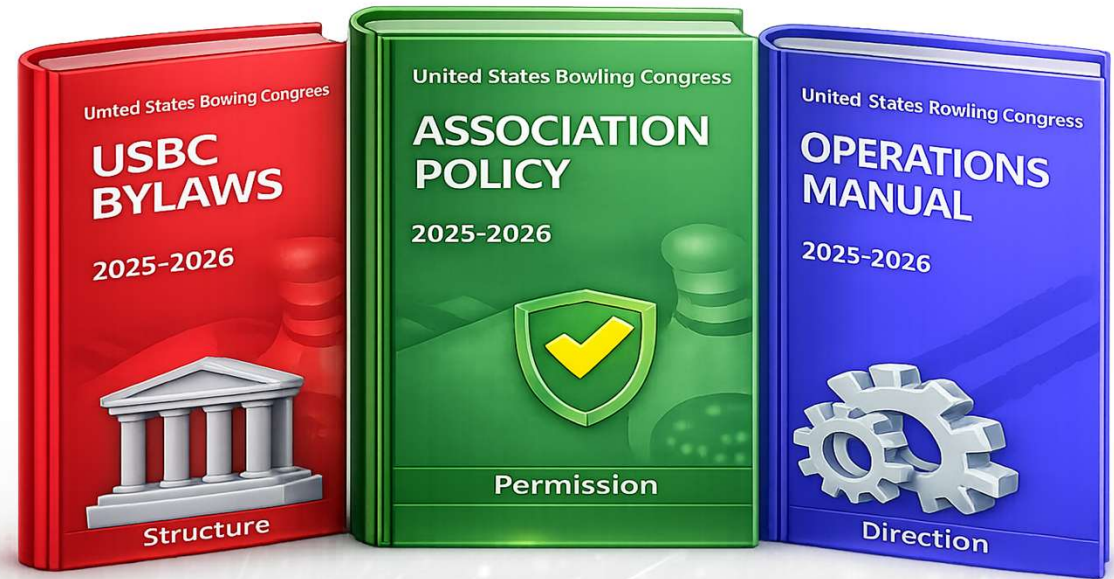


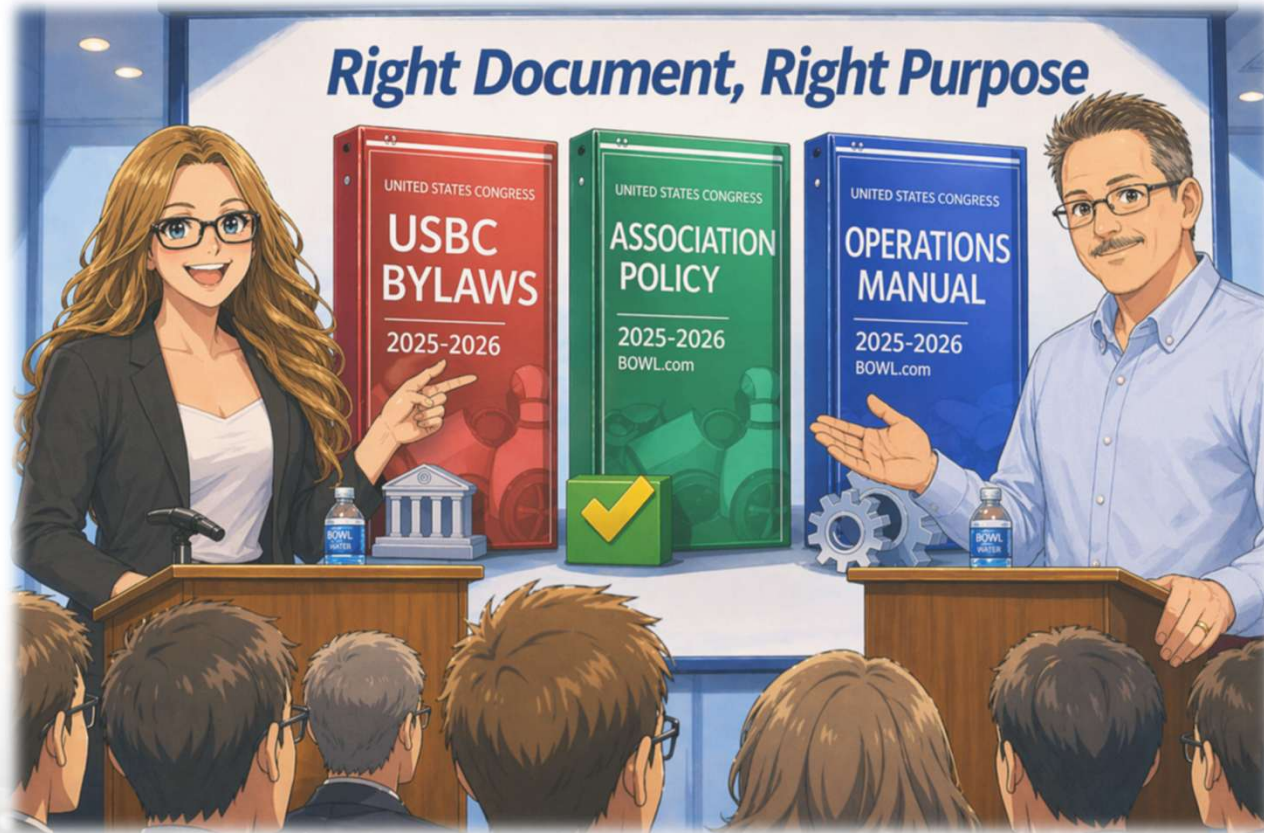
A **Future** FOR  
THE **Sport**



# Right Document. Right Purpose.



**Policy = Permission | Bylaws = Structure | Operations = Direction**



**Tina Brown – SE  
Field Service Manager**

**David Fields – S  
Field Service Manager**

