

2021 Charter Renewal



Unit Training
October 2020



BOY SCOUTS OF AMERICA®

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Charter Renewal Overview





- Annual renewal of your unit's charter with the National Council
 - Update membership roster
 - Renew charter agreement with chartering organization
 - Pay national membership fees
- 2 step process:
 - Update roster with online program
 - Submit recharter application and forms to local council



New for 2021



2020 BSA National Membership Fees

ANNUAL MEMBERSHIP FEE	
EFFECTIVE	EFFECTIVE
AUGUST 1 2020	OCTOBER 1 2020
FOR ALL NEW MEMBERS	FOR ALL RENEWING MEMBERS (RECHARTER)
\$66/YR	Participants in Kindergarten through age 20 
\$42/YR	 Participants age 10 - 20
\$42/YR	All registered adult volunteers in unit and non-unit positions. (Volunteers with multiple registrations will continue to pay for only one position).



New for 2021



2020 BSA National Membership Fees

NEW - MEMBER JOINING FEE

EFFECTIVE

AUGUST
1
2020



ONE-TIME

\$25

TO JOIN

Same flat fee no matter when you join during the year. (no prorating) New members pay joining fee in addition to membership fee.



UNIT RECHARTER FEE

EFFECTIVE

AUGUST
1
2020



\$75/YR

For all new and rechartering units.



New for 2021



Criminal Background Check Authorization form on file confirmation

- Criminal Background Check (CBC) Authorization forms were collected for adult leaders with the 2020 Charter Renewal process
- Status of adult CBC form on file part of online Step 2 Member Data update along with Youth Protection Training certification review
- Adults without CBC form on file must submit form along with charter renewal application
- CBC forms link on Bay-Lakes Internet Recharter web page



New for 2021



Screenshot from online charter renewal tool

STEP 5 OF 6 : UPDATE MEMBER DATA

REMINDER: Each volunteer is asked to sign a document titled "Additional Disclosures & Background Check Authorization." The signed forms should promptly be gathered by unit leaders and delivered to the local council service center or sent directly to the council. This process should be completed during the unit renewal period. Please also refer to the FAQ.

Please scroll through your roster and ensure the personal information is correct. If the personal information is not correct, click the **Update** button to the left of the name.

When roster is complete, click **Next Step**.

Note: You will have the option to signup members for *Boys' Life* during the Update Fees stage.

Search

Make Update	Remove from Roster	Name	Birth Date	Address / Phone	Position	Boys' Life	YPT Trained	YPT Date	CBC Auth On File
Update	Remove	David ...			1. Committee Chairman	Y	Y	09/03/2020	Y
Update	Remove	Thomas 127			1. Executive Officer	Y	N	09/08/201	N

- **N = No CBC form on file**
- **Unit must submit missing form along with charter renewal application**

Course : Youth Protection Training - Y01

YPT Date : 9 / 3 / 2020

CBC Auth on File : 3/27/2020





2021 Charter Renewal Schedule

October

- Recharter information and access codes to unit Key 3
- Assign Charter Renewal Processor and review rosters
- Review Youth Protection Training recertification needs

November

- Update roster with online charter renewal tool
- Get charter application approval, required forms, and fees

November – December

- Turn in charter renewal application at district check in event
- Deadline to turn in charter renewal application: December 21





Youth Protection Training

- BSA Youth Protection Training required for all adult leaders
- Youth Protection Training must be current on January 1, 2021 in order for the leader to recharter
- Avoid year-end bottlenecks – renew lapsed Youth Protection Training certifications early



Youth Protection Training Catholic Units



All adult leaders registered with units chartered by Catholic Churches are required to have church required youth protection training *in addition to* the BSA's Youth Protection Training:

- Milwaukee Archdiocese: Safeguarding All of God's Family
- Green Bay Diocese: Virtus

Leaders should check with their parish training coordinator for details on the training requirement and options to receive the training if it's needed



Online Charter Renewal Program Browser Requirements



- Online program works best with Chrome or Firefox Operating Systems
- Microsoft OS requirements:
 - IE version 11.0 or higher
 - Turn off Compatibility View
 - Enable JavaScript
- Not compatible with Apple OS



