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BOY SCOUTS OF AMERICA  
100 YEARS OF SCOUTING



CELEBRATING THE ADVENTURE  
CONTINUING THE JOURNEY

# Charter Renewal Guidebook

CONFIABLE LEAL SERVICIAL AMIGABLE CORTÉS AMABLE

valores para toda la vida™

OBEDIENTE ALEGRE AHORRATIVO VALIENTE SANO RESPETUOSO

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My Fellow Scout Leaders,

Welcome to the annual BSA Charter Renewal! We truly appreciate community organizations establishing a charter with the BSA to conduct our programs for their families. It is time to renew your unit's charter and the Sequoia Council Commissioner staff is here to help you with the process.

To begin, review the information currently in this handbook, your charter renewal packet, and the unit roster provided by the Scout Service Center.

Meet with your key leaders early in the charter renewal period. Most units can do the bulk of the process in one evening. However, you shouldn't put it off because there could be stragglers, hard-to-get signatures, or other delays. "Be Prepared!"

The Sequoia Council is offering two options for renewing your charter this year: Paper or Internet Rechartering. Instructions for both are included both in this guidebook and in the charter packet you received. The Sequoia Council will have an Internet Rechartering link on our Web site ([www.seqbsa.org](http://www.seqbsa.org)) with instructions and tutorial. You will have access to the Internet Rechartering system beginning November 1<sup>st</sup>, with all charters due to the Sequoia Council Service Center by December 15<sup>th</sup>.

Also, make sure that you have completed your 2009 Quality Unit application and your 2010 Quality Commitment forms, and turn these into the council office or to your unit commissioner as you start your recharter process.

Yours in Scouting Service,

Philip E. Sage  
Council Commissioner

## Getting Started

### Items you need to gather before you begin your Charter Renewal:

- Your Charter Renewal Guidebook, including the current roster printed from the Council Service Center. You may use your Unit Management Software in relation to the online Rechartering system. To see which software programs interface with the Boy Scout Network (ScoutNet) please refer to the appendix section entitled “Unit Management Software” in this handbook.
- If you are planning to use the Internet Rechartering system, please find your unit’s Internet Rechartering Access Code. (Bright yellow card included in your Charter Packet.)
- Set the unit’s charter application meeting date and follow suggested meeting preparation checklist in this booklet.
- Your charter information will be available November 1<sup>st</sup> online for Internet Rechartering users and should be completed by the **15th** of December to give council staff sufficient time to review and process your charter.
- Your 2009 Quality Unit application and your 2010 Quality Commitment forms should be completed at the time your renewal packet is given to you. Please spend five minutes with the individual presenting your packet to complete these forms.

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**Important-**If your charter expires, you are not eligible to earn advancement, or to participate in events or activities that require you to be registered. This could create major problems for eagle candidates as well.

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### CONFIDENTIALITY STATEMENT

**Important:** *You are about to view information confidential to your unit and Boy Scouts of America. You accept the responsibility of maintaining the confidentiality of this information only with individuals in your unit or the Boy Scouts of America on a need to know basis.*

*You agree that this information will not be distributed or shared outside of the Boy Scouts of America.*

## Unit Charter Application Meeting Preparation

The following items are highly recommended to ease the charter renewal process for your unit.

- ❑ Set a date to meet early in your charter renewal cycle that is convenient for your team.
  - Suggested attendance: Unit Commissioner, person preparing the charter, Unit Leader, Unit Committee Chair, Finance chair, and other interested adults.
  - Consider inviting youth leaders for programs with older youth (e.g. Senior Patrol Leader, Crew President, or Team Captain)
  - Optional attendees could also include Executive Officer (Institutional Head), Chartered Organization Representative.
- ❑ Gather current copies of unit youth and leader rosters (printout included in your charter renewal packet or contact the Sequoia Council Service Center)
  - Review your current unit rosters.
  - Make changes to the roster in another color (e.g. red) to make official data entry easier to process.
- ❑ Review all materials from your Recharter Packet, including the Charter Renewal Guidebook, Centennial Quality Unit forms, and new youth and adult applications.
- ❑ Have telephone access (extra cell phones can be very helpful)
- ❑ Have refreshments (cookies, soft drinks) at hand to help keep meeting focused.
- ❑ If you need assistance, your Unit Commissioner has resources to help with the charter renewal process.

***Signed Charter paperwork and fees are due  
to either the Fresno or Visalia Service Centers  
by the 15th of December 2009.***

## Paper Rechartering Overview

### **What are the benefits of Paper Rechartering?**

Paper Rechartering is really for those individuals who are not as comfortable with the computer and prefer using the hardcopy version of the charter. This rechartering process is simpler and can be more time efficient since the data entry is done by council staff.

