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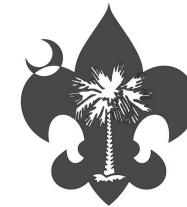
Handbook Revised 10/3/2011

2011 - 2012 Charter Renewal Handbook



RETENTION

A well-planned program,
delivered by a trained leader,
with a strong outdoor program,
supported by a good commissioner,
attracts and retains youth!



Indian Waters Council
Boy Scouts of America



Prepared. For Life.™

Mission Statement

The mission of the Boy Scouts of America (BSA) 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 Law.

Why is a Charter Necessary?

The chartering process is one of the oldest traditions in all of Scouting history. It is the formal document that certifies the agreement between a Charter Partner – an organization that agrees to utilize Scouting as a part of its service to youth and community outreach – and the Boy Scouts of America, setting expectations for the quality of program to be delivered to the Charter Partner’s youth population.

Why is a Charter Renewed Annually?

The charter renewal process ensures continuity of a unit’s program, advancement and activities for youth as well as continuity of service and tenure records for youth and adult advancement and recognition. This process is something to be taken very seriously, executed thoroughly and conducted in a timely manner according to the schedules in this handbook.

What will I find in this handbook?

This *Charter Renewal Handbook* is a compilation of information available via the internet regarding Internet Rechartering, its associated tutorial and help. Renewal processors are encouraged to take the *Internet Rechartering Tutorial* and review the *End-User Procedures* (help) to gain a better understanding of Internet Rechartering. This handbook is a resource that provides answers to frequently asked questions. Additional resources are available to help you with special issues not covered in this book.

Who Can I Contact with Specific Questions?

First, contact your district commissioner staff to resolve charter renewal concerns. If further assistance is needed, please contact your District Commissioner (see page 5)

My goal is simple for this recharter season: Units will deliver accurate, complete charter renewal packages on time. In return, expect accurate charters and membership cards to be delivered to the chartered organization and unit leaders, respectively, within 30 days of your charter renewal date.

Best wishes to all for a successful charter renewal season.

Jeff Will
Council Commissioner

MyScouting.org Accounts and Youth Protection Training

- Go to www.scouting.org and select MyScouting.
- Click on “Create an account.”
- Enter a username and then click “Check User Name Availability.”
- If username is available, click “Next” or enter a different username.
- Click “I am new and don’t know my member ID” and then click “Create User”
- Select your security questions, enter the answers, and then click OK
- To complete account activation, click the link in the e-mail response you will receive shortly. If you do not receive the e-mail, check the junk e-mail folder or any alternate inbox to which your Internet provider directs spam e-mail.
- Click on the link in the e-mail and then enter and confirm your password.
- Log on to MyScouting, and from the menu on left, click “E-learning.” From the “General” tab, scroll down to Youth Protection training and click “Take Course.”
- Upon completion, print a certificate of completion to submit with your volunteer application or submit the completion certificate to unit leader for processing at the local council.

When your volunteer application is approved, you will receive a BSA membership card which includes your member ID number. After you receive your membership card, log back into MyScouting, click on “My Profile,” and update the system by inputting your member ID number. This will link your Youth Protection training records, and any other training, in MyScouting to you BSA membership record.

You can log back into your account through either www.scouting.org or www.myscouting.org and take the next three courses to complete your training. They are listed in recommended order.

- Fast Start
- Position-Specific Training
- This is Scouting

To ensure these policies are fully implemented, please take the following steps before beginning the rechartering process:

- Review the YPT Y or N indicator located under Gender for each adult leader listed on the Charter Renewal Roster.
- If a unit leader has not taken Youth Protection Training within the last two years, they need to log on to MyScouting and take the training. They will need to make sure that their member ID is listed on their MyScouting profile. The number can be found on their BSA membership card and on the Charter Renewal Roster.
- If they took YPT online but did not input their member ID number, they should log back into MyScouting and input their member ID so the training will be linked with their records.
- If they have taken YPT within the past two years but did not take the course online, leaders can still log on to MyScouting to ensure their training records are up-to-date, or contact the council and have them verify that the YPT record is accurate.

