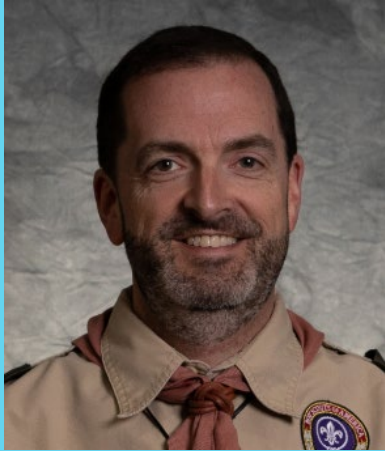




BOY SCOUTS OF AMERICA
BAY-LAKES COUNCIL

RECHARTER 2024





Tom Hemr

Assistant Council Commissioners



Dave Bainbridge



Melissa Lochner

Program/Membership
Customer Service Representatives



Laura Martin

WE'RE HERE TO HELP

WHERE DO I START?

1. Select a Recharter Champion
2. Submit new youth & adult applications promptly
3. Know who is renewing; collect fees
4. Check YPT for all adults

BOY SCOUTS OF AMERICA YPT Status Report

Organization Name: Skyline 75
Report Generated By: Taylor
Data Report Generated: 10/03/2017

| Name | Service Area | District | Program | Unit Number | Chartered Org Name | First Name | Middle Name | Last Name | Member ID | Position | Status | Effective Through |
|--|---------------|----------|--------------|-------------|--------------------|------------|-------------|-----------|-----------|--------------------------------|--------|-------------------|
| East Division - SAGE, Skyline - 75 - Skyline 75 (Count: 112) | | | | | | | | | | | | |
| Ben Houston Area | East Division | SAGE | Skyline - 75 | | | | | | | Merit Badge Counselor | YES | 05/05/2018 |
| Ben Houston Area | East Division | SAGE | Skyline - 75 | | | | | | | Charter Member-at-Large | NO | 04/09/2017 |
| Ben Houston Area | East Division | SAGE | Skyline - 75 | | | | | | | Charter Member-at-Large | NO | 04/09/2017 |
| Ben Houston Area | East Division | SAGE | Skyline - 75 | | | | | | | Charter Member-at-Large | NO | 01/06/2013 |
| Ben Houston Area | East Division | SAGE | Skyline - 75 | | | | | | | Merit Badge Counselor | YES | 05/07/2018 |
| Ben Houston Area | East Division | SAGE | Skyline - 75 | | | | | | | District Commissioner-at-Large | YES | 05/07/2018 |
| Ben Houston Area | East Division | SAGE | Skyline - 75 | | | | | | | Unit Commissioner | YES | 05/07/2018 |
| Ben Houston Area | East Division | SAGE | Skyline - 75 | | | | | | | District Member-at-Large | YES | 05/07/2018 |
| Ben Houston Area | East Division | SAGE | Skyline - 75 | | | | | | | Merit Badge Counselor | NO | 01/03/2018 |

BSA YOUTH MEMBER APPLICATION

YOUTH INFORMATION
First name (No initials or nicknames) Middle name Last name
Country Mailing address City Suffix Preferred nickname
Home phone Date of birth (month/day/year) Grade Ethnic background State Zip code
School Business phone Occupation Employer Gender
Signature of parent/guardian Parent/guardian email address






PARENT/GUARDIAN INFORMATION
First name (No initials or nicknames) Middle name Last name
Country Mailing address City Suffix Preferred nickname
Home phone Date of birth (month/day/year) Occupation Employer Gender
Cell phone Business phone Ext. Previous Scouting experience
Signature of parent/guardian Parent/guardian email address

TO BE COMPLETED BY THE UNIT
Unit type: Cub Scout Boy Scout Venturing Sea Scout Sea Cadet Sea Scout Sea Scout Sea Scout
Unit No.: For pack registration select one: Cub Tiger Cub Cub Scout Cub Scout

