application.

## **Section C. Membership Upgrades**

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The following are membership upgrades to USBC Youth Standard membership. A bowler who applies for the upgrades below must have current USBC Youth Standard membership.

### **Junior Gold - Youth**

The USBC Junior Gold membership will be available to all youth who have a current season youth Standard membership and maintain compliance with Rule 400. An upgrade can be purchased by paying an additional fee of:

1. U15/U20           \$30
2. U12                \$10 (Available only to those whose birthdate is 8-1-2004 or later.)

Junior Gold membership is valid:

1. For the season starting August 1 through July 31.
2. Through October 1 of the following season for summer leagues.

Junior Gold membership must be purchased prior to entry into a qualifying event for the Junior Gold Championships.



### **Bowlopolis - Youth**

The Bowlopolis membership upgrade is \$3.50 and can be purchased for any USBC Youth member. Youth bowlers who are eight (8) years and under prior to August 1, of the current season, are eligible for a free upgrade to Bowlopolis. Youth bowlers who are eight (8) years or older as of August 1, of the current season, can purchase the upgrade.

## **Section D. Optional Benefits**

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### **USBC National:**

1. May offer optional benefits for members at dues reflective of the value of services provided by USBC, state and/or local associations.
2. May offer optional benefits for men, women and youth bowlers who choose to be identified with USBC. Dues will reflect the level of membership privileges, services and benefits provided.
3. Determines dues for USBC and establishes the maximum amount of state and local dues only for optional benefits.

The association must offer all levels of membership as established by USBC.

USBC is authorized to test optional benefits prior to offering them, and to waive those specific bylaws, rules and regulations required for testing and implementation.

### **State/Local Associations:**

1. May offer additional optional benefits for members at cost reflective of the value of services/products provided by the association.
2. Cannot waive or change national dues or state/local, as applicable.
3. May not increase their own dues as stated in their bylaws, without a vote of the membership.
4. May decrease their own dues to provide discounted dues to specific groups of members.

Each member would decide if he/she wants to purchase Standard Membership Dues, or one of the Association's Optional Memberships. (Refer to Optional Benefits – Adult, Chapter 4, Section C)

## **Section E. Youth Membership Eligibility – Rule 400**

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USBC Youth membership is available to individuals who have not reached their 20th birthday prior to August 1 of the current bowling season and have maintained compliance with "Item a" below. Individuals who purchase Youth membership in a summer league and turn 20 prior to August 1 will be allowed to complete the summer league. The age limitation is waived for those authorized as mentally challenged.

1. Except as provided in "Item b", a youth may not bowl, substitute or pace in any bowling activity which offers any of the following as prizes:
  - a. Cash or bonds.
  - b. Merchandise exceeding \$500 in value.
2. Youth may bowl in singles competitions, including side competitions/brackets, offering such prizes, provided, prior to bowling:

The competition agrees to award the youth's prize in the form of a scholarship; or

The youth signs the USBC Singles Competition Prize Waiver waiving his/her rights to any prize in violation of this rule.

In youth competition, youth members may participate in side competitions/brackets provided all entries are returned 100% in the form of scholarships only and awards comply with "Item a", above.

Buying or selling of earned prizes is prohibited. Any youth bowler deemed in violation of this rule is subject to disciplinary action including the potential loss of youth membership.

**NOTE:** There are no limits on scholarship amounts. Entry fees must be paid directly to the tournament director/manager. For reimbursement of actual travel expenses into the next higher level of competition, tournament or event you must provide receipts upon request. The prizes authorized by a state high school athletic association or a collegiate athletic association recognized by USBC and USBC Collegiate are not subject to the limitations of this rule.

## **Section F. USBC Board of Directors**

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### **Eligibility and Term Information**

1. **Eligibility.** The Board composition and eligibility for the directors elected by the delegates is outlined in the USBC Bylaws, Article IV, Section A. Additional eligibility requirements may be established by the Nominating Committee.
2. **Athletes.** Athlete eligibility is outlined in the USBC Bylaws, Article IX.
3. **Athlete Election to USBC Board.** The Team USA Athlete Board members are elected by eligible Team USA Athletes as outlined in the bylaws. The election is conducted annually based on the staggered Team USA Athlete terms.
  - a. Athlete Election Procedure. After the resume submission deadline date, all eligible Team USA Athletes will receive a ballot including all resumes received, in the exact form as they were submitted, along with the deadline date for voting.
  - b. Team USA Athlete(s) who receives the majority of votes is (are) the new Team USA Athlete director(s) and Team USA Athletes will be notified of the results.

## **Section G. Committees**

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The USBC Board of Directors has several standing and other committees as well as Ad-Hoc committees. Please refer to the "About USBC" page on BOWL.com for current committee descriptions and members.

## **Section H. Amendment Procedures**

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### **Amendments Policy**

1. **Board Authority.** The Board authority is outlined in the USBC Bylaws Article IV, Section E, Items 11, 12, 14, and 15. The USBC Board, by a two-thirds vote, may amend the following:
  - a. The provisions of the USBC National Bylaws specific to compliance with USOC rules and regulations, provisions related to athletes and youth and other provisions mandated by the Articles of Incorporation or applicable law and those specific to youth competition.
  - b. National Championship tournament rules.
  - c. General Playing Rules.
  - d. Youth league rules.
  - e. Youth tournament rules.
  - f. Awards rules.
  - g. Resolutions.

Items a-g may be amended at any duly called meeting of the Board. Youth changes must first be considered by the Youth Committee and submitted to the Board with a recommendation.

All amendments/resolutions approved by the Board become effective immediately, unless otherwise specified.

2. **Delegate Authority - Bylaws.** Delegate authority for bylaws is outlined in the USBC Bylaws Article VIII. The delegates, by a two-thirds vote may amend the following:
  - a. The USBC National Bylaws with the exception of those listed in Section 1, of these amendment procedures.
  - b. USBC State Bylaws.
  - c. USBC Local Bylaws.

3. **Delegate Authority - Other.** Delegate authority for rules is outlined in the USBC Bylaws, Article VIII. The delegates by a majority vote may amend the following:
  - a. Adult league rules.
  - b. Adult tournament rules.
4. **Submission Date.** To be considered at the next USBC Annual Meeting, a proposed amendment must be submitted by a:
  - a. Member or chartered association, in writing, to USBC Headquarters by September 1 prior to the date of the next USBC Annual Meeting.
  - b. USBC committee or the USBC Board, in writing, to USBC Headquarters by December 1 prior to the date of the next USBC Annual Meeting.
5. **Special Procedures.** The USBC Board, by a two-thirds vote, may submit a proposed amendment to the USBC National, State or Local Bylaws (except those listed in Section 1, Item a of these amendment procedures) and/or adult league or tournament rules directly to the delegates prior to the opening of the USBC Annual Meeting.
6. **Withdrawal of Proposed Amendments.** A proposed amendment may be withdrawn by the proposer prior to being presented at the USBC Annual Meeting delegates' session.
7. **Returned Amendments.** Those amendments, which in USBC's judgment do not merit Board and delegate consideration, will be returned to the proposer. The proposer of a returned amendment may resubmit the proposal to USBC if it is supported by a petition signed by 100 USBC members. The addresses and USBC membership numbers of the signers of the petition must be included. Such amendments will be submitted to the delegates for consideration at the next USBC Annual Meeting.
8. **Codification.** USBC Headquarters, with Board approval, may renumber, revise, codify and correct any provision of the bylaws, rules and regulations of USBC.

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## Chapter Two: Charter Requirements

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USBC is the representative, legislative and executive body with complete and final jurisdiction over chartered associations, its members, leagues and tournaments. The purpose of an association is found in the bylaws. USBC has jurisdiction over the name and jurisdictional boundaries for associations. USBC has the authority to remove/revoke the charter of an association for failure to comply with the Charter Requirements. USBC has the authority to suspend, expel, or otherwise discipline for cause, officers and directors of any chartered association.

### Section A. Charter Requirements

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To obtain/maintain a charter, an association must:

1. Adopt and adhere to the bylaws provided by USBC and not enact any bylaws or rules inconsistent with *USBC Bylaws*, *National Supplement*, *USBC Association Policy Manual*, or the USBC Board of Directors.
2. 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.
3. Obtain and comply with their state's corporate statutes.
4. Provide the appropriate championship tournament(s).
5. Conduct an annual meeting.
6. Conduct an annual audit with an outside provider.

**NOTE:** An outside provider is comprised of anyone that is not a member of the Board of Directors or a family member. A committee can still be appointed as long as they meet the requirements stated above. In no way does this mean the association must hire a Certified Public Accountant or have to pay for the financial review if they can't afford one.

7. Transmit membership/dues, tournament scores (if applicable), awards and association board data to USBC via WinLABS and/or as required by USBC. All associations must indicate the number of board members, current vacancies and who their Youth Directors are (depending on association type).
  - a. Transmit membership and dues, including state dues, to USBC within 20 days of receipt. (Local)
  - b. Apply for all USBC awards within seven days of receipt.
  - c. Transmit (Local) or forward (State) all board information within 20 days of election and within 48 hours of appointments/resignations and maintain the accuracy of the information.
8. Establish and comply with sound financial policies including, but not limited to, verification by the president monthly of all association accounts and two signatures for withdrawals. The association is to conduct an examination of the association's finances annually. (It is recommended the financial examinations be done on a quarterly basis.)
9. Membership and Awards processing. At the local level this includes the distribution of awards and supplies to the leagues, as well as, the education of league secretaries.
10. All use of USBC, and any USBC logo (the "USBC trademarks"), by the association shall be pursuant to a non-exclusive royalty free license from USBC granted pursuant to the Bylaws. All use of the USBC trademarks shall insure to the benefit of USBC, and USBC shall have the right to inspect and approve all such use of the USBC trademarks by the association.

**Revocation**

USBC shall have the power to revoke the charter of any state or local association at any time USBC determines the association is not meeting the requirements of chartering or for violating USBC rules. The revocation may be appealed to the USBC Legal and Legislative Committee.

**Section B. Business Guidelines**

The Business Model is to assist the board in managing the association in a business-like manner. The procedures are stated as **required** and **recommended**.

**Required:**

1. Support the purpose of the Organization as stated in Article III of the USBC Bylaws.
2. Conduct association championship tournament(s). These tournaments should be self-sufficient.
3. Examination of financial documents/procedures. Additional information in regard to guidance on an audit may be found on the Association page of BOWL.com under Forms and Manuals.
  - a. Deposits: made within seven days of receipt.
  - b. Disbursements: checks, credit cards, transfer of funds.
  - c. Tax forms filed to appropriate agency and on time.
  - d. Dual signatures for withdrawals.
  - e. President verifies all accounts monthly. If statements are issued quarterly the president must verify quarterly.
  - f. Provide needed recommendations.
4. Transmit membership, tournament scores (if applicable), awards and association board data to USBC Headquarters via WinLABS and/or as required by USBC Headquarters. Merged associations must indicate the number of board members, current vacancies and who their Youth Directors are. (Depending on association type).
  - a. Transmit membership and dues, including state dues, to USBC Headquarters within 20 days of receipt. (Local)
  - b. Apply for all USBC awards within seven days of receipt.
  - c. Transmit all board member information within 20 days of election and maintain the accuracy of the information. Update (Local) changes in the board, (i.e., resignations, newly appointed board members) within 48 hours of the change.
5. Provide full financial disclosure to membership annually. (Income, disbursement, salaries, assets, reserves, etc.)
6. Maintain industry standard recommended reserves of 6-9 months, not to exceed 2 years of fixed costs. (Reserves are listed on line 21 of the Form 990-EZ.)
  - a. Tournament lineage, prize fund and state and national dues are not calculated in this dollar amount because they are flow through amounts.
  - b. Utilizing excess reserves through planned, structured programs can increase member services, proprietor satisfaction, industry awareness, and more.
7. Protect the tax exempt status of its association and USBC National as described by Michael Best & Friedrich, LLP, USBC's legal counsel. See the Protect Tax Exempt Status document at the end of this section
8. File all required corporate forms, tax returns and IRS forms as appropriate. Examples include, but are not limited to: IRS Forms (990, Schedule A and Schedule B if applicable), Payroll Taxes, State Corporate Statutes and State Workers Compensation. This would also include recording and filing meeting minutes as required by state law. The IRS has a Form 990 that all associations will need to submit. Form 990 has 3 versions: 990-N, 990-EZ, and 990. See Form 990 series at the end of this chapter to determine the correct form for your association and see IRS.gov for the forms.
9. Follow all local, state, and federal laws.