### **What do users need to use Paper Rechartering?**

All that is needed is the roster included in your charter packet, a pen, and a current internal unit roster to compare to. New youth and adult applications may also be needed.

### **What can I NOT do in Paper Rechartering?**

Paper Rechartering is only for charter renewal. New charters cannot be established through Paper Rechartering.

### **What are the steps in the Paper Rechartering process?**

The Paper Rechartering process is very simple. The **unit renewal processor (RP)** simply needs to make changes and corrections to the roster included in their charter packet, along with securing applications for new youth and adults.

## Paper Rechartering Instructions

### To renew a unit's charter:

1. The unit eligible for Paper Rechartering designates an adult member as the RP.
2. The RP gathers all the information regarding their current internal roster of registrants. (e.g., new applications, fees, data of which adults are holding which paid positions, etc.).
3. Start with the printed roster found in your Charter Renewal Packet. Review who is listed and their current positions and contact information.
4. Verify that the chartered organization and Executive Officer information is correct.
5. Indicate who is not continuing by running a line completely through their name and information.
6. Update information for those who are continuing by crossing out the old information and writing in the new.
7. If there are any position changes, simply cross out the old position and write in the new.
8. Circle the name of any individual who is multiple registered with your unit, indicating they are paying their registration fees with a different unit and do not need to pay with your unit.
9. Any new scouts and/or new adults not listed on the enclosed roster need to turn in a signed application form. Turn the application forms for new youth and adult members in to the Service Center as soon as possible and include a copy with your charter paperwork.
10. Review who is receiving Boy's Life subscriptions. To remove a subscription, simply cross out the Y and write in a N for that individual. To add a subscription, simply cross out the N and write in a Y.
11. The RP **sends the signed paperwork** and **fees** to the Sequoia Council Service Center for processing.

## Internet Rechartering Overview

Internet Rechartering is a Web-based software application designed to make the unit charter renewal process more efficient and accurate.

The Internet Rechartering tutorial is a step-by-step explanation of how to use the Internet Rechartering system. It includes screen captures and examples. We recommend that users take the tutorial before using Internet Rechartering.

### **What are the benefits of Internet Rechartering?**

There are two key benefits from using Internet Rechartering:

- More accurate member data, and
- Freeing up of scarce council resources.

These benefits are really two sides of the same coin. Moving some of the data entry for charter renewal from the council to the unit leads to more accurate member data (because a unit member is entering the information). Also, the council will need to only double-check and potentially edit the submitted Internet Rechartering data before it is posted to PAS (Program Administration System within the Boy Scout Network).

### **What do users need to use Internet Rechartering?**

Internet Rechartering was designed to accommodate the widest variety of users without a need for specific training. The users of Internet Rechartering should have a basic knowledge of Boy Scouts of America terminology and familiarity with a computer and the World Wide Web. Internet Rechartering contains an optional tutorial that will walk users through each step.

Internet Rechartering will require that the user have access to a computer with a **56 KB** or faster Internet connection and a browser that is **IE 5.5** or greater.

### **What can I NOT do in Internet Rechartering?**

Internet Rechartering is only for charter renewal. New charters cannot be established through Internet Rechartering. Internet Rechartering is for traditional units only – Packs, Troops, Teams, Crews, and Ships.

### **What are the steps in the Internet Rechartering process?**

The **unit renewal processor (RP)**, the person who is renewing the unit's charter, follows the process on the secure Internet site to create a charter renewal file. The RP provides Internet Rechartering with the data necessary to create the file in a series of intuitive steps.

## Internet Rechartering Instructions

### To renew a unit's charter:

1. The unit eligible for Internet Rechartering designates an adult member as the RP.
2. The RP gathers all the information needed for a traditional charter renewal (e.g., new applications, fees, data of which adults are holding which paid positions, etc.).
3. With the charter renewal information at hand, the RP navigates to Internet Rechartering via the council Web site.
4. In Internet Rechartering, the RP registers/logs in to Internet Rechartering and follows the intuitive process. Fundamentally, the process requires the RP to:
  - a. Load the Roster – use PAS or third-party unit-management software (UMS) to create the initial work-in-progress roster.  
—OR—
  - b. Upload UMS File - upload the file created in unit-management software.
  - c. Update the Roster – update charter information, select which current members to renew on next year's roster, add adult members, add youth members, update member data, and update member positions.
  - d. Check the Roster – validate that the data to be submitted conforms to BSA rules.
  - e. Update Member Fees – update fees (e.g., assign “Multiple” status) and sign up unit members for Boys' Life.
5. After double-checking the information, the RP submits the file to the council and prints the Internet Rechartering Charter Renewal package.
6. The RP **sends the signed paperwork** and **fees** to the Sequoia Council Service Center for processing.

