



# United Methodist Church Partnership

Webinar

October 12, 2022

# Webinar being Recorded!

We are recording tonight's webinar in order to share with other leaders and volunteers who are unable to attend.

What is being recorded:

- Items that are shared on the screen

- Audio from our panelists

- Question and Answers (we will not publish the names associated with any questions that are asked)

- Chat (this will not be posted anywhere)



# Virtual Meeting Orientation

- Phones and microphones will be muted
- Meeting is in a webinar format and not a meeting format
- You will only see the panelists and the shared screen
- Screen Sharing – Presentation and Personal Screen



# Questions

## Questions

We want questions, but wait until after we have covered the topic before you ask them

Use the Question and Answer feature for questions

Don't ask your questions for the panelists in the Chat section

Posted FAQ after the meeting

# History

- During the bankruptcy proceedings the United Methodist Church entered a discussion with the National Council about changes to the existing chartered partner relationship
- The National Council has worked with the National UMC over the last year to develop a new agreement
- The United Methodist Church is the largest chartered partner for the BSA
- Currently 48 units are chartered to 29 UMCs
- June 30 the National Council announced a new agreement with the United Methodist Church
- Councils have until the end of 2022 to resolve all United Methodist Church relationship agreements

# New Agreement

- No United Methodist Church will serve as a chartered partner for any Scouting unit
- Current UMC units may continue to meet at their current UMC location if the church and the council enter an Affiliation Agreement
- Current UMC units may continue to meet at their current UMC location with a New Chartered Partner and a Facilities Use Agreement (FUA)

# Options for UMC Units

1. New Chartered Organization
2. New Chartered Organization – Unit continues at UMC location
3. Council Registered Unit

# Option #1 – New Chartered Organization

- Current UMC units would completely move from current location
- All assets transfer to new Chartered Organization
- All bank accounts are closed and opened under the EIN of the new chartered organization (will discuss bank accounts later)
- New Chartered Organization reviews and approves all leadership



# Option #1 - New Chartered Organization

## Pros

- This is a standard process that is done on a fairly regular basis
- Maintains the unit/charter organization relationship just with a new partner
- Other than new meeting location, likely no major disruption in current unit structure or processes

## Cons

- Explanation to New Chartered Organization of need to move charter partners
- Availability of chartered partners
  - Concerns for small/rural communities
  - Concerns for enough charter partners in the future

# Example: New Charter Partner/New Location

- First United Methodist Church – Hershey
  - Currently Charters Pack 203 and Troop 203
  - Unit leadership, district volunteers, and staff work to identify a new chartered partner
  - New chartered partner agrees to charter both units
  - First United Methodist Church releases all assets and all ownership of the pack and troop to the new chartered partner
  - Units close current bank accounts and open new ones
  - All titles or ownership of items are transferred to new chartered partner
  - Unit moves all its assets to new chartered partner

## Option #2 – New Chartered Organization

- UMC units would be permitted to continue to meet at their current UMC church with the execution of a Facilities Use Agreement
- New Chartered Organization is identified
- Though stored at the UMC, all ownership of assets would be transferred to the New Chartered Organization
- All bank accounts are closed and opened under the EIN of the new chartered organization
- New Chartered Organization reviews and approves all leadership

## Option #2 – New Chartered Organization

### Pros

- Units continue to meet at current UMC partner
- Maintains the unit/charter organization relationship just with a new partner
- Currently, some units already function with this type of relationship

### Cons

- Risk of lack of chartered organization oversight or ownership over the unit
- Potential conflicting partner relationships between meeting location and chartered partner
- Explanation to New Chartered Organization of need to move charter partners
- Concern of a chartered partner being responsible for more than 3 units

# Example: New Charter Partner/Same Meeting

- First United Methodist Church – Hershey
  - Currently Charters Pack 203 and Troop 203
  - Unit leadership, district volunteers, and staff work to identify a new chartered partner
  - New chartered partner agrees to charter both units
  - First United Methodist Church releases all assets and all ownership of the troop to the new chartered partner
  - First United Methodist and new partner sign Facilities Use Agreement
  - Units close current bank accounts and open new ones
  - All titles or ownership of items is transferred to new chartered partner
  - Unit continues to meet and store equipment at First UMC