**Recommended:**

1. Support and implement programs and services developed by USBC Headquarters. Support the USBC Vision and Mission, which is on the index page of this manual.
2. Develop an association operations manual. Provides guidelines for day-to-day operations of the local association.
3. Prepare and operate under an annual budget. Aids the board in financial proficiency and is a recognized sound business practice.
4. Develop and maintain a membership retention and development plan. Increasing membership and improving proprietor relations ensures not only the association's stability but the future of the sport. This plan should include:
  - a. A program to increase proprietor, association and membership relations. (Locals; however States could help Locals).
  - b. Retaining current members
5. Assist centers with membership promotions and membership marketing plans, i.e. In School programs, After School, High School and Coaching Clinics.
6. Develop and implement a communication plan. The plan should include methods of communicating information to and from USBC Headquarters, the respective board, the proprietors and the members they serve. The plan should also include a method for the members to provide feedback. Examples of types of communication are newsletters, website, e-mail blasts, posters, association representative program, etc.
7. Support USBC partner charities (BVL & Bowl for the Cure) at the local and state level.
  - a. Promotes national recognition for charitable work by the bowling family.
  - b. Still give locally, but report nationally to receive proper credit.
8. Develop an Association leadership/training program/new board member training program to include, at a minimum:
  - a. Duties.
  - b. Bylaws.
  - c. Policies and Operations Manual.
  - d. Committee responsibilities.
9. Develop a Business/Action plan the association can use as a guide to meet its purpose.
10. Perform Evaluations for all paid employees on an annual basis.

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



**USBC Business Template - Attachment A**

Michael Best & Friedrich, LLP, USBC’s legal counsel, stated:

- The IRS is using the “commensurate test” to create and enforce a standard that ensures exempt organizations are spending in line with their resources”. Simply put, this means that the IRS is going to ensure that Associations are not hoarding their funds, but are spending the funds to support the purposes for which they received their exemption from taxation.
- If an association violates IRS requirements it may have its exemption from taxation cancelled.
- If the IRS were to challenge the exempt status of an Association, the potential financial impact on the Association coupled with legal fees to defend an IRS proceeding, could jeopardize its continued viability.
- Associations will be expected to:
  - Create and maintain board minutes, policies, documents related to governance and fundraising, and reports related to administrative activities. The IRS expects that actions taken by Associations in Board and Committee meetings to be documented.
  - Maintain information concerning the results of their activities and the measurement of their performance of their exempt purposes.
  - Oversee and evaluate staffing needs and to measure the performance of their chief executive.
    - Boards will be expected to meet on a regular basis at pre-announced times with a known agenda and to keep minutes of meetings.
    - Evaluate their effectiveness and performance every three years.
- There will be increased scrutiny concerning the obligation of the Associations to keep and maintain complete, current and accurate financial records. Associations will be expected to implement safeguards to protect member funds, to audit the records of those entrusted with the funds and to conduct an annual review of the Association’s financial activities by a qualified, independent expert.
- The IRS has recommended that an Association have an audit committee and employ an outside audit expert whenever it possesses significant funds.
- The IRS expects the local and state associations chartered by USBC to have procedures and policies in place to ensure the activities and operations of the associations are consistent with those of the parent organization. The IRS will use Form 990 Report to monitor this requirement.
- Prudence suggests that action be taken before criticism is leveled, claims of breach of duty are made or an action is taken to revoke tax exempt status.

<b><i>Form 990 Series Information</i></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

All associations are required to file one of the versions of the *IRS Form 990 (Every Year) - Return of Organization Exempt from Income Tax* based on the association’s “gross receipts”.

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

## Chapter Three: Association Structure

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This chapter details USBC requirements for associations regarding charters, association purpose, tax exemption, incorporating, name, jurisdictional area, 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. Association 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, sex, sexual orientation, 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.
5. Provide services and benefits to its members.
6. Enforce the playing rules.
7. Promote the growth of youth activities.
8. Maintain or increase membership.
9. Foster programs to increase bowling skills among its membership.

### Section B. Incorporation

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Every USBC association (excluding affiliate associations) will incorporate. Associations must comply with state requirements and maintain their corporate status. This could include yearly filings and fees.

### Section C. Name

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1. The name of the association is subject to approval of USBC Headquarters.
2. Name will be as follows:
  - a. (Name of state or local) USBC (Serving men, women and youth)
  - b. (Name of state or local) USBC BA (Serving men and women)
  - c. (Name of state or local) USBC WBA (Serving women)
  - d. (Name of state or local) USBC Youth (Serving youth)

### Section D. Jurisdiction/Location

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1. The association's jurisdictional boundaries shall be approved by USBC Headquarters.
2. Jurisdictional boundaries describe the area, including the centers, assigned to an association. The association will then provide programs and 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 change or modification of the boundaries shall be approved by USBC Headquarters.
5. Local association jurisdictional boundaries shall include at least one certified bowling center.
6. The following may not serve the same center:
  - a. Merged and a non-merged adult association.
  - b. Two merged associations.
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 jurisdictional boundaries 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. Local 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 state with a non-merged youth state association.
10. Multiple states may combine into one state association with approval of USBC Headquarters.
11. The location of the association office shall be determined by the board and should be central to the area served.

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

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Associations who no longer have a charter with USBC include, but are not limited to, those that:

1. Have merged with another association.
2. No longer have an active USBC certified center within its jurisdiction.
3. Had its charter revoked by USBC.
4. Chose to dissolve.

Once USBC has terminated an association charter, all assets, including trusts and escrow accounts, must be transferred within 30 days to the association(s) serving its members. If the association does not have an active USBC certified center, the assets will be transferred to the state association(s).

#### **Merged association/no active USBC certified center**

Prior to merging/dissolving and after payment of all bills, lawful obligations and liabilities, the association has the right to assign up to 25% of their funds to:

1. A nationally approved 501(c)(3) organization.
2. The new association to benefit the membership, such as for the women's or open championship tournaments or for scholarships. When earmarking funds to benefit the membership, it cannot be for more than a three-year period.

#### **Charter revoked/other**

Within 30 days of the date of USBC's letter notifying the association of their charter being revoked, an association must:

1. Pay all outstanding bills.
2. Discharge all lawful obligations and liabilities.
3. Transfer all remaining assets to the association that is serving the membership.

USBC has the authority to enforce any/all distributions as stated above.

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

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## Chapter Four: Membership and Dues

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This chapter explains the processing of membership dues.

### **Section A. Dues – State/Local - Adult**

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Each state/local association will determine the amount of state/local adult dues for its members. State dues may not exceed those maximums established by the USBC delegates and local dues would be determined by the members. In addition:

1. Associations who service men and women must charge the same local association dues amount to men and women.
2. Youth members, who also buy an adult membership must pay national, state and local dues unless the association waives all or part of its own adult dues. (Refer to Rule 400 for youth eligibility.)
3. Associations will accept payment of annual membership dues in any form approved by USBC Headquarters.

### **Section B. Dues - Youth**

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The annual USBC Youth Standard membership dues are \$4, state/local association dues are not allowed.

### **Section C. Optional Benefits - Adult**

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Associations may:

1. Offer additional optional benefits for members at a cost reflective of the value of services/products provided.
2. Not increase their own dues as stated in their bylaws, without a vote of the membership.
3. Decrease their own dues to provide discounted dues to specific groups of members.

Each member would decide if he/she wants to purchase the Standard Membership Dues as provided for in the bylaws, or one of the Association's Optional Membership packages.

Associations cannot waive or change national dues or state/local dues, as applicable.

No member can be forced to purchase a membership higher than the Standard Membership dues.

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

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State dues shall be distributed by USBC Headquarters as follows:

1. Merged State – Adult dues go to the merged state association.
2. Non-merged State
  - a. Men's dues go to state BA.
  - b. Women in a merged local association choose the state WBA, BA or both. If choosing both, she must pay the corresponding dues for both.\*
  - c. Women in a non-merged local association will pay the corresponding state dues.\*

#### **Definition:**

- \* *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.*

## Chapter Five: Board of Directors

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This chapter explains the board structure, the authority and duties of board members, and topics associated with board eligibility, participation, and responsibilities.

### Section A. Structure

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1. The association's officers and directors, as determined in the association's mandatory bylaws, constitute the board of directors.
  - a. The Association Manager is not a member of the board of directors unless elected/appointed to a director's position by the voting body.
  - b. The Association Manager may not be elected/appointed as an Officer of the association.
2. No individual may be elected or appointed to more than one voting position on the board.
3. Additional individuals may be selected/appointed to assist the association; however, those individuals will not be considered members of the board. (i.e. assistant office manager, committee member, etc.)
4. Life or other honorary members are not members of the board unless elected by the voting body as an officer or director.
5. Where there has been a merger of a BA and WBA and they have an agreement with the non-merged youth association (non-competing), the merged board must still have 20% representation elected by the youth representatives/youth delegates and Youth Directors.
6. In an area where the BA and WBA merge and the youth association refuses to merge, this creates a competitive situation. The merged association will serve men, women, and youth, and the structure is consistent with a regular merged association. Additionally, the youth association will be chartered and have a structure consistent with a regular non-merged youth association.
7. USBC shall have the authority to suspend, expel, or otherwise discipline for cause, officers or directors of any chartered association.

### Section B. Authority and Duties

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The management and governance of the association is vested in the board of directors.

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

1. Enforce the bylaws.
2. Comply with the *USBC Association Policy Manual*.
3. Conduct championship level competition for its membership constituency.
4. Establish annual local/state dues up to the amount set by the membership/delegates.
5. Establish a procedure for the handling of funds which includes:
  - a. Approve the financial institution(s), which must be federally insured or its equivalent.
  - b. Approve the signatures for the financial account of at least two individuals (officers/directors/association manager) authorized for withdrawals.
  - c. Comply with bonding requirements as specified in Chapter 14.
  - d. Ensure all money is deposited within seven days.
  - e. Authorize all expenditures which can include electronic transfers of routine bills. (Electronic transfers and routine bills only need initial authorization.)
  - f. Ensure the president verifies the association accounts monthly.
  - g. Ensure all required financial reports are filed. (IRS, payroll taxes, state taxes, etc.)
  - h. Ensure scholarship funds are deposited into USBC's SMART program within 30 days of completion of the league or tournament, or academic or meritorious accomplishment.
  - i. Approve an individual(s) to sign contracts (must be at least 18 years old).
6. Signers on accounts, contract and/or official documents must be a minimum age of 18, unless state laws mandate a specific age.