# Detailed Internet Rechartering Instructions

## Register and Log In

Users must register as a new user for each separate unit in cases where they are the RP for more than one unit, and every year in cases where they were the RP for the same unit last year. Users can begin the process and stop before finishing. When these users return, they follow the process for the returning user to log in.

### If you are a new user:

- 1) At the Internet Rechartering home page, click the **First Time User** button.
- 2) At the registration page, enter your information into the following fields:
  - a) Access Code (yellow card included in the Charter Renewal Packet)
  - b) Unit Type (choose one from the drop-down list)
  - c) Unit Number (must be a 4 digit number, i.e. Pack 2 would be 0002.)
- 3) Click **Continue**.
- 4) Read the confidentiality statement. Click **I Agree**.
- 5) At the contact information page, enter your information. All fields are required.
- 6) Click **Register**.

### If you are a returning user:

- 1) At the Internet Rechartering home page, click the **Returning User** button.
- 2) At the Log In screen, enter the access code and password.
- 3) Click **Log In**.

## Recover a Forgotten Password

If you forget your password, a new password will be e-mailed to you.

### To reset the password:

- 1) Click **Forgot password?** on the Log In page.
- 2) At the Password Reset page, enter the following information:
  - a) Access Code (original access code provided by the council)
  - b) E-mail (e-mail address provided during registration)
- 3) Click **Reset**.

## Load Roster - Stage One

After the RP has logged in, the dynamic home page appears. This home page will change depending on how many steps of the process are left incomplete. The first time the user logs in; the home page will list all the steps in the process.

To load the roster:

1. At the home page, click **Begin**.
  2. At the Load Roster Welcome page, click **Load Roster**.
- 

**Result:** The existing PAS data is loaded into Internet Rechartering for editing, and the user is taken to the Update Roster page.

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**Important:** *Once you have selected a method for loading the roster, you cannot go back and use the other method for loading the roster without having the council reset the unit. If at a later time the unit would like to purge its UMS data, the RP must call the council to reset the unit.*

**Upload UMS File (if using this option)** After the RP has logged in, the dynamic home page appears. This home page will change depending on how many steps of the process are left incomplete. The first time the user logs in; the home page will list all the steps in the process.

To upload the UMS file:

- 1) At the home page, click **Begin**.
- 2) At the Load Roster Welcome page, click **Upload UMS File**.
- 3) At the UMS File Upload page, click **Browse**. In the dialog box, locate and select the UMS file, and click **Open**. Back at the UMS File Upload page, click **Verify File**.
- 4) Review the charter information to ensure the information is correct. Click **Continue**. At the next screen, click **Next Step**.
- 5) At the Identify New Members screen, select the check box next to the new members of the unit. Click **Next Step**.
- 6) At the Match Renewing Members screen, Internet Rechartering will present the names in the UMS file that you have not yet identified as new, but that do not match perfectly with existing members. If a member is new, click **Member is New**. If a member is renewing, select the member on the right, and click **Match**.
- 7) Click **Next Stage**

## Update Roster - Stage Two

Once the roster is loaded from PAS, the user can make the changes for the next year. The first page of the Update Roster stage is a listing of the steps needed to make the updates.

**Important:** *If the RP signs in and starts the recharter process and Loads from PAS, they will only get the members currently posted to their unit at that point. If additional enrollments are posted by the council after the RP has begun the renewal process, the downloaded roster will not include them. If the RP has many unprocessed additional enrollments that they do not want to key in as new, they should wait to start the charter renewal process or if the RP has already begun, the council can reset the unit.*

To update the roster:

- 1) At the Update Roster page, click **Next**.
- 2) At the Update Charter Information page, update the fields. Click **Next**.
- 3) At the Select Members for Renewal page, the current roster for the unit is displayed. All members are automatically selected. Deselect the members who will be in the renewed unit by clearing the check mark. Click **Next**.

At the confirmation screen, click **Next**.

### Important tips about your entries:

- Examples of a prefix are Dr.; Rev. Etc. Examples of a Suffix are Jr., II etc. You do not need to enter Mr. or Mrs.
- Name entries:
  - NO spaces between prefixes (DeCarlo not De Carlo)
  - NO apostrophes (OBrian not O'Brian)
  - NO initials for first names. NO full middle names. Use an initial.
- Every registering adult is required to provide their social security number. These are required for the criminal background check. Social Security numbers are not required for youth.
- Please make sure all of your information is 100 % accurate.

- 4) At the Add New Member (Adult) page, you can add a new adult member to your roster. To add a new adult, click **New Adult**. See [Add New Member \(Adult\)](#). If you do not need to add a new adult, click **Next**.
- 5) At the Add New Member (Youth) page, you can add a new youth member to your roster. To add a new adult, click **New Youth**. See [Add New Member \(Adult\)](#).

