

Guide to BSA Affiliation Agreement with UMC Congregations

The Boy Scouts of America (BSA) and the United Methodist Church (UMC) have created an Affiliation Agreement that provides an alternative to the traditional charter organization agreement for UMC congregations to engage with and support Scouting Units. Under this agreement:

- The **BSA** indemnifies the UMC and its employees, members, volunteers, etc. against claims and losses due to Scouting activities and provides insurance to cover the claims and losses.
- The **Heart of Virginia Council (HOVC)** will directly register a Scouting unit (Council Registered Unit), essentially functioning as its charter organization. The HOVC will select the unit's adult leaders and own its assets (rather than the UMC congregation). The HOVC will also provide its traditional Scouting resources: program and training services, camping opportunities, professional staff, unit-level fund raising opportunities, recruitment resources, etc.
- The **Affiliated Organization** (the UMC Congregation) will provide the use of facilities for the Unit's meetings and storage of equipment and support the Scouting program through volunteer service, promotion, Scout Sunday, religious awards, etc. It will support the Scouting unit's committee.
- The **Unit** will perform its traditional functions: administering the unit through a Unit Committee, ensuring all leaders are properly registered with Youth Protection Training, maintain registration records of adult and youth members, conduct the Scouting program consistent with BSA and Council standards, conduct unit fund raisers, etc.

These responsibilities are communicated in more detail in the [Affiliation Agreement](#) that shall be signed by the Affiliated Organization, HOVC, Scouting Unit, and the BSA annually.

The remainder of this document explains how the HOVC will administer a Council Registered Units (CRUs) affiliated with a UMC congregation.

Key Leaders for Council Registered Units:

Institutional Head – The Scout Executive will serve as the Institutional Head for Council Registered Units. The HOVC “owns” these units, and this requires proper oversight.

Council Registered Unit Representative – The Institutional Head, appoints an individual to serve as the CRU Representative to have direct contact with the unit. The CRU Representative is not a voting member of the local council. The CRU is responsible for appointing the unit committee Chair for the unit committee, as described below, and is responsible for reference checks, Youth Protection training, and ensuring adherence to safe practices, two-deep leadership, and the Guide to Safe Scouting. The CRU Representative could be the existing Charter Representative for the unit or the existing Committee Chair. *(The CRU representative will be coded as “COR” in the BSA system).* The CRU Representative should attend regular

committee meetings, review unit finances, and keep records indicating that the unit is complying with BSA and HOVC requirements.

Committee Chair – the CRU Representative must approve the Committee Chair. The Committee Chair oversees the unit account and appoints the unit treasurer, adhering to the BSA Fiscal Policies and Procedures and Unit Money Earning Guidelines. The Committee Chair, with the support of the committee, is responsible for ensuring safe program practices and helps recruit other unit positions per BSA guidelines.

Unit Committee – Each unit of the Boy Scouts of America must be supervised by a unit committee, consisting of three or more qualified adults, 21 years of age or older, selected by the Committee Chair. The unit must operate under the guidance of the unit committee, in accordance with the Rules and Regulations, policies, and guidelines of the Boy Scouts of America.

Unit Treasurer – The Unit Treasurer manages all unit funds and secures proper authorizations for the unit. The Unit Treasurer pays bills, supervises money-earning projects, and reports back to the Unit Committee on the receipt and application of funds at each meeting.

Unit Program Leaders – Two registered adult leaders 21 years of age or over are required at all Scouting activities, including meetings. A registered adult female leader must be present for any activity involving female youth. In addition, age and program appropriate supervision must always be provided at Scouting activities.

Affiliation Agreement

The BSA, HOVC, UMC Congregation, and Unit shall execute the Affiliation Agreement. The Scout Executive (or designee), Chair of the UMC congregation's Board of Trustees, and Unit Committee Chair signs this agreement annually. [The Affiliation Agreement form can be downloaded from the HOVC website.](#) Both the UMC Congregation and the Council shall also execute the [downloadable Release/Assumption of the Unit Charter form.](#)

Annual Unit Registration Fee for UMC Affiliated Units

For Units affiliated with a UMC congregation, an annual Affiliation Fee is required in lieu of the former annual Recharter Fee. It should be paid out of the Unit Budget.