7. Establish a procedure for a yearly examination and verification of all the organization's financial documents and accounts. (Quarterly examination of the organization's financial status is recommended.)

**NOTE:** It is a USBC requirement that an association, at a minimum, completes an audit with an outside provider on an annual basis. USBC does suggest an association complete regular internal audits in addition to the required annual outside audit. If there should be a need for any other interim audits (i.e. merger, new association manager, etc.), they should be scheduled as necessary. An outside provider is comprised of anyone that is not a member of the Board of Directors or a family member. A committee still can be appointed as long as they meet the requirements stated above. In no way does this mean the association must hire a Certified Public Accountant or have to pay for the financial review if they can't afford one.

8. Choose the date of the association annual meeting.
9. Determine the procedure for selecting the annual meeting and championship tournament site(s).
10. Approve a procedure for retention of records which must include the financial records.
11. Oversee the transfer of association records and property to the:
  - a. Successors to a position, or employee, no later than the first day of their term or employment.
  - b. Board within two weeks from the date of vacancy.
12. Determine association adult optional member benefits and cost. Cost may exceed the maximum amount established by the membership (delegates for state) and/or USBC Delegation, in order to reflect the value of services/products provided by the association.
  - a. Standard membership dues must also be available. Each member would decide if he/she wants to purchase Standard Membership Dues, or one of the Association's Optional Memberships. (See Chapter 4, Section C)
  - b. If the board wants to lower their dues for seniors, etc., see Article IV of the Association Bylaws.
13. Implement USBC programs as requested.
14. Ensure the association has an active e-mail account, to be maintained and regularly monitored by the association manager or another individual appointed by the board. The e-mail account must be entered in the association's WinLABS database and transmitted to USBC Headquarters.
15. Select/appoint the association manager.
16. Approve requests by a center or another entity for a special mailing to the entire membership.
  - 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 association board 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 centers.

17. Final averages shall be submitted at the end of league competition, including playoffs and sweepers. Averages will be entered for the season in which the league is certified. Bowlers in leagues that cross over seasons will not have an average for the season in which the league starts until the league is completed.
  - a. Provide each league secretary with the National ID number of each participant in the league prior to the end of each league's schedule or association cutoff date.
  - b. Process all averages, including pin total and number of games bowled in WinLABS or a system approved by USBC, regardless of the number of games.

**NOTE:** Associations cannot set an average cutoff date. All league scores include those bowled in playoffs and rollofs must be included in a league average.

18. Re-rate the league average of an association member when there is evidence the bowler's average does not represent the bowler's true ability. (Local)
19. Conduct suspension and reinstatement hearings if requested by USBC Headquarters. (Refer to the Suspension and Reinstatement Procedures for re-rate, suspension, reinstatement, and appeal procedures in Chapter 16.)
20. Render a final decision on all protests and disputes within the association unless appealed to USBC Headquarters.
21. Provide other reports as required by USBC Headquarters.
22. Be aware of bonding, burglary, and hold-up insurance from USBC, as well as the need for liability insurance.
23. Establish partnership with proprietors.
24. Approve committees.

### **Section C. Board Eligibility**

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In addition to the eligibility requirements in the association's bylaws, the following applies:

1. A candidate for the board (elected or appointed) must be bondable by USBC (if at least 18 years of age).

**NOTE:** To be bondable by USBC, individuals must: (For details see Chapter 14.)

1. Be at least 18 years of age or older.
2. Not have been convicted of a felony.
3. Not have misused any funds.

2. When a Director resigns from the Board or fills a vacancy, and has served more than half of a term, that Director is considered to have served a full term.
3. The association manager is not eligible to serve concurrently as an officer; however, may be elected as a director, if association policy allows.
4. A maximum of three bowling center proprietors may serve on the Board at one time. A proprietor is defined as an individual who is the owner, partner, or corporate Officer of a bowling center or group of bowling centers. (Please refer to your bylaws for further information.)

5. Representation on the state board from local associations is not limited unless otherwise specified in the state bylaws. If limited:
  - a. The first local association the individual joins (within the state) will be the determining factor in applying the limitation.
  - b. An officer or director who changes residence shall not be required to relinquish office until the term expires unless:
    - 1) A written resignation is received.
    - 2) Disciplinary action or the removal procedures are instituted in accordance with the procedures in the USBC Bylaws and Suspension and Reinstatement Procedures (Chapter 16).
    - 3) Membership is not renewed by October 1. Before a vacancy can be declared, the individual has the opportunity to appear before the board to explain the reasons for not renewing his/her membership.
6. Being an auxiliary board member may not be used as an eligibility requirement for election to the board. (See Auxiliary Members, Section M)

### **Section D. Elections**

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In addition to the election requirements in the USBC Bylaws, the following applies:

1. Board members remain in office until their successors take office.
2. Terms of office begin August 1 following the election unless another date is specified in the bylaws. If another date is adopted, it is to be indicated in Article V, Section D of the associations bylaws.
3. The president, vice president(s), and sergeant-at-arms (optional) positions shall be voted on separately and consecutively beginning with the highest office to be filled.
4. When only one candidate has been nominated for a position, they may be elected by acclamation. (NOTE: Election by Acclamation - Election by unanimous consent; used only when only one person has been nominated for an office.)
5. An officer or director may accept a nomination and run for election for another office on the board without resigning the present office. If defeated, the individual completes his/her term.

### **Section E. 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 (Attn: Rules) within 15 days of the meeting.

Directions on protests during the meeting are announced at the meeting. An appropriate venue would be in the opening remarks or the Rules of the Meeting and/or again by the chairman prior to the elections. If there is no timely protest, the election stands.

### **Section F. Resignation, Removal and Vacancies**

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In addition to the USBC Bylaws and Suspension and Reinstatement Procedures, the following applies:

No vacancy, except by death, can be filled unless:

1. A written resignation is received.
2. Disciplinary action or the removal procedure is instituted in accordance with the procedures in the *USBC Bylaws* and Suspension and Reinstatement Procedures (Chapter 16).
3. Membership is not renewed by October 1. Before a vacancy can be declared, the individual has the opportunity to appear before the board to explain the reasons for not renewing the membership.

Refer to the Suspension and Reinstatement Procedures (Chapter 16) for removal of a board member or member suspension and reinstatement procedures.

### **Section G. 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 Laws.
2. State Laws.
3. Local Laws.
4. Articles of Incorporation.
5. USBC Bylaws.
6. *USBC Association Policy Manual*.
7. *Association's Operations Manual*, if applicable.
8. *Robert's Rules of Order, Newly Revised* (most recent edition).

### **Section H. Diversity**

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1. USBC will provide equal opportunity for all in the sport of bowling without regard to race, religion, age, sex, sexual orientation, disability, or national origin.
2. All associations should make every effort to ensure its board and committees are representative of its membership.

### **Section I. 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 board of directors unless they are elected to one of the board positions.

The board has 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 may not include automatic board participation.

### **Section J. Conflict of Interest**

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Board members have a legal responsibility to the association and its members and may be held responsible for failing to honor those obligations. A board member must:

1. Look out for the associations and member's best interest, not his/her own.
2. Not experience personal gain from his/her position as a member of the board.
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 all matters of the board.

### **Section K. Expenses**

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Legitimate business expenses can be reimbursed, with board approval. Such expenses must be documented, including receipts. (See Chapter 10, Reimbursing Business Expense.)

## Section L. Auxiliary Members

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For the purpose of training and educating a potential board member, the association board may implement an auxiliary board member program.

The auxiliary members perform specific duties for the association, as determined by the board, and:

1. Are appointed by the president with board approval. An association may not use being an auxiliary board member as an eligibility requirement for election to the board.
2. Attend board meetings with voice only and no vote. The auxiliary member(s) must be excused from the board meeting when confidential or legal business is discussed (i.e. hearings, performance reviews, etc.)

## Section M. 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 youth association:
  - 1) All Board members.
  - 2) Association Manager.
- b. Local merged association:
  - 1) All Youth Committee members.
  - 2) Youth Directors (20% of the board who represent youth).
  - 3) Association Manager.
- 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 (See the association page on BOWL.com, Forms and Manuals section).

### 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 be approved by headquarters. Associations may not license the use of the USBC logo or trademarks (i.e., related graphics such as the logo for BOWL.com, USBC tournaments, departments, etc.) to any third party.
- b. The USBC association logo templates must be used when creating an association logo. Associations who want to customize association logos must submit the proposed logo to USBC Headquarters at [marketing@bowl.com](mailto:marketing@bowl.com), or to their Regional Manager for approval before printing or digitizing.
- c. When creating new (or reordering existing) association apparel, pins, etc., that include 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 be approved by USBC by emailing a request to [marketing@bowl.com](mailto:marketing@bowl.com).

### 5. Recognition

USBC 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.
- c. Provide USBC Headquarters with appropriate information, as requested.

## Chapter Six: Elected Officers

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

### Section A. President

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The President has additional roles/duties in comparison to other board members, but does not have any additional authority than other board members. These duties are centered on the principles of overseeing association activities and providing guidance in helping the association meet its goals. Authority and duties:

1. Presides at all board and association meetings.
2. Acts as spokesperson for the association.
3. Obtains financial records from the association manager and verifies all association accounts monthly.
  - a. If already reconciled, the president would check to see that the reconciliation is correct.
  - b. Compares itemized deposits and receipts.
  - c. Verifies that all deposits are made within 7 days of receipt.
  - d. Verifies checkbook entries including voids and cancelled checks.
  - e. Verifies that all checks and/or receipts have two authorization signatures.
4. Appoints committees and committee chairman, with board approval, and has the authority to remove them. If a replacement is needed, appoints a person, with board approval.
5. Youth association, appoints two adult board 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 association board and youth leader's board.
6. Provides an agenda to the association manager which should be within one week in advance of the meeting.
7. May attend president-appointed committee meetings in an ex-officio, non-voting capacity, unless the Board directs otherwise.

### Section B. Vice President

---

Authority and duties:

1. Presides at all meetings when the president is absent.
2. Performs other duties as prescribed by the board or requested by the president.
3. Should be prepared to serve as presiding officer by:
  - a. Having a copy of the next meeting's agenda before the meeting
  - b. Having a good understanding of parliamentary procedure
  - c. Being familiar with the association's governing documents (bylaws, *USBC Association Policy Manual*, association operations manual, etc.)

### Section C. Sergeant-at-Arms (Optional)

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If deemed necessary by the association, this individual will be considered an officer of the association. His/her main duties, which should be added to the association's operations manual, if applicable, should include:

1. Counting votes during hand/standing votes.
2. Distributing/collecting ballots (if there are no tellers)
3. Speaking up if meeting drifts off topic
4. Removing disruptive attendees from the meeting

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

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## Chapter Seven: Association Operations

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### Section A. Association Manager Duties

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1. Acts as the ex officio, non-voting secretary/treasurer of the board.
2. Has voice only, does not count towards the quorum and cannot make or second motions at board meetings, unless he/she is also a director. He/she may be excused from board 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/appointed by, and accountable to, the board and USBC.
5. Must be a minimum age of 18, unless state laws mandate a specific age, and be USBC bondable.

**NOTE:** To be bondable by USBC, individuals must: (For details see Chapter 14.)

- 1) Be at least 18 years of age or older.
- 2) Not have been convicted of a felony.
- 3) Not have misused any funds.