If you do not need to add a new youth, click Next.

- 6) At the Update Member Data screen, every adult and youth member of the unit is listed.

To update contact information for a member, click the **Update** link to the left of the member's name. To remove a member from the list, click the **Remove** link to the left of the member's name.

Click **Next**.

- 7) At the Update Member Position screen, you can double-check that a unit has all the required adult positions filled before getting to the validation step.

**To modify an adult's position:**

- 1) Click the **Update** link to the right of the adult's name.
- 2) Choose the new position from the drop-down menu, and then click **Save**.

Click **Next**.

**Add New Member (Youth)**

In step 4 of the Update Roster procedure, the RP can click **New Youth** to add a new youth member to a unit. The following procedure describes the actions necessary once the RP has clicked New Youth. The data requested in this procedure is similar to that requested on the youth membership application.

**To add a new youth member to a unit:**

- 1) At the Add New Member (Youth) screen in the Update Roster procedure, click **New Youth**.
- 2) Fill in the available fields

Click **Next**.

- 3) At the Add Personal Data screen, fill in the available fields.

Click **Next**.

Click **Save**.

---

**Result:** The new youth member is added to the working draft of the charter renewal roster. Until the charter is submitted, the RP can modify this data through the Member Update feature.

---

Click **Next**.

## Add New Member (Adult)

In step 4 of the Update Roster procedure, the RP can click New Adult to add a new adult member to a unit. The following procedure describes the actions necessary once the RP has clicked New Adult.

To add a new adult member:

- 1) At the Add New Member (Adult) screen in the Update Roster procedure, click **New Adult**.
- 2) Fill in the available field.

Click **Next**.

- 3) At the Add Personal Data screen, fill in the available fields.

**Note:** The address format changes if the user enters a different country code.

Click **Next**.

- 4) At the Add Business Data screen, fill in the available fields.

Click **Save**.

---

**Result:** The new adult member is added to the working draft of the charter renewal roster. Until the charter is submitted, the RP can modify this data through the Member Update feature.

---

Click **Next**.

- 5) At the Add Personal Data screen, fill in the available fields.

Click **Next**.

- 6) At the Add Business Data screen, fill in the available fields.

Click **Save**.

## Check Roster - Stage Three

Stage Three - Check Roster allows the RP to do a final update on the charter renewal data and to submit the data for validation against BSA business rules.

### To check the roster:

1. From the Check Roster page, the RP can select any of the four available links to alter the roster.
2. When the roster is complete, click **Check Roster**.

**Note:** If the charter renewal data does NOT conform to the BSA business rules, the check roster results page will inform the user and will dynamically create links that will help the user fix these violations. Possible violations are classified as one of two types: errors and warnings. Errors must be fixed or Internet Rechartering will not allow the process to proceed. If there are errors, Internet Rechartering will not display a Next Stage button.

Warnings are also violations of BSA business rules, but the RP can override the objections.

## Update Fees - Stage Four

Stage Four - Update Fees gives an overview of the fees owed by each member of the unit. The fees include the Member Fee, the *Boy's Life* subscription fee, and the total fee per member.

### To update fees for the unit:

- 1) From the Update Fees page, the RP may review the final charter renewal data and make any last-minute changes. If the charter data is correct, click **Summary**.
- 2) To update a fee or to subscribe to *Boys' Life*, click the **Update** link next to the left of the name.
- 3) In the Update Fee Status dialog box, enter the updated information, and then click **Save**.
- 4) When the roster is complete, click **Next**.

### To indicate a member holds multiple positions:

- Is the member multiple because he is paying in another unit?
- If so, complete the following steps:
  - 1) Select the **Update** link to the left of the name.
  - 2) Select the **Member Paid in Another Unit**.
  - 3) Click **Save**.

## Submit Roster and Print Charter Renewal Application - Stage Five

From the Submit Roster page, the RP can submit the charter renewal data to the council. The RP gets only one chance to submit this information. Any changes

that need to be made to any submitted information will have to be made by the council. You may cross out any incorrect information on the renewal application and print the correct information and inform the council.

To submit the roster and print the application:

- 1) From the Submit Roster page, click **Submit to Council**.
- 2) At the survey page, answer the three questions. Click **Save**.
- 3) At the prompt, click **OK**.
- 4) At the Success screen, click **Print Renewal Application**.
- 5) Print the renewal application. Deliver the following to the council:
  - a) Signed and dated application
  - b) Member applications
  - c) Fees

**Note:** In addition to the Charter Renewal Roster, the printed report also includes a list of members who are new, transfers, multiples, no fees, and/or drops. For simplicity, Internet Rechartering allows the RP to submit to the council only one time. After submitting, the only feature that the user has access to is the feature that prints the renewal application

## Understanding the Unit Charter Application

To help understand your printed results of your unit’s unit charter application process, we have included this section to help explain the different sections of the application. Please refer to the bolded letters for a detailed description.

