Charter Renewal
For Unit Leaders
2019-2020
Objectives for Charter Renewal

• Properly renew youth and adults for the new charter year so that youth benefit from Scouting
  – Inventory Membership
    • Identify renewing and dropping members (and reason)
  – Choose Leadership for new charter year
    • Identify and approve new positions
  – Validate adult training
    • Ensure youth have trained leaders, esp. Youth Protection Training
  – Confirm Charter Organization sponsorship for new year
  – Pay renewal and insurance fees for new year

• Complete renewal on time – avoid impact on youth
• Update BSA official records
Responsibilities for Charter Renewal

Objectives for Charter Renewal

• Properly renew youth and adults for the new charter year so that youth continue to benefit from Scouting
  – Inventory Membership
    • Identify renewing and dropping members (and reason)
    • Identify the new program or unit “fit” for dropping members
  – Choose Leadership for new charter year
    • Identify and approve new positions
  – Validate adult training
    • Ensure youth have trained leaders, esp. YPT
  – Confirm Charter Organization sponsorship for new year
  – Pay renewal and insurance fees for new year
• Complete renewal on time – avoid impact on youth
• Update BSA official records

Committee Chair & Unit Renewal Team
Recharter Processor
Commissioner
Advise and Support
Charter Renewal Timelines

• Immediately
  - Submit youth and adult applications as soon as completed

• Begin to Prepare
  - CC identify Renewal Team & set expectations
  - CC and Renewal Processor complete training and tutorial
  - Conduct membership inventory
  - Request adults update my.scouting profile
  - Request adults validate and update training esp. YPT
  - CC receive access codes
  - Identify Renewal Processor (RP) to Commissioner
Charter Renewal Timelines

• October – Unit Recharter Activity
  – RP log in to Internet Rechartering website
  – Charter renewal team provide RP with members (& reasons for drops), Boys’ Life subscriptions, leadership positions, primary (paid) position/unit and other (multiple, unpaid) positions/unit
  – Charter renewal team obtain applications and YPT certificates, as needed, and fees
  – RP clicks “Update Unit Roster” to pull in new data
  – Key 3 (and UC) review draft
  – RP clicks “Submit to Council” and print final
  – Meet with Chartering Organization head for signatures on final charter
Charter Renewal Timelines

• **November – District/Council Recharter Activity**
  – CC assembles Charter Renewal Application package with envelope and check and submits to Unit Commissioner
  – Unit Commissioner reviews package and assists with changes
  – District Executives review package and submit to Council Registrar

• **December – Council Activity**
  – Registrar processes application
  – Deficiencies corrected

• **January – Unit/Commissioner Activity**
  – Registrar posts charter
  – Units print and present charter and membership cards
NEW! YPT Certificate Sent By Email
National 05/11/2018

Effective now, when completing the 4 modules of the Youth Protection Training course on the BSA Learn Center, the system will automatically email a PDF attachment of the Youth Protection Certificate to the email associated to your myscouting account. This YPT certificate will include the completion date and the expiration date. No more guessing when your YPT will expire, and no more waiting to access and print your certificate.

More myscouting features are in development – stay tuned!

Unit Rechartering Overview

The Annual Unit Rechartering Process is one of the most vital administrative components of managing a Unit (Troop, Pack, Crew, Ship or Post). It renewed each year as part of this process is the formal document that certifies the agreement between a Chartered Partner – an organization that Scouting as a part of its service to youth and community outreach – and the Boy Scouts of America. Without an up-to-date Charter, as Unit is not associated to Council or National Resources, including insurance.

The 2018 Unit Rechartering process will begin on October 20. Each Unit Committee Chair and Unit Leader of Record will receive important commu

18 Unit Rechartering before this time. After having received this information, the Unit’s Renewal Processor, designated by the Unit Committee Chair, will review the 2018 Unit Rechartering Overview, the 2018 Unit Rechartering walkthru and the appropriate Journey to Excellence forms. Links to these document below.
For Membership Inventory, use Member Manager to export BSA roster & compare unit records.

