

2022 CENTRAL NC COUNCIL RECHARTER GUIDEBOOK



COUNCIL COMMISSIONER'S CHARGE

What is a charter?

In the BSA, a charter authorizes an organization to operate BSA Scouting units. It certifies the agreement between a chartered organization – an organization that 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 usually issued for a period of 1 year; hence, chartered organizations must submit an application to the Council annually to renew its charter. The requirement to renew a charter:

- Fosters a formal, timely plan for regular dialogue between charter organization and BSA, and
- Assures membership is 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. Use this handbook along with resources found on this page as well as your district's commissioner staff to submit your Charter Renewal Application (CRA) on time and error free.

Who can I contact with specific questions?

Contact your unit commissioner (UC) or your District Executive (DE).

Why is timely charter renewal important?

We, as the adult volunteers and leaders for our Scouting units, owe each and every Scout who are in the Central NC Council registration rolls the opportunity to learn, grow and advance in their Scouting experience with trained leaders in a valid Scouting unit. While the recharter process may seem overwhelming, broken down into small bites and done by multiple members of the unit, these bites are easy to accomplish.

We urge each and every one of you who are involved in the 2022 charter renewal season to Give Your All and Do Your Best to complete your unit's charter in the timeframe outlined in the handbook. Unlike this past year, when the charter renewal system was kept open longer than usual due to the pandemic, it will close on time this year.

Best wishes to all for a successful charter renewal season,
The Central NC Council Commissioner Team

DEFINITIONS AND ABBREVIATIONS

Definitions

Dropped Member – A dropped member is an individual who no longer has a current registration

Dropped Unit – A dropped unit is a unit that is not currently registered and did not re-register within the two-month lapsed period after unit expiration.

Executive Officer – The executive officer is the head of the community-based organization and is sometimes referred to as the institutional head. The EO is the only person that can approve a CR application.

Lapsed Unit – A lapsed unit is a unit that has expired and not yet renewed but is still within the BSA's two-month grace period.

New Member – A new member is an individual who has never been registered.

New Member Fee – The one-time \$25.00 joining fee for *new* program participants in Cub Scouts, Scouts BSA, Venturing and Sea Scouts is still required; however, there is no joining fee for Exploring participants, participants previously registered in any BSA program, those transferring from one program to another, council-paid memberships, or adult volunteers.

New Unit – A new unit is a unit that has never been chartered before or has not been chartered in more than 12 months.

Abbreviations

CC – Committee Chair

CR – Chartered Organization Representative

CRA – Charter Renewal Application

CRS – Charter Renewal System

NLT – Not Later Than

RP – Renewal Processor (One of the unit Key 3 or Key 3 Delegate)

UL – Unit Leader

PRELUDE

UNIT CHARTER RENEWAL OVERVIEW

Since 1916, Chartered Organizations renew their charters annually. In this process, the unit Key 3 (chartered organization representative (CR), Committee Chair (CC) and unit leader (UL)) confirm and record their members and leaders for the coming year and pay national membership fees. At the same time, the institutional head of the chartered organization recommits to offering the Scouting program to youth for the new charter year.

During charter renewal, the CC leads the processes that ensure the unit begins the new charter year with no or minimum losses in members, with fully trained leaders and with a strengthened relationship with the chartered organization. These processes include forming the charter renewal team, setting timelines, completing a membership inventory, updating leader training, confirming leader positions, collecting fees, entering data into the Recharter software, reviewing and approving the charter renewal application, submitting materials on time, printing new membership cards and participating in the new charter presentation. When listed, these processes seem daunting. In fact, the committee accomplishes these processes routinely throughout the year and merely validates them during charter renewal. The unit commissioner can assist the CC and the committee throughout the renewal process. Units that need help with a warning or error should contact the Council Registrar for assistance.

Note:

- Explorer Posts and Clubs do not have Charters or Chartered Organizations and do not have Chartered Organization Representatives. Instead, they have Memorandums of Agreement and Participating Organizations. However, the renewal process for these units is basically the same as for traditional Scouting units.