### Front Page information

<b>A</b>	Unit District 01 Local District Unit Status: R	Troop 0001 County Fresno Term : 12 Months	Expire Date: 12/31/2010
<b>B</b>	Chartered Organization: The Local Church 2222 Two Mile Rd Somewhere, Ca 93617	Executive Officer: Mary Doe 2222 Two Mile Rd Somewhere, Ca 93137	<b>C</b> Boys’ Life: 8 Term: 12 Months Begins: 03/2010 Ends: 12/2011

The top of the unit charter lists general information about your pack, troop, team, crew, or ship.

**A)** Indicates information concerning the unit’s...

- Unit Type and Council Number
- District
- County
- Expiration Date of Unit Charter

**B)** Indicates information concerning the unit’s...

- Charter Organization Information
- Executive Officer Information

**c)** Indicates information concerning the unit’s *Boy’s Life* term

**Signature Section**—Signatures of the Charter Organization’s Executive Officer and the Council Representative (Unit Commissioner or District Executive) are required for the charter.

<p><b>D. Executive Officer Certification</b> _____</p>	<p>Signature</p>
<p>Our organization approves this application and all reregistering adults. I understand the responsibility for the approval of new adults can be given to our chartered organization representative. (Complete information is on instruction sheet no. 28-420)</p>	
<p><b>E. Council Representative Certification</b> _____</p>	<p>Signature</p>

- D)** Example-The president of the PTO from a school chartering a pack is the Executive Officer whose signature is needed here.

**Important** -The executive officer of the chartered organization must sign the charter. This certifies that the organization has approved all registering adults. The chartered organization certifies that all registered adults subscribe to the Declaration of Religious Principle, Policy of Nondiscrimination, and the Scout Oath or Promise. Adults agree to be guided by the Charter, Bylaws, and Rules and Regulations of the Boy Scouts of America; they are U.S. Citizens (or have declared intention or are otherwise qualified.) There is no charge for the Executive Officer position.

- E)** A Unit Commissioner, a District Commissioner or a District Executive signs here after verifying the information is correct.

**Charter Fees**—appearing on the front page, this section is used to calculate the unit’s annual charter fees for registration, *Boy’s Life*, and Charter Fee.

Registration	Qty	Fee
<b>G.</b> Paid Youth	5	\$ 75.00
<b>H.</b> Multiple Youth	0	XXXXX
<b>I.</b> Paid Youth BL Subs	5	\$ 60.00
<b>J.</b> Paid Adults	5	\$ 75.00
<b>K.</b> Multiple Adults	1	XXXXX
<b>L.</b> Paid Adult BL Subs	3	\$ 36.00
<b>M.</b> Charter Fee		\$ 20.00
<b>N.</b> Total Fee Submitted		\$266.00

- G)** Number and amount of registration fees collected for youth  
**H)** Number of youth that are multiple registering with the unit  
**I)** Number and amount of youth *Boy’s Life* Subscription fees collected  
**J)** Number and amount of registration fees collected for adults  
**K)** Number of adults that are multiple registering with the unit  
**L)** Number and amount of adult *Boy’s Life* Subscription fees collected  
**M)** Annual charter fee for use of Scouting program  
**N)** Total fees to be submitted

**Unit Codes**-This information is located on the front page and displays information about the unit's tenure and its status as a 100% Boy's Life unit.

<b>O.</b> 36 Months Completed Tenure	<b>P</b> 100% Boys' Life: <b>Y</b>
--------------------------------------	------------------------------------

- O)** Indicates the number of consecutive months a unit has been chartered.
- P)** Unit is considered 100% if all households are receiving at least one copy of *Boy's Life*.

**Adult Leader and Youth Members Pages**

**Adult Leader and Youth Members pages Adult Leaders**—starting on the first page is a list of your adult leaders who are registered.