# Your Hosts



# *Raise Your Hand If...*



# Why This Training Matters



## Relying on memory

Boards rely on institutional memory instead of written documents



## Misplaced information

Procedures are stored in the wrong place



## Outdated systems

Documents aren't updated regularly



## Training gaps

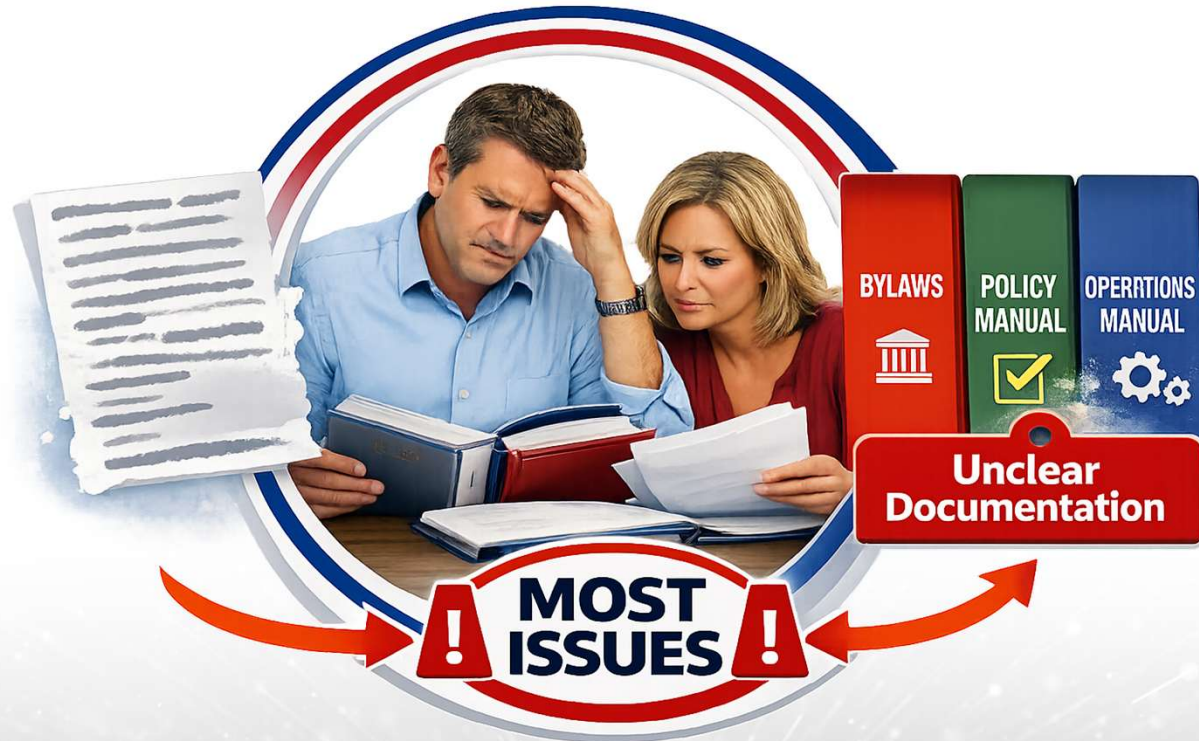
New board members are rarely trained on governance documents