6. Is not required to be a member of the association; however, it is strongly suggested.
7. Is not eligible to serve concurrently as an officer of the association.
8. Is eligible to serve as a director. (Not recommended due to possible conflicts of interest.)
9. Authority and duties:
  - a. **Reporting**
    - 1) To USBC Headquarters, as required.
    - 2) To the board/delegates/youth representatives/members at every meeting and as needed.
    - 3) A financial report, in writing, at every board and delegate/youth representative/membership meeting.
    - 4) A written year-end financial report at a board and the delegate/youth representative/membership meeting.
  - b. **Financial.** Comply with the established bookkeeping procedures and accounting of assets and disbursements, as approved by the board, which must include:
    - 1) Receive and issue a receipt for all funds paid to the association within 10 days, i.e., a local association would send a receipt to league secretaries for receipt of dues.
    - 2) Deposit association funds, and if applicable, Youth Leaders Chapter funds in the association's account, in a financial institution which must be federally insured or its equivalent, within seven days of receipt. Non-board members are not bonded through USBC.
    - 3) Ensure all withdrawals have two signatures. (Two members of an immediate family cannot cosign for withdrawals.)
    - 4) Provide the president with all records for monthly verifications.
    - 5) Ensure all required financial reports are filed. (IRS, payroll taxes, state taxes, etc. Refer to Section D of this chapter.)
    - 6) Provide all documentation for the examination of the organization's financial documents.

**NOTE:** An annual audit, also known as a year-end financial review, is put in place to verify that the association's financials are correct and proper procedures are followed for deposits, statement verifications, and tax filings. A sample year-end financial review form can be found on BOWL.com/associations under the Forms and Manuals tab.

- 7) Prepare a budget for board approval, if required. (Note: The finance committee reviews and monitors the budget, if applicable.) 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 board's approved policy.
- 8) Establish a procedure for retention of records that must include the financial records, to be approved by the board.
- 9) Provide a report of financial transactions as requested by the board or USBC Headquarters.
- 10) Pay all bills authorized by the board.
- 11) Pay all invoices/warrants from funds 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) Submit 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) Handle association correspondence, including distributing information to and from USBC Headquarters to the respective board, proprietors and members.
- 2) Ensure board members have a current copy of the association's bylaws.
- 3) Distribute meeting notifications, as designated in the bylaws.
- 4) Maintain the association's operations manual, if applicable.
- 5) Receive, compile and file committee reports.
- 6) Record and maintain meeting minutes.
- 7) Manage the association championship tournament(s) and all other association tournaments. The association manager is the tournament manager, or acts as the supervisor of the tournament manager.
- 8) 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 for each tournament conducted.
- 9) Manage the State Pepsi USBC Youth Championships (and all associated qualifying levels, if applicable). The association manager is the tournament manager, or acts as the supervisor of the tournament manager. (State)
- 10) Distribute all prize funds within 30 days following the close of the tournament, except when USBC Headquarters has authorized delay in payment.
- 11) Maintain a record of and submit tournament scores to USBC Headquarters as specified.
- 12) Order association supplies.
- 13) Select/appoint individuals for additional non-board positions, if these positions have been approved by the board. Positions could include, but are not limited to, office assistant, clerk, awards chairman, etc.
- 14) Maintain a record of, verify and submit to USBC Headquarters the pin fall and number of games for all members who have participated in a league, regardless of the number of games bowled. (Local)

<p><b>NOTE:</b> Official averages for adults are 21 games and youth are 12 games. Regardless of the number of games bowled, USBC must have all games entered into WinLABS or USBC approved processing system and transmitted to USBC.</p>
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- 15) Provide each league secretary a list of all league members and their National ID numbers for submission of averages. (Local)
- 16) Provide membership records and submit to USBC Headquarters when requested and in a format specified by USBC Headquarters.

- 17) Ensure lane certification and dressing inspections are completed and submitted to USBC Headquarters in a timely manner. Lane certification may begin on April 1 each year, and must be completed by August 31.
- 18) Submit the association's delegates/alternates credentials to USBC Headquarters and, in the case of the local associations, submitting delegates/ youth delegates/alternates credentials to the state, within the specified formats and dates.
- 19) Process membership and remit USBC national and state dues (adult) to USBC Headquarters within 20 days of receipt. (Local)
- 20) Perform an upload of WinLABS backup twice per year. (The first one must be completed after "starting new season" in WinLABS).
- 21) Transmit all board member information to USBC Headquarters within 20 days of election and maintaining the accuracy of the information.
- 22) Within 7 days of receipt by the local association all USBC award applications must be processed using USBC's processing system. State associations would have an agreement for processing with one local association; or send all award applications to:
  - a) Each respective association.
  - b) USBC Headquarters.
- 23) Run the appropriate reports in WinLABS to assist the association in managing member's awards.
  - a. Honor score awards that are sent to the association's mailing address, but have not been received in a timely manner, must be reported to USBC Headquarters within:
    - i. 30 days of the date shipped for plaques and trophies.
    - ii. 60 days of the date shipped for rings.
  - b) Honor score awards that are shown to have been shipped to the association, but not received, and not reported within the above timeframe will be charged to the association.
  - c) USBC will charge the association for replacements when the award is processed incorrectly by the association.
- 24) Enter Youth Leaders Chapter information (identifying youth leaders and their titles) in Win-LABS within 20 days of receipt, if there is a Youth Leaders program in the association's jurisdiction. (Local).
- 25) Oversee volunteer activities.
- 26) Perform other duties as prescribed by the board, the USBC Bylaws, *USBC Association Policy Manual*, and the association's operations manual, as applicable.

## **Section B. Performance Reviews**

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1. The association manager reports and is accountable to the board and USBC Headquarters.
2. Federal and state laws on employment must be taken into consideration.
3. The board should, at a minimum, review the association manager's performance annually.
4. Documentation of performance items (both good and bad) should start from the day of the association manager's hiring/appointment.

## **Section C. Processing and Distributing Awards**

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USBC local associations are required to:

1. Distribute/present all national awards within seven days of receipt of an award shipped to the association.
2. Submit high score awards 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 to USBC Headquarters within seven days of the completed application.



**Section D. IRS and Tax Information**

The following lists some of an 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 board** 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.

See the association page of BOWL.com under Forms and Manuals for our documents on Tax and IRS, Tax Requirement, and Tax Exempt Status.

The following is from the IRS website:

<http://www.irs.gov/charities/article/0,,id=184445,00.html>

<i>Form 990 Series Information</i>	<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, or Total assets ≥\$500,000	990

**Section E. Association Tournaments**

This section describes the association requirements for conducting tournaments.

**1. Required Tournaments**

**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) 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) WBA - Women’s tournament.
- 3) Youth - Youth tournament.

**c. State Associations.** In addition to the above, merged and/or youth associations must conduct a State Pepsi USBC Youth Championships. (Refer to Item 11 of this section.)

## 2. **Tournament Operation**

- a. An annual championship tournament shall be conducted unless:
  - 1) The USBC national or state association championship tournament is held in the association's jurisdiction. The association board is given the authority to determine if it should forego the local tournament for that year.
  - 2) Specific permission to forego the tournament must be granted by USBC Headquarters-Rules Department.
- b. All USBC members must have an equal opportunity to participate in tournaments of equal design and quality.
  - 1) Associations should put equal effort into their championship tournaments regardless of the number of entries.
  - 2) Any added monies should be added to each championship tournaments proportionate to entries.
  - 3) Tournament formats should be decided upon based upon feedback and the needs of the bowlers in the association.
- c. 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.
- d. One tournament may be conducted with divisions for open (men and women), women and/or youth.
- e. Tournament scores must be submitted to USBC Headquarters as specified.

## 3. **Certification**

- a. Association championship tournaments are certified through the Online Tournament Certification (OTC) system on BOWL.com.
- b. If the association conducts additional tournaments, they must be certified with USBC, using the OTC system, 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 online once the tournament is completed.

## 4. **Rules**

- a. The championship tournament shall be governed by the following:
  - 1) Article V of the mandatory association bylaws.
  - 2) *USBC Playing Rules*.
  - 3) *USBC Association Policy Manual*.
- b. Tournament rules:
  - 1) Are adopted by the board or a committee (more than one member) appointed by the board. A majority vote is required to adopt or change the tournament rules.
  - 2) Shall not conflict with USBC rules. The following rules do not apply:
    - a) 300c, Item 1(b)
    - b) 301a
    - c) 303 Item e
  - 3) The following formats are not available for the annual association championship tournament:
    - a) Pro-Am Tournament. Rule 301e
    - b) Mail-o-Graphic. Rule 302
    - c) Modified Formats. Rule 3
  - 4) Can limit the number of players who are identified as professionals or who apply for membership in any professional bowling organization during the calendar year preceding the event and up through their dates of competition to two on a four or five-player team and one on a three-player or doubles team.
  - 5) Cannot require an average to have a minimum number of games in excess of 21 (adult), 12 (youth) 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. An official USBC average includes averages established in winter and summer seasons. Unless tournament rules state otherwise, a bowler shall use his/her highest average regardless if established in winter or summer.

**NOTE:** An official average includes both summer and winter averages. For example, the summer 2015 averages would be part of averages for the 2014-15 season. All averages that appear on BOWL.com are considered official. If leagues and tournaments want to restrict entering averages to a particular season, they should be specific as to what averages they are using.

## 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 association champions can be in any or all of 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 boards of the adjacent associations approve such consolidation. The boards of the adjacent associations shall determine the management of the consolidated association championship tournament. Consolidated tournaments are then operated as one event with one prize fund. Associations must notify USBC Headquarters if they choose to hold a consolidated tournament so that both associations may be credited with hosting their required championship event.

## 9. Sectionals

The state association may conduct the championship tournament using a maximum of two (2) sectionals with the permission of USBC Headquarters. In state associations using the sectional format, the association shall have the option of determining the state champions of each event via a championship roll-off or the sectional winners of each event declared sectional champions. The rules must list the option used.

## 10. Eligibility

- a. **Adults.** Must be a member of the association and have paid current association dues, including National and state (if applicable).
  - 1) Those eligible to bowl in a state WBA are:
    - a) Women in a merged local association who join the state WBA.
    - b) Women in a local WBA.
    - c) Women who belong to a local BA are not eligible unless they join the local WBA and pay appropriate local and state dues. The local WBA could supply the member with a multiple membership card designating she is a member of the WBA.
  - 2) Those eligible to bowl in a state BA are:
    - a) Men and women (The women must have joined the state BA.) in a merged local association.

- b) Women in a merged local association are not eligible unless they join the state BA and pay appropriate dues.
  - c) Men and women in a local BA.
  - d) Women in a local WBA are not eligible unless they join the local BA and pay appropriate local and state dues. The local BA could supply the member with a multiple membership card designating she is a member of the BA.
- b. **Youth.** All USBC Youth Members are eligible. Associations may have a tournament rule restricting participation. However, any such limitation may not exclude any USBC Youth member who is bowling in a league within the associations' jurisdiction.
- c. 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 not 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.

<p><b>NOTE:</b> Eligibility cannot be restricted for individuals who have a current average of 21 (adult), 12 (youth) or more games in a league within its jurisdiction or members who do not hold membership in another association.</p>
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#### 11. **State Pepsi USBC Youth Championships**

Associations serving youth shall encourage and assist coaches of USBC 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.

Merged state associations serving men, women and youth and state youth associations that are not in direct competition with a merged association shall appoint the State Pepsi USBC Youth Championships tournament manager as directed by USBC Headquarters.

State youth associations that are in direct competition with the merged state association shall assist the merged association by forwarding to them any funds, records or supplies held in trust for the State Pepsi USBC Youth Championships Tournament. A merged state must conduct State Pepsi USBC Youth Championships Tournament for all eligible state youth members.