CHAPTER ONE

UNIT INFORMATION

This year the Boy Scouts of America is introducing new Rechartering software. It will be effective for all units that have a charter expiration date of 31 December 2021 or later. The new program will be part of Internet Advancement and will not require an access code to use it; however, it will be only accessible to those members of the unit who are part of the Key 3 or have been designated as a Key 3 Delegate. As you work through the recharter system, the software will alert you to inconsistencies in your data. All warnings and errors will have a pop-up notice. If it's an error, it would also be a blocker, so a notice would keep you from proceeding. A warning will only have a pop-up appear letting you know something will need to be further addressed. If help is needed with warnings or errors, contact the District Renewal Expert for assistance.

Below is information that is extremely important to the Committee Chair and Unit Leader about what needs to be done to complete the Internet Advancement Renewal process for their unit this year.

RECHARTER PROCESS

The recharter process is broken down into two parts – The **Data Collection** phase and the **Data Input** phase. There are specific processes required in each phase and neither is more important than the other. In fact, the Data Input phase cannot be done without the Data Collection phase being completed first.

For the **Data Collection** Phase, the following processes need to be completed:

- ❖ review Chapter One of the Council Charter Renewal Handbook
- ❖ conduct a Membership Inventory comparing the roster from my.scouting.org to your unit roster, identify Scouts who are not returning and reason why along with adults who are not returning and identify adults and Scouts from the unit's roster that do not appear on the official my.scouting.org roster and submit applications for them along with the appropriate fees (waiting to submit the applications with the recharter application will **NOT** get them on your current year roster)
- ❖ with the assistance of the Charter Organization Representative (CR), select leaders for the next charter year
- ❖ with Unit Leader (UL) assistance, select direct contact leaders for the next charter year and have them approved by the CR
- ❖ identify the unit Renewal Processor (RP) team
- ❖ attend the District Charter Renewal training
- ❖ ensure the unit is properly coded (especially for Packs (Boy Pack (BP) or Family Pack (FP))
- ❖ identify volunteers with expired YPT or YPT that will expire before 1 May of the new charter year
- ❖ identify a committee member to collect the registration and Scout Life magazine fees for recharter

While the above task may seem daunting, they can be completed in the two months leading up to the Data Input phase and will reduce the overall effort needed to complete it. As the Cub Scout and Scouts BSA mottos say "Do Your Best" and "Be Prepared."

For the **Data Input** Phase, it's just a matter of entering the data collected during the previous phase into the actual recharter system. This part of the recharter process should be fairly easy to do if you have saved all of the data you have amassed during the **Data Collection** phase.

IMPORTANT DATES FOR UNITS

The most important dates for units to remember are:

- ❖ 15 October – Data Input phase begins
- ❖ 1 December- Recharter Must Be Submitted to Council office
- ❖ 31 December – Current unit charter expires
- ❖ 1 January 2022 – Units without new charters posted become lapsed units
- ❖ 1 March 2022 – Unit without new charters posted become dropped units

While units are only focused on their own charter renewal packets, the District Rep can be responsible for any number of charters ranging from 30 to over 100 and the Council is focusing on almost 200 charters to get processed and posted before 31 Dec 2021. By working on your Data Collection and Data Input phases and completing them early so your charter can get turned in early will greatly decrease the chances that your unit will become a lapsed unit or worse a dropped unit.

MEMBERSHIP INVENTORY

Conducting a thorough inventory of youth and adult members is key to a successful charter renewal. The CC should log in to their my.scouting.org account and download a copy of their unit's roster (council information). This is the official unit membership file and will contain a listing of all adults and youth registered in the unit. Comparing the local unit roster against the official membership file, will reveal any adults and youth who are not officially registered in BSA. An application should be collected from any member on the local roster that is not on the official membership file. These applications with appropriate fees can be completed online or can be turned in to the District Renewal Expert or District Executive so they may be properly registered in the unit as soon as possible. This will be crucial when the unit starts the actual recharter data input process. Contact all inactive members and attempt to reactivate them. Make every effort to recruit additional youth and adults so that the unit re-registers with no loss in membership.

