2020 CHARTER RENEWAL GUIDEBOOK

The information provided in this Guidebook is a tool provided for Unit Leaders and Charter Renewal Processors who will be completing their unit’s annual charter renewal between November 1—December 31, 2019.

An electronic version of the Guidebook, along with additional support materials can be found on the Bay-Lakes Council website (www.baylakesbsa.org), under the Internet Charter Renewal tab.

What is a charter?
A unit charter authorizes an organization to operate Boy Scouts of America Scouting unit. It certifies the agreement between a chartered organization – who agrees to utilize Scouting as a part of its service to youth– and the Boy Scouts of America, setting expectations for the quality of program to be delivered. Issuing a charter is one of the oldest traditions in Scouting.

Why is a charter renewed annually?
Charters are typically issued for a period of 1 year; hence, chartered organizations must submit an application to the Council annually to renew its unit charter. The requirement to renew a charter:
- Fosters a formal, timely plan for regular dialogue between charter organization and the Council
- Assures membership rosters are current so Scouts can participate in Scouting activities and advance in rank

What will I find in this handbook?
This Charter Renewal Guidebook explains the timelines, key roles, major process steps, and common challenges. Please use this handbook along with resources found on the Internet Charter Renewal web page at www.baylakesbsa.org, the Internet Rechartering Tutorial, and your district’s commissioner staff to submit your Charter Renewal Application on time and error free.

Who can I contact with specific questions?
Contact your unit commissioner (UC) or your District Field Staff members for help with charter renewal. A full list of District Field staff members with their contact information is available at www.baylakesbsa.org ➔ About Us Tab ➔ Staff Directory

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Charter Renewal Roles and Duties:

The unit’s roles and tasks for charter renewal can be divided into four phases:

1. Pre-Planning Activities (November 1 - November 15)
2. Online Charter Renewal Data Entry (November 15 - December 15)
3. Finalizing and approving the charter renewal packet (November 15 - December 15)
4. Final Charter Renewal Report with support documents and payment due by December 23, 2019

ROLES & DUTIES:

1. Pre-Planning Activities:
   - **WHO:** CHARTER ORGANIZATION REPRESENTATIVE (COR); COMMITTEE CHAIR (CC); UNIT LEADER
     - Confirm leaders for the next charter year - Complete Membership Inventory
     - Ensure all leaders have completed Youth Protection Training 2.0 since February 2, 2018
       - Print Unit Training Report from [My.Scouting.org](http://www.baylakesbsa.org/)
       - Schedule YPT Training sessions for any leaders needing training (See Page 4 for details.)
     - Select Charter Renewal Processor (RP)
     - Attend District Charter Renewal Training Session ([www.baylakesbsa.org](http://www.baylakesbsa.org/ Calendar))
   - **WHO:** COMMITTEE CHAIR (CC); CHARTER RENEWAL PROCESSOR (RP)
     - Attend District Charter Renewal Training Session ([www.baylakesbsa.org](http://www.baylakesbsa.org/ Calendar))
     - Confirm roster of continuing adult and youth members
     - Collect applications for new adult and youth members joining the unit as of January 1, 2020
     - Collect new Disclosure Authorization forms for each adult leader
     - Confirm Boy’s Life subscriptions from youth members

2. Online Charter Renewal Data Entry
   - **WHO:** CHARTER RENEWAL PROCESSOR (RP)
     - Log-in to and enter all data [Online Charter Renewal System](http://www.baylakesbsa.org/)(See Page 8-9 for Instructions)

3. Finalizing and Approval of Charter Renewal Application
   - **WHO:** COMMITTEE CHAIR (CC); UNIT LEADER AND CHARTER RENEWAL PROCESSOR (RP)
     - Review Charter Renewal Application draft and make any needed corrections
     - Coordinate meeting with the Executive Officer or Charter Organization Representative for final review and signature on the Charter Renewal Application
   - **WHO:** EXECUTIVE OFFICER OR CHARTER ORGANIZATION REPRESENTATIVE (COR)
     - Review and sign the final charter renewal application form either electronically through the Online Charter Renewal System or on the hardcopy Renewal Report
   - **WHO:** CHARTER RENEWAL PROCESSOR (RP)
     - Once final review of application is complete the Executive Office or Charter Organization Representative have approved and signed the document, click “SUBMIT TO COUNCIL” in the Online Charter Renewal System and print 2 copies of the final charter renewal application
   - **WHO:** COMMITTEE CHAIR (CC)
     - Coordinate payment for all charter renewal fees

4. Final Charter Renewal Report
   - **WHO:** UNIT LEADER
     - Turn in the charter renewal application along with all support documents/applications to your District Commissioner by December 23, 2019
Getting Started—Quick Start:

1. Review and print the Unit Roster in MY.SCOUTING.ORG. This step will provide a list of currently registered youth and adult leaders. Verify those who are active in your unit and planning to remain on the charter roster in 2020.