LOCAL COUNCIL COPY
Registration fee \$ Boy's Life fee \$

2023 Annual Membership Fees

EFFECTIVE
AUGUST
1
2023
FOR ALL
NEW
MEMBERS

| | |
|------------------------------------|---|
| NATIONAL \$80/YR COUNCIL \$ /YR | Participants in kindergarten through age 20.  |
| NATIONAL \$50/YR COUNCIL \$ /YR | For all Exploring youth and adults.  |
| NATIONAL \$60/YR COUNCIL \$ /YR | All registered adult volunteers in unit and non-unit positions. (Volunteers with multiple registrations will continue to pay for only one position).  |
| NATIONAL \$30/YR COUNCIL \$ /YR | Scoutreach participants in kindergarten through age 20.  |
| NATIONAL \$25/YR COUNCIL \$ /YR | This fee is for Merit Badge Counselors who are not already registered volunteers.  <small>Merit badge counselors who are not already registered in a unit position are not allowed to attend overnight Scouting activities/events.</small> |

NEW-MEMBER JOINING FEE

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.



No joining fee for adult volunteers, Exploring participants, participants previously registered in any BSA program, or those transferring from one program to another.

UNIT CHARTER FEE

\$100/YR
For all new and rechartering units.

SCOUT LIFE MAGAZINE FEE



RESOURCES

- ▶ Council website: <https://baylakesbsa.org/resources/internet-recharter/>
 - ▶ Video tutorial, guidebook, FAQs, documents
- ▶ National website: <https://www.scouting.org/commissioners/internet-rechartering/>
- ▶ Your unit/district/council commissioners, district professionals, registrars

This presentation focuses on online Internet Recharter.

The Annual Charter Agreement is still on paper.

(This is considered a separate process)

The image displays three pages of the Annual Charter Agreement (Form 002001-012004). The first page (left) is titled "THE ANNUAL UNIT CHARTER AGREEMENT AMONG:" and includes sections I (The Local Council agrees to) and II (The Charter Organization agrees to). The second page (middle) is titled "The Scouting Unit agrees to:" and includes sections III (The Scouting Unit agrees to) and IV (The BSA agrees to). The third page (right) is titled "B. Taskbook Dates:" and includes a table for recording dates and a signature line for the District or Charter Executive Officer.

Page 1 of 4

Page 2 of 4

Page 3 of 4

“I HEARD RECHARTERING WAS GOING AWAY...”

- ▶ True. This is the FINAL YEAR that membership renewals will be handled during annual charter renewal
- ▶ Beginning **next** summer-fall 2024, all Scouts and adults will receive email notices to renew their registration, 60 days before their expiration date
- ▶ Unit leaders will receive copies of the emails, and will be able to see who has renewed. Units will have the option to pay for their members, but that is not required.
- ▶ But this year, mostly the same...

“WAIT! MY
BRAND-NEW
SCOUTS JUST
PAID \$105
WITH THEIR
APPLICATION!”

- ▶ There was a significant registration change on August 1. Our new Scouts and adults now pay for a full 12 months upon joining.
- ▶ Any new members after August 1 will be shown on your roster as **Prepaid**. You won't pay again for them.
- ▶ However, this year your unit still needs to renew all of your previously-registered members.

WHERE TO LOG IN

Log in at

<https://advancements.scouting.org/>

Use your My.Scouting.Org
username & password.

Also available from My.Scouting.Org:
Click the Menu,
then BSA Web Links,
then Internet Advancement 2.0

The Whole **Scouting Experience** Rolled
Into One Great Free Web App

TRY NOW

SCOUTBOOK

Life Skills
Edge/Skill
Climbing
Activities

70%
100%
60%

BSA

Login to
Internet Advancement

Username (my.scouting)

Password

I'm not a robot

LOGIN

Forgot username / password?

