# **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 <u>Bay-Lakes Council website (www.baylakesbsa.org)</u>, click on <u>Resources</u> in the tool bar, then click on <u>Internet Charter Renewal</u>.

#### 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.

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#### 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 <a href="www.baylakesbsa.org">www.baylakesbsa.org</a>.

### **IMPORTANT:**

The Charter Renewal Processor (RP) is going to view and handle information confidential to your unit's members and the Boy Scouts of America. By working with this information, the RP accepts the responsibility of maintaining the privacy and confidentiality of this information. The RP must agree that information will only be shared with registered individuals within your unit, Bay-Lakes Council and/or the Boy Scouts of America. This information must never be shared outside of the Boy Scouts of America. If a volunteer cannot accept this responsibility, then they should not serve as the RP or be a part of the renewal process.

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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 (October 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 21, 2020

#### **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/current Youth Protection Training 2.0
    - Print Unit Training Report from My.Scouting.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 (October 7, 2020 at 6 pm via Zoom)
  - ☐ WHO: COMMITTEE CHAIR (CC); CHARTER RENEWAL PROCESSOR (RP)
  - Attend District Charter Renewal Training Session
  - Confirm roster of continuing adult and youth members
  - Collect applications for new adult and youth members joining the unit as of January 1, 2021
  - Collect new Disclosure Authorization forms for leaders who have not submitted yet
  - 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 (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 and 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 21, 2020.

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# **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 2021.

- 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.
- 4. Collect new Additional Disclosure Authorization forms from any renewing adult leaders who have not yet submitted the form.
- 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 Additional Disclosure Authorization form.
  - Verify each adult leader has current Youth Protection Training.

Youth and adult applications can be printed from www.baylakesbsa.org.

#### **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.)

# 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.

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# 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

### O R

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 <u>My.Scouting.org</u> 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:

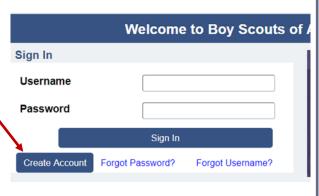
 Scroll down the page and click on: Youth Protection Training -MANDATORY

- On the next screen, click on the "TAKE COURSE" button on the right-hand side of the screen.
  - Complete all 3 training modules:
    - 1. Overview and Policies 2. Sexual Abuse 3. Bullying
  - 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 <u>My.Scouting.org</u> for 24 Hours following the completion of the training.
- Please note the preferred internet browsers for <u>My.Scouting.org</u> 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 email <a href="mailto:Jennifer.neuville@scouting.org">Jennifer.neuville@scouting.org</a>.





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# New for 2021:

# ALL ADULT LEADERS MUST COMPLETE THE ADDITIONAL DISCLOSURES & BACKGROUND CHECK AUTHORIZATION FORM BY DECEMBER 31, 2021.

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 2021.

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

\*\*If an adult leader has already submitted the Additional Disclosures & Background Check Authorization Form, then there is no need to re-submit. This requirement is only for adult members over age 18 and registered with a unit who have not yet completed the new Authorization form.\*\*

If an adult member chooses to decline the background check, or if they do not complete the <u>Additional Disclosures & Background Check Authorization Form</u> their 2021 annual registration will not be processed.

\*\*Anyone registered as Venturing or Unit Participant (Ages 18-21) must also complete the

# **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 \$16.50 Registration \$3.00 Boys' Life
 November \$11.00 Registration \$2.00 Boys' Life

• December \$5.50 Registration Boys' Life is not available for one month

As of January 1, 2021 membership fees will be as follows:

### **Annual Renewal Fees:**

# January 1 through December 31, 2020

Youth: \$66.00 Each (\$5.00 per month)
 Adults: \$42.00 Each (\$3.00 per month)

Boys' Life Subscription: \$12.00 Each
Unit Liability Insurance Fee: \$75.00 per unit

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

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# **Frequently Asked Questions:**

# **Boys Life and Scouting Magazine Subscriptions:**

Boys Life and Scouting magazine subscriptions run from March 2021 - February 2022. Any magazines received by Scouts in January and February of 2021 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 2021, 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 2021 Charter year (January 1, 2021), 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, 2021 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.