2. Print Unit Training Report in MY.SCOUTING.ORG. This will provide a current list of all registered adult leaders and the expiration of their Youth Protection Training.

3. Reference the Unit Membership Inventory Worksheet to be sure all of the required adult leader positions are filled. Please note: Adult leaders cannot hold more than one registered position in a unit at the same time. So, a Committee Member cannot also fill a Den Leader position.


5. Verify the accuracy of youth member ages and grade levels, addresses, telephone numbers and collect current email addresses for all members. This data will be used during the online step of the renewal process.

6. Collect completed Youth Applications for new Scouts. Verify all applications have been signed by the parent and unit leader. **Verify that all applications include a Unit Number.**

7. Collect completed Adult Applications for adults being added to your unit.
   Verify all applications have been signed by the applicant and the chartered organization representative.
   • Verify each application includes a signed Disclosure Authorization form.
   • Verify each adult leader has completed Youth Protection Training since February 1, 2018.

Youth and adult applications can be printed from:
www.baylakesbsa.org ➔ Click Resources (Top horizontal tool bar) ➔ Click Forms and Resources

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**MY.SCOUTING.ORG Unit Management Tools:**

**Unit Key 3 Members have access to Unit Management Tools in My.Scouting.org. Key 3 Members Include:**

- **Unit Leader** (Cubmaster, Scoutmaster, Venturing Crew Advisor or Venturing Ship Skipper)
- **Committee Chair (CC)**
- **Chartered Organization Representative (CR)**

*(In order to access this tool, the unit Key 3 member must be currently registered with the unit and have linked their BSA member ID number with their My.Scouting.org account.)*

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**Training Manager:**
The Training Manager tool provides the ability for Unit Key 3’s to view a dashboard of position-trained leader status and youth protection training status. Key 3’s can also add training, search training, print member’s training certificate(s), and print various reports.

**Member Manager:**
It’s a tool that provides the ability for Key 3’s to assign members to functional roles in sub organization(s), view and export certain roster details, update member profile details, print membership cards, and print unit’s Youth Member Age report and a Unit Ros-

**Organization Security Manager:**
It’s a tool that provides the ability for Key 3s at each organization level to assign certain functional roles in the unit. **Key 3s can Opt-In their unit for Family Scouting and Online Membership Registrations under the Settings tab.**
Youth Protection Training 2.0:
All Adult Leaders Must Complete Current Youth Protection Training to be renewed with their Unit Charter.

To Access Youth Protection Training (YPT):

- Log into/create an account at: My.Scouting.org
- If this is your first visit to the site, click Create Account.
  Steps to Create Account:
  1. Are you already associated with the BSA? If YES, then:
     - Do you know your Member Number? If YES, then:
       - Enter Member Number and Date of Birth
  2. Are you already associated with the BSA? If NO, then:
     - Enter account information to set up your new account

OR

1. Do you know your Member Number: If NO, then:
   - Enter your information so the system can match you to an already existing Member ID Number. If the system cannot match you to an existing Member ID number, please set up a new account.

Once you complete the Sign In/Account Creation step, the My.Scouting.org Flash Page will open. The quickest way to navigate to Youth Protection Training is to click on the icon on the far-right hand side of the screen:

- Scroll down the page and click on: Youth Protection Training - Mandatory
- On the next screen, click on the “Take Course” button on the right-hand side of the screen.
- Complete all 3 training modules:
- Complete the YPT Certification Test

IMPORTANT:

- A Certificate of Completion will be sent via email following completion of ALL course materials.
- Your completed Youth Protection Training Course will not sync with Unit Tools in My.Scouting.org for 24 Hours following the completion of the training.
- Please note the preferred internet browsers for My.Scouting.org and the BSA Learn Center are Google Chrome OR Safari for Mac.
- If the site does not load properly, clear your browser history, then go back and load the page again.

Questions? Please call the Bay-Lakes Council office at 1-920-734-5705 or contact the National Boy Scouts of America Member Care Center 1-972-580-2489 (Dial 1 once auto-answer system begins).

www.baylakesbsa.org
New for 2020:

**All adult leaders must complete the 2020 Additional Disclosures & Background Check Authorization Form by December 31, 2019.**

Providing a safe and secure environment for our youth members is the greatest priority of the Bay-Lakes Council. We work every day to protect our children through our Youth Protection policies including mandatory youth protection training for all registered leaders, leadership selection policies and mandatory criminal background checks for new leaders.