Adult Members							
Position	Trained	Name	Address	BL	DOB	M/F	Phone
Committee Member	Y	John Doe	111 Main St. Anytown, Ca 93715	Y	1/1/1960	M	H (559) 555-3500 B (559) 555-3000
Committee Member	N	Jane Doe	111 Main St. Anytown, Ca 93612	N	2/2/1962	F	H (559) 555-3500 B (559) 555-3000
Assistant Scoutmaster	N	Ted Jones	2323 Oak St. Anytown, Ca 93715	N	3/3/1963	M	H (559) 555-1111 B (559) 555-2222
Scoutmaster	Y	Bob Smith	3333 Cedar Ave. Anytown, Ca 93715	Y	4/4/1964	M	H (559) 555-3333 B (559) 555-4444
Committee Chairman	Y	Anne Smith	3333 Cedar Ave. Anytown, Ca 93612	N	5/5/1966	F	H (559) 555-3333
Charter Organization Rep.	N	William Scout	4445 Main St. Anytown, Ca 937115	Y	10/10/1965	M	H (559) 555-1122 B (559) 555-2211
Executive Officer	N	Marv Doe	2222 Two Mile Rd. Somewhere, Ca 93715	N	4/5/1955	M	H (559) 555-9876 B (559) 555-6785

Adults Printed 7

Information includes:

- Position
- Trained: No-N, Yes-Y
- Name and Address
- Subscription to Boy's Life
- Date of Birth and Sex
- Phone Numbers

**Youth Members**—Most of the remaining pages of your charter are your youth member information.

Youth Members						
Name	Address	BL	DOB	Grade	M/F	Phone
Sam Jones	2323 Oak St. Anytown, Ca 93612	Y	1/1/1993	7	M	H (559) 555-1111
Steve Doe	1111 Main St. Anytown, Ca 93711	Y	2/2/1991	9	M	H (559) 555-3500
Stan Doe	1111 Main St. Anytown, Ca 93715	Y	2/2/1991	9	M	H (559) 555-3501
Will Smith	3333 Cedar Ave. Anytown, Ca 93715	Y	5/20/1992	8	M	H (559) 555-3333
Jeff Jones	2323 Oak St. Anytown, Ca 937151	Y	6/1/1990	10	M	H (559) 555-1111
Unit Leader Certification: _____						Youth Printed: 5
Unit Totals Paid Adults = 5 Paid Youth = 5 Total BL Subs = 8						

At the end of the youth member listing is the Unit Leader's Certification signature line. This must be signed by the Cubmaster, Scoutmaster or Crew Advisor.

**Multiple, Dropped and No Fee Reports**-The following page(s) contain the lists of multiple registrations, dropped members and/or adults and registrations paying no fee.

Multiple Adult Members					
Name	Position				Multiple From
William Scout	Chart Organization Rep. (COR)				Pack 103
Dropped Adult Members					
Position	Name	Address	DOB	M/F	Phone
Committee Member	Jim Johnson	110 West Ave. Anytown, Ca 93715	8/8/1965	M	(559) 555-1222
Dropped Youth Members					
Position	Name	Address	DOB	M/F	Phone
Youth Members	Jack Johnson	110 West Ave. Anytown, Ca 93715	9/9/1987	M	(559) 555-1222
No Fee Adults					
Name	Position				
Marv Doe	Executive Officer				

**Unit Renewal Processor Page**

This page is to remind the unit renewal processor (RP) to submit all paperwork and forms to the council.

Please attach to this report package the application forms for all new and transferring adult and youth members and any other forms as requested by your council. The next step is to have the package reviewed for approval. The Executive officer of the Chartered Organization and the Unit Leader must sign the Charter Renewal Application. If something is found that now must be corrected, please print the correct information on the Application in the appropriate area and line through the correct information.

Please follow the instructions of the Sequoia Council to obtain the Council Representative signature.

The final step is to submit to the Sequoia Council this entire report package with attachments and the payment for the total amount due.

Please print below the name, telephone number, and e-mail address of a person who may be contacted by the council in case of questions.

Unit Contact Person \_\_\_\_\_

Telephone Number \_\_\_\_\_

E-mail Address \_\_\_\_\_

# Appendix

## CHARTER APPLICATION CHECKLIST

- ❑ 1. The Executive Officer has signed the charter on the front page of the charter application
- ❑ 2. The Unit Leader (Scoutmaster, Cubmaster, Varsity Coach, Crew Advisor, or Ship Skipper) has signed the Unit Certification page.
- ❑ 3. Double check Unit information on front page.
- ❑ 4. Verify all adult and youth members' information for correctness.
- ❑ 5. Collect all new member and adult leader applications to turn in with charter application.
  - Youth application must be signed by unit leader and parent
  - Adult applications must include SS# and be signed by the applicant, Committee Chairmen, and the Chartered Organization Representative or Executive Officer. All new adults must also sign and complete the authorization/disclosure form permitting the Council to run a Criminal Background Check.
- ❑ 6. Double check the amount of fees for charter applications
  - Make sure to include any new applications in the count
  - Make checks payable to **Sequoia Council, BSA**
- ❑ 7. Review charter with Unit Commissioner or District Executive and have them sign the charter application, if correct.
- ❑ 8. Turn in signed paperwork, fees, and award applications to either the Fresno or Visalia Service Center or a council representative by the 15<sup>th</sup> of December 2009.