A committee member should contact every family to:

- ❖ Verify members re-registering with the unit and their email address.
- ❖ Verify Scout Life subscription.
- ❖ Confirm fees and payment due date.
- ❖ Note the reason for members who are not re-registering and extend an invitation to continue in Scouting.
- ❖ Once the membership inventory is completed, save and hold onto the roster as it will be needed during the data input process.

Commissioner Support for Membership Inventory

Unit commissioners can help with the membership inventory. Give your UC the latest version of your unit roster. Your UC can help place a youth in another unit if a change will keep a youth in Scouting.

Preparing A Membership Inventory Roster

The CC should log in to their my.scouting.org account and click on "MENU" at the top of the page on the left

Scroll down until they come to their unit toward the bottom of the page, then click on their unit and select "ROSTER"

Select "EXPORT ROSTER" then click on "EXPORT TO CSV" and click on "CONFIRM"

The exported roster will show up as a link at the bottom left of the page, click on it

Highlight the first 10 lines (maybe more or less) and delete them

Delete the last 2 columns (Registration_Expiry_Date and Membership_Status)

This is a complete alphabetic list of all officially registered members along with their Position Name, Street, City, Zip, Email and Phone

Save as an Excel file

Compare this file with the roster that you are using locally.

Submit Applications Now

Best practice is to use the Online Registration system, it will avoid delays and alleviate processing time.

If you choose to use paper application, complete and submit it immediately. Do not hold youth or adult applications for submission with the charter renewal file. Scouts cannot advance or receive Scouts' Life if they are not registered members of Boy Scouts of America. Submitting applications immediately will reduce your data entry in Internet Advancement. Holding the application will not place the individual on your charter or in your unit until next year. Be prepared to upload copies of the applications with the charter renewal file. Applications not processed before the unit submits its charter renewal will need to be uploaded with the recharter package.

A complete application is required for all new youth and adult leaders added to a unit's roster during this phase of data input into Internet Advancement. Online applications submitted after 1 October will collect fees for the remaining months of the current charter year and the new charter year (Pre-Paid registration). If paper applications previously submitted to Council have not processed, when updating the roster in Internet Advancement Rechartering, submit the application again with the charter renewal file. A copy of an application previously submitted will suffice; for adult applications, the Social Security Number must be visible on the application. If the Online registration does not populate the unit roster, pull a copy of the

completed online registration from <<my.Scouting.org>> and include it with the CRA package just as you would with a paper application.

For all on-line BeAScout applications completed earlier, ensure they are approved in Application Manager.

Collect Charter Renewal Fees

The unit charter fee is \$75.00 per year. All units are required to pay this annual insurance fee.

Adult Registration: \$45.00

Cub Scout, Scouts BSA, Venturing, & Sea Scouts Youth Registration: \$72.00

Exploring Youth Registration: \$45.00

Scout Life: Subscription: \$12

Council Insurance: \$16

Council Activity Fee: \$18

Multiples: \$0

Make checks payable to Central NC Council, BSA.

**If mailing a check please address it to PO Box 250, Albemarle NC 28002

Keep a copy of all forms you submit.

We strongly encourage all BSA families subscribe to Scouts' Life magazine as the magazine is an important part of the unit's program. A special ribbon and patch are awarded to units in which 100% of the families subscribe to Scouts' Life magazine.

Special Scout Executive Approval Requirements

The Central NC Council Scout Executive must approve charter applications for units with 100 or more youth, units with a loss of 50% of youth from the previous year, units with no change in youth membership, and units with less than 5 paid youth.

If your unit is one of these types, your commissioner will coordinate with the DE to seek Scout Executive approval. Any unit that meets the above criteria requires an explanation. Providing an explanation with the Charter Renewal Application will help reduce the amount of time needed to get the approval.

Identify Unit Leaders

The CR approves adult leaders. Unit leaders may recommend direct contact leaders for appointment while the CC identifies committee members. Ideally, leaders are identified early so they can take position-specific training prior to appointment.

Fill leadership vacancies as soon as possible. A unit will not be able to renew its charter without the minimum required leaders.