As Scouting and the Bay-Lakes Council look to strengthen our youth protection policies, we have instituted a periodic criminal background recheck of existing adult leaders. In order to do this, a new Additional Disclosures & Background Check Authorization Form must be signed by every registered adult member before their annual membership can be renewed for 2020.

- Background Check Disclosure
- Additional Disclosures & Background Check Authorization Form

For Adult members over age 18 and registered with a unit, please submit your original, signed Additional Disclosures & Background Check Authorization Form to your unit for submission with the 2020 charter renewal.

If an adult member chooses to decline the background check, or if they do not complete the Additional Disclosures & Background Check Authorization Form their 2020 annual registration will not be processed.

**Anyone registered as Venturing or Unit Participant (Ages 18-21) must also complete the Additional Disclosures & Background Check Authorization Form.  
Lion and Tiger Adult Partners do not need to complete this form.**

Membership Fees:

Any new youth recruited in the fall must be registered with the council before you begin the online charter renewal process.

However, if you are adding new youth at the same time as renewing the charter please add the following prorated fees to the annual charter renewal fees submitted to the Council.

This will allow us to register these new youth before year end. Please verify that you have attached completed applications for all new youth being added to the charter.

- October $8.25 Registration $3.00 Boys’ Life
- November $5.50 Registration $2.00 Boys’ Life
- December $2.75 Registration Boys’ Life is not available for one month

As of January 1, 2020 membership fees will be as follows

**Annual Renewal Fees:**

*January 1 through December 31, 2020*

- Youth: $60.00 Each ($5.00 per month)
- Adults: $36.00 Each ($3.00 per month)
- Boys’ Life Subscription: $12.00 Each
- Unit Liability Insurance Fee: $60.00 per unit

**NOTE: Packs do not need to collect registration fees for Lion or Tiger Cub Adult Partners.**
Frequently Asked Questions:

**Boys Life and Scouting Magazine Subscriptions:**
Boys Life and Scouting magazine subscriptions run from March 2020—February 2021. Any magazines received by Scouts in January and February of 2020 are in fact the last two months of their previous year’s subscription. If members of your unit have not yet received a magazine by April of 2020, please contact the Council office at 920-734-5705.

**Packs with Lion and/or Tiger Cub Adult Partners:**
Lion and Tiger Cub Adult Partners are listed on the unit roster. They are a valuable part of your Scouting unit. They have a Scouting ID number, but are they registered leaders? No, they are not fully registered leaders.
- Lion/Tiger Cub Adult Partner is NOT a registered leadership position. An adult application is not needed, a criminal background check is not conducted and a registration fee is not collected.

**When a Lion/Tiger Cub Adult Partner becomes a Registered Leader:**
If a Lion/Tiger Cub Adult Partner chooses to join the Pack as fully registered adult leader (example, a Den Leader, Committee Chair, Assistant Cubmaster, etc.) then they must submit a completed Adult Leader Application and signed Disclosure Authorization form.

**Please remember:** All new adult leaders must submit a copy of the Youth Protection Training (YPT) certificate of completion with their application.

**Transfers at Charter Renewal**
If a youth or adult member is moving to your unit at the start of the 2020 Charter year (January 1, 2020), they must be registered as a NEW member of the unit they are joining. All NEW members must submit a completed application and the annual membership fee.

**Please indicate on the NEW application the unit or council they were previously registered with. If unknown, please indicate the city and state they are moving from.**

**5th Grade Webelos**
- If a 5th grade Webelos is transitioning/crossing over to a Troop on January 1, 2020 they must complete a youth application to join that Troop. The application to join the Troop must be submitted to and signed by the Scoutmaster. The Troop application must be submitted with the Troop Charter Renewal paperwork.
- If a 5th grade Webelos is transitioning/crossing over to a troop sometime after January 1, 2020 They must be renewed as youth members with the Pack. After the cross-over ceremony they must complete a youth application indicating the Pack they are Transferring from and the Troop they are Transferring to. The application must be signed by the Troop Scoutmaster who will then submit the application to the Center for Scouting. NOTE: There are no fees when transferring between units.
Log-In to Online Charter Renewal System:

**LOCATED AT:** [HTTPS://SCOUTNET.SCOUTING.ORG/UCRS/UI/HOME/](HTTPS://SCOUTNET.SCOUTING.ORG/UCRS/UI/HOME/)

Use Internet Explorer Only (Firefox, Safari, and Chrome are compatible but may come up with warnings. Mac is not compatible.)