Charter Renewal Application Approval Options



Online Approval

- Done in Step 5 (Submit Roster – Approve Roster)
- Grant access to either chartered organization Executive Officer or unit Chartered Organization Representative – an email requesting approval is sent
- Organizational representative selects “I AGREE” option
- Organizational representative approving charter can’t be same person doing online charter renewal process

Manual Approval

- If “I (WE) DO NOT AGREE” option is selected in Step 5 Approve Roster the charter application must be signed for approval
- Signatures required on first page of final roster report
- Must be signed by chartered organization Executive Officer **and** the Unit Leader

Note: The Executive Officer must sign the Unit Annual Charter Agreement form even if online approval is done





Fee Payment Options

1. Check – *Recommended*

- Most flexible: allows for later local adjustments if there are changes to membership

2. Unit account payment

- Note: Insufficient account balance when recharter is processed causes delays

3. Charge card payment

- Completed online in Step 5
- Carries 3% service fee
- Not flexible: charge fees can't later be refunded if a member decides not to recharter





Recharter Application Turn In

- Recharter application and required forms must be turned in to a Commissioner or Professional
 - Each district has scheduled turn-in events to review and check in recharter applications
- Do not mail or drop off recharter application and forms to the Council Office
 - Recharter applications not checked in may be defective, causing processing delays
- Deadline to turn in your recharter application:
December 21



Recharter Application Check List of What to Turn In



Documents to turn in for your recharter application:

1. Final copy of approved and updated unit roster from online recharter process
 - Do not submit EZ-Summary report roster
2. Application forms for youth or adults registering for the first time with the unit during the charter renewal process (if applicable)
 - Adult applications require signed Additional Disclosures & Background Check Authorization form
3. Annual Unit Charter Agreement form with required signatures
4. 2020 Journey to Excellence form (even if award is not earned)
5. Charter renewal fees (if not already paid online)
6. Date, location, and time for 2021 Friends of Scouting presentation
7. Unit Key Contact Information form





Helpful Tips

1. Create an easy to remember password: use your unit number
 - Forgotten passwords can only be reset by the Council Registrar
2. In Step 1 – Load Roster option: select “Load Council Information”, not “Upload Recharter File”
 - Load Council Information option lets you sync with registrations and information in the council office
3. Print two copies of the final charter renewal roster
 - Turn one copy in, keep the other as your record until the charter renewal has been processed





Helpful Tips (con't)

4. Pay charter renewal fees by check
 - Disadvantages of paying online:
 - It's more expensive – comes with an additional 3% processing fee
 - Online payments can't be refunded later if you decide a member isn't going to recharter with the unit

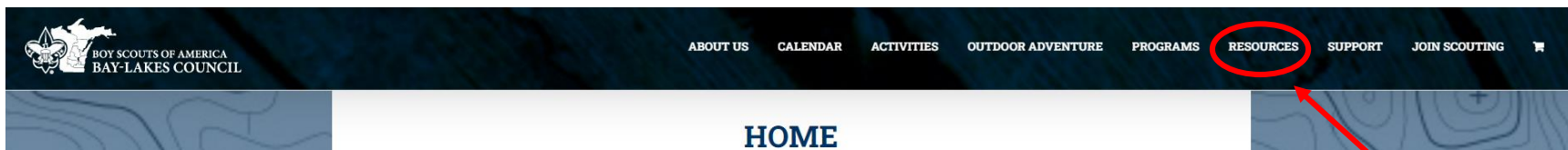
5. If you need your chartered organization's Executive Officer to sign your charter also get his/her signature at the same time on the Annual Unit Charter Agreement so a separate trip isn't required



Resources

Bay-Lakes Council Internet Home Page

<https://baylakesbsa.org>



Select
"Resources"
from Main
Menu

**JOIN US AT THE VIRTUAL
GOLDEN EAGLE EVENT**
TUESDAY, OCTOBER 13, 2020 AT 4:00 P.M. CST LIVESTREAMED

Join guest speaker, **MASON CROSBY**, and the Bay-Lakes Council for an inspiring virtual event, as our area's corporate and community leaders come together to support our young Scouts and future leaders.