## Option #3 – Council Registered Unit

- UMC units would be permitted to continue to meet at their current UMC church with the execution of an Affiliation Agreement
- Though stored at the UMC, all ownership of assets would be transferred to the New Birth of Freedom Council
- All bank accounts are closed and opened under the EIN of the New Birth of Freedom Council
- New Birth of Freedom Council reviews and approves all leadership
- New Birth of Freedom Council responsible for all Chartered Organization responsibilities

## Option #3 – Council Registered Unit

### Pros

- Units continue to meet at current UMC partner

### Cons

- Risk of lack of chartered organization oversight on weekly issues – no or limited local presence
- Potential conflicting partner relationships between meeting location and chartered partner
- Council is responsible for managing unit assets
- Potential conflict between unit goals and council goals (i.e. where to camp)

# Example: Council Registered/Same Meeting

- First United Methodist Church – Hershey
  - Currently Charters Pack 203 and Troop 203
  - First United Methodist Church and NBoFC sign Affiliation Agreement
  - First United Methodist Church releases all assets and all ownership of the units to NBoFC
  - Units close current bank accounts and open new ones with NBoFC EIN
  - All titles or ownership of items is transferred to NBoFC
  - Units follow established criteria for auditing finances
  - Units assigned Institutional Head and Council Registered Unit Representative by NBoFC Board
  - Unit continues to meet and store equipment at First UMC