- A tutorial, PowerPoint training presentation and other useful tools available at: [HTTPS://SCOUTNET.SCOUTING.ORG/UCRS/UI/HOME/DEFAULT.ASPX](HTTPS://SCOUTNET.SCOUTING.ORG/UCRS/UI/HOME/DEFAULT.ASPX)

**Internet Charter Renewal Log-In Instructions:**

1. Visit: [HTTPS://SCOUTNET.SCOUTING.ORG/UCRS/UI/HOME/DEFAULT.ASPX](HTTPS://SCOUTNET.SCOUTING.ORG/UCRS/UI/HOME/DEFAULT.ASPX)
2. Select CLICK HERE TO BEGIN
3. Select FIRST TIME USER
4. On the next screen enter the **2020 UNIT ACCESS CODE**
   - 2020 Unit Access Code is sent via email to Unit Key 3 members
   - If you cannot locate your Unit Access Code, please email: Jennifer.neuville@scouting.org
5. Select the unit type and enter the four digit Unit Number
6. Create a password as instructed and click on REGISTER
   - We suggest keeping your password easy to remember and keeping a written copy.

You can stop at any time, log off the system and begin again where you left off by log-

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**Final Check List:**
What do I need to turn into Council once my charter is complete?

1. Full Charter Renewal Application (Do not submit the EZ Form)
   - **MUST BE SIGNED OR ELECTRONICALLY APPROVED BY THE CHARTER ORGANIZATION REPRESENTATIVE**
2. Payment for Charter fees made payable to Bay-Lakes Council
3. A new Additional Disclosures & Background Check Authorization Form for each adult leader and youth member over 18 years of age
4. Adult Applications Forms for all new leaders
5. Youth Applications for all new scouts
6. Signed Annual Charter Agreement
7. Unit Key Contact Form
8. Complete Journey to Excellence Score Card

- Pack
- Troop
- Crew
- Ship
- Post

All completed charters are due to the Council office by December 23, 2019.

*Any charter not received by the Council office by December 31, 2019 will be placed on the “Non-Member” list.*

*Any liability insurance coverage will not apply to units without current charters.*
On-Line Charter Renewal Stages & Steps:

INTERNET CHARTER RENEWAL STAGES & STEPS:
Charter Renewal Processor Logs In: https://scoutnet.scouting.org/ucrs/UI/home/default.aspx

Stage 1: Load Roster (Click Load Council Information)

Stage 2: Update Roster
- Step 1: Update Charter Organization Contact Information
- Step 2: Select Members for Renewal
- Step 3: Promote Members
  - Only units that are chartered under the same Charter Organization can Promote members between units. If a Scouts that was registered with a unit in 2019 is going to join your unit your unit as of January 1, 2020, then they are considered a NEW MEMBER and an application must be completed and submitted with the charter renewal paperwork.
  - Step 4: Add a New Member
    - Enter member date for new adult and youth members.
  - Step 5: Update Member Data
    - Review and update address, telephone, e-mail, and grade-level for all members.
  - Step 6: Update Member Position
    - This step will verify if your unit has met the required minimum adult positions for your unit type. See Unit Inventory worksheet for required unit positions.
    - NOTE: Adult Leaders CANNOT hold more than one registered position. For example: A Den Leader cannot also be on the roster as a Committee Member or a New Member Coordinator.

Stage 3: Check Roster
- This stage will check your roster for any errors. If an error is found, you must correct that error before moving forward with the online renewal.

Questions?
- Click here to access the Frequently Asked Questions
- Click Help in the upper right-hand corner of the Online Charter Renewal System screen
- Review Updated Internet Rechartering PowerPoint located: https://baylakesbsa.org/resources/internet-recharter/
Charter Renewal Stages & Steps: (Continued)

INTERNET CHARTER RENEWAL STAGES & STEPS:

Stage 4: Summary

- **Step 1: Update Fees**
  - Enter Boys Life subscriptions and indicate which members are Multiple Registrants. *Please note: Council will do its best to verify that a Multiple Registrant’s membership fees are already paid by another unit, if the membership fee is not already paid by another unit the fee will be accessed to the first unit charter processed.*

- **Step 2: Approve Roster**
  - If choosing Electronic Approval, you will need to meet with your Charter Organization Representative or Executive Officer who must log-in, review the roster and electronically approve the roster. **THIS STEP IS NOT TO BE COMPLETED BY THE CHARTER RENEWAL PROCESSOR.**
  - If not signing electronically, select Next to move to the final step of the process.