The Golden Eagle Event proudly supports the mission and services we provide for our 18,417 youth.

FOR REGISTRATION OR SPONSORSHIP VISIT:
ONE.BIDPAL.NET/GOLDENEAGLE

GOLDEN EAGLE

Resources



BOY SCOUTS OF AMERICA
BAY-LAKES COUNCIL

ABOUT US CALENDAR ACTIVITIES OUTDOOR ADVENTURE PROGRAMS **RESOURCES** SUPPORT JOIN SCOUTING

RESOURCES

HOME / RESOURCES

General Resources

- Advancement
- Adult Leader Training
- Awards Central
- Commissioner Resources
- Eagle Scout Information
- Guide to Safe Scouting
- Marketing Resources
- Merit Badge Counselor Information
- ScoutBook
- Scouting Forms
- Scouting Gear
- Scouting Safety
- Youth Leader Training
- Youth Protection

Unit Resources

- Bay-Lakes Scout Shop Order Form
- Cub Scout Leader Resources
- Cub Scout Recruiting Resources
- Fiscal Policies & Procedures for BSA Units
- Guide to Safe Scouting
- **Internet Charter Renewal**
- International Scouting
- Journey to Excellence
- Scouts with Special Needs
- Service Hours Reporting
- Unit Program Planning
- Description of Coverage

National Resources

- MY.Scouting.org
- Boy's Life
- Bryan on Scouting
- Scouting Magazine
- ScoutingWire
- ScoutBook

**From Unit Resources list, select
"Internet Charter Renewal" link**

Ad Banner



BOY SCOUTS OF AMERICA®

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Resources



Your 1 stop for all the charter renewal resources you need



WHY	WHEN	TRAINING EVENT
<p>The chartering process is one of the oldest traditions in Scouting. It is the formal document that certifies the agreement between a Chartered 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.</p> <p>The BSA grants charters to sponsoring (chartered) organizations who must report to Scouting annually to renew their local charters. Charter Renewal is the process where a Scout unit renews its charter as an official part of the Boy Scouts of America.</p>		

STEP 1: PRE-PLANNING ACTIVITIES

1. Print 2021 Charter Renewal Guidebook

The *Charter Renewal Guidebook* explains the timelines, key roles, major process steps, and common challenges. Please use this handbook along with the Charter Renewal web page and your district's commissioner staff to submit your 2021 Charter Renewal Application on time and error free.

2. Assign Tasks: Charter Renewal Roles and Duties

3. Complete Unit Membership Inventory

- Pack Membership Inventory Worksheet
- Troop Membership Inventory Worksheet
- Crew Membership Inventory Worksheet
- Ship Membership Inventory Worksheet

Link for 2021 Charter Renewal Guidebook



Resources



Return each of the following items with your 2021 Charter Renewal:

1. Charter Renewal Report

Print from Internet **Charter Renewal Website**. *Do not submit E-Z/Summary Report*

2. Schedule your **Friends of Scouting Presentation** online. *(Online form to be released by October 15)*

3. Unit Key Contact Form

4. **Journey to Excellence** scorecard specific to your unit type

Scorecards are available for all unit types and reflect changes adopted by National BSA due to Covid 19's impact during the 2020 program year.

- Pack
- Troop
- Crew
- Ship
- Post

Use the Charter Renewal Checklist to be sure that you have all required materials included for your final charter turn-in meeting.

Any charter renewals not received at the Council office by December 31, 2020, will be placed on the "Non-member" list. Any Units on the "Non-member" list will not have access to membership privileges and services offered by the Boy Scouts of America. Including but not limited to: use of camping facilities, activity attendance, advancement system and accident & liability insurance.