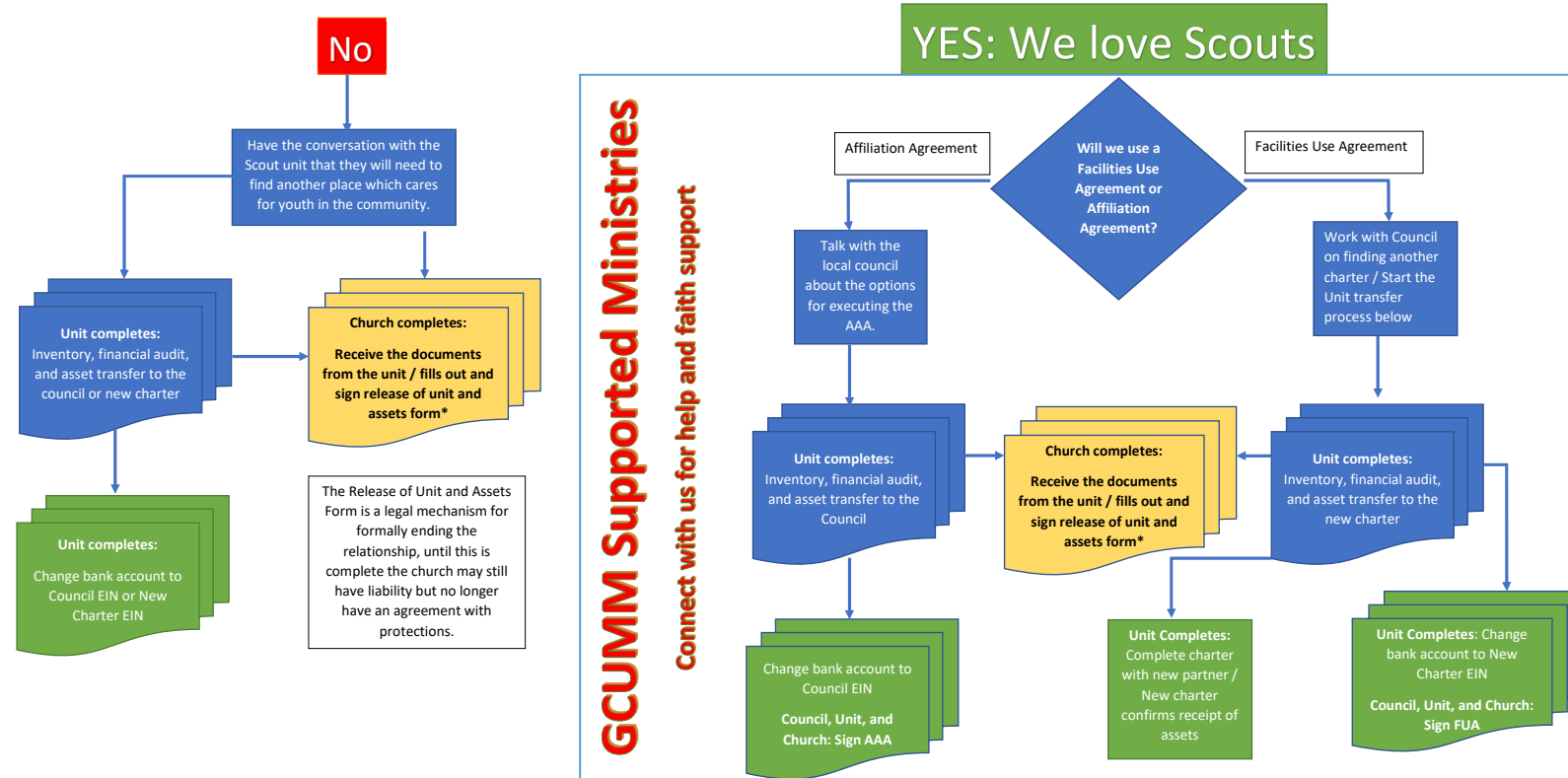


What is the Right  
Option for My Unit?

## Move Forward Decision Tree for UMC Churches and Units

**THE BIG QUESTION: Do you want to continue to live in ministry to youth through Scouting?**

If you have questions about this process or the reasons for any direction, we are here to help. [www.MethodistScouter.org/a-new-agreement/](http://www.MethodistScouter.org/a-new-agreement/) or [SScheid@GCUMM.org](mailto:SScheid@GCUMM.org)



AAA = Annual Affiliation Agreement, FUA = Facilities Use Agreement, Charter = traditional owner of the unit, responsibilities, and assets

\*These forms are delivered to the local council



We support you. Center for Scouting Ministries GCUMM 6/30/2022 Rev.3

# Unit Reference Guide

Quick Reference Guide for Units

	Affiliation Agreement /Council Registered Units	New Chartered Organization with/ Approved Facilities Use Agreement	Traditional Chartered Organization
<b>Key Steps</b>  ✓ Meet with UMC /Unit Leadership to determine best local option moving forward	<ul style="list-style-type: none"> <li>Affiliation Agreement signed by UMC</li> <li>Council works with UMC and Unit Leaders to move assets to council</li> <li>Unit to continue meeting at UMC</li> <li>Council approves Unit Leadership</li> <li>Provide Certificate of Insurance within 10 days</li> </ul>	<ul style="list-style-type: none"> <li>Identify New Charter Partner</li> <li>Unit signs Facilities Use Agreement with UMC</li> <li>Unit Leadership approved by new Chartered Organization</li> <li>All new charter paperwork completed and submitted to council</li> </ul>	<ul style="list-style-type: none"> <li>Identify New Charter Partner or continue with the UMC</li> <li>Work with current UMC to transfer Unit assets to new CO</li> <li>New Chartered Partner works with Unit to Approve Unit Leadership</li> <li>All new charter paperwork completed and Submitted to council</li> <li>Unit starts meeting at new Charter Partner</li> </ul>
<b>Key Leadership Requirements</b>	<ul style="list-style-type: none"> <li>Council Appointed Institutional Head</li> <li>Council Unit Representative</li> <li>Committee Chair</li> <li>Committee Members (2)</li> <li>Unit Leaders as required</li> </ul>	<ul style="list-style-type: none"> <li>Institutional Head</li> <li>Chartered Organization Representative</li> <li>Committee Chair</li> <li>Committee Members (2)</li> <li>Unit Leaders as required</li> </ul>	<ul style="list-style-type: none"> <li>Institutional Head</li> <li>Chartered Organization Representative</li> <li>Committee Chair</li> <li>Committee Members (2)</li> <li>Unit Leaders as required</li> </ul>
<b>Minimum Required Youth</b>	5	5	5
<b>Unit Finances</b>	<ul style="list-style-type: none"> <li>Unit establishes new checking account Using the council EIN</li> <li>Unit reports account balances as required by council at least annually</li> </ul>	<ul style="list-style-type: none"> <li>Unit establishes new checking account using the new Chartered Organization EIN</li> <li>Unit reports balances as required by new Charter Organization</li> </ul>	<ul style="list-style-type: none"> <li>Unit establishes new checking account Using the new Chartered Organization EIN</li> <li>Unit reports balances as required by new Charter Organization</li> </ul>
<b>Employer Identification Number (EIN)</b>	Council Responsible	Charter Organization Responsible	Charter Organization Responsible
<b>Annual Charter Fee</b>	Paid by Unit	Paid by Chartered Organization or Unit	Paid by Chartered Organization or Unit
<b>Meeting Location</b>	Unit continues to meet at UMC facility	Unit continues to meet at UMC facility	New Charter Organization facility
<b>Unit Equipment</b>	<ul style="list-style-type: none"> <li>Title transfers to Council (sole use of Unit)</li> <li>Unit responsible for insurance or storage fees if required, payable to Council</li> <li>Storage at UMC or Unit established storage facility</li> </ul>	<ul style="list-style-type: none"> <li>Title transfers to new Charter Partner</li> <li>Storage at UMC or Unit established storage facility</li> </ul>	<ul style="list-style-type: none"> <li>Title transfers to new Charter Partner</li> <li>Storage at UMC or Unit established storage facility</li> </ul>
<b>Tools &amp; Resources</b> ✓ Affiliation Agreement	<ul style="list-style-type: none"> <li>Guidelines for CRU &amp; refer to:               <ul style="list-style-type: none"> <li>Council Toolkit &amp; Resources</li> </ul> </li> </ul>		