Sign in as Tom
tomhemr@gmail.com

Sign in with Apple

Credit for several slide contents and notes: Mike Weber,
Technology Chair, BSA National Commissioner Service Team

WHAT YOU'LL SEE

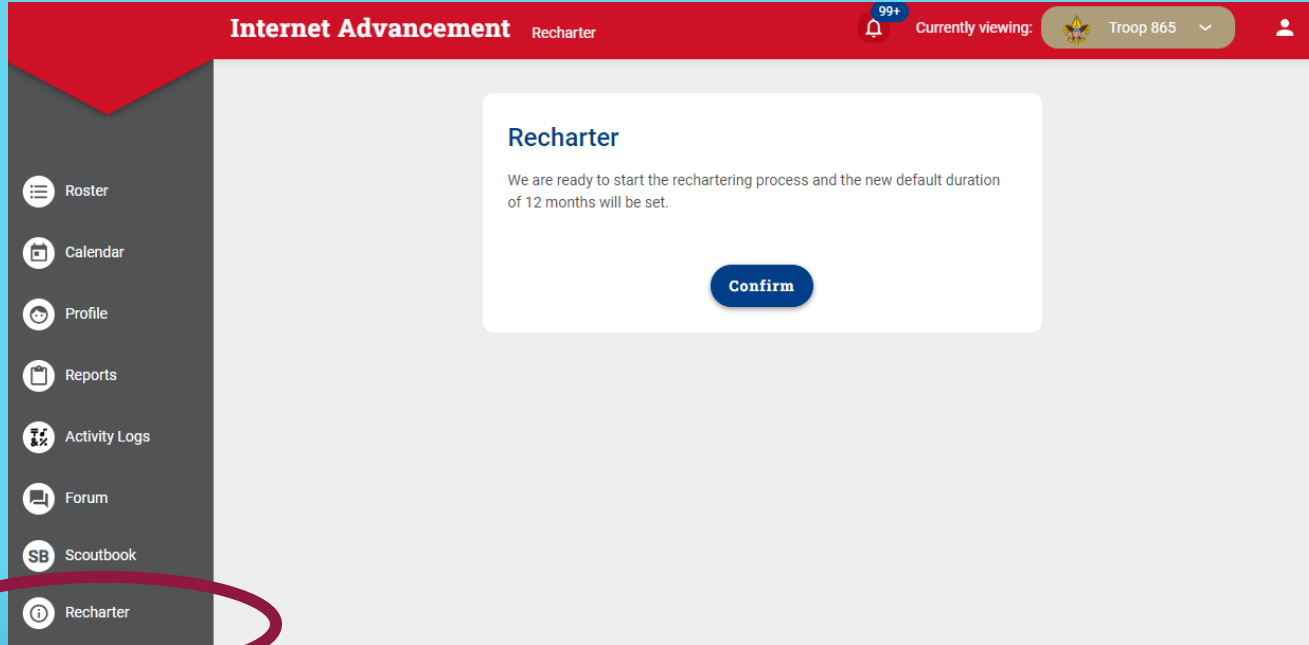
ROLE



FIRST LOGIN - MESSAGE

“We are ready to start the rechartering process and the new default duration of 12 months will be set.”

This just means all units are rechartering for 12 months, from January 1 to December 31 2024. There are no variations this year.



RECHARTER



MAIN SCREEN

The majority of your work is done on this screen.

The screenshot displays the 'Internet Advancement Recharter' interface. The top navigation bar includes 'Roster', 'Activities', 'Profile', 'Reports', 'Calendar', 'Forum', 'Scoutbook', and 'Recharter'. The main content area is divided into two columns. The left column, titled 'MY UNIT', shows details for 'PACK 52 VISTA RIDGE UNITED METHODIST CHURCH' (Family), including unit type (Pack), unit number (62), tenure (352 months), unit expire date (01/31/2023), chartered organization (Vista Ridge United Methodist Church), district (Orion), council (Longhorn Council), unit term (12 months), and unit new expire date (01/31/2024). The right column, titled 'CHARTERED ORGANIZATION INFORMATION', shows details for 'VISTA RIDGE UNITED METHODIST CHURCH', including chartered organization name, address (2901 Damon Tap Rd, Lewisville, TX), and zip code (75067-8156). Below this, the 'PACK ROSTER' section shows a table of members with columns for checkboxes, first/last names, gender, DOB, address, member type, position, member ID, YPT, CBC Auth, Scout Life, and Total. The table lists seven adult members, including an Assistant Cubmaster and several Tiger Cub Adults. A search bar and 'Show: All Roster' option are visible above the table.