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

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

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## Chapter Eight: Meetings

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This chapter details requirements associated with membership and board meetings.

### Section A. General Meeting Requirements

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1. Meetings involving youth members may not involve the use of tobacco products or alcoholic beverages.
2. Minutes.
  - 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.
4. A merged association may not hold separate meetings of delegates and youth delegates (State) or members and youth representatives (Local).

<p><b>NOTE:</b> Youth associations will also allow adult USBC members involved in youth programs to attend annual meetings with voice only.</p>
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### Section B. Annual Meeting Quorum

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A quorum is the number of voting members who must be present in order for business to be legally transacted. USBC requires a specific number be adopted, not a percentage.

1. **State Annual Meeting** - To conduct business at the state annual meeting, both the number of delegates representing adults, and the number of delegates representing youth, as determined in the association's bylaws, must be present.
2. **Local Annual Meeting** - To conduct business at a local annual meeting, both the number of adult members, and the number of youth representatives, as determined in the association's bylaws, must be present.

<p><b>NOTE:</b> The quorum should be as large a number as can be reasonably depended on to be present at a meeting.</p>
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### Section C. Youth Representation at Annual Meetings

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1. **Attendance at Annual Meetings**
  - a. Youth Delegates. Attend merged state and/or non-merged state youth association meetings.
  - b. Youth Representatives. Attend merged local and/or non-merged local youth association meetings.
2. **Youth Representatives (Local)**
  - a. Youth representatives consist of the following:
    - 1) All youth members of the association, at least 14 years of age.
    - 2) One adult representative, who is a USBC member, from each certified youth or adult/youth league.
    - 3) One representative, who is a USBC member, from each center in which there is at least one certified youth league.
  - b. League and center representatives serving as youth representatives shall serve for one year.

- c. Vacancies
  - 1) A league or center representative serving as a youth representative, who is unable to attend an association annual meeting, may appoint an alternate, who meets the eligibility requirements, from the league or center represented.
  - 2) A league representative chosen to represent more than one league may appoint an alternate from the league represented.

#### **Section D. Board Meetings**

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- 1. **Quorum:**
  - a. To conduct business at a board meeting, the number of board members as determined in the association's bylaws must be present. USBC requires a specific number be adopted, not a percentage.
  - b. The association manager has voice only and does not count towards the quorum, unless the association manager is also a director.
- 2. **Excused from Meetings.** A board member, including the association manager, may be excused from any portion of a board meeting based on a conflict of interest.
- 3. **Entitled to Vote.** All members of the board of directors are entitled to voice and vote with the exception of the association manager, who acts as the ex officio non-voting secretary/treasurer of the board and has voice only. The association manager may have vote if also elected as a director.

#### **Section E. Teleconference, E-mail and Mail Voting**

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Article VII, Section B, Item 4 of the bylaws must be adopted by the Delegates/Youth Delegates (state) or Members/Youth Representatives (local) to use teleconference, e-mail or mail voting, and only if state laws permit.

These options may be used for both board and committee meetings.

Votes by teleconference, e-mail or mail should only be used for emergency/urgent issues. All other issues should be handled at a board/committee meeting.

Questions may be submitted through the mail (e-mail, if every member of the board has e-mail) to all members of the board.

A quorum is required as listed in Article VII, Section B, Item 2 of your bylaws Record of the vote will be recorded in the board's minutes. This action must be reported at the next board meeting.

- 1. **Teleconference.** This is a meeting conducted by use of telephones or cell phones without requiring attendees to be physically present in the same physical area. Such a conference may also incorporate video.
  - a. The question/subject to be discussed should be told in advance of the teleconference to all board members so that they may prepare for the call.
  - b. Minutes must be taken for all teleconferences.
  - c. Teleconferences are handled just like a regular meeting.
    - 1) President/Chairperson hosts the meeting.
    - 2) Everyone should have the opportunity to speak.
  - d. Voting procedures:
    - 1) Roll call vote
    - 2) Group vote (Aye/Nay)
    - 3) Secret ballot (Must be done by email. See E-mail voting procedures below.)
  - e. Minutes of teleconference meetings are treated as regular minutes and should be reported at the next regular meeting.

2. **E-mail voting.** The Delegates must have previously voted to approve the use of an e-mail ballot vote for a particular issue or, in an emergency. (Article VII, Section B, Item 4 of the bylaws.)
  - a. If every member of the board has e-mail, questions may be submitted electronically and shall be sent to every member of the board. The e-mail must include:
    - 1) The number of responses needed to meet a quorum (Quorum number is the same as is required for a board meeting.)
    - 2) Full instructions for marking the ballot.
    - 3) Required return date.
    - 4) Information from which it can be determined that the e-mail vote was authorized by the board member. Examples: National ID number, last four digits of a board member's Social Security number, passwords, etc. could be used as proof of identification. Board may decide on the method for authorization and include it as part of their Operations Manual.
    - 5) The e-mail address and person to which the e-mail ballot is to be returned. The President should choose one specific person will be designated to receive the e-mail ballots by the specified deadline.
      - a) NOTE: When casting your vote, use only the "Reply" button and not the "Reply All" button.
      - b) The proposed action as would be stated when making a motion.
      - c) Separate ballots shall be given for each proposed action.
    - 6) Adequate, fair and open discussion of the issue must precede the e-mail vote.

NOTE: Explain in the e-mail that all discussion should be done using the "Reply All" button so that everyone may be included in the discussion.
    - 7) Results of the e-mail ballot voting are to be verified by two other persons.
    - 8) The person chosen to receive the returned e-mail ballots shall:
      - a) Record the results of the e-mail ballot vote.
        - (1) Votes must be held confidential.
        - (2) Abstentions do not count in vote tally.
      - b) Report the results of the e-mail ballot vote to all board members by a method chosen by the board (e-mail, meeting, conference call, phone tree, etc.) within 10 days after the voting deadline.
      - c) Retain a hard copy of each ballot, as required by state law. If no law, then retain a hard copy until after the next in-person meeting. After which, if no question or challenge has been raised, the hard copy records are destroyed.
      - d) Read and record the vote in the next board's minutes. This has the same effect as taking the vote at a meeting.
3. **Mail voting**
  - 1) Questions may be submitted through the mail and shall be sent to every member of the board. Notice must include:
    - a) The number of responses needed to meet a quorum.
    - b) Required return date.
    - c) Full instructions for marking the ballot.
    - d) The President should choose one specific person will be designated to receive the ballots by the specified deadline.
    - e) The proposed action.
    - f) Separate ballots shall be given for each proposed action.Approval of the ballot requires a majority vote and the quorum is valid only when the number of votes cast equals or exceeds the quorum required for a regular board meeting.
  - 2) If the vote is not to be secret also send the following:
    - a) Printed ballot containing space for voter's signature.
    - b) Self-addressed return envelope.



- 3) If the vote is to be secret, also send the following:
  - a) Printed ballot (no signature space).
  - b) An inner envelope with a space for the voter's signature placed on its face instead of on the ballot.
  - c) Self-addressed return envelope.  
The person(s) designated to receive/count ballots should hold them, unopened, until the meeting or date the votes are to be counted, remove the inner envelopes; and verify the ballot is from a qualified voter. Open the inner envelopes and remove the ballots.
- 4) Count the ballots. Report the results of the mail vote to all board members by a method chosen by the board within 10 days after the voting deadline.
- 5) Retain a hard copy of each ballot, as required by state law. If no law, then retain a hard copy until after the next in-person meeting. After which, if no question or challenge has been raised, the hard copy records are destroyed.
- 6) Read and record the vote in the next board's minutes. This has the same effect as taking the vote at a meeting.

**NOTE:** In all cases where the USBC Bylaws and *USBC Association Policy Manual* are silent, the most recent edition of *Robert's Rules of Order, Newly Revised* shall govern all meetings.

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

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## Chapter Nine: Committees

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This chapter details the requirements of the standing committees.

Every state and local association is required to have a finance committee. In addition, every state and local merged association is required to have a Youth Committee.

Association committees, may be comprised of both board members and non-members. Non-members serve with voice, but no vote.

### Section A. Finance Committee

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1. Composed of at least three members of the board, including the chairman.
2. Appointed by the president with board approval.
3. 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 financial documents is completed by an outside provider. Must be handled by a committee or an outside auditor, provided they meet the requirements thereof (See note below). Quarterly reviews are suggested, which could be handled by a board committee.

**NOTE:** An outside provider is comprised of anyone that is not a member of the Board of Directors or a family member. A committee can still be appointed as long as they meet the requirements stated above. In no way does this mean the association must hire a Certified Public Accountant or have to pay for the financial review if they can't afford one.

### Section B. Youth Committee (Merged Only)

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1. Appointed by the president (including the chairman) with board approval.
2. Is responsible for:
  - a. Developing any additional eligibility requirements for:
    - 1) Youth Directors. At least 20% of the board members, to be elected by the delegates/youth delegates (State) or members/youth representatives (Local), and to be included in the association's bylaws.
    - 2) Youth Delegates. Candidates for youth delegates to the state annual meeting, to be elected by the members/youth representatives (Local), and to be included in the association's bylaws. Any adopted eligibility requirements shall be placed at the end of Article IX, Section C, Item 2 of the merged local bylaws.
  - b. Monitoring, promoting, reviewing and recommending youth programs and services conducted by the association.
  - c. Reporting to the board. The board approves all youth related matters using input from the youth committee/youth directors.
  - d. Appointing two adult association board 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 Youth Leaders' board.
3. **Vacancies.** Vacancies on the Youth Committee are filled by the President, with Board approval.



### Section C. Other Committees

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1. The president may establish other committees, with board approval, as needed.
2. The president appoints the chairman and committee members.
3. The President has the authority to remove committee members from president appointed committees.
4. Other committees may be, but are not limited to:
  - \* Audit
  - \* Awards
  - \* Education/Training
  - \* Events
  - \* Lane Certification
  - \* Nominating
  - \* Membership
  - \* Public Relations
  - \* Scholarship
  - \* Strategic Planning
  - \* Tournament

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

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## Chapter Ten: Delegates

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This chapter details topics associated with delegates. It is to be used in conjunction with those requirements listed in the bylaws.

A state or local association whose charter has been suspended or revoked, or an association that is delinquent in processing dues for the current bowling season is not considered "in good standing" for the purposes of delegates attending the USBC Annual Meeting.

### Section A. Delegates

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

**1. Representation for USBC Annual Meeting (USBC National Bylaws, Article VI, Section A, Item 3).**

- a. Each state association in good standing may elect:
  - 1) **Merged.** Two Delegates and two Alternate Delegates to the USBC Annual Meeting.
  - 2) **Non-merged.** One Delegate and one Alternate Delegate to the USBC Annual Meeting;
- b. The number of Delegates to which a local association is entitled will be based on USBC's records of the association's fiscal year membership as of July 31, the year prior to the USBC's Annual Meeting. Each local association in good standing with USBC, with the exception of affiliate associations, are entitled to Delegates to the USBC Annual Meeting as follows:
  - 1) Less than 1,000 members - one Delegate and one Alternate Delegate.
  - 2) 1,000 members or more - one Delegate and one Alternate Delegate for each 1,000 members or major fraction thereof.