## TROUBLESHOOTING PROBLEMS FOR INTERNET RECHARTERING

- ❑ All of your membership expires on the last day of the month in which you recharter. Your charter paperwork should be turned in and paid for by the 15th of December 2009. Turning in your charter after it has expired could affect your status as a quality unit, your advancement eligibility, and your liability coverage for events in which you are participating.
- ❑ Unable to login—The system is unavailable from Saturday 9 p.m. to Sunday 6 p.m. (for system update). When demand is high the system may not let you in. If you logout and try again later you should be able to get in.
- ❑ For your convenience the Internet Rechartering Program is available two months before your charter expiration date.
- ❑ If the Executive Officer is listed correctly on the printout with the other leaders but does not change on the top portion of the charter printout—Changes to the organization portion of the charter printout will be made in the council office. Draw a line through the retiring Executive Officer on the printout and write in the new one. We will complete the process here.
- ❑ You must turn in the signed printout from the online charter process. No paperwork means delays in the charter renewal process.
- ❑ Print a copy of your charter before you hit the “submit” button. Verify your information and then submit it. You will not be able to access your information or reprint after you hit submit and the notice to print disappears. If you cannot print the “submitted” charter paperwork, call the Council Registrar at **(559) 320-2100** and she can print it for you.
- ❑ Examples of a prefix are Dr., Rev., Etc., Examples of a Suffix are Jr., II etc. You do not need to enter Mr. or Mrs.
- ❑ Name entries:  
NO spaces between prefixes (DeCarlo not De Carlo)  
NO apostrophes (OBrian not O’Brian)  
NO initials for first names.

- ❑ A social security number is required for all registering adults. These will be entered by the Council Registrar, so they must be included on the Adult Application. Social Security numbers are not required for youth.
- ❑ When changing positions, follow the procedure within the Internet Rechartering System. Do not drop and reenter an individual. This will cause their original record with the individual's registration/training/advancement history to be dropped from your unit and will create a duplicate record with no history and request an application for the "new individual". Those two records will have to be merged by the Council Registrar to reinstate the person's history and this delays the processing of your charter.
- ❑ If a registrant has a registration paid for in another unit or is registered and paid in a district or council position you can identify that "primary" or "paid" position in the "Update Fees" portion of the Internet Rechartering process.
- ❑ Tiger Parents (AP's) and ScoutParents (PS's) are not registered as leaders with Boy Scouts of America and therefore do not pay a fee or receive a membership card. If they decide to assume a leader position, they must fill out an Adult Application.
- ❑ Transfers at charter time must be accomplished with an application. The Internet Rechartering Program will now transfer their membership from one unit to another. If you turn in their applications with your charter make sure you identify and pay for them on your printout. This means you will have to write in a "transfer" line on your paperwork so that we can complete that process for you.
- ❑ Overflow sheets are obsolete with Internet Rechartering because you will see an up to the minute list of registrants when you enter the Internet Rechartering System.
- ❑ Check all of your information for errors. Check names, addresses and phone numbers for accuracy.

## Glossary

**Chartered Organization Certification:** The executive officer of the chartered organization must sign the charter. This certifies that the organization has approved all registering adults. The chartered organization certifies that all registered adults subscribe to the Declaration of Religious Principle, Policy of Nondiscrimination, and the Scout Oath or Promise. Adults agree to be guided by the Charter, Bylaws, and Rules and Regulations of the Boy Scouts of America.

**Charter Fee:** All units are required to pay an annual charter fee of \$20. This fee is submitted with the unit's application and helps defray expenses of the general liability insurance program.

**Executive Officer:** Also known as the Institutional Head (IH)

**Multiple Registrations:** A **multiple** can be someone who is the **CR** (Chartered Organization Representative) in your unit and is also serving as an **MC** (Member of Committee). No one else may hold more than **one position within** your unit.

The term **multiple** also refers to an adult who is serving in a position in another pack, troop, team, crew, ship, or in a district or council position and has already paid in that position, or for a youth that is active in both a troop and a team and/or crew. The multiple registrants should **designate** their primary position to avoid confusion. To indicate a member holds a multiple position, select Member Paid in Another Unit on the Update Fees Page

Please refer to the Program Planning Guide for General Liability Insurance information.

## Adult Position Codes:

Use the following codes to fill out an adult leader application. All adult positions may be male or female. The minimum age for these positions is noted in parenthesis beside the position.