| | First Name | Last Name | Gender | DOB | Address | Member Type | Position | Member ID | YPT | CBC Auth | Scout Life | Total |
|--------------------------|------------|------------|--------|------------|-------------------------------------|-------------|---------------------|------------|-------------------------------------|-------------------------------------|-------------------------------------|---------|
| <input type="checkbox"/> | [Redacted] | [Redacted] | M | [Redacted] | 1325 W Walnut Hill Ln, Lewisville | Adult | Assistant Cubmaster | [Redacted] | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | --- | \$0.00 |
| <input type="checkbox"/> | [Redacted] | [Redacted] | F | [Redacted] | 1325 W Walnut Hill Ln, Flower Mound | Adult | Tiger Cub Adult | [Redacted] | --- | --- | <input checked="" type="checkbox"/> | \$15.00 |
| <input type="checkbox"/> | [Redacted] | [Redacted] | F | [Redacted] | 1325 W Walnut Hill Ln, Lewisville | Adult | Lion Adult Patron | [Redacted] | --- | --- | <input type="checkbox"/> | \$0.00 |
| <input type="checkbox"/> | [Redacted] | [Redacted] | F | [Redacted] | 1325 W Walnut Hill Ln, Lewisville | Adult | Tiger Cub Adult | [Redacted] | --- | --- | <input type="checkbox"/> | \$0.00 |
| <input type="checkbox"/> | [Redacted] | [Redacted] | M | [Redacted] | 1325 W Walnut Hill Ln, Denton | Adult | Tiger Cub Adult | [Redacted] | --- | --- | <input type="checkbox"/> | \$0.00 |
| <input type="checkbox"/> | [Redacted] | [Redacted] | F | [Redacted] | 1325 W Walnut Hill Ln, Lewisville | Adult | Tiger Cub Adult | [Redacted] | --- | --- | <input type="checkbox"/> | \$0.00 |
| <input type="checkbox"/> | [Redacted] | [Redacted] | M | [Redacted] | 1325 W Walnut Hill Ln, Flower Mound | Adult | Tiger Cub Adult | [Redacted] | --- | --- | <input type="checkbox"/> | \$0.00 |

- Roster Update
- YPT Check
- CBC Form Check
- Scout Life – add or remove subscriptions
- Change Adult Leader Position
- Remove any members not continuing
- Add new members *(Better practice is to submit applications in advance for easier charter processing.)*
- Manage “Multiple” registrations...

WHAT ARE “MULTIPLES”?

- ▶ Many Scouts or adults are registered in more than one unit. Examples:
 - ▶ Den Leader in a pack, registered adult in a troop
 - ▶ Scoutmaster for boy troop, assistant for girl troop
 - ▶ Youth member in a troop and a crew
 - ▶ Adult member in a troop, Merit Badge Counselor in a district *(troop role would always be primary)*
- ▶ Only need to pay fee once = PRIMARY unit
- ▶ All other units = mark as MULTIPLE, for no charge
- ▶ Communicate with these members and with the other units. AGREE on which unit will be primary for each person.