Choose All (Youth and Adults)

Export Member List (Name and BSA ID)
Identify drops

• Contact Member: Confirm drop reason

• Determine if a youth dropping your unit might stay in the Scouting if they were introduced to another unit
Requests adults update info

- Update profile – email, phone, address
- Validate training – retake YPT, update completed training
- Confirm positions
- Confirm primary (paid) and multiple registrations
- Subscribe to Boys’ Life if desired
Confirm Leadership for new year

- Charter Renewal FAQ specified required leaders for each unit type
- Internet Recharter checks required leaders
- Submit applications now if leadership begins this year. Update Unit Roster to pull in data
Collect fees

- Member Renewal (Tiger/Lion Partners no fee)
  $???.00 per member

- Boys’ Life
  $12.00 per subscription

- Council Program Activity Fee (Lions & Venturers 18-21 do not pay)
  $30.00 per youth

- Unit Charter Renewal
  $40.00 per unit

- Note: Use Submittal Envelope to calculate fees
Internet Rechartering Instructions
The portal to Internet Rechartering is the “Recharter Now” link

Direct URL link: mayflowerbsa.org/recharter
Everyone registers as a new user each year
Note the ‘Frequently Asked Questions’ link on most pages as well as a link to a presentation with instructions.
This is the Registration Page when using Internet Rechartering for the first time each year: Enter the Access Code number given in the Rechartering letter, select the unit type, and enter the unit number in 4-digit format.
Identify the User and create a Password, the first time entering the system for the year.
When logging in after the first time, enter the same access code and password

If you forgot your password, select Returning User and click: Forgot password?
Inside, the first page shows the 5 stages of Internet Rechartering (Begin with Begin)
(The process has 5 stages)

You can go back and forth between stages from any point in the process

until you make the final submission
Stage 1 – The first choice is whether to download the existing Unit Roster from the National Database (myScouting) or upload from a third party software
Uploading using Third party software

e.g., Packmaster, Troopmaster, TroopTrack

- All official data is already in myScouting
- If you use unit software, make sure that each name in your software is shown the same as the name in myScouting

-- Do not use nicknames for official records
Use Stage 2’s six steps to update adult and youth information

Later in Stage 4, you can change Boys’ Life and identify multiples who paid in another unit
Stage 2, Step 1 – Update information about the unit and the Chartered Organization
Stage 2, Step 2 begins with a list of all members currently in myScouting, with a default checkmark for renewals. Uncheck for a non-renewal.
"Update Unit Roster" each time you return to work on the roster to pick up recent registrations and training.
Stage 2, Step 3 lets you promote a member from another unit if you have their unit access code. Or, you can manually enter the information.
Promoting a Member

Promoting a member does not take them out of the other unit. That must be done manually by the Renewal Processor of the previous unit.
Stage 2, Step 4 is the addition of new members, beginning with adults
Do NOT check: Transfer from another unit
Adding a member ("transfer")

Don’t use “Transfer into this unit.” for either an adult or a scout during rechartering.

If you process a transfer in internet rechartering, you will be trying to register the member for the NEXT Charter year but the fee will not be collected.

Submit a transfer separately now to register for THIS year. If you “Update Unit Roster,” the member will be listed. Then, the member can be renewed for the NEW Charter year.
Parents as Tiger or Lion Partners

An adult Tiger or Lion partner is not a registered position (but they are assigned a BSA ID)

A previous or current Tiger or Lion partner registering in a committee or leader/assistant leader position must fill out an adult application, disclosure, and YPT

– If you write in the Tiger or Lion Parent BSA ID on the new adult application, all training is transferred to the new adult profile
Tiger/Lion partners registering

Although an adult Tiger/Lion partner is not in a registered position, they will be listed on the rechartering roster as a Tiger or Lion partner.

It **may** be possible to add a registered position for a Tiger partner in the ‘Update Roster’ stage without having to enter them here –

But they will still have to complete an adult application.
This part of Stage 2, Step 4 lets you add new Scouts
Page 3 starts the process of adding parent/guardian information. Is the parent or guardian an adult member of the unit?
If yes, choose the member
If no, enter the information manually
18 year-old Venturers

A new Venturing youth registrant 18 or older must submit an adult application (signed application, disclosure, and YPT certificate.)