ADDITIONAL RESOURCES

- BSA Charter Renewal Stages – Version 12 *(Coming Soon)*
- BSA Adult Application
- Background Check Disclosure
- Additional Disclosures & Background Check Authorization Form
- BSA Youth Application
- How to Print Training Reports
- How to Complete Youth Protection Training *(Coming Soon)*
- Annual Charter Agreement
- Accident Insurance Brochure
- Membership Specific Assistance Request

Links to forms

Tutorial for online charter renewal tool

Ad Banner



Resources

2021 Charter Renewal Guidebook



Link near top of Internet Recharter Resources Page

- Instructions
- FAQs
- How-To's
- Check List
- Tips

Bay-Lakes Council Boy Scouts of America



2021 CHARTER RENEWAL GUIDEBOOK

The information provided in this Guidebook is a tool provided for Unit Leaders and Charter Renewal Processors (RP) who will be completing their unit's annual charter renewal between November 1 - December 31, 2020.

An electronic version of the Guidebook, along with additional support materials can be found on the [Bay-Lakes Council website \(www.baylakesbsa.org\)](http://www.baylakesbsa.org), click on [Resources](#) in the tool bar, then click on [Internet Charter Renewal](#).

WHAT IS A CHARTER?

A unit charter authorizes an organization to operate a 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, 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.

IMPORTANT:

The Charter Renewal Processor (RP) is going to view and handle information confidential to your unit's

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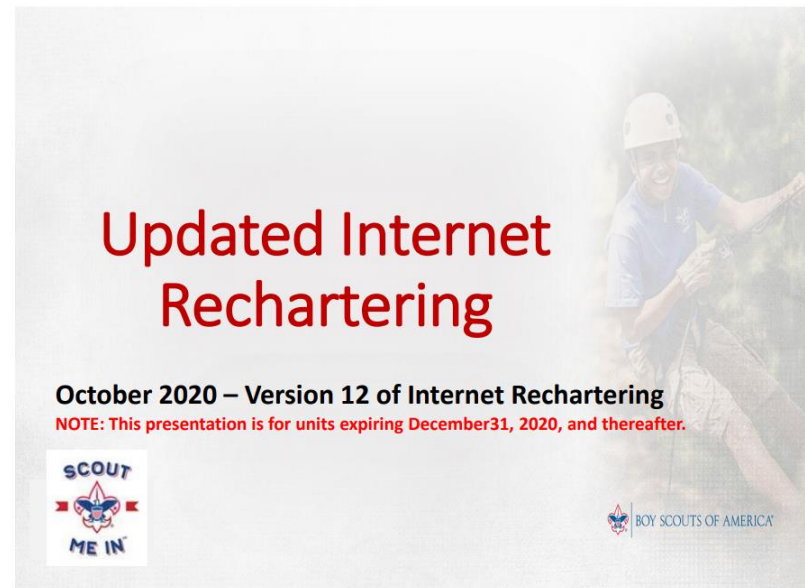
Resources

Online Charter Renewal Tool Tutorial



Link at bottom of Internet Recharter Resources Page in Additional Resources section

- Step-by-step instructions
- Tips
- Tool screen shots



Resources



Need charter renewal help?

Contact your District Commissioner
or Unit Commissioner



Resources



New this year: Commissioner Clyde is on duty 24/7 to help with charter renewal

Have a question or need help? Send an email to:

BayLakesCommissionerHelp@gmail.com

One of Clyde's colleagues will get back with you quickly



Most Common Mistakes



1. Defective Adult Application

Please print one letter in each space.

BSA ADULT APPLICATION

First name (Full legal name) Middle name Last name Suffix
 Preferred nickname:
 Country Home address City State Zip code
 Primary phone Alternate phone Ext. Date of birth (mm/dd/yyyy)
 Ethnic background: Male: American, Hispanic/Latino, Other Name, Other Ethnicity, Other Race
 Gender: M / F
 Country Business address City State Zip code
 Position code Scouting position title Are you an Eagle Scout? Date earned (mm/dd/yyyy)
 Email address (Select one) Work Home Boys' Life subscription
 I hereby certify that:
 1. I have read and affirm that I accept the Declaration of Religious Principle. I agree to comply with the rules and regulations of the BSA and the local council, including the Scoutmaster Code of Conduct.
 2. I affirm that the information contained in this application is true and accurate to the best of my knowledge and belief.
 Signature of applicant Date
 Signature of Scout executive or designee Date
 Signature of chartered organization head or representative Date
 Unit type: Former leader / Participant, Former leader / Multiple application, Former leader / Multiple application
 District name Council No. Unit No. or District name
 Registration fee Boys' Life fee PAID: Cash Check No. Credit card