MINIMUM REQUIRED ADULT LEADERSHIP

- ▶ Every unit needs 1 **Chartered Organization Representative (COR)**
- ▶ Every unit needs 1 **Institutional Head (IH)**
e.g. president of the club, pastor of the church, owner of the company, etc. -- no fee, no YPT required. Could also be the COR.
- ▶ Every unit needs 1 **unit leader**
Cubmaster for packs, Scoutmaster for troops, Skipper for ships, Advisor for crews and posts
- ▶ Every unit needs 1 **Committee Chair** and at least 2 **Committee Members**
- ▶ Packs also need at least 1 **Den Leader**
- ▶ The second Committee Member may be registered as a New Member Coordinator (in packs or troops) or a Pack Trainer (in packs only).
- ▶ Each person can have only one registered position. Only the COR may double as a Committee Chair or Committee Member (or triple as an IH).

ADULT LEADERSHIP

Two registered adult leaders 21 years of age or over are required at all Scouting activities, including all meetings. There must be a registered female adult leader 21 years of age or over in every unit serving females. A registered female adult leader 21 years of age or over must be present for any activity involving female youth or female adult program participants.



- ▶ As of September 1, **all adults staying overnight** in connection with a Scouting activity must be currently registered as an adult, in the position they are serving in.
- ▶ Registration as a merit badge counselor position does not meet this requirement.
- ▶ Exception: Cub Scout parents or legal guardians taking part in an overnight Cub Scout program with their own child or legal ward are not required to register as leaders. They must be accompanied by a registered leader at any time they are with youth members other than their own child/ward. All other overnight adults must be currently registered in an adult fee required position.
- ▶ At council summer camps, adults are required to be registered with the specific unit they are attending with. This is a national directive.



- ▶ Highly recommend for all adults joining your unit
 - ▶ All adults need to login or create a My.Scouting account, and take YPT first, anyway
 - ▶ Since they're already logged in, the application is easy after that
 - ▶ COR can approve adults electronically. No more scanning/emailing or driving around for signatures.
- ▶ Find your unique unit link in “Invitation Manager” in My.Scouting.org. It will look something like
<https://my.scouting.org/VES/OnlineReg/1.0.0/?tu=UF-MB-635taa####>
- ▶ Suggest trying online apps for youth, where possible
 - ▶ If not practical, scan and email PDF to application@baylakesbsa.org

ONLINE MEMBERSHIP APPLICATIONS

PAYMENT SCREEN

Features on Payment Screen

- Payment Summary
- Payment Method

Payment Options

- Credit Card (3% fee)
- ACH (\$1.00 handling fee)
- Check <<< **HIGHLY RECOMMENDED**

The screenshot shows a payment screen with the following sections:

- Navigation:** "Back to: Recharter Info", "Complete Recharter Information", and "Payment and Confirmation".
- BILLING INFORMATION:** Fields for First Name, Last Name, Code (USA), Phone Number, Email Address, Country (USA (US)), Address, City, State, and Zip Code.
- PAYMENT METHOD:** Three options: "Credit Card payment" (highlighted with a yellow circle), "ACH payment" (highlighted with a yellow circle), and "Pay at Council" (highlighted with a yellow circle).
- RENEWAL ROSTER FEES:** A table with columns for item, quantity, and fee. The total amount is \$726.15 USD.
- Pay and Post Renewal:** A button highlighted with a blue circle.
- Disclaimer:** A text box at the bottom right explaining the payment process and options.

| RENEWAL ROSTER FEES | QUANTITY | FEES |
|---------------------|----------|-----------------|
| REGISTRATION | | |
| Paid Youth | 5 | \$90.00 |
| Pre Paid Youth | 0 | \$0.00 |
| Multiple Youth | 0 | \$0.00 |
| Paid Youth SL | 0 | \$0.00 |
| Pre Paid Youth SL | 0 | \$0.00 |
| Paid Adults | 5 | \$270.00 |
| Pre Paid Adults | 0 | \$0.00 |
| Multiple Adults | 0 | \$0.00 |
| No Fee Adults | 1 | \$0.00 |
| Paid Adult SL | 0 | \$0.00 |
| Pre Paid Adult SL | 0 | \$0.00 |
| Charter Fee | | \$75.00 |
| Paid Join Fee | | \$0.00 |
| Council Fee | | \$0.00 |
| Administrative Fee | | \$21.15 |
| TOTAL AMOUNT | | \$726.15 |

During this process, you have ability to verify all fees and choose your payment option. The payment option is ACH (\$1 fee), Credit Card (3% fee) and Pay at Council, which a local processing fee may apply. If you pay at council, you will need to provide a form of payment to the local council in order to register your unit. Once you have chosen your payment option, click the Pay and Post Renewal button.