Any training taken online or updates made to the council’s database after the roster has been loaded Internet Rechartering will not be reflected in the Internet Rechartering process. A copy of the YPT certificate should be provided with the completed recharter paperwork.

Youth protection training and more information are available at [http://www.scouting.org/Training/Youth Protections.aspx](http://www.scouting.org/Training/Youth%20Protections.aspx).

UNIT MEETING AGENDA FOR CHARTER RENEWAL (Conducted 45 Days Prior To Charter Renewal Date)

I. INTRODUCTION AND OPENING COMMENTS

- Unit Committee Chairman

II. MEMBERSHIP REVIEW

- Adult
- Youth
- Will your Webelos be in a Boy Scout Troop by the last day of the pack's charter renewal month?
 - If yes, then those adults and youth register in their new troop.
 - If no, then those adults and youth need to register in their existing pack during charter renewal and then transfer membership as soon as they bridge to their new troop.

III. COLLECT FEES

- Charter Fee: \$20
- Adult Registration: \$15
- Youth Registration: \$15
- *Boys' Life* Subscription: \$12
We strongly encourage *Boys' Life* magazine for all Cub and Boy Scout families as an important part of your overall unit program.
- Transfers: – There are no transfers during rechartering.
- Multiples: \$0

IV. COMPLETE RENEWAL APPLICATION

- Check for accuracy and completeness.
- Executive officer approves and certifies volunteers.
- Unit leader approves and certifies youth.
- Make check payable to NCAC-BSA.
- Keep a copy of all forms you submit.

V. CONFIRM CHARTER PRESENTATION DATE

- Commissioner

VI. CLOSING COMMENTS

A Word about Youth Protection

Youth Protection Training (YPT) must be taken every two years. If a volunteer's YPT record is not current at the time of recharter, the volunteer will not be registered. Units should not wait until charter renewal to ensure compliance. Failing to ensure compliance now will undoubtedly make unit charter renewal more difficult.



Privacy Policy

Charter renewal involves viewing and handling confidential and/or private information and accepting the responsibility for maintaining the privacy and confidentiality of that information. Private and/or confidential information must never be shared outside of the Boy Scouts of America. If you cannot accept this responsibility, you must notify your unit's committee chair and withdraw from viewing or working with these documents.

Incomplete Applications/Submissions

When a unit fails to submit even one complete application during charter renewal, it delays registration for all the adult and youth members of that unit. Incomplete adult/youth applications account for the highest percentage of defective charter renewal applications.

REMINDER: For a new adult application to be complete it must be accompanied by both a YPT Certificate and a signed copy of the Disclosure/Authorization form found on the opposite page of the adult application. All registered adults must be YPT trained **and** must submit a disclosure/authorization form.

Submittal Procedure

Forward all pages of the system generated charter renewal application and comply with all provisions as noted. Please submit all charter renewal packages along with appropriate fees and applications via your commissioner staff. **Please do not take the charter renewal package directly to Council.**

Uploading Recharter Data Using Third-Party Software

If a unit elects to upload data using a third-party Unit Management Software file, Internet Rechartering automatically checks that the file is compatible. The system also conveniently enforces many of BSA's business rules.

Here are a few examples of business rules:

1. Each unit (except LDS units) must have at least five paid youth members.
2. A completed application is required for all new youth and adult leaders added to a unit's roster during charter renewal, even if applications were previously submitted to Council. (**Note:** A copy of an application will suffice, provided the Social Security number is visible on the adult application.)
3. A Scout who has reached the age of 18 cannot be registered in a troop as a youth.

While Internet Rechartering does enforce BSA's business rules, it cannot check, correct or prevent the entry of erroneous personal data. All handlers in the charter renewal process (executive officer, unit committee chair, renewal processor, unit commissioner, district commissioner and district executive) are responsible for ensuring data accuracy. Non-matching data from third party software will give you an error message. If you do not see a members name listed on your downloaded roster you should assume that the person is not registered. They should be added as a new registrant. An application is needed for registration.