**IH**--Institutional Head or Executive Officer of Chartering Organization--  
This is not a registered position and **no fee** is charged. This person must fill out an adult application to hold any registered position. **(21)**

**CR**--Chartered Organization Representative—Registration fee and application required to register for this position—only one per unit **(21)**

**CC**--Committee Chairperson--only one per unit **(21)**

**MC**--Member of Committee--need at least two per unit **(21)**

**SM**—Scoutmaster--only one per unit **(21)**

**SA**--Assistant Scoutmaster **(18)**

**NL**--Venture Crew Advisor--only one per unit **(21)**

**NA**--Venture Crew Associate Advisor **(18)**

**SK**—Sea Scout Ship Skipper--only one per unit **(21)**

**MT**—Sea Scout Ship Mate **(21)**

**VC**--Varsity Scout Coach--only one per unit **(21)**

**VA**--Assistant Varsity Scout Coach **(18)**

**CM**—Cubmaster--only one per unit **(21)**

**CA**--Assistant Cubmaster **(18)**

**PT**--Pack Trainer **(21)**

**PC**—ScoutParent Unit Coordinator **(21)**

**WL**--Webelos Den Leader **(21)**

**WA**--Assistant Webelos Den Leader **(18)**

**DL**--Den Leader **(21)**

**DA**--Assistant Den Leader **(18)**

**TL**--Tiger Cub Den Leader **(21)**

**AP**--Tiger Adult Partner--This is not an official registered position. This person must fill out an adult application to hold a registered position.

**PS**—ScoutParent—This is not an official registered position. This person must fill out an adult application to hold a registered position.

### NON-UNIT Position:

**42--Merit Badge Counselor (18)** This is a **district position** requiring district approval by the Advancement Committee. No fee is required. You will need an application and the information sheet turned in and it is **not part of your unit charter. Please turn in this application separate from your unit registrations**

## Rechartering using Unit Management Software

### Compatible Software:

#### **Troopmaster Software, Inc.** programs:

- Troopmaster Millennium Edition, version 2.00a and higher
- Troopmaster 2000, version 1.11
- Packmaster Millenium Edition, version 2.00a
- Packmaster 2000, version 1.06a and higher

#### **Hart C. Enterprises**

- Rank N File, Cub Scout version 2.06
- Rank N File, Boy Scout version 4.07

#### **Scoutmate**

- Scoutmate, version 5.12

#### **SBF Publication Company, Inc.**

- Scoutsoft, version 3.5

Note: Earlier versions of these software programs WILL NOT work with ScoutNet interface, please check with your software vendor's website for updates.

## Centennial Quality Unit Award

Major Features: Each unit signs up at the beginning of its charter year and qualifies for the award at the end of its charter year.

During the charter renewal meeting, a review is conducted by a unit commissioner to determine if the unit qualifies as a Centennial Quality Unit for the year they have just completed and make commitments for the coming year.

### Key Required Standards include:

#### *Training:*

- Cub Scouts: Cubmaster, Assistant Cubmaster and at least 50% of Den Leaders and Webelos Den Leader complete Fast Start and New Leader Essentials and Position Specific Training.
- Boy Scouts: Scoutmaster and Assistant Scoutmaster, Assistant Varsity Essentials, Intro to Outdoor Leadership Skills and Position Specific Training.
- Venturing: Crew Advisor, Associate Crew Advisor, Skipper and Ship Mate must complete Fast Start, New Leader Essentials, Intro to Outdoor Leadership Skills and Position Specific Training.

#### *Two-Deep Leadership:*

- One or more trained assistants. One leader assigned responsibility to promote Youth Protection Training.

#### *Outdoor Activities:*

- Cub Scouts must participate in one or more of the following: Day Camp, Resident Camp, Family Camp or Webelos Overnight Camp.
- Boy Scouts must participate in one or more of the following: Attend long-term council summer camp and conduct at least six other activities.

#### *On-Time Charter Renewal:*

- Complete charter before the current charter expires. Cub Scout Packs must also complete two of the following: Pack meetings, Tiger Cubs, Service Project, Advancement, Boy's Life and Membership.

#### *Boy Scout Troops must also complete two of the Following:*

- Planned Program, Service Project, Advancement, Boys' Life, Membership, Patrol method.

**The following services are provided by your Friends of Scouting Donations  
and Popcorn Sale Participation.**

- Council Service Center
- Camp Chawanakee Scout Reservation and Camp Wortman
- Roundtable materials, fliers and mailings
- The Council newsletter
- Internet Rechartering tools
- The Council Website: [www.seqbsa.org](http://www.seqbsa.org)
- Inventory at Council Scout Shop
- Professional and Support Staff
- And much more...

**Thank you for your support.**

Sequoia Council Service Centers  
Boy Scouts of America

6005 N. Tamera Ave.  
Fresno, Ca 93711-3911  
Phone (559) 320-2100  
Fax (559) 320-2114

230 NW 3<sup>rd</sup> Ave.  
Visalia, CA 93291-3628  
Phone (559) 732-3424  
Fax (559) 732-0822

[www.seqbsa.org](http://www.seqbsa.org)