

Quick Reference Guide for Units

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