Managing Unit Finances and Assets for Council Registered Units

When converting a transitioning the registration of a chartered organization unit to a council registered unit, the outgoing chartered organization should transfer ownership of the CRU's funds and property to the HOVC. See the accompanying form which can also be [downloaded from the HOVC website.](#)

Unit Bank Accounts – The Heart of Virginia Council is the official owner of all CRU financial assets. The HOVC encourages CRUs to maintain a separate unit bank account using the council EIN. Again, the HOVC is the official owner of all CRU assets. CRUs must provide the HOVC with an annual unit financial report using the HOVC provided form by January 15 each year. The Unit shall include year-end bank statement with this report. CRUs previously using separate bank accounts through a Charter Organization should close those accounts and open new accounts using the HOVC EIN. CRUs must require two signatures for bank account transactions, typically the Treasurer and a member of the Unit Committee. CRUs may not incorporate or seek status as a 501(c)3 tax exempt entity.

Unit Vehicles – CRUs that have a trailer must transfer the title from the former Charter Organization to the HOVC at a Virginia Division of Motor Vehicle office. The CRU must deliver a copy of that title and registration certificate to the HOVC Controller at the council office. CRUs must also turn in a completed HOVC trailer inspection report using the HOVC provided form at the same time and annually thereafter by January 15 each year. By state law, liability coverage is provided by the insurance policy associated the tow vehicle owner (not the BSA or HOVC). The HOVC will not pay for property or loss insurance coverage for trailers or other unit equipment. If the CRU committee wants to obtain and pay for such coverage, they can do so through the HOVC’s insurance agent and policy.

If the CRU possesses a motorized vehicle, it will be responsible for all associated costs: insurance, fuel, maintenance, etc. Title of the vehicle needs to be transferred to the HOVC. Contact the HOVC controller for more guidance.

Other Property – The HOVC is the official owner of the CRU’s camping and other equipment. The CRU should inventory its equipment annually and provide a list of that inventory to the HOVC controller by January 15 each year.

Membership for Council Registered Units

The units must have at least five registered youth members and meet all BSA adult registration requirements. Volunteer leaders without children in the unit must always be accompanied by a parent- leader. Units must always adhere to the two-deep leadership requirements and BSA youth protection guidelines. All registered leaders should take position specific training.

Reference Checks for Adult Volunteers

The CRU Representative signs all applications for new adult volunteers in the CRU and is responsible for checking the references that each new adult volunteer provides. Results of these reference checks shall be recorded on the accompanying “Telephone Reference Call Script and Checklist” form and turned into your district executive or council registrar with the new adult volunteer’s application, YPT certificate, and Criminal Background Check Authorization. If the new adult volunteer applied online, turn in the reference check forms alone.



Transfer of Unit Funds and Property From Chartered Organization to Local Council

_____ (Chartered Organization Name)
agrees to transfer all the funds and property of _____
(Unit Type and Number) to The Heart of Virginia Council.

Unit Committee Chairman

Printed Name: _____ Signature: _____ Date: _____

UMC Congregation Chair of Board of Trustees

Printed Name: _____ Signature: _____ Date: _____

Scout Executive Officer or Designee

Printed Name: _____ Signature: _____ Date: _____

Council or Unit Assets Upon Dissolution (BSA Rules and Regulations Section III)

Consistent with the Bylaws, in the event of the dissolution of a council or the revocation or lapse of its charter, the Executive Committee may, at its option, authorize the National Council to assume charge of the affairs of the council and continue operation pending reorganization or re-establishment of the council or wind up the business of the council. All funds and property in the possession or control of such council must be applied to the payment of the council's obligations. Any surplus funds or property may thereafter be administered as deemed to be in the best interest of Scouting.

In the event of the dissolution of a unit or the revocation or lapse of its charter, unit funds and assets must be used to first satisfy any outstanding unit obligations. Any remaining assets obtained with funds raised in the name of Scouting must be redeployed for Scouting use in the local area.