NOTE: USBC calculates association membership for the purpose of delegate counts by the number of national memberships purchased through the association.
- c. Newly-chartered local bowling associations, with no membership numbers recorded by July 31st, the year prior to the USBC's Annual Meeting, may elect one Delegate and one Alternate Delegate to the USBC Annual Meeting.
- d. A state or local association whose charter has been suspended or revoked, or an association that is delinquent in processing dues for the current bowling season, is not considered "in good standing" for purposes of Delegates or Alternate Delegates attending the USBC Annual Meeting.

**2. Responsibilities**

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 or USBC 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.

- a. A USBC national delegate has the authority to vote on:
  - 1) USBC bylaws, except with respect to:
    - a) Provisions for compliance with United States Olympic Committee (USOC) rules and regulations.
    - b) Provisions related to athletes and youth.
    - c) Provisions mandated by the Articles of Incorporation or applicable law.

- 2) Adult league rules
  - 3) Adult tournament rules
  - 4) Electing directors to the USBC Board as outlined in the bylaws.
- b. A state delegate has the authority to vote on:
- 1) Legislation (applicable state association bylaw amendments).
  - 2) Electing the state board of directors.
  - 3) Electing the delegate(s) to represent the state association at the USBC Annual Meeting.

### 3. Reimbursing Business Expenses

An association may reimburse actual business expenses incurred by Delegate/Alternate without tax consequences to the individual as long as the:

- a. Expense is related to the business or purposes of the association, and
- b. Individual submits evidence of such expense (receipts).

If an individual receives a reimbursement for more than such individual's out of pocket expenses, then the excess reimbursement is taxable income to the individual.

If an individual is not reimbursed for out-of-pocket association expenses (or for less than 100% of such expenses), the individual may be able to claim the expenses as a donation to the association on his/her personal income tax return.

## Section B. Credentials

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1. **USBC:** Credentials for delegates/alternates to the USBC Annual Meeting shall be submitted in a format and by the deadline, as specified by USBC Headquarters.
2. **States:** Credentials for delegates/youth delegates/alternates to the State Annual Meeting(s) shall be submitted in a format and by the deadline, as specified by the state association's bylaws and policies.

## Section C. State Delegates Representing Adult Membership/Youth Delegates/Alternates

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1. 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 and local association bylaws and policies, to attend state annual meetings.
2. **Merged Local Associations**
  - a. Adult members and Youth representatives elect:
    - 1) Delegates/alternates representing adult and youth membership to attend the merged state annual meeting.
    - 2) Men and/or women members of the state BA as delegates/alternates to attend the non-merged state BA annual meeting.
    - 3) Women members of the state WBA as delegates/alternates to attend the non-merged state WBA annual meeting.
    - 4) Youth delegates/alternates to attend the merged state annual meeting.
    - 5) Youth delegates/alternates to attend the non-merged state youth annual meeting.
  - b. 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 shall never vote on any matter or election more than once.
3. **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.

#### **Section D. Vacancies for Delegates to the USBC Annual Meeting**

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- 1. **Prior to the USBC Annual Meeting:**
  - a. Vacancies shall be filled for the unexpired portion of each term by the alternates, in the order in which they were elected.
  - b. If a vacancy still exists, the president fills the vacant position by appointment.
  - c. The appointee must meet the same eligibility requirements as elected positions.
- 2. **When a local association elects fewer delegates than it is entitled, the board of directors may exercise one of the following options:**
  - a. Authorize another election to be held at a membership meeting to fill the position(s).
  - b. Fill those vacancies with alternates, in the order in which they were elected.
  - c. Empower the president to fill the vacancies when alternates are not available.
- 3. **At the USBC Annual Meeting:**

If an association is not fully represented while attending the USBC Annual Meeting, those association delegates in attendance reserve the right to appoint any member of their association to fill their delegate allotment, with the approval of USBC.

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

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## Chapter Eleven: Amendments

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This chapter explains the requirements associated with adopting/amending, and reporting bylaws decisions to USBC Headquarters.

### Section A. Options within the Bylaws

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It is important that the association adopt and follow the appropriate version of the bylaws in their official form. (The most current version of the bylaws can be found in the Forms & Manuals section of BOWL.com) However, there are specific areas of the bylaws that are determined by the association to best fit its unique needs. Those areas are:

1. Fill-in-the-blank, and other areas indicated as optional within the bylaws including:
  - a. Association name
  - b. Dues amounts (State dues up to the maximum)
  - c. Number of directors
  - d. Number of vice presidents
  - e. Number of years in a term, maximum number of terms, etc.
2. Additional eligibility requirements for officers, directors, adult delegates, and youth delegates. For example, an association might decide that to be elected president, an individual must have served on a board for two years. Additional eligibility requirements should be based on an applicable skill, experience, and/or level of expertise, and not be so restrictive that filling board positions could be in jeopardy. (These eligibility requirements should also be clearly written on the application for board, or readily available to anyone who may want to run for the board.)
3. Stagger systems based on the adopted number of years in a term, are developed by the nominating committee, to be approved by the appropriate voting body and included in the bylaws. Two examples of stagger systems are:
  - a. Two-Year Terms
    - 1) Odd Years
      - a) President
      - b) 6 Directors
    - 2) Even Years
      - a) Vice President
      - b) 5 Directors
  - b. Three-Year Terms
    - 1) Year One
      - a) President
      - b) 3 Directors
    - 2) Year Two
      - a) Vice President
      - b) 4 Directors
    - 3) Year Three: 4 Directors
4. Other items specifically stated in the *USBC Association Policy Manual* as requiring inclusion in the bylaws.

### Section B. Amending

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Associations can elect to change the optional portions of the bylaws by following the amendment procedure outlined in the bylaws.

Any member may submit a proposed amendment, in writing, to the association by the number of days prior to the annual meeting as stated in its bylaws. Approval requires a two-thirds vote of the voting body at an association membership/delegate meeting

1. An association may NOT make any changes to the mandatory bylaws with the exception of:
  - a. Including additional eligibility requirements for Board, and/or delegate positions.
  - b. A stagger system.
  - c. A delegate/youth delegate chart(s) for attendance at the state annual meeting (State).
  - d. Amending the indicated options such as number of directors, quorum, etc.
2. In addition, if adopted, the following items must be included in the association bylaws:
  - a. The board's ability to use mail/e-mail/teleconference voting, if state laws allow.
  - b. The start date of a term (if not August 1).
3. Changes approved at a USBC Annual Meeting or by the USBC Board, applicable to the state or local association bylaws, are made automatically without further necessary action by the association.

A template of the bylaws may be found on the Association page of on BOWL.com under Forms and Manuals.

### **Section C. Reporting to USBC**

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A complete set of current bylaws must be submitted to USBC Headquarters upon request.

### **Section D. Change in Dues**

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An association may make an amendment to its current adult standard dues by following the procedure outlined in the respective bylaws.

## Chapter Twelve: Establishing a Procedure for Additional Positions

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In considering the possibility of authorizing additional positions (such as assistant association manager, office assistant, etc.) to assist in the day-to-day operations of the association, the board should take into account both the resources available, as well as whether there is a need for the position.

1. The board:
  - a. Makes the decision if additional positions are necessary.
  - b. Determines salary maximum, if any.
2. The Association Manager:
  - a. Develops job descriptions(s) and includes in association Operations Manual.
  - b. Hires/selects the individual(s).
  - c. Determines salary, if any, up to the maximum set by the board.
  - d. Reports performance to the board.

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

## **Chapter Thirteen: Establishing a Procedure for the Handling of Funds**

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On the whole, overseeing the financial responsibilities of an association is one of the most important responsibilities of the board. To significantly decrease the risk of funds being misplaced or mishandled, the board should maintain an active role in providing checks and balances.

### **Section A. Approving the Financial Institution**

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The most important consideration in deciding on a financial institution is that it be federally insured by the Federal Depository Insurance Company (FDIC), or its equivalent. To be federally insured means that accounts held at that particular financial institution are insured by a federally supported program up to \$100,000. To check if your association's bank is federally insured, a search may be conducted at [www.fdic.gov](http://www.fdic.gov).

Associations are not permitted to use in-house banking. All association accounts must be maintained at an insured bank or credit institution, in the name of the association.

### **Section B. Designating Board Members to Sign for Withdrawals**

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In choosing signatories for withdrawals, the board must first satisfy bonding requirements before considering convenience. To ensure bonding protection of association funds, signatories on an association account must:

1. Be current board members, at least 18 years of age, and not immediate family members.
2. Have at least two signatures on all withdrawals.

Associations are encouraged to allow more than two board members to serve as signatories as this allows for greater flexibility. If one individual is out of town, etc., money can still be withdrawn.

An association may face a situation in which a payment or withdrawal must be made in an expedient manner. For this reason, convenience should be a consideration when board members are chosen to act as a signatory.

Making financial decisions based exclusively on convenience, however, is not advisable. A board should not authorize, for example, checks to be pre-signed.

### **Section C. Ensuring All Money is Deposited Within Seven Days**

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It is the board's responsibility to verify deposits and ensure the association manager is keeping meticulous records of money received by the association. If the association manager is not issuing a receipt for all money paid to the association (as required), verifying that all money has been deposited will be virtually impossible.

To verify that all money has been deposited, a record of deposit must be compared to all receipts that have been issued. Furthermore, the deposit date should be compared to the date of each receipt to verify that deposits were made within seven days. Should the money and receipts not balance, the association manager should be able to provide documentation of the difference.

**Section D. Authorizing Expenditures**

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When making decisions regarding money, board members are obligated to keep in mind the association purpose and the best interest of the members.

Many expenditures an association faces are routine – for example, if an association maintains an office, it may incur property taxes, rent, utility bills, etc. The payment of routine bills such as these only need to be authorized by the board once and noted in the meeting minutes. Despite this, board members should continually keep themselves informed of these costs, and immediately question any discrepancies and/or something not accounted for or approved by the board.

For convenience, the board may choose to authorize all expenditures under “x” dollars, or grant a blanket authorization for specific expenditures. Even if these practices are used, however, the expectation remains that the board review all expenditures. In these cases, a receipt or warrant should always be used and should have two signatures on them.

The use of a debit card by an association is NOT recommended due to the ease and nature of potential misuse, but if a debit/credit card is ultimately used it should be addressed by the board prior to utilization. Again, as mentioned in the previous paragraph, the board may choose to authorize all debit/credit card transactions under a specific amount (“x” dollars), or grant a blanket authorization for specific expenditures. If the practice of using a debit/credit card is implemented, however, the expectation remains that the board reviews all expenditures and the association president perform a proper monthly bank verification to confirm proper use of the debit/credit card. In these cases, a receipt or warrant should always be used and should have two signatures on them.

**Section E. Ensuring the President Verifies the Association Accounts**

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While the president verifies association accounts monthly, the board provides an extra financial check by ensuring this verification takes place. Asking the president to provide a summary report of his/her findings is one method of satisfying this duty.

**Section F. Ensuring All Required Financial Reports Are Filed**

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The board has a responsibility to familiarize themselves with the specific Internal Revenue Service (IRS), payroll, state, and local forms/reports that are required of the association, and ensure the association manager files all applicable documents in a timely manner.

Choosing not to verify all applicable forms/reports have been filed is a significant risk as a board member. If the IRS performs an audit on the association and determines money is due, each member of the board can be held legally responsible.

To familiarize yourself with the most common IRS and payroll forms that apply to 501(c)(3) organizations, reference Chapter 2 of this manual.

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

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## Chapter Fourteen: Bonding, Burglary, Holdup Insurance, & Liability Insurance

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### Section A. Bonding, Burglary & Holdup Insurance

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USBC maintains a policy of bonding, burglary and holdup insurance for chartered associations with the exception of those located on US Military Bases in foreign countries. The coverage amount is limited to \$10,000 as indicated in the Coverage section below. No insurance coverage is available except as specifically set forth in the policies of insurance purchased by USBC.