We highly recommend that units choose Check and make payment through the council office.

The other choices send payment straight to national. Your roster and payment are locked. Laura and Melissa cannot assist with any adjustments.

DID YOU KNOW?

UNIT ACCOUNTS

- ▶ Every unit has a financial account at council office
- ▶ Your “trusted people” (usually Key 3, treasurer, etc.) can verify balance or add funds at 247Scouting
- ▶ From baylakesbsa.org, choose Calendar, then “Access Existing Event Registration”
- ▶ Sign in with your BlackPug account
- ▶ Click your name, then make sure your unit number has a green checkmark
- ▶ Click “View Activity”
- ▶ Click on the “Unit Account” tab to view balance, make a deposit, manage the trusted people, or see all your past transactions

The screenshot shows the Boy Scouts of America Bay-Lakes Council website. The top navigation bar includes 'Calendar', 'Event Details', 'Lookup', and a user profile 'Tom'. A dropdown menu is open under 'Lookup', with 'View Activity' circled in red. Below the navigation, a text prompt says 'Click "Lookup" in the top-right, then select "Lookup Registration"'. A second dropdown menu is open, showing 'My Roster' and 'KC Troop 865 B' with a green checkmark, both circled in red. The main content area has tabs for 'Summer Camp & Activities', 'Year Round Camping', and 'Unit Account', with 'Unit Account' circled in red. The 'Unit Account' page for 'Kettle Country Troop 865 B' shows a 'UDA Balance' of \$209.53, a 'BSA Unit ID', and buttons for 'Manage Trusted People' and 'Deposit to UDA'. A 'Transaction History' table is visible at the bottom.

| Date / Nbr | Item | Amount | Balance |
|--------------|--|----------|---------|
| Jan 09, 2020 | Default Bal Unit Account Deposit Nicholas Hanson and Richard | \$465.00 | 209.53 |

FINAL STEP – YOU'RE NOT DONE YET!




Charter Approval is sent via Adobe Acrobat Sign

- An email is sent to Key 3 and Key 3 Delegates with instructions
- Any of them may approve the charter
- Preferred approval is by COR

**RECHARTERS ARE DUE BY
FRIDAY, DECEMBER 15, 2023**

CHANGE OF CHARTER ORGANIZATIONS

- ▶ All Archdiocese of Milwaukee Catholic units
 - ▶ Certain other groups, based on individual organization decisions
 - ▶ Work with your District Executive!
 - ▶ 4 forms needed:
 - ▶ Release and Assumption of the Unit Charter
 - ▶ New Unit Application
 - ▶ Annual Charter Agreement
 - ▶ BSA Adult Application for your new Chartered Organization Representative, or anyone switching positions in the unit
- 

AVOID TYPICAL CHARTER DEFECTS

- ▶ Ensure ALL Adults have a signed Background Check form on file at Scout Office (green checkmarks)
- ▶ Ensure ALL Adults have YPT up-to-date with expiration dates well into 2024
- ▶ Have all New Member Applications submitted in advance
- ▶ Compile membership inventory prior to start of charter
- ▶ Agree in advance of recharter who will complete approval
- ▶ Double-check all arithmetic including collection of funds from families
- ▶ Be aware of youth already 18 and remaining with unit that they'll need to be dropped and re-added with YPT, Adult Application, and Background Check
- ▶ Be sure any document attached to charter has a purpose & is complete
- ▶ Don't attach JTE scorecards or Annual Charter Agreements

QUESTIONS / DISCUSSION