Additional Disclosures & Background Check Authorization
 Additional Disclosures
 The state disclosures below are included because state law requires them to be provided in writing. Some of the below rights, notices, or information also may apply to individuals from, applying to, or volunteering in states not listed below. There may be additional requirements, options, or provisions applicable to you and you may have additional rights under applicable law that are not required to be disclosed to you in writing.

1. Missing Driver's License # or SSN
2. Incomplete questions or references
3. Missing applicant initials or signature
4. Missing Chartered Organization Representative approval signature
5. Missing unit number
6. Missing or unsigned Additional Disclosures & Background Check Authorization Form (app page 9)





Most Common Mistakes

2. Missing form or incorrect signatures on required Annual Unit Charter Agreement Form

THE ANNUAL UNIT CHARTER AGREEMENT BETWEEN:

_____ and the _____ Council, BSA
Chartered Organization Local Council

Pack No. _____ Troop No. _____ Crew No. _____ Ship No. _____
(Please identify those units chartered by the Chartered Organization.)

The purpose of the Boy Scouts of America (BSA) program is to prepare young people to make ethical and moral choices over their lifetimes by instilling in them the values and principles taught in the Scout Oath and Scout Law.

The Chartered Organization, as a duly constituted organization that serves youth, desires to use the program(s) of the BSA to further its mission respecting the youth it supports. The Local Council provides the support and

Local Councils will serve as a youth member of unit and council committees on which the COR serves; and will, with the Chartered Organization, select and approve volunteer leaders for submission to the Local Council for its consideration. The COR will work with the unit committees sponsored by the Chartered Organization.

- Support unit committee(s) made up of at least three persons for each unit.

in developing a successful Scouting program.

- Provide primary general liability insurance to cover the Chartered Organization, its board, officers, COR, employees, and Scouting members and volunteers for authorized Scouting activities. Indemnify the Chartered Organization in accordance with the resolutions and policies of the National Executive Board of the Boy Scouts of America.

Signed _____ Title _____ Date _____
For the chartered organization

Signed _____ Title _____ Date _____
For the BSA local council

Signed _____ Title _____ Date _____
Chartered Organization Representative



524-182
2019 Printing

- **Link to form on Internet Rechartering Resource page**
- **Form does not print as part of online charter renewal roster**

Required Signatures:

Chartered Organization Executive Officer

District Representative
(Commissioner or Professional)

Chartered Organization Rep



Most Common Mistakes



3. On-Line Charter Renewal Program Mistakes

- In Step 5 - Submit Charter: Failing to click the “Submit” button after making all changes and completing the process
- Completing on-line charter renewal process but failing to physically turn in the roster and required forms for processing
- Submitting draft EZ-Summary roster instead of final roster for processing





Most Common Mistakes

4. Listing different Chartered Organization Representatives for the same chartered organization.

- When more than one unit is chartered by the same chartered organization, all units at that organization must have the same Chartered Organization Representative (COR).
- When multiple units with the same chartered organization have their charter renewals processed, the COR for first unit processed becomes the COR of record. If other units from the same chartered organization are later processed with a different COR the other units' recharterers become defective.



Most Common Mistakes



5. Incorrect approval signature on first page of charter roster

- Charter renewals that are *not* electronically approved during the Step 5 (Submit Roster – Approve Roster step) on-line process require approval signatures of the chartered organization's Executive Officer *and* the Unit Leader on the hard copy of the final roster.
- A common mistake is having a non-authorized signature on the form, such as the Committee Chair.





Questions?

BayLakesCommissionerHelp@gmail.com



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