Packs must have: Chartered Organization Rep (CR may be dual registered as EO, CC or MC); Committee Chair (CC); two Committee Members (MC) or one MC and one Pack Trainer (PT); Cubmaster (CM); and one Den Leader (DL). Normally, a Pack should have a registered DL for each Den in the Pack. List a Tiger/Lion adult partner (AP/LP) for each Tiger/Lion in the pack. An AP/LP does not pay a fee or complete an Adult Application if they are the parent of a Tiger/Lion. **Note, an AP/LP registering in a pack adult leader position must complete an Adult Application, the Additional Disclosures & Background Check Authorization, and take Youth Protection Training.**

Troops/Crews/Ships must have: Scoutmaster (SM), Crew Advisor (NL), or Skipper (SK); Committee Chair (CC); Chartered Organization Representative (CR may be dual registered as EO, CC or MC); and two Committee Members (MC).

Exploring Posts must have: Post Advisor (EA); Committee Chair (PCC); and two Committee Members (PMC).

Exploring Clubs must have: One Club Sponsor (ES) and one or more Associate Sponsors (AS).



Trained Leaders

Every Scout deserves a trained leader. **All registered adults are expected to complete position-specific training for the position they are registering for in 2022.** Scouting University provides position-specific training via the BSA Learn Center available at <https://my.scouting.org>. In-person position-specific training and outdoor training is offered frequently by your district and near-by districts. As units select leaders for the new Scouting year, it is a good time to verify the training of all adults and encourage those in new positions to commit to completing training.



Youth Protection Training – an absolute must!

All registered adults must take Youth Protection Training (YPT) at least every two years. If a volunteer's YPT is not current at charter renewal the volunteer cannot be registered. Successful districts and units separate YPT updates from charter renewal so that waiting for YPT completion does not delay renewal. Such units choose a month such as May and ask all adults to retake YPT if theirs expires within the next 12 months. Units should not wait until it is time to renew the unit's charter to make sure all YPT is current. Unit Key 3s must review their unit's YPT status.

Recharter Link

The unit can access additional resources to aid charter renewal at the CNCC Website < 2022 Recharter Portal the unit RP has reviewed all of the resources available to them, they can access Internet Advancement to recharter at <https://advancements.scouting.org/login>. Remember that only a member of the Unit Key 3 or a Key 3 Delegate can input into the charter. There is no access code required. Log in to Internet Advancement 2.0 using the same Username and Password as your my.scouting and Scoutbook account.

Privacy Policy

Charter renewal involves confidential and/or private information and requires accepting the responsibility for maintaining the privacy and confidentiality of that information. Private and/or confidential information

must never be shared outside of the Boy Scouts of America. If you cannot accept this responsibility, you must notify your unit's CC and withdraw from viewing or working with these documents.

PAYMENTS

Payment can be made electronically by credit card or e-check or by cash/check to council. An administrative fee is added when paying by credit card (3%) or e-check (\$1.00) with payment going directly to the National Office in Texas.

Commissioners recommend using a unit e-check. If there are any issues with the payment like over payment it can take months to get a refund to the Council office or under payment can hold the final processing of the unit charter until the shortage is made up.

Unless you paid electronically, have the treasurer provide a check to pay charter renewal fees. If your unit has a Unit Account at the Scout Office and you want to apply those funds toward your renewal fees, contact the District Executive or your unit commissioner to verify funds available.

*If you are mailing a check please make sure to use address:

CNCC BSA

PO Box 250

Albemarle, NC 280020

CHAPTER TWO

COMMISSIONER INFORMATION

The new software is specific to the unit and the Key 3 for that unit or a Key 3 Delegate; however, you may still be able to assist the unit in getting through the Internet Advancement program to recharter. Make sure your units know that if they are having an issue with a specific part of the program or just have a question in general, they can always reach out to you. **If your unit needs help with a warning or an error from the system, they should you to contact the District Commissioner or Renewal POC for assistance.**

There are two main areas in which you can be of assistance to the unit – the membership inventory and the YPT aging report. These two products will account for 80-90 percent of the information that the unit needs to complete their Internet Recharter. Collecting all of the data identified under the Unit Information section above will be critical to the units.