Hold on... I know it's in here somewhere.

Pretty sure this says we can do it.

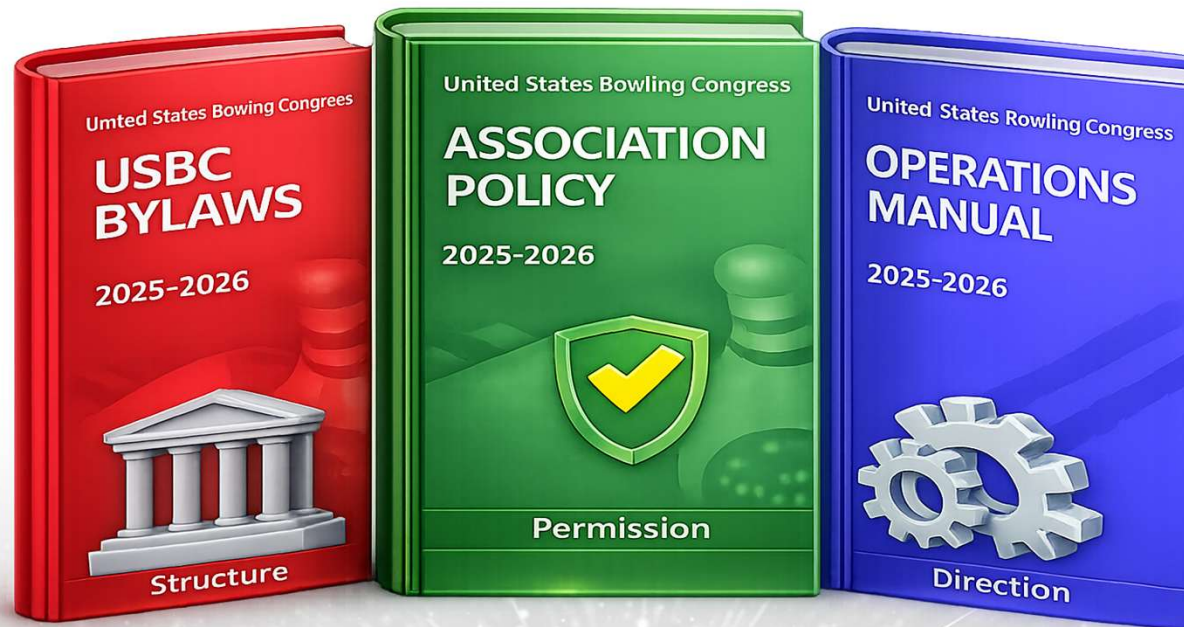
Maybe we should start by figuring out which book we're supposed to be in



***Most issues arise not from bad intent—  
but from unclear documentation***

# Right Document. Right Purpose.

The Pillars of Association Governance



**Policy = Permission    Bylaws = Structure    Operations = Direction**

---

# THE THREE DOCUMENTS AT A GLANCE



## Policy Manual

### Governance & Guidance

Are we allowed to do this?