Note Regarding Tiger Cub Adult Partners and Scout Parents

Tiger Cub adult partners and Scout parents are **not** adult leader positions and as such a registrant is not required to provide a Social Security number. If a Tiger Cub adult partner or Scout parent subsequently volunteers to serve in an adult leader position, they must submit a completed adult application (with payment), along with a disclosure/authorization form and have current YPT training. Even though a Tiger adult partner does not receive a membership card they do have a membership number. When they apply and are approved for an adult leader position, they will receive a membership card and retain the membership number they had as a Tiger Cub partner. *While Tiger adult partners are not required to take Youth Protection training, we strongly recommend that they do so.*

UNIT CHARTER RENEWAL OVERVIEW

The charter renewal process will be explained in greater detail on the following pages, but here are a few key ideas at the outset:

- The actions of all involved in the process must facilitate an on-time charter renewal package delivery, meaning that the complete charter renewal package is turned in to the commissioner staff in the charter renewal month to allow time to correct errors and for the renewal to be posted at Council before the current charter expires.
- Notice that your current charter expires the last day of your charter renewal month. It is essential that charters be renewed during their charter renewal month to avoid lapse of the charter, which is a period beginning the day after the charter expires and ending the last calendar day two months later.
- When the lapse period ends, the unit is dropped, meaning the unit has no status and no insurance from BSA. Literally, the unit no longer exists and should not operate in any capacity. Registrations of youth and adults terminate, no activities can occur, no advancement or achievements of any kind for the boys - *including Eagle Rank* – can occur, tenure in rank and for leadership positions for boys and for adult service is stopped.

HOW TO DO A MEMBERSHIP INVENTORY

1. Appoint a unit adult to conduct the inventory.
2. You will obtain a printout of your unit's roster in your charter renewal package, including both youth and adults.
3. Set a membership inventory date at a meeting of the unit. Before the inventory date, meet with unit leaders to discuss ways to make best use of the inventory.
4. All inactive members are assigned to various persons to contact them to determine if they are to be reregistered.
5. Be sure to register any youth or adult member who is participating but not yet registered.
6. For packs, will your Webelos (and parents) be in a Boy Scout Troop by the last day of the pack's charter renewal month?
 - a. If yes, then those adults and youth register in their new troop.
 - b. If no, then those adults and youth need to register in their existing pack during charter renewal and then transfer membership as soon as they bridge to their new troop.

Youth Protection Training (YPT) Requirements

Effective June 1, 2010, BSA implemented mandatory YPT for all registered volunteers. Final Internet Rechartering paperwork for unit renewal processor will include a list of leaders that require that proof of YPT be submitted to the local council with the signed renewal paper work. An information sheet is provided that reminds volunteers of the YPT changes along with instructions on how to create a MyScouting account to take online training. The information sheet will also be placed in the charter renewal packets.

Ethnic Background Field System Changes

The Internet Rechartering software has been changed to better collect data that is important to the BSA and your local council. Internet Rechartering processors will now need to indicate the ethnicity of new youth and adult applicants. However, one of the choices on the list of selection will be "Not Provided" which can be used when this information is unavailable.

Providing race or ethnic data is not required to become a member of the BSA. This change is being made to encourage Internet Rechartering processors to fully enter information that is willingly provided. These changes will also encourage, but not require, processors to input ethnicity on existing members records that do not include it currently.

A separate information sheet will be placed in the charter renewal packets to inform Internet Rechartering Processors that an ethnic background selection is required for all applicants.