# Finding a New Chartered Partner (Traditional Partner)

# New Chartered Organization Options

***"A chartered organization can be a place of worship, school, or other community group that has the same interests as the Boy Scouts of America (BSA)."***

- Another church or religious organization
- Service Club or Organization (Rotary, Lions, Kiwanis, etc.)
- Veteran Organizations (American Legion, VFW)
- PTO/PTA Organization

# Chartered Organization Agreement

## THE ANNUAL UNIT CHARTER AGREEMENT BET

\_\_\_\_\_ and the \_\_\_\_\_

Pack No. \_\_\_\_\_ Troop No. \_\_\_\_\_ Crew No. \_\_\_\_\_ S

(Please identify those units chartered by the Chartered Organization.)

of the Boy Scouts of America (BSA) program is to prepare young people to make ethical and  
them the values and principles taught in the Scout Oath and Scout Law.

l Organization, as a duly constituted organization that serves youth, desires to use the prog  
cting the youth it supports. The Local Council provides the support and service necessary to  
use of Scouting.

### **Council agrees to:**

primary general liability insurance to cover the Charter Organization, its board, officers, Charter C  
is, and adult volunteers for authorized Scouting activities. Indemnify the Charter Organization in  
f the National Executive Board of the Boy Scouts of America.

*general liability policy issued to the Boy Scouts of America provides primary liability insurance co  
nizations for liability arising out of their sponsorship of a traditional Scouting unit. Evanston Insu  
on per occurrence coverage. Additional policies, all providing primary coverage to the chartered  
more than \$10 million in primary coverage is provided. There is no coverage for those who com  
lity insurance is purchased to provide financial protection in the event of accidents or injury that*

# Council Responsibilities

## The Local Council agrees to:

- Provide primary general liability insurance to cover the Charter Organization, its board, officers, Charter Organization Representative (COR), employees, and adult volunteers for authorized Scouting activities. Indemnify the Charter Organization in accordance with the resolutions and policies of the National Executive Board of the Boy Scouts of America.  
*“The general liability policy issued to the Boy Scouts of America provides primary liability insurance coverage for all chartered organizations for liability arising out of their sponsorship of a traditional Scouting unit. Evanston Insurance Company provides the first \$1 million per occurrence coverage. Additional policies, all providing primary coverage to the chartered organization, have been purchased so that more than \$10 million in primary coverage is provided. There is no coverage for those who commit intentional or criminal acts. Liability insurance is purchased to provide financial protection in the event of accidents or injury that is neither expected nor intended.”*
- Respect the aims and objectives of the Charter Organization and assist the Charter Organization by making available Scouting resources.
- Assure that adults selected as unit leaders are willing to accept Scouting’s values and meet any other requirements of membership, having the appropriate number of leaders for the unit and review and sign each application.
- The local council will conduct criminal background checks on adult leaders.
- Make available to the Charter Organization and members program training, program resources, and other Scouting support services.
- Make available training and support for the Charter Organization and for the Charter Organization Representative, the primary link between the Charter Organization, the local council, and the BSA; track and **require all unit leaders** to complete **BSA Youth Protection Training**. YPT training is located on the My.Scouting website. *(no leader is registered w/o YPT)*
- Provide camping opportunities, administrative support, and professional staff to assist the unit in developing a successful Scouting program.
- Provide unit money earning opportunities for the unit to support their annual program.
- Support the unit with recruitment strategies, resources and materials to grow the BSA movement.