Once the unit RP has reviewed all of the resources available to them, they can access Internet Advancement to recharter at <https://advancements.scouting.org/login>. Remember that only a member of the Unit Key 3 or a Key 3 Delegate can input into the charter. There is no access code required. Log in to Internet Advancement 2.0 using the same Username and Password as your my.scouting and Scoutbook account.

Encourage the unit to read the part of this handbook that pertains to unit information and review the resources on the web page before proceeding.

Once the unit has completed their charter and it has been approved electronically by the CR, the unit will send the charter renewal directly to council electronically. They need to include any applications, CBC forms or YPT certificates with the charter renewal. There will be no need for the unit to print a validation copy as they have done in the past. Also, the Annual Charter Agreement and Journey to Excellence form do not need to go with the charter renewal to council.

For the **Annual Charter Agreement**, it is recommended that the unit get the form signed before they start the actual Data Input phase of rechartering as this assures the unit that their Chartering Organization is going to continue supporting their unit and they will be no unexpected surprises. The Annual Charter Agreement form can be found in the 2022 Recharter Portal.

For the **2021 Journey to Excellence** form, it is suggested that arrangements be made with all of the units in your district to provide you with a copy with your recharter by December 1st, 2021. This will help you see how the unit did during the past year and also provide you with insight into the unit for preparing a Detailed Assessment. The Journey to Excellence forms can be found at scouting.org/jte.

CHAPTER THREE

RECOGNITION AFTER CHARTERS POST

Ceremony is important to individual and unit identity. Plan a charter presentation to acknowledge the sponsor's and unit's commitment to a new year of Scouting.

Ask your UC to officiate or participate in the charter presentation ceremony.

To print the charter certificate, follow these instructions:

Unit Key 3 leaders can print the charter certificate for their units by logging into <http://my.scouting.org>, Click on Menu > the unit > Organization Manager > click on Download Charter Certificate > click on the Open button at the bottom of the screen to display and print the certificate.

Verify you have a membership card for all adult and youth and that each is listed in the my.scouting Roster.

To print membership cards, follow these instructions:

Unit key 3 leaders can print membership cards for their units by logging into <http://my.scouting.org>, Click on Menu > the unit > Roster > select who you want to print a membership card for, and then click on >Print> membership card.

Distribute membership cards with panache – they represent membership in a national “club” and a worldwide movement.

CHAPTER FOUR

ONLINE EXPLORER RENEWAL OVERVIEW

Exploring posts and clubs will use the Internet Advancement the same as traditional units. The unit type is identified by the system when the Key 3 logs in. The Advisors and Chairs of these units are considered Key roles and will have access. They will log in with the same Username and Password they use for my.scouting and Scoutbook.

What are the benefits of Explorer Renewal?

1. More accurate participant data.
2. Renewals are validated against Explorer membership rules before submission.

A post or club that enters data for renewal results in more accurate participant data (because a participant is entering the information) and ensures data integrity. The Learning for Life office will need to double-check and reconcile the submitted renewal data.

What do users need to use Internet Advancement for the Online Post Renewal?

Internet Advancement for renewing requires internet connectivity. This site supports [Chrome](#) and [Firefox](#) and [Internet Explorer 11](#) (without Compatibility View) with a minimum screen resolution of 800x600. The site requires JavaScript to be enabled for your browser.

What can I NOT do in the Online Post Renewal system?

Explorer Renewal is only for renewal and does not permit changing the district, organization name, or Post/Club expiration date. These changes may only be made by the Learning for Life Office. Online Explorer Renewal uses person records from the national LFL database. The record for one person must never be changed to that of another person. Names may be corrected to ensure that proper names are used and to correct misspellings, but for no other reason.

The Renewal Report Package includes a Name Change report. The Name Change report shows any name changes and includes a reminder that one person's record may not be changed to another person's information.

What are the steps in the Online Post Renewal process?

1. The Post Advisor or Chair or Club Sponsor are Key 3 roles and will be able to access the recharter system.
2. They will gather all the information and **signed** forms needed for renewal:
 - a. Applications for *NEW* youth and adults
 - b. Applications for adults changing positions
 - c. Form 28-573 (Criminal Background Check Waiver), if applicable
 - d. Exploring Annual Memorandum of Understanding
3. With the renewal information at hand, the RP goes to advancement.scouting.org and uses the same Username and Password they use for my.scouting to log in.