## Bylaws

### Organizational Structure

How is our board built and governed?



## Operations Manual

### Specific Procedures

How do we do the work?

Each one answers a different question. Understanding which to use is critical for effective governance.

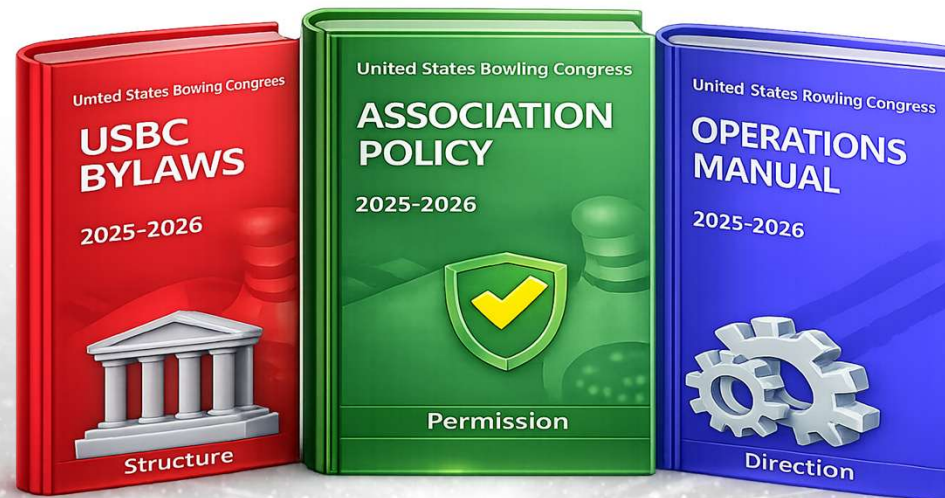
# **I Trust Your Instincts...**

**Before we walk through the documents, let's look at some common situations.**

***This isn't a test – it's a confidence builder!***

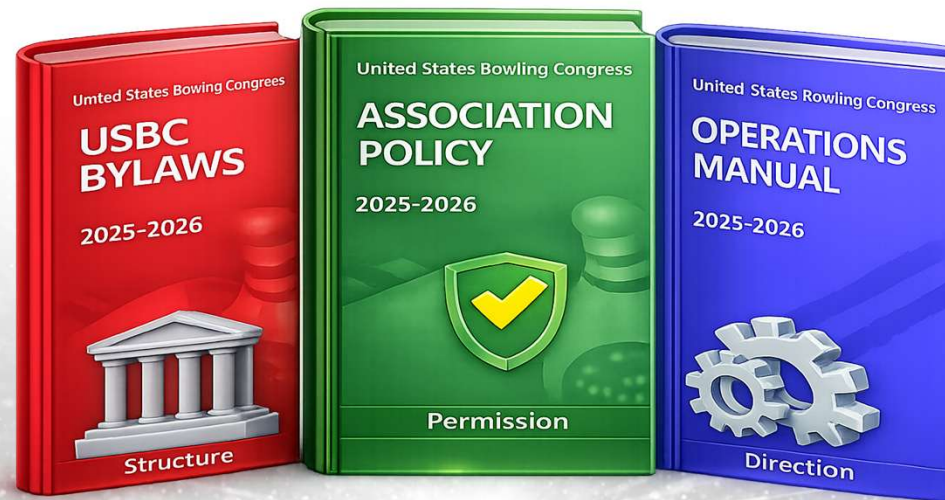
***Where are the duties of elected officers defined?***