# Chartered Organization Responsibilities

## The Charter Organization agrees to:

- Use Scouting to further the Charter Organization's aims and values for youth.
- Charter organizations must utilize the Scouting program to accomplish specific objectives related to one or more of the following: youth character development, faith-based youth ministry, career skill development, community service, patriotism and military and veteran recognition
- Conduct the Scouting program consistent with BSA rules, regulations, and policies. Located on the My.Scouting website and online at: [www.scouting.org/about/membership-standards/](http://www.scouting.org/about/membership-standards/).
- Charter Organization representatives are also auto-matic voting members of the council and district selected by their respective Charter Organization" **BSA Rules & Regs, Article IV**
- Encourage adult leaders to receive additional applicable training made available by the council.
- Be a good steward of unit resources and adhere to BSA Fiscal Policies. ie. Unit Money Earning projects
- Actively participate in the local councils annual giving campaign and product sales to ensure quality Scouting throughout the community. (ex. Friends of Scouting campaign, popcorn, camp card, etc.)
- Encourage the unit to maintain accurate and timely registration records of all its youth and adult members. Utilizing BSA's online registration tools like membership leads, online applications, and online recharter. (*no leader is registered w/o YPT*)
- Units must not use the Scouting program to pursue any objectives related to political or social advocacy, including partisan politics, support or opposition to government action, or controversial legal, political, or social issues or causes.
- Maintain and support the unit committee(s) made up of at least three persons for each unit.
- Ensure appropriate facilities for the unit for its regular meetings to facilitate the aims and methods of the BSA.
- Coordinate with the local council to provide annual recruitment opportunities to grow the BSA movement as well as publicize BSA through inhouse publications.



# Steps to Change Chartered Organizations

## STEP 1: New Chartered Organization agrees to the responsibilities of the BSA’s “Annual Unit Charter Agreement”

THE ANNUAL UNIT CHARTER AGREEMENT BETWEEN:

\_\_\_\_\_ and the \_\_\_\_\_ Council, BSA

Pack No. \_\_\_\_\_ Troop No. \_\_\_\_\_ Crew No. \_\_\_\_\_ Ship No. \_\_\_\_\_

(Please identify those units chartered by the Chartered Organization.)

The purpose of the Boy Scouts of America (BSA) program is to prepare young people to make ethical and moral choices over their lifetimes by instilling in them the values and principles taught in the Scout Oath and Scout Law.

The Chartered Organization, as a duly constituted organization that serves youth, desires to use the program(s) of the BSA to further its mission respecting the youth it supports. The Local Council provides the support and service necessary to help the Chartered Organization succeed in its use of Scouting.

The Local Council agrees to:

- Provide primary general liability insurance to cover the Charter Organization, its board, officers, Charter Organization Representative (COR), employees, and adult volunteers for authorized Scouting activities. Indemnify the Charter Organization in accordance with the resolutions and policies of the National Executive Board of the Boy Scouts of America.  
*"The general liability policy issued to the Boy Scouts of America provides primary liability insurance coverage for all chartered organizations for liability arising out of their sponsorship of a traditional Scouting unit. Evanston Insurance Company provides the first \$1 million per occurrence coverage. Additional policies, all providing primary coverage to the chartered organization, have been purchased so that more than \$10 million in primary coverage is provided. There is no coverage for those who commit intentional or criminal acts. Liability insurance is purchased to provide financial protection in the event of accidents or injury that is neither expected nor intended."*
- Respect the aims and objectives of the Charter Organization and assist the Charter Organization by making available Scouting resources.
- Assure that adults selected as unit leaders are willing to accept Scouting's values and meet any other requirements of membership, having the appropriate number of leaders for the unit and review and sign each application.
- The local council will conduct criminal background checks on adult leaders.
- Make available to the Charter Organization and members program training, program resources, and other Scouting support services.
- Make available training and support for the Charter Organization and for the Charter Organization Representative, the primary link between the Charter Organization, the local council, and the BSA; track and **require all unit leaders** to complete **BSA Youth Protection Training**. YPT training is located on the My.Scouting website. *(no leader is registered w/o YPT)*
- Provide camping opportunities, administrative support, and professional staff to assist the unit in developing a successful Scouting program.
- Provide unit money earning opportunities for the unit to support their annual program.
- Support the unit with recruitment strategies, resources and materials to grow the BSA movement.