Check: Venturing Participant
Stage 2, Step 5 lets you see, review, and update personal information. Later (Stage 4) you can change Boys’ Life or mark multiple (paid in another unit).
Stage 2, Step 6 begins by letting you update unit positions. Note on the right a list of required and filled positions.
Change a position using pull down lists. Select the first blank to remove a position.
Check Roster -

… provides two kinds of information –

Warnings that should be reviewed to see if there is a problem

Errors that must be corrected before rechartering can be completed
The Summary Stage lets you review the final roster or return easily to a previous stage.
Pause! Before you begin Stage 4, Summary, print and review with the unit Key 3 to approve the roster.
UNIT CHARTER RENEWAL REPORT PACKAGE

Mayflower  Council : Troop 1100

New Adult Members
(The application form(s) and Youth Protection certificate(s) for new adult member(s) must be submitted with Renewal Package)

Name and Person ID
Matthew :  

New Youth Members
(The application form(s) for new youth member(s) must be submitted with the Unit Charter Renewal Package)

Name and Person ID
William :  

Page 1 of the Draft will show you the adults and youth for whom a registration form is required
Summary, Step 1, lets you update fees for multiple registrations and Boys' Life
A “multiple” registration is a person (adult or scout) whose primary (i.e., paid) registration is in another unit.

Payment of the $?? registration fee (and $30 council program activity fee) is required only once for each registered person.
Check the fees shown carefully

The system defaults to “Member paid in this unit” even if that wasn’t the case at the last rechartering.
IH or CR can approve electronically OR select NEXT skip this screen and sign printed report. Do not insert Renewal Processor initials.
Select payment type. Credit card adds a service fee. Cash if writing a check.
The “Submit to Council” link is on this page – But Don’t Do It Yet. This is your last chance to print and review.
A registration form is required …

Include a complete paper application for each person shown on page 1, even if a paper or online application was previously submitted but has not been processed.

Normally, if you “Update Unit Roster” in Internet Rechartering before clicking “Submit to Council,” the new registration will be listed and removed from page 1. Then, another paper application is not needed.
Problem -

Adults/youth being given a second member ID when they are already registered or were previously registered
Re-registrations and “multiple” registrations

For any registration, indicate on the registration form that an adult or youth was previously or is currently registered (or is/was a Tiger Cub partner), including (if possible)

- Previous or current member ID
- Previous or other current unit
This application is a significant step in Scouting’s efforts to protect its youth members and deliver a quality program.

Approved for Council and District Adults: I have reviewed this application and have made any follow-up inquiries necessary to be satisfied that the applicant possesses the moral, educational, and emotional qualities to be an adult leader in the BSA.

<table>
<thead>
<tr>
<th>Date</th>
<th>Signature of Scout executive or designee</th>
<th>Date</th>
</tr>
</thead>
</table>

If applicant has an unexpired membership certificate, registration may be accomplished at no charge by transferring the registration:

- **Transfer application**

  **Enter membership number from unexpired certificate:**

<table>
<thead>
<tr>
<th>Transfer from council number:</th>
<th>Unit type:</th>
<th>Unit No.:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>○ Pack</td>
<td>○ Crew</td>
</tr>
<tr>
<td></td>
<td>○ Troop</td>
<td>○ Ship</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Term:</th>
<th>Registration fee $</th>
<th>Boys’ Life fee $</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Months</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**LOCAL COUNCIL COPY**
Tiger Cub partners

A Tiger Cub partner is not a registered adult, has not filled out an adult registration form, does not have to take YPT, and has not had a background check.

But they are assigned a member ID.
Problem -

If a scouter’s YPT isn’t shown in their list of training in MyScouting, and the rechartering document shows missing or expired YPT.
The most frequent cause -

The scouter forgets the original User Name or password originally used to create the training account, and creates another
Avoiding the problem -

The log-in page at MyScouting has a procedure for retrieving the User Name or password.
Print the complete application

- Get signatures
- Submit the report to your Commissioner for review
- The District Executive will deliver the charter after Commissioner Review
Required Signatures

On page 2 of the printout –

- the institution head – not the COR
  (The COR can approve an electronic submission)
- the unit leader

On the submittal envelope

- the Committee Chair and the Unit Commissioner
For each adult/youth paid registration in the unit, $?? (Lion/Tiger partners do not pay this)

For each registered youth, $30 Mayflower Council Program Activity Fee.