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# Log-In to Online Charter Renewal System:

LOCATED AT: https://scoutnet.scouting.org/ucrs/UI/home/default.aspx

**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

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

- 1. Visit: <a href="https://scoutnet.scouting.org/ucrs/Ul/home/default.aspx">https://scoutnet.scouting.org/ucrs/Ul/home/default.aspx</a>
- 2. Select CLICK HERE TO BEGIN
- 3. Select FIRST TIME USER
- 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-

EVERYONE

Must Log-In

As a

FIRST TIME

USER

As of

10/01/2020

### **Final Check List:**

What do I need to turn into Council once my charter is complete?

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

All completed charters are due to the Council office by December 21, 2020.

Any charter not received by the Council office by December 31, 2020 will be placed on the "Non-Member" list.

Any liability insurance coverage will not apply to units without current Charters.

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# On-Line Charter Renewal Stages & Steps:

### **INTERNET CHARTER RENEWAL STAGES & STEPS:**

Charter Renewal Processor Logs In: <a href="https://scoutnet.scouting.org/ucrs/UI/home/default.aspx">https://scoutnet.scouting.org/ucrs/UI/home/default.aspx</a>
Log In Steps:

• Remember every unit must log in as a FIRST TIME USER during their initial visit to the site. Each unit only has 1 user profile in the system. Whoever logs in first, is setting up the password for the unit.

 The Recharter Processor must agree to the Confidentiality Agreement before moving to Stage 1.

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 Scout that was registered with a unit in 2020 is going to join your unit your unit as of January 1, 2021, then they are considered a NEW MEMBER and an application must be completed and submitted with the charter renewal paperwork. Contact the

Center for

Scouting at

920-734-5705

if You Need to

Reset Your

On-line Charter

Renewal

**Password** 

- Step 4: Add a New Member
  - Enter member data 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.

### Questions?:

- Click here to access the <u>Frequently Asked Questions</u>
- Click Help in the upper right-hand corner of the Online Charter Renewal System screen
- Review Updated Internet Rechartering PowerPoint located: <a href="https://baylakesbsa.org/resources/internet-recharter/">https://baylakesbsa.org/resources/internet-recharter/</a>

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# Charter Renewal Stages & Steps: (Continued)

### **INTERNET CHARTER RENEWAL STAGES & STEPS:**

# 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.

### 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 a 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 21, 2020
- ☑ 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 è Contact Us)
- Click here to contact <u>Jenn Neuville</u>, <u>Bay-Lakes Council Registrar</u>

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# **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 <u>Internet Advancement 2.0</u> or <u>Scoutbook.com</u> systems.

#### **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 <u>Scoutbook.com</u> 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: <a href="https://help.scoutbook.com/">https://help.scoutbook.com/</a>

### **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: <a href="https://ht

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# Final Charter Turn-In Check List

1. CHARTER RENEWAL APPLICATION & ANNUAL CHARTER AGREEMENT:
Attach a complete printed copy of the final Charter Renewal Roster and Annual Charter
Agreement. ALL PAGES ARE REQUIRED.
a Province Consequence Days a of the about a management and institute was at his sign and OD
2. <b>REQUIRED SIGNATURES:</b> Page 2 of the charter renewal application must be signed OR
electronically approved by the adult leader registered as the Exec. Officer or Charter Organization
Representative. SUBSTITUTE SIGNATURES ARE NOT VALID.
☐ Charter Organization Representative/Executive Officer Signature on Charter Roster
☐ Electronic Signature Submitted Online
3. Youth Applications:
Included an application for each youth joining our unit as of January 1/First day of renewed
charter.
Applications all include:
☐ Signed by the parent/guardian
☐ Signed by the unit leader
All applications include unit number, full name, birth date, current grade, parent/guardian
contact information.
4. ADULT APPLICATIONS: I have included an application for each adult joining our unit as of
January 1/First day of renewed charter.
Applications all include:
☐ Signature from Committee Chair AND Chartered Organization Rep
☐ Initials & responses to all questions/statements and signature by applicant
☐ A signed Disclosure Authorization form for each application
☐ A copy of the applicant's Youth Protection Training Certificate
5. JOURNEY TO EXCELLENCE (JTE) AWARD SHEET
). JOURNET TO EXCELLENCE (STE) AWARD SHEET
6. PAYMENT:
☐ One check (preferred) for all charter renewal fees payable to Bay-Lakes Council is included.
7. Additional Information:
☐ Friends of Scouting Presentation Schedule
☐ Unit Contact Information Form.