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- Use Scouting to further the Charter Organization's aims and values for youth.
- Charter organizations must utilize the Scouting program to accomplish specific objectives related to one or more of the following: youth character development, faith-based youth ministry, career skill development, community service, patriotism and military and veteran recognition
- Conduct the Scouting program consistent with BSA rules, regulations, and policies. Located on the My.Scouting website and online at: [www.scouting.org/about/membership-standards/](http://www.scouting.org/about/membership-standards/).
- Charter Organization representatives are also auto-matic voting members of the council and district selected by their respective Charter Organization" **BSA Rules & Regs, Article IV**
- Encourage adult leaders to receive additional applicable training made available by the council.
- Be a good steward of unit resources and adhere to BSA Fiscal Policies. ie. Unit Money Earning projects
- Actively participate in the local councils annual giving campaign and product sales to ensure quality Scouting throughout the community. (ex. Friends of Scouting campaign, popcorn, camp card, etc.)
- Encourage the unit to maintain accurate and timely registration records of all its youth and adult members. Utilizing BSA's online registration tools like membership leads, online applications, and online recharter. *(no leader is registered w/o YPT)*
- Units must not use the Scouting program to pursue any objectives related to political or social advocacy, including partisan politics, support or opposition to government action, or controversial legal, political, or social issues or causes.
- Maintain and support the unit committee(s) made up of at least three persons for each unit.
- Ensure appropriate facilities for the unit for its regular meetings to facilitate the aims and methods of the BSA.
- Coordinate with the local council to provide annual recruitment opportunities to grow the BSA movement as well as publicize BSA through inhouse publications.

_____	_____	_____
Charter Organization	Title	Date
_____	_____	_____
Charter Organization Representative	Title	Date
_____	_____	_____
Unit Committee Chair	Title	Date
_____	_____	_____
Local BSA Council	Title	Date

Resources

1. Chartered organizations must use the Scouting program to accomplish their objectives in a manner consistent with the Bylaws, Rules and Regulations, guidelines, policies, and other publications available on the BSA national website located at [www.scouting.org/about/membership-standards/](http://www.scouting.org/about/membership-standards/).
  - The Charter and Bylaws of the Boy Scouts of America
  - The Mission of the Boy Scouts of America
  - The Rules and Regulations of the Boy Scouts of America
  - The Scout Oath and the Scout Law, including Duty to God
  - BSA youth protection policies and guidelines, including mandatory reporting
  - The *Guide to Safe Scouting*
  - The Sweet Sixteen of BSA Safety
  - Scouter Code of Conduct
  - Incident Reporting <https://www.scouting.org/health-and-safety/incident-report/>
2. Chartered organizations must not use their charter organization affiliation or the Scouting brand as a means to imply Scouting's endorsement of the objectives of their organization except with respect to youth development consistent with the goals and objectives of the Scouting program. Scouting units should utilize the BSA Brand Center for all branding guidelines, images, and logos. The BSA Brand Center can be located at [www.scoutingwire.org](http://www.scoutingwire.org)
3. Charter organizations must not use the Scouting program to obtain financial support or assistance except as authorized for the chartered unit.

Scout Mission:

*The mission of the Boy Scouts of America is to prepare young people to make ethical and moral choices over their lifetimes by instilling in them the values of the Scout Oath and Scout Law.*

Scout Oath:

*On my honor I will do my best to do my duty to God and my country and to obey the Scout Law; to help other people at all times; to keep myself physically strong, mentally awake, and morally straight.*

Scout Law:

*A Scout is trustworthy, loyal, helpful, friendly, courteous, kind, obedient, cheerful, thrifty, brave, clean, and reverent.*

# Steps to Change Chartered Organizations

STEP 2: New Chartered Organization completes a “New Unit Application”

STEP 3: New Chartered Organization identifies their Institution Head (IH). IH contact information is included on “New Unit Application”