Any assets obtained with funds from the chartered organization or parents of registered members may be redeployed as agreed upon by the chartered organization and local council. Any property or funds acquired by the National Council upon the dissolution of a Scouting unit or local council will be administered so as to make effective, as far as possible, the intentions and wishes of the donors.

Provide a list of funds and property on the following page.

ANNUAL COUNCIL REGISTERED UNIT FINANCE REPORT		
Unit Type and Number		
Report Year		
Bank Information		
Bank Name		
Branch Name/Location		
Last 4 Digits of Account Number		
Signers on Checking Account (Minimum 2)		
Signer 1		
Signer 2		
Signer 3		
Signer 4		
Revenue		
Membership/Registration Fees		
Council Program Fees		
Unit Dues		
Popcorn & Peanut Sales		
Camp Card Sales		
Other Money Earning Projects		
Activity/Event Fees		
Other Revenue		
Total Revenue		
Expenses		
Membership/Registration Fees		
Council Program Fees		
Popcorn & Peanut Sales		
Camp Card Sales		
Other Money Earning Projects		
Activity/Event		
Troop Supplies and Food		
Advancement		
Other Expenses		
Total Expenses		
Total Revenue less Expenses		
Bank Account Balance Summary		
Starting Account Balance		
Revenue		
Expenses		
Ending Account Balance		

- Submit to HOVC Accounting Department by January 15th each year.
- Enclose actual year-end bank statement reflecting reported account balance.

Council Registered Unit (CRU) Trailer Inspection Form

Unit Type and Number: _____

Trailer Description: _____

Trailer License Number: _____

Trailers with Brakes

In the Commonwealth of Virginia, trailers equipped with brakes are required to pass a Virginia State Inspection. If your trailer requires a state inspection, complete the information below and attach a copy of the state inspection receipt.

State Inspection Station: _____

Inspection Date: _____

Trailers without Brakes

It is important that all trailers get inspected regularly. If a state inspection is not required, the CRU must self-inspect its trailers at least annually using the following checklist.

Initial

_____ Inspect trailer lighting: brake lights, turn signals, and clearance lights should all be intact and functioning.

_____ Inspect trailer's coupling device: latch and pin or other locking device should operate properly and move freely, coupling device should be structurally sound, a pair of safety chains should be attached and of proper length, trailer jack should be in proper working order.

_____ Inspect trailer tires: tire tread should be measured at no less than 2/32nds of an inch, tires should be of an approved type "for trailer use", tires should be properly inflated, tire condition is to be inspected and found free of structural defects, inspect that all lug nuts are fastened and properly torqued.

_____ Inspect trailer springs and shackles: springs should be attached properly and unbroken, shackles should move freely and be attached to the trailer frame sufficiently, trailer axle(s) should be inline and not bent so as to effect tire wear negatively.

_____ Inspect trailer brakes: trailers with brakes and breakaway systems should be inspected by a Virginia State Inspection Station annually.

_____ Inspect trailer structure: fenders, doors, ramps, spare tire, etc. all should be properly attached to the trailer.

Inspector Name

Inspector Signature

Date of Inspection

Committee Chair Name

Committee Chair Signature

Date

Telephone Reference Call Script and Checklist

Name of Applicant _____

Unit Type and Number _____

Name of Reference _____

Date _____ Reference Telephone _____

This is _____. I am with Pack/Troop/Crew/Ship _____ of the Boy Scouts of America. _____ has made an application to serve as a volunteer leader in Scouting and has given us your name as a character reference. We have been given written authorization to contact you. It will only take a few minutes. Could you please answer the following questions to the best of your ability?

1. How long have you known the applicant? _____

2. In what capacity have you been affiliated with the applicant?

3. What do you think of the applicant?

4. What are the applicant's outstanding strong points?

5. Does the applicant have any difficulty in having a good relationship with others?

6. Do you know of any problem the applicant has that would affect the leadership of youth?

7. Would you entrust the care of your child to the applicant?

Reference checked by:

Name _____

Phone _____