***Which document contains this information?***



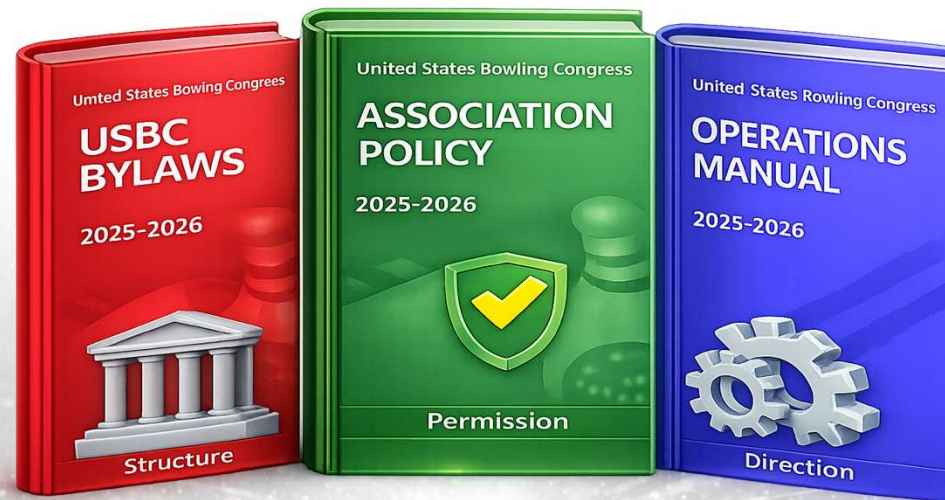
*How is our board structured and governed?*

*Which document contains this information?*

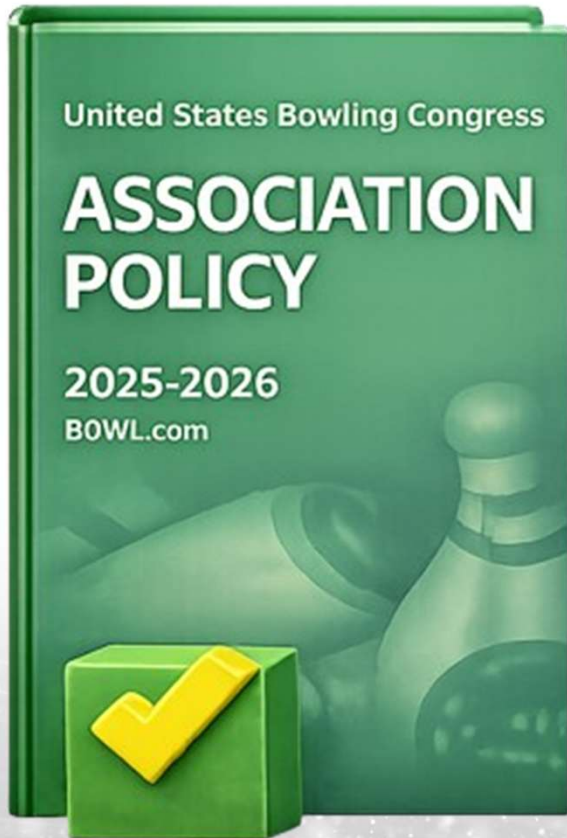


*Where are the specifics of our association's operations detailed?*

*Which document contains this information?*



# **| POLICY MANUAL — WHAT IT IS**



## **National Governing Document**

Issued and maintained by USBC

-  **Defines governance requirements**
-  **Establishes mandatory standards**
-  **Provides the foundation for Operations Manuals**