NEW-UNIT APPLICATION										
Print one letter in each space—leave a space between words.										
Council No.		District No.—Name								
<input type="text"/>		<input type="text"/>								
Chrt. org. code		Full name of chartered organization								
<input type="text"/>		<input type="text"/>								
Type of organization		If not for profit, purpose of organization				If religious organization, denomination				
<input type="text"/>		<input type="text"/>				<input type="text"/>				
Mailing address of chartered organization										
<input type="text"/>										
City		State		Zip code						
<input type="text"/>		<input type="text"/>		<input type="text"/>						
Physical address of chartered organization, if different				County						
<input type="text"/>				<input type="text"/>						
City		State		Zip code						
<input type="text"/>		<input type="text"/>		<input type="text"/>						
Website address of chartered organization										
<input type="text"/>										
Executive officer: First name			Middle name			Last name			Suffix	
<input type="text"/>			<input type="text"/>			<input type="text"/>			<input type="text"/>	
Gender	Date of birth (mm/dd/yyyy)		Executive officer email address: <input type="radio"/> Work <input type="radio"/> Home							
<input type="text"/>	<input type="text"/>		<input type="text"/>							
Address										
<input type="text"/>										
City		State		Zip code				Phone No.		
<input type="text"/>		<input type="text"/>		<input type="text"/>				<input type="text"/>		
<input type="checkbox"/> Boy Pack	<input type="checkbox"/> Boy Troop	<input type="checkbox"/> Crew	Unit No.	Effective date (mm/yyyy)	Term (months)	Expire date (mm/yyyy)	No.	Youth registration fees	\$	
<input type="checkbox"/> Girl Pack	<input type="checkbox"/> Girl Troop	<input type="checkbox"/> Ship	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Leader registration fees	\$	
<input type="checkbox"/> Family Pack								Scout Life fees (\$15 each)	\$	
Special-interest code—Description			100% Scout Life unit			Accident and sickness insurance fees				\$
<input type="text"/>			<input type="text"/>			Unit liability insurance fees				\$ 100.00
Does your organization agree to the Declaration of Religious Principle?			<input type="checkbox"/> Yes <input type="checkbox"/> No		Total fees					\$
<input type="text"/>			<input type="text"/>		<input type="text"/>					
Signature of executive officer			Signature of Scout executive or designee							

# Steps to Change Chartered Organizations

STEP 4: New Chartered Organization identifies a Chartered Organization Representative

STEP 5: Chartered Organization Representative completes an "Adult Application", Youth Protection Training, and submits the 3 PA required clearances (PSP, DHS, and FBI)

STEP 6: Completed paperwork is submitted to District Executive



# Steps to Transfer to New Chartered Partner

# Steps to Transfer

- STEP 1: Complete Release/Assumption of Unit Charter
- STEP 2: Unit Leadership approved by new Chartered Organization
- STEP 3: Title Transfers of Unit Assets
- STEP 4: Bank Accounts

# STEP 1: Release/Assumption of Unit Charter



BOY SCOUTS OF AMERICA®

## RELEASE/ASSUMPTION OF UNIT CHARTER

### 1: RELEASE OF CHARTER

TO: \_\_\_\_\_

*Please print contact information for existing Chartered Organization below.*

FROM: \_\_\_\_\_

\_\_\_\_\_  
*Name of Releasing Charter Organization*

\_\_\_\_\_  
*Institutional Head/Executive Officer Name*

\_\_\_\_\_  
*Mailing Address*

\_\_\_\_\_  
*City*

\_\_\_\_\_  
*State*

\_\_\_\_\_  
*Zip Code*

We hereby release the charter for unit(s): \_\_\_\_\_  
so that the unit may be assumed by a new chartering organization. It is understood that this includes all unit  
equipment and the unit treasury.

\_\_\_\_\_  
*Signed by: Executive Officer of Releasing Organization*

\_\_\_\_\_  
*Date*

### 2: ASSUMPTION OF CHARTER

TO: \_\_\_\_\_

*Please print contact information for new Chartered Organization below.*

FROM: \_\_\_\_\_

\_\_\_\_\_  
*Name of New Charter Organization*

\_\_\_\_\_  
*Institutional Head/Executive Officer Name*

\_\_\_\_\_  
*Organization Mailing Address*

\_\_\_\_\_  
*City*

\_\_\_\_\_  
*State*

\_\_\_\_\_  
*Zip Code*

\_\_\_\_\_  
*Organization Telephone Number:*

\_\_\_\_\_  
*Organization Website*

We hereby assume the charter for unit(s): \_\_\_\_\_  
It is understood that this includes all unit equipment and the unit treasury.

