Unit Recharter – Timeline & Technology

Presenter           Mike Weber & Kevin Phillips
Date                September 15, 2022
Course Objectives

- Understand charter importance and need to complete early
- Learn the simple steps to completing a charter
- Be familiar with recharter resources
What is a charter