Boys’ Life - $12 per subscription

$40 unit charter fee
Charter Renewal Transmittal Envelope

District: ☐ Cranberry Harbors ☐ Headwaters ☐ Metacomet ☐ Post Road ☐ Sachem
Scouting Unit Type: ☐ Pack ☐ Troop ☐ Crew ☐ Ship ☐ Post Scouting Unit #: ____________
Scouting Unit Town: ____________________________

Unit commissioners submit reviewed packages to the district executive

<table>
<thead>
<tr>
<th>Charter Renewal Checklist</th>
<th>Verification (initial when complete)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Charter Renewal Application</td>
<td>Unit</td>
</tr>
<tr>
<td>A. Proper Fees Enclosed (see summary below)</td>
<td>Unit Commissioner</td>
</tr>
<tr>
<td>B. Executive Officer Signature</td>
<td></td>
</tr>
<tr>
<td>C. Unit Leader Signature (CM, SM, NL, EA or SK)</td>
<td></td>
</tr>
<tr>
<td>2. New applications complete: Date of birth, address, phone, etc. and signed. Adult application with SSN, disclosure, WP, COM, ID</td>
<td></td>
</tr>
<tr>
<td>3. Charter Renewal Application: All addresses, telephone numbers correct.</td>
<td></td>
</tr>
<tr>
<td>4. Required positions listed: ☐ CR ☐ CC ☐ MC ☐ MC</td>
<td></td>
</tr>
<tr>
<td>Parkers ☐ DL and/or ☐ WL, if Lions ☐ LL, if Tigers ☐ TL</td>
<td></td>
</tr>
<tr>
<td>5. Unit leader listed (see required): ☐ CM ☐ SM ☐ NL ☐ SK ☐ EA</td>
<td></td>
</tr>
<tr>
<td>6. Annual Charter Agreement</td>
<td></td>
</tr>
<tr>
<td>7. ☐ 100% Boys’ Life</td>
<td></td>
</tr>
<tr>
<td>8. Journey to Excellence Form</td>
<td></td>
</tr>
</tbody>
</table>

Summary of Enclosed Fees

<table>
<thead>
<tr>
<th>Description</th>
<th>Qty</th>
<th>Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Youth Membership Registration</td>
<td>$33.00</td>
<td>X</td>
</tr>
<tr>
<td>Youth Program Activity Fee*</td>
<td>$30.00</td>
<td>X</td>
</tr>
<tr>
<td>Multiple Youth (no fee)</td>
<td>$0.00</td>
<td>X</td>
</tr>
<tr>
<td>Adult Leader Registration</td>
<td>$33.00</td>
<td>X</td>
</tr>
<tr>
<td>[Not including Tiger Adult &amp; Lion Adult Partners]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Multiple Adults (no fee)</td>
<td>$0.00</td>
<td>X</td>
</tr>
<tr>
<td>Boys’ Life Subscriptions</td>
<td>$12.00</td>
<td>X</td>
</tr>
<tr>
<td>Charter Liability Insurance Fee</td>
<td>$40.00</td>
<td>X</td>
</tr>
<tr>
<td>* Does not apply to Lions, 10-21 year old Venturing participants and adult leaders</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total Fees $ ____________

Unit Account Authorization

I give the Mayflower Council permission to use our unit account to hold all registration fees and then withdraw them to transmit to the National Council, Boy Scouts of America.

Signed: ____________________________ (Committee Chair)
(Print Name) (Telephone Number)

Recharter Review Completed

Signed: ____________________________ (Unit Commissioner)
(Print Name) (Telephone Number)

Mayflower Council, Boy Scouts of America, 2 Mount Royal Avenue, Suite 100, Marlborough, MA 01752
Supported through your contributions to Investment in Character and That’s a Job worth doing

Prepare. For Life.
Assemble Charter Renewal Package

- Mayflower Council Submittal Envelope
- First page indicating attached applications
- Second page with all signatures. Commissioner or DE signs for Council
- Last page with Processor information
- Applications (Youth. Adults: signed app, disclosure, YPT, CORI and Photo ID)
- Check: Payable to Mayflower Council
- Signed Annual Charter Agreement
Meet with your Unit Commissioner by the date given by the District to submit your completed rechartering package (with all signatures).

The Unit Commissioner will review the document with you, and submit it to the District for final review and turn-in.
Your Goals

Increase Membership & Reduce the Rechartering paperwork:

- Identify youth and adults on your roster who are not properly registered
- Submit completed adult & youth applications prior to completing Internet Rechartering
- Complete the new YPT
- Don’t get stuck/delay, call your Unit Commissioner
- Identify specific time/place to obtain signatures and a check
- Submit to UC well before designated District turn-in date
Remember ..

The key to an easy rechartering is completing your membership inventory and getting any registration forms processed before you begin to use Internet Rechartering.
Questions?