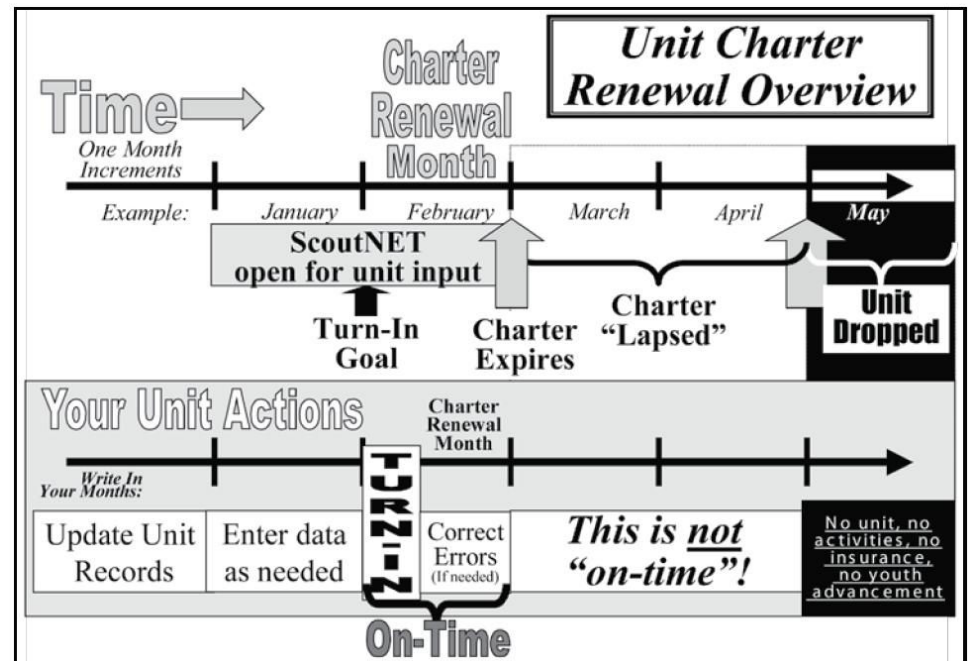
Please share this information during district charter renewal training.

UNIT RENEWAL PROCESSOR INSTRUCTIONS

The unit renewal processor (RP) follows the process on the UCRS to create a charter renewal file. The RP provides Internet Rechartering with the data necessary to create the file in a series of intuitive steps.

Steps to Renew a Unit Charter:

1. The unit eligible for Internet Rechartering designates an adult member as the RP.
2. The RP gathers all the information needed for a traditional charter renewal (e.g., new applications, fees, data for which adults are holding which positions, etc.).
3. With the charter renewal information at hand, the RP accesses the UCRS via the Council's Web Site. All RPs should take the Tutorial and review end-user procedures (help) also available on the UCRS.
4. The RP follows the intuitive process on the UCRS. Fundamentally, the process requires the RP to:
 - a. **Load Council Information** — Use the council's unit information -- OR-- Upload Recharter File upload the file created in third-party, unit-management software (UMS) to create the initial work-in-progress roster.
 - b. **Update the Roster** — Update charter information, select which members to drop from next year's roster, add adult members, add youth members, update member data, and update member positions.
 - c. **Check the Roster** — Validate that the data to be submitted conforms to BSA rules.
 - d. **Update Member Fees** — Update fees (e.g., assign Multiple status) and sign up unit members for *Boys' Life*.
5. After double-checking the information during the Unit Charter Renewal meeting, the RP electronically submits the file to Council and prints the UCRS Unit Charter Renewal Report package.
6. The RP delivers the paperwork and fees to the unit commissioner, keeping a copy for the unit files.



UNIT CHARTER RENEWAL SYSTEM ACCESS WINDOWS

Units have access to the Unit Charter Renewal System beginning two months prior to and ending one month after your recharter date. To determine your unit's recharter date and "access window" simply locate your district in the below table.

Recharter Date 12/31/2011	Recharter Date 1/31/2012
Access 11/1/2011 – 12/31/2012	Access 12/1/2011 – 1/31/2012
Chinquapin Edisto Etowah	3Rivers Catawba Congaree Wateree

ENTERING NAMES

For data consistency:

- Do not put spaces between prefixes, i.e. DeCarlo, *not* De Carlo.
- Do not enter apostrophes, i.e. OBrian, *not* O'Brian.
- Do not use hyphens, i.e. John SmithPayne, *not* John Smith-Payne.
- Do not change names during recharter. If a name is incorrect, contact the registrar separately to get it corrected.

Be careful before changing or dropping names. If a name is incorrectly dropped from the system, then later added back, a new application is required.

IMPORTANT:

Any name changes need to be submitted to the Council. Once the "Submit" button is clicked, no more changes will be allowed.