4. The RP follows the intuitive process. Fundamentally, the process requires the RP to:

a. **Update the Roster:** update organization information (if needed), select the current youth and adult participants to renew on next year's roster, add NEW youth and adult participants, update participant data, and update participant positions.

Change the name of your new Executive Officer, if applicable, during this step!

b. **Check the Roster:** Validate that the data to be submitted conforms to LFL rules.

c. **Update Participant Fees:** Update fees (e.g., assign multiple status if applicable).

Multiple Status means a youth/adult is registered in more than one Post and/or Club, based on the next Post registration term.

5. After doublechecking the information, the RP submits the file. The Post/Club may do Online Approval. Online Payment is available, or Payment Direct to Council.

Note: Renewal packages for Law Enforcement units that are part of the Potomac Boundary Advisors Association (PBAA) are handled directly by the NCAC Director of STEM and Exploring.

ADULT POSITION CODES

Each adult position has a corresponding code used on the adult application. All adult positions may be male or female. The minimum age for each position is noted in the "Age" column.

Code	Position	Age
CR	Chartered organization representative	21
CC	Committee Chairman	21
MC	Committee Member	21
SM	Scoutmaster	21
SA	Assistant Scoutmaster	18
92U	Unit College Scouter Reserve	18
91U	Unit Scouter Reserve	18
NL	Crew Advisor	21
NA	Crew Associate Advisor	21
SK	Ship Skipper	21
MT	Mate	21
CM	Cubmaster	21
CA	Assistant Cubmaster	18
WL	Webelos den leader	21
WA	Assistant Webelos den leader	18
DL	Den leader	21
DA	Assistant den leader	18
TL	Tiger den leader	21
LL	Lion Guide	21
PT	Pack Trainer	21
PC	Parent coordinator	21
UP	Youth Participant over 18	18
IH or EO	Institution Head/Executive Officer	21
PCC	Post Committee Chair	21
PMC	Post Committee Member	21
EA	Exploring Post Advisor	21
AA	Exploring Post Associate Advisor	21
ES	Exploring Club Sponsor	21
AS	Exploring Club Associate Sponsor	21
EP	18-20 year-old Exploring Participant	18

**Tiger/Lion adult partners
(AP/LP) complete the bottom
portion of the youth application**

GLOSSARY

Chartered Organization Certification - The Executive Officer of the Chartered Organization signs the CRA. This certifies that the organization has approved all registering adults. The CRA may be approved and certified electronically by the Chartered Organization Representative (CR).

During the year, responsibility for approval of adults can also be given to the Chartered Organization Representative.

The Chartered Organization certifies that all registered adults

Subscribe to the Declaration of Religious Principle, Policy of Nondiscrimination, and the Scout Oath or Promise.

Agree to be guided by the Charter, Bylaws, and Rules and Regulations of the Boy Scouts of America; Are U.S. Citizens (or have declared intention or are otherwise qualified.)

Charter Fee - All units are required to pay an annual charter fee of \$75.00. This fee is submitted with the unit's application and helps defray expenses of the general liability insurance program.

Executive Officer – Is also known as the Institutional Head (IH). There is no cost for this position.

Multiple Registrations - An adult who pays a registration fee in one unit (or a district or a council position) does **not** pay a registration fee in any additional unit. Youth members paid in one unit are **not** required to pay more than once.

(No cost multiple registrations do not exist between Exploring Units or STEM Labs and Traditional Scouting Units. An individual registering in both programs must pay a registration fee in both programs.)



Recharter Questions?

Contact your unit commissioner or district POC

Cabarrus & Rowan Counties- Chad Wells, Chad.Wells@Scouting.org

Montgomery, Stanly, and Richmond Counties, Melissa Ewing, Melissa.Ewing@Scouting.org

Union & Anson Counties- Jesse Crump, Jesse.Crump@Scouting.org

Assistant Scout Executive, Kimberly Morrison

Kimberly.Morrison@Scouting.org

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