**Policy = Permission**



# **| POLICY MANUAL — REAL-WORLD USE**

The Policy Manual answers: **"Are we allowed to do this?"**

---

## **Board Decision Roles**

When there is uncertainty about the board's role in a particular decision

---

## **Conduct & Accountability**

When conduct matters must be addressed in accordance with policy

---

## **Voting Roles & Responsibilities**

Questions about who can vote and under what circumstances

---

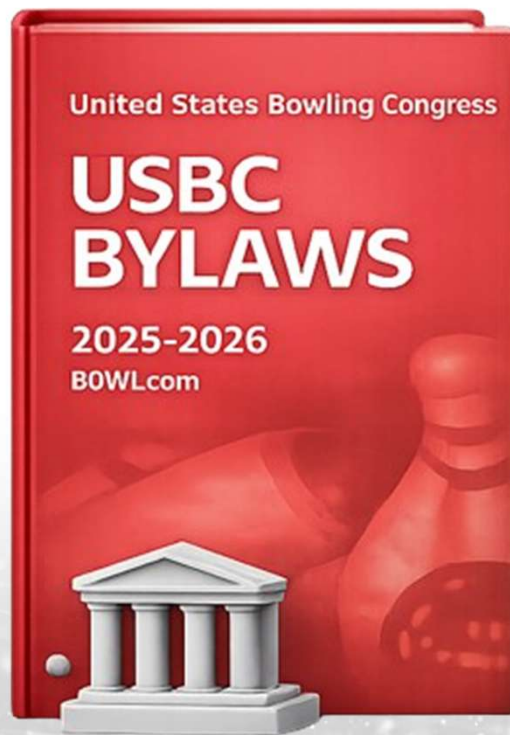
## **USBC Compliance Requirements**

When there's disagreement about following USBC requirements



# BYLAWS – WHAT THEY ARE

The bylaws outline the association's leadership structure, responsibilities, and decision-making processes.



## The Association's Foundational Document



Establishes elections and governance processes



Defines association structure



Approved by membership

**Bylaws = Structure**



# BYLAWS: ASSOCIATION- CONTROLLED AREAS (LOCAL & STATE)

## LOCAL

---

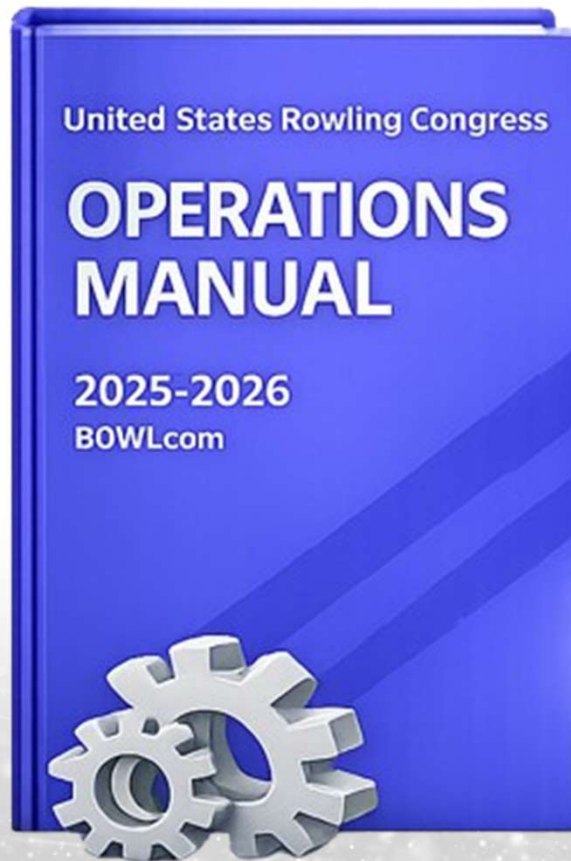
- Assoc Name
- Dues
- Board Size (# Officers, Directors)
- Additional Eligibility
- Director election method (majority or plurality)
- Term length (officers and directors)
- Stagger System
- Officer Election Method
- Additional Officer eligibility
- Meeting Quorum (annual & board)
- Bylaw amendment notice

## STATE

---




- Allow At- Large Directors
- Local association delegate structure
- Credentials forwarded prior to annual meeting
- Allow Hall of Fame members voting privilege
- Remote attendance option for Annual Meeting

# OPERATIONS MANUAL — WHAT IT IS



## Locally Written Working Document

The Operations Manual details your association's specific functions and procedures.