District Commissioners			
District	Name	Phone	Email
3 Rivers	Ernest Jones	(803) 318-2916	jones9021@bellsouth.net
Catawba	Robert Park	(803) 413-5255	rpark@sc.rr.com
Chinquapin	David Leech	(803) 960-3638	cclear@pbtcomm.net
Congaree	George Burnett	(803) 673-3108	Woodcarver37@aol.com
Edisto	Wes Connelly	(803) 533-9183	wconnelly@orbgdpu.com
Etowah	Craig Dooley	(803) 422-9534	Morgul@sc.rr.com
Wateree	Jim Bradshaw	(704) 905-6586	bsaisfun@truvista.net

CHARTER RENEWAL PROCESS

OBJECTIVE

Provide a plan to register all Scout units on time.

THE PLAN

At Least 120 Days Before Unit Renewal Date

- The Council prepares a unit charter renewal kit for each unit, including a letter outlining the use of Internet Rechartering, the Council's Web Site address, and the unit's unique code (codes change every year!) used to access the Unit Charter Renewal System (UCRS).
- The district commissioner (DC) establishes the unit charter renewal timeline dates to include unit charter renewal training and district-wide turn in to support the goal of submitting charter packages to Council at least 15 days before the unit renewal date.
- The unit commissioner (UC) conducts a committee visit to determine if there are any major concerns that will affect charter renewal and offer assistance throughout the process. Pay particular attention to the unit's implementation of required leader and Youth Protection Training policies.

At Least 90 Days Before Unit Renewal Date

- A member of the district leadership team (district executive, members of the district committee) visits the head of the chartered organization to renew the Scouting relationship. When possible the annual charter agreement is renewed with the executive officer of the chartered organization during this visit.
- The Council provides the charter renewal packages to the DE for distribution to the units.
- The committee chair (CC) selects members to help with unit charter renewal to include a unit renewal processor (RP) and advises the members of the district charter renewal training date and location.
- The DC conducts charter renewal training, delivers charter renewal packages to the units, and confirms that units have received access codes.
- The chartered organization representative (COR), CC, committee members and RPs as appropriate/assigned attend district charter renewal training. The RP is the person responsible for preparing the charter renewal application using the Unit Charter Renewal System. See Unit Renewal Processor Instructions.
- The unit commissioner should keep the DC and the DE advised of any matter which might adversely affect charter renewal.

60 Days Before Unit Renewal Date

- The Council activates the unit's access code on the first day of the unit's access window. See "Unit Charter Renewal System Access Windows".
- The Council starts providing weekly "Commissioners Unit Charter Renewal Status Reports" to the DCs. This report provides commissioners with the renewal status of each unit, including the date of first login, the current stage of the process completed and date submitted. Units should all log in and begin the process during the first 10 days of their Access Window.
- The UC and unit committee conduct a membership inventory of currently registered youth and adults. See "How to Do a Membership Inventory".
- The CC announces the charter renewal meeting date and location, and officials of the chartered organization, the unit committee, unit leaders, and the unit commissioner or other district or council representatives are urged to attend.

60 to 45 Days Before Renewal Date

- The unit RP accesses the UCRS, completes all steps of the process except submittal, and prints a Charter Renewal Application to be brought to the unit's charter renewal meeting for review and discussion.
- The unit commissioner and unit committee chairman conduct the charter renewal meeting. See "Unit Charter Renewal Meeting Agenda". During the meeting, additional changes may be made to the application. If additional changes are needed, the RP must return to the UCRS and complete all necessary steps. The RP then electronically "submits" and prints the Charter Renewal Application. The Application, with appropriate signatures and applications for new youth and adults, are all completed at this meeting.
- The charter renewal packet, including all forms and fees, is then given to the UC or taken to the district's charter renewal turn-in meeting for the DC's review.

At least 15 Days Before the Renewal Date

- The DE delivers the charter renewal packet to the Council office at least 15 days before the charter renewal date. The Council's registrar receives and reviews this information online along with the hard copies received. Once processed, the registrar then creates the new charter and registration cards for the unit, mails the registration cards to the unit leader and makes the charters available to the district executive for presentation by the commissioners.

30 Days After the Renewal Date

- The commissioner makes a formal presentation of the new charter at an appropriate gathering of the chartered organization.