\_\_\_\_\_  
*Signed by: Executive Officer of New Organization*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*New Executive Officer Email Address*

\_\_\_\_\_  
*Telephone Number*

To Complete the Charter Organization Release/Assumption return this form with the following:

- New Unit Application
- Annual Charter Agreement

Mail completed forms to: \_\_\_\_\_

\*\*\*\*\* FOR LOCAL COUNCIL USE \*\*\*\*\*

\_\_\_\_\_  
*Signed by: Council Scout Executive or Designee*

\_\_\_\_\_  
*Date*

# Steps to Transfer

- STEP 2: Unit Leadership approved by new Chartered Organization
  - New Chartered Organization reviews the unit structure to make sure minimum required leadership positions
  - New Chartered Organization reviews the unit leadership and registered positions and approves continued service or any changes
- STEP 3: Title Transfers of Unit Assets
  - Unit equipment – most commonly trailers

# Steps to Transfer

- STEP 4:

## Bank Accounts

- If the unit's bank account is established with the EIN of a United Methodist Church, the unit will need to close the bank account and open a new one with the EIN of the new chartered partner
- If the unit's bank account is NOT affiliated with the EIN of a United Methodist Church, the unit does not need to close the account
- Units are required to report balances as required by the new Chartered Partner



# UMC Facilities Use Agreement

- Must be filed annually for units that continue to meet at a United Methodist Church but are chartered by another organization.
- [Facilities Use Agreement](#)

## United Methodist Role

- Support Scouting through its prayers, faith-based youth ministries , financial gifts and volunteer service
- Promote Scouting in church publications
- Provide Meeting Facilities - store reasonable equipment
- Provide Property Insurance to protect against loss
- Support the Unit Committee and assist w/annual recruitment
- Respect the BSA Brand



New Chartered Partner  
(Council Registered  
Unit)

# Traditional vs. Council Registered

- The chartered partner relationship is one of the hallmarks of the success of the Scouting program. Having a local community partner is the best option for helping units thrive in their home communities. Local leadership is best equipped to handle local challenges and identify local opportunities in support of the unit. Whenever possible the traditional model should be pursued. When not possible, the Council Chartered Unit model can be utilized.

# Council Registered Units - Differences

- An Institutional Head (IH) or Institutional Heads are appointed by the New Birth of Freedom Council Executive Board
- The IH(s) appoint Council Registered Unit Representatives to work with each Council Registered Units
- The New Birth of Freedom Council and the Unit sign an "Annual Council Unit Registration Agreement Form"
- Units Complete "Transfer of Unit Funds and Property Form"
  - Assets will be reviewed to see if anything requires additional insurance coverages beyond current council limits. Units may have to pay an additional insurance fee for anything about current insurance coverage limits

# Council Registered Units - Differences

- Unit bank accounts need to be closed and new accounts need to be opened using the New Birth of Freedom Council EIN
- Unit must submit an Annual Unit Finance Report
- Unit must submit an "Annual Unit Finance Report" once a year to the New Birth of Freedom Council
- New Birth of Freedom Council, United Methodist Church, and the unit must complete at "Affiliation Agreement" annually

# Next Steps

- Decide which option is right for your unit
- Complete steps to change registered Chartered partner
- Complete steps to transfer membership and assets to new Charter partner
- Complete by 12/31/22
- Continue local Scouting programs



# United Methodist Church Affiliation Agreement FAQ



# FAQS

- **Are the local Methodist Churches required to use the New Affiliation Agreement?**
- The UMC has strongly encouraged all their conferences, congregations, and units to utilize the New Affiliation Agreement moving forward.

# FAQs

- **What type of insurance does the BSA have to protect Affiliate Organizations and Chartered Organizations?**
- The BSA provides primary general liability insurances coverage for all chartered organizations and affiliate organizations on file with the BSA for liability arising out of an official Scouting activity of a traditional Scouting unit. The BSA insurance is consistent for all affiliate and chartered organizations.

# FAQs

- **Can a unit create a Non-Profit Corporation or a 501(c)(3) for the purpose of Chartering a unit?**
- No, units are not legal entities and are not authorized to incorporate. Moreover, obtaining an IRS 501(c)(3) designation by a unit puts unit leaders and parents at risk to the extent their actions may violate IRS private benefit rules.

# FAQS

- **Is the membership renewal process the same?**
- Membership renewal for youth and adults is an annual process that is completed online and will need to be completed during the council renewal period.

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# Resources and Help



# Questions