**Covered individuals.** Association officers and directors are covered in this policy with coverage extended to a non-board member appointed by the association manager as the tournament manager of a required championship tournament. Funds from other association tournaments, conducted by a non-board member are not covered until received by a member of the board. The surety company will not extend coverage to any individual who misused funds in the past or has been convicted of a felony.

**Coverage.** The bonding, burglary and holdup insurance coverage described in this section is available through a policy of insurance issued to USBC by an independent licensed insurance company. The policy covers:

1. Bonding/misuse/misappropriation of funds. A shortage attributable to dishonesty by a covered individual. Additional coverage is available free of charge. **Additional coverage must be requested annually.**
  - a. State associations may obtain additional coverage without cost upon written request to USBC Headquarters.
  - b. Local associations may obtain additional coverage without cost through WinLABS
2. Holdup. The taking of funds from a covered individual. No additional coverage is available.
3. Burglary. Funds taken through the forcible entry into the premises or locked receptacle where the funds are kept by a covered individual. There must be visible evidence of forcible entry. An on-site police report is required. No additional coverage is available.

The surety company shall not be held liable for any loss which may have existed prior to the time the bond or insurance became effective. The policies of insurance do not cover funds frozen through insolvency or liquidation of any financial institution.

### Losses and Claims

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Any loss should be reported to USBC Headquarters for guidance within 15 days.

Any attempt to regain funds through an agreement between the principal and offended parties without authorization from USBC Headquarters creates a legal situation which places the association's right of recovery under the bond in jeopardy.

Any officer, director or appointed tournament manager who misuses the funds of a state or local association shall be subject to suspension from USBC membership.

The president also may be liable for suspension from USBC membership for failing to make the monthly verification of all association accounts. (This could be, but is not limited to scholarship account, each tournament account, fund raiser account, etc.)

**Conditions**

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**Bonding Insurance.** Misuse/misappropriation of funds. The following conditions govern the method by which associations must handle its funds to qualify for 100% protection of any loss caused by the dishonest act of a covered individual:

1. Funds must be deposited within 7 days in an insured bank or credit institution in the name of the association.
2. Withdrawals require the signatures of two authorized officers/directors who are at least 18 years old.
  - a. Signature stamps should not be used.
  - b. Checks should not be pre-signed.
  - c. 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, and same gender spouses, 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.
3. The president must verify all accounts monthly.
4. All association accounts must be audited annually.

**NOTE:** When a signature stamp is used or checks are pre-signed the associations bonding coverage will be in jeopardy.

**Failure to meet any of the conditions of the policies of insurance above will result in a 50% reduction of any documented loss.**

**Burglary and Holdup Insurance.** The policies of insurance provide coverage as follows:

1. The taking of funds from a covered individual by violence or threat of violence.
2. Funds taken through the forcible entry into the premises or locked receptacle where the funds are kept by a covered individual. There must be visible evidence of forcible entry. An on-site police report is required.
3. Receipts: Not to exceed one week's receipts at any one time, with a limit of \$2,000.
4. Disbursements: Not to exceed an amount of \$10,000 at any one time for a period of seven days.

In the event the association fails to deposit the funds in a recognized banking or credit institution in the name of the organization as specified, the insurance company will be liable for only one week's receipts when a loss occurs due to burglary or holdup.

The policies of insurance **DO NOT** cover loss by:

1. Fire
2. Mysterious disappearance
3. Funds left unattended

**Section B. Liability Insurance**

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Associations can purchase professional or general liability insurance coverage through USBC Headquarters. USBC Headquarters, through its master policy, is able to offer a group (discounted) rate which should reduce premiums when compared to like coverage offered by local agents.



### **Professional Liability Insurance**

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There is no guarantee against lawsuits. To limit your association's exposure to them, it is wise to purchase professional liability insurance. It includes coverage for officers, directors, staff, committee members and any other volunteers acting on the association's behalf. It also covers actual or alleged wrongful acts (i.e., negligence, omissions, breach of duty, etc.) while performing your association duties. Please note that state associations are automatically provided with professional liability insurance coverage under the USBC master policy.

### **General Liability Insurance**

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General liability insurance covers such things as third party bodily injury, property damage, or personal injury claims. This coverage is especially tailored to protect members participating in an association sponsored league event or tournament play, as well as for other association functions such as board meetings, workshops, or banquets.

### **Lane Inspectors Insurance**

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Lane inspectors conducting bowling lane inspections at centers on behalf of USBC and local associations are provided coverage against accidental bodily injury. While extensive, this policy is not all encompassing. Those conducting lane inspections are responsible for familiarizing themselves with the terms of the policy and the procedure for filing a claim, should the need arise.

Lane inspector insurance is not purchased. Those qualified individuals, as outlined in the policy, are covered.

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

## Chapter Fifteen: SMART

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**SMART** is the Scholarship Management Accounting and Reports for Tenpins program and provides a centralized location to manage bowling scholarships at no cost to the Provider and/or Recipient.

USBC requires all former and awarded (assigned to a person) scholarships issued through an association, including those issued for academic or meritorious accomplishments, to be deposited with SMART. (This has been a requirement since 2008.)

Scholarship funds must be deposited with SMART within 30 days after the end of the league/tournament/event in which they were earned, including scholarships for academic or meritorious accomplishments.

### Section A. Benefits of the USBC SMART Program

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1. All youth scholarships that are managed by SMART are held in the name of the organization that provided the scholarship.
2. Recipients have up to eight years from their high school graduation date to use the funds, or eight years from award date, if after high school graduation. If they have served in the military, their funds are extended by the period of their first enlistment only.
3. Returned Funds:  
As stated in the *SMART Policy Manual*, if a Recipient does not use their scholarships within the allotted timeframe, then the scholarships expire and the funds are returned to the Provider. These funds can be used to:
  - Enhance a tournament or league
  - Conduct a tournament or league without payment of prize money and using these funds for scholarships
  - Give an extra scholarship, meritorious service, high game/series, etc.

We hope you will be able to put the added funds to good use. Remember, these funds **cannot** be used in place of paid prize/scholarship money.

4. SMART is an online program and is accessible at [BOWL.com/SMART](http://BOWL.com/SMART). Providers and Recipients may view the information in their account. The online service includes:
  - a. Providers:
    - 1) Viewing account information
    - 2) Changing contact information
    - 3) Submitting recipient information lists
    - 4) Viewing or printing annual statements
  - b. For Recipients:
    - 1) Viewing account information
    - 2) Adding/changing contact information
    - 3) Viewing scholarships earned
    - 4) Viewing scholarship disbursements
    - 5) Requesting funds for college



## **Section B. Additional Information**

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Go to [www.BOWL.com/SMART](http://www.BOWL.com/SMART) for information needed to efficiently manager Provider and Recipient accounts, including:

1. Frequently Asked Questions for both Providers and Recipients
2. Application to open new Provider accounts
3. Application to add Additional Providers to an existing account
4. SMART Policy Manual
5. Terms and Conditions
6. Privacy policy
7. Parent information
8. Program information
9. Current news releases
10. Financials

## Chapter Sixteen: Suspension and Reinstatement

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USBC has established measures to ensure due process for any USBC member:

1. Against whom a complaint may be filed.
2. Whose right to USBC membership may be challenged.
3. Who may be seeking reinstatement of membership.

In this chapter we will discuss and identify procedures for:

1. Filing a complaint.
2. Processing of a complaint.
3. Types of hearings an association may need to conduct. (Prior to a hearing contact USBC – Rules for the procedures.)
  - a. Average re-rate.
  - b. Suspension.
  - c. Reinstatement.
4. Failure to pay membership fees.
5. Tournament worthless check.
6. Failure to submit final averages.
7. Removal from office.
8. Temporary suspension.
9. Fund shortages.

### Section A. Filing of a Complaint

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1. Complaint may be filed only in the current season or the season immediately following the alleged violation. The following do not have a time limit:
  - a. Scholarship funds not submitted to SMART.
  - b. Youth Predator/Child Endangerment when an individual is charged by a local law enforcement agency (This may change as USOC implements their Safe Sport Policy.)
  - c. RVP Code of Conduct violation.Upon receipt of a complaint, USBC will determine if the complaint can be processed.
2. The complaint shall be in writing and set forth the rule(s) violation(s) and detail the charges against the member(s), hereafter referred to as the defendant(s), and the USBC rule(s) involved. When charges or a bond claim have been filed:
  - a. The defendant(s) continues to be eligible to bowl in USBC competition.
  - c. USBC may temporarily suspend the defendant(s) from all offices held, until the matter has been considered.
  - d. If temporarily suspended, another individual shall be appointed by the league/association board to perform the duties of the individual who is under temporary suspension.
3. The complaint shall be:
  - a. Signed by the person(s) making the charges;
  - b. Include supporting documentation; and
  - c. Filed with USBC Headquarters. Any complaint received by the association must be forwarded to USBC Headquarters for processing.

### Section B. Processing of a Complaint

---

1. Upon receipt of a proper written complaint, USBC will forward a copy of complaint and supporting documentation to the defendant.
2. USBC Headquarters will give the defendant an opportunity to:
  - a. Respond in writing.
  - b. Have counsel review the complaint and respond in writing on his/her behalf.
  - c. Submit written testimony from witnesses.
  - d. Submit any other evidence on his/her behalf.

3. When either the information is received or the time limit for submission elapses, an administrative decision will be rendered and all involved notified.

The possible decisions are:

- a. Indefinite suspension.
  - b. Indefinite suspension, not to hold office.
  - c. Indefinite suspension, never to hold office.
  - d. Warning.
    - 1) Imposition of penalty is withheld.
    - 2) Individual has a record; similar to probation.
    - 3) Individual can compete in certified competition.
  - e. Dismiss.
  - f. Not guilty.
4. Withdrawal of Complaint. A request to withdraw a complaint may be made by the complainant prior to a decision being rendered. USBC is under no obligation to grant the request.

### **Section C. Reinstatement**

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#### **Application for reinstatement must:**

1. Be filed in writing to USBC Headquarters, Attention: Rules.
2. Include payment or proof of payment if money is owed.

**NOTE:** The status of the applicant shall remain unchanged until USBC notifies the applicant in writing of the decision.

### **Section D. Failure to Pay Membership Fees**

---

1. State and local associations must comply with the following procedures to initiate suspension charges against an individual for failing to pay his/her membership fees. (The following procedure does not apply to checks issued/credit cards tendered by a league secretary for payment of membership dues for the league.)
2. If an individual has not paid his/her membership fees by the date requested by the association, the following procedures must be followed:
  - a. The association sends a letter notifying the individual:
    - 1) Payment has not been received or payment was made with a bad check/credit card.
    - 2) Payment or proof of payment must be submitted within fifteen (15) days. If payment was made by bad check/credit card, additional bank/service fees can be applied to the amount owed.
    - 3) Personal check/credit card is not an acceptable method of payment. (Cash, money order or cashier's check only.)
    - 4) Failure to submit payment or proof of payment could result in denial of membership.
    - 5) He/she is ineligible to participate in any USBC competition.
  - b. The association notifies the league(s) that the individual does not hold membership and cannot participate in USBC competition. (See the Rules page of BOWL.com under Resources-Association for sample letter.)
  - c. If payment or proof of payment is not received within the time period specified, the association forwards the following to USBC Headquarters, Attention: Rules:
    - 1) Copy of the notice sent to the individual requesting payment.
    - 2) Copy of the membership application.
    - 3) If bad check/credit card was issued, copy of the front and back of the check or credit card draft returned and documentation of bank/credit fees incurred.
    - 4) Any other supporting documentation.