-  Documents procedures specific to your association
-  Maintained by the board
-  Used to train and orient new board members

**Operations = Direction**

# TRAINING & CONTINUITY TOOL

-  Supports leadership transitions
-  Preserves institutional knowledge
-  Builds operational consistency
-  Improves onboarding and role clarity



A well-maintained Operations Manual is your association's institutional memory.

# OPERATIONS MANUAL – REAL-WORLD USE



# ANNUAL UPDATE CYCLE (BEST PRACTICE)



## Policy Manual

Monitor annually for  
USBC August updates

## Bylaws

Review annually; amend  
when structure changes

## Operations Manual

Review annually; update  
when procedures change

**Board should document: What changed, Why it changed, When it was approved**

# | Right Document. Right Place.



## Where to Store It:

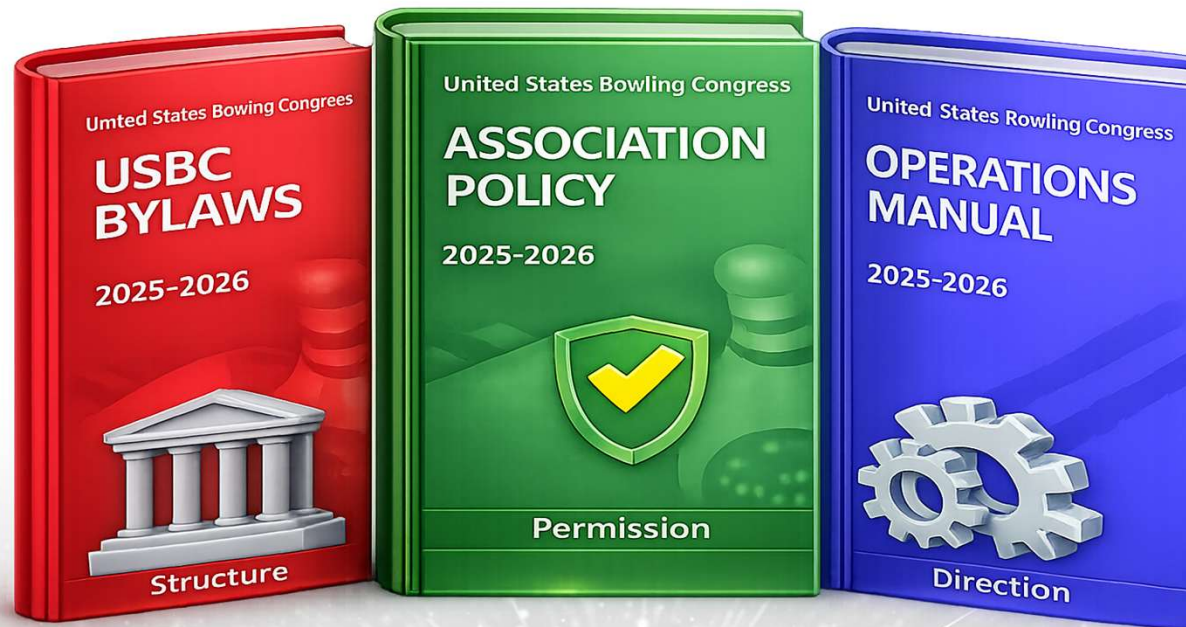
- Board shared drive
- Association manager records
- Board training binders
- Share with USBC at [AssociationServices@Bowl.com](mailto:AssociationServices@Bowl.com)

## USBC Policy Manual

[Bowl.com](#) > [Association](#) > [ARC-Home](#) > [Manuals](#)

# Right Document. Right Purpose.

The Pillars of Association Governance



**Policy = Permission    Bylaws = Structure    Operations = Direction**

---