Stage 5: Submit Roster

- **Step 1: Payment**
  - **COUNCIL RECOMMENDS PAYING CHARTER FEES VIA CHECK PAYABLE TO BAY-LAKES COUNCIL.**
  - If paying by credit card, there is an additional 3% administrative processing fee charged by National BSA AND absolutely no changes or corrections can be made to you the charter renewal roster once submitted.

- **Step 2: Submit Roster**
  - Last chance to make changes to the roster before final submission.
  - Once any changes have been made, click SUBMIT TO COUNCIL.

- **Step 3: Internet Rechartering Survey (optional)**

- **Step 4: PRINT CHARTER RENEWAL APPLICATION**
  - ✔ PRINT 2 COPIES OF THE FULL RENEWAL APPLICATION.
  - ✔ TURN IN ONE COPY TO COUNCIL BY DECEMBER 23, 2019
  - ✔ KEEP THE SECOND COPY FOR YOUR UNIT RECORDS.

**Need Help?:**

- Contact your Unit Commissioner
- Click here to contact your District Field Staff representative ([www.baylakesbsa.org ➔ Contact Us](http://www.baylakesbsa.org))
- Click here to contact Jenn Neuville, Bay-Lakes Council Registrar
Renewal Reminders:

Reminders...

1. A chartering organization that sponsors more than one unit must register the SAME Executive Officer and Chartered Organization Representative [CR] for all units.
2. ONLY the Executive Officer may hold more than 1 position in a unit. The Executive Officer may also hold the Committee Chair, Chartered Organization Representative or Committee Member positions. If they hold the Committee Chair position, they cannot also serve as a Committee Member.
3. Please update or add adult leader and family email addresses. We want to ensure everyone has the opportunity to receive Bay-Lakes Council’s electronic communications. Additionally, National BSA sends out an electronic satisfaction survey twice a year called “Voice of the Scout.” This survey determines what parents and adult leaders think about the Scouting program. It is a great opportunity for direct feedback and suggestions from those experiencing Scouting every day.
4. Do not type over an existing leader’s record. Create a new record for new leaders. Attach a completed application, disclosure authorization and proof of completed YPT for any new adult leader.
5. Ranks can only be updated through Internet Advancement 2.0 or Scoutbook.com systems.

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**SCOUTBOOK**

Scoutbook (https://www.scoutbook.com) is an online unit management tool that ensures that you never miss a Scouting moment—from tracking advancements to milestone achievements along the Scouting adventure.

If you don’t have a Scoutbook account yet, visit Scoutbook.com to create one. Note, a youth and parent can still setup a Scouting account for ScoutBook without a unit subscription to Scoutbook.

**Questions:** The Scoutbook Forum is a great location to learn more about utilizing Scoutbook’s many tools: https://help.scoutbook.com/

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**INTERNET ADVANCEMENT 2.0**

Internet Advancement 2.0 (https://scoutbook.scouting.org/login) was launched June 2019 and is available to use by the unit Key 3 and the assigned Advancement Chair. This is a different option for units to use instead of Scoutbook.

The new version of Internet Advancement writes to the Scoutbook database so anything approved will instantly show up in Scoutbook (and visa versa.) Also all records are sync’d with the council records automatically within 48 hours.

**Questions:** There is a great tutorial available via the Scoutbook forum that outlines how to log in and utilize Internet Advancement 2.0: https://help.scoutbook.com/knowledge-base/what-is-internet-advancement-2/
New Online Popcorn Sale Available

We know there is some concern on how to cover the costs of new Scouts joining this time of year as fundraising is over. We do have the opportunity to continue to sell popcorn online until the end of the December 9, 2019. Please share this exciting news with your families.

The extended online sale is pretty simple and offers Scouts a 41% commission. The new Scout only needs to sell $150.00 of product to cover their $60.00 registration fee for 2020. Two more great things about the online popcorn sale are:
1. We don't have to collect money
2. We don't have to deliver product

Online Popcorn Sale Extension: November 1—December 9, 2019

Frequently Asked Questions

- Sales made between November 1-December 9 will earn 41% commission, to help offset the 2020 registration fees
- No Prizes or Bonus Prizes will be offered
- All commission will be deposited in the unit account at the Center for Scouting by December 20.

A detailed list of the Scouts sales will be emailed to unit leaders
- If a scout sold popcorn this fall, please continue to use the current Scout Seller ID.
- If a scout didn’t sell popcorn in 2019 and would like to participate in the online sale extension, please email Nikki.Woolf@scouting.org the following information: Email Must include the Scout’s First Name, Last Name, Unit Number, Email Address.
- Once a Scout is added to the online popcorn system, they will receive an email with a link to the store and their unique Scout ID
- FREE SHIPPING on all products ordered online