### **Section E. Tournament Worthless Check/Invalid Credit Card Procedures**

---

Tournaments must comply with the following procedures when handling a worthless check/credit card for tournament fees.

1. Tournament management must send a letter notifying the principal that: (See the Rules page of BOWL.com under Resources-Association for sample letter.)
  - a. The check(s) was/were returned or the card was deemed invalid and requests payment.
  - b. Payment must be submitted within a specified time period. If payment was made by bad check/credit card, additional bank/service fees can be applied to the amount owed.
  - c. Personal check/credit card is not an acceptable method of payment. (Cash, money order or cashier's check only.)
  - d. Failure to submit payment or proof of payment could result in suspension of membership.
2. If payment or proof of payment is not received within the time period specified, tournament management forwards the following to USBC Headquarters, Attention: Rules:
  - a. Copy of the notice sent to the individual requesting payment.
  - b. Copy of the front and back of the check or credit card draft returned and documentation of bank/credit fees incurred.
  - c. Tournament must provide printed documentation if tournament has any additional worthless check fees.
  - d. Any other supporting documentation.

### **Section F. Failure to Submit Final Average(s) Procedure**

---

Local associations must comply with the following procedure in order to initiate suspension charges against a league secretary for failing to submit league averages.

If final league averages have not been submitted by the date requested, the association must:

1. Send a letter to the league secretary stating:
  - a. Averages have not been received.
  - b. Averages must be submitted within fifteen (15) days.
  - c. Failure to submit could result in suspension of membership.
2. If averages are not received within the specified time period, the association forwards the following to USBC Headquarters, Attention: Rules:
  - a. Copy of the letter sent to the league secretary.
  - b. Supporting documentation.

### **Section G. Nonpayment of League Fees**

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1. When a league member is accused of failing to pay league fees and/or withdrawing without sufficient cause, the league must follow the procedures in the *USBC Playing Rules* book, Rule 115b.
2. If the local association receives a copy of the file, the local association manager shall:
  - a. Verify that complete information was provided.
  - b. Submit the file to USBC Headquarters, Attention: Rules.

### **Section H. Infractions of Youth Eligibility Rules**

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Upon notification of a USBC Rule 400 violation, the local association shall:

1. Verify the following information was provided:
  - a. Bowler's name/address/birth date.
  - b. Date and location of activity.
  - c. How youth violated eligibility rules.
  - d. List any cash or awards received in violation of youth eligibility rules and/or returned.
2. Within seven (7) days of receipt of notification of the Rule 400 violation, submit a copy to USBC Headquarters, Attention: Rules.

### Section I. Re-rate Averages

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The local association board or a committee of not less than five (5) board members, may re-rate the league average of any member of the association when there is evidence that the bowler's average does not represent the bowler's true ability.

1. The following procedure must be used to re-rate any member of the association:
  - a. Written notice can be sent first class mail or be hand delivered and shall be sent to the individual charged not less than ten (10) days prior to the date of the hearing and must include:
    - 1) Date, time and location of hearing
    - 2) His/her right to attend and offer a defense.
    - 3) His/her right to have counsel present;
    - 4) His/her right to produce witnesses on his/her behalf.
  - b. The bowler shall be given the opportunity to appear before the committee and present any testimony or evidence to show why such re-rate action should not be taken.
  - c. A bowler whose average has been re-rated must be notified of the re-rated average by first class mail or be hand delivered and a copy to USBC Headquarters, Attention: Rules.
  - d. The bowler has the right to appeal the association's decision in writing to USBC Headquarters, Attention: Rules, within ten (10) days after being notified of the re-rated average.
  - e. If no appeal is filed within the ten (10) day period, the re-rated average shall stand.
2. The bowler must report and use the re-rated average or established league average (whichever is higher) for all handicapped or classified competition.
3. After re-rating has been in effect for a 12-month period, the bowler may apply to USBC Headquarters for an adjustment if the bowler has not established a higher league average and can also provide sufficient documentation to support a re-rate adjustment.

**NOTE:** Before conducting a re-rate hearing, contact the Rules Department for further information.

### Section J. Removal from Office

---

The following procedure must be followed when a complaint is filed to remove an officer or director from an association office.

1. Within one week after receipt of the complaint, the association president or in his/her absence or involvement a board member not involved in the case, schedules a meeting of the association board of directors.
  - a. The meeting should be held within thirty (30) days of receipt of the complaint.
  - b. Written notice shall be sent to the individual charged and the complainant not less than ten (10) days prior to the meeting and:
    - 1) Must include the date, time and place of the meeting as well as his/her right to attend and offer a defense.
    - 2) Must include a copy of the complaint.
    - 3) Be sent by first class mail **or** be hand delivered.
  - c. The board must be provided written notice of the meeting.
2. A quorum of the board must be present and a roster listing those present and absent must be included in the file.
3. A complete and accurate report of the meeting minutes must be maintained.
4. All documents and materials relating to the charges must be retained.
5. A two-thirds vote of the board members present and voting is required for removal from office.
  - a. Within five (5) days from the date of the meeting notify the individual(s) involved in writing of the board's decision.
  - b. The individual charged must be notified of his/her right to appeal that decision to USBC Headquarters, Attention: Rules.

- c. The complainant and the defendant have the right to appeal the decision of the board after a ruling has been made.
6. An appeal must be filed in writing within fifteen (15) days of the date of the notice; otherwise the decision of the board is final.

**NOTE:** The defendant and complainant should be excused prior to deliberation and vote.

An officer or director removed by the board is not eligible to seek re-election and/or be reappointed to the board unless two-thirds written consent of the board is obtained.

For committees the appointing authority has the power to remove or replace members.

### **Section K. Appeal**

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USBC's administrative decisions may be appealed to the USBC Legal and Legislative Committee. The appeal must be filed in writing within ten (10) days of the date of the letter notifying them of the administrative decision. A statement of the reasons for the appeal must be included. The appeal is to be sent to USBC Headquarters, Attention: Rules.

### **Section L. Special Hearing Committee**

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USBC may appoint a special committee, which may include USBC Board members and non-USBC Board members to conduct a hearing or investigation within an association.

### **Section M. Hearings**

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USBC may direct an association to conduct a hearing and will provide further information when directed to do so.

### **Section N. USBC SafeSport Code**

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#### 1. SafeSport Jurisdiction of USBC

- a. Statement of Jurisdiction. USBC is recognized by the United States Olympic Committee as the National Governing Body ("NGB") for the sport of Bowling under the Ted Steven Olympic and Amateur Sports Act, 36 U.S.C. § 220501, et seq. (the "Olympics Act"). The Olympics Act states that an NGB is authorized to "exercise jurisdiction over international amateur athletic activities and sanction international amateur athletic competition held in the United States and sanction the sponsorship of international amateur athletic competition held outside the United States." 36 U.S.C § 220523(a)(4).
- b. The United States Olympics Committee requires all NGBs to adopt the SafeSport Policy consistent with an NGB's jurisdictional authority under 36 U.S.C § 220523(a)(4).

#### 2. Definitions - The following definitions apply to USBC's SafeSport Policies and Procedures:

- a. "Athlete" means "athlete" as defined in USBC Bylaws, Art. IX, § B.
- b. "Individuals within the SafeSport governance or SafeSport disciplinary jurisdiction of USBC" means those individuals within USBC's jurisdiction established by 36 U.S.C. § 220523(a)(4). In addition to "Athletes" and "Non-Athlete Participants," "Individuals within the SafeSport governance or SafeSport disciplinary jurisdiction of USBC" are USBC high performance department employees and employees serving operational roles at the USBC Team USA training center (ITRC).
- c. "Non-Athlete Participants" means:
  - 1) An individual that USBC formally authorizes, approves or appoints to a position of authority over Athletes or to have frequent contact with Athletes; and
  - 2) Serves as a coach, trainer, team staff, medical or paramedical personnel, administrator, official, or other athlete support, personnel, employee or volunteer for Team USA.

### 3. Covered Individuals

- a. A covered individual is someone who currently is, or was at the time of a possible violation of the USBC SafeSport Code part of at least one of the following groups:
  - 1) Any individual within USBC's safe sport governance or safe sport disciplinary jurisdiction.
  - 2) Athletes
  - 3) Non-athlete participants.
- b. Information about Covered Individuals may be disclosed to the Center in connection with disciplinary proceedings. Covered Individuals consent to disclosure to the Center for this purpose.

### 4. Prohibited Conduct

USBC has agreed to adopt the U.S. Center for SafeSport (Center) prohibited conduct policy and its definitions as stated in the SafeSport Code for the U.S. Olympic and Paralympic Movement (Code), into this policy. The Center may update its prohibited conduct and definitions at any time and the changes are effective when published. For the most current prohibited conduct and definitions, go to [www.safesport.org](http://www.safesport.org).

### 5. USBC SafeSport Violations

- a. Covered individuals can be charged with a violation of USBC's SafeSport Code if the prohibited conduct is alleged to have been committed:
  - 1) During Team USA competition or any function in connection with Team USA, USBC, its associations or certified competition.
  - 2) Through out-of-program activities regardless if directly associated with a lesson, function or competition.
- b. USBC and/or the Center has the discretion to decline jurisdiction over possible violations that occur out-of-program.

### 6. Reporting Procedures

- a. Any alleged violation of the USBC SafeSport Code may be reported:
  - 1) Directly to the Center
  - 2) To the Director of High Performance at USBC Headquarters.
- b. There are no time limits on reporting possible USBC SafeSport Code Violations.

### 7. US Center for SafeSport Authority

- a. Sanctions can be imposed by the Center for misconduct. Sanctions include the possible sanction of permanent ineligibility, which extends to USOC and all national Governing Bodies or Professional Sports Organization. This sanction could also result in the Covered Individual's name on a publicly available ineligibility list that identifies the misconduct giving rise to sanction.
- b. A copy of US Center for SafeSport policies and procedures can be found online at [safesport.org](http://safesport.org) and can be modified by the Center. Lack of knowledge about the policies and procedures is not a defense to misconduct.

### 8. USBC Procedure

Upon receipt of a proper complaint alleging a violation of the USBC SafeSport Code, USBC will:

- a. Review the complaint within seven days.
- b. Forward any complaint alleging a violation of sexual abuse directly to the Center for processing.
- c. Process all other complaints in accordance with Team USA Code of Conduct Procedures. USBC reserves the right to forward any complaint directly to the Center for processing.



## Chapter Seventeen: Alcohol and Tobacco Policy

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USBC Headquarters' stance on the consumption of alcoholic beverages or use of tobacco products at meetings involving youth has not changed. Put simply, alcohol and tobacco may not be present at meetings that involve youth.

This requirement is applicable at youth association meetings, as well as merged association meetings, which serve all constituencies – men, women and youth members.

If the association meeting is conducted with a corresponding event (such as a banquet), the no alcohol and tobacco requirement is only pertinent to the meeting portion of the event, however there are still restrictions when youth attend the banquet.

USBC Headquarters recommends hosting the event in a facility that does not have a bar in the area where the banquet is held. If that cannot be found, the bar in the banquet area should remain closed during the event. Furthermore, adult leaders representing youth (i.e. - members of the youth committee, board, youth coaches/supervisors, etc.) should not partake in consuming alcoholic beverages or using tobacco products in the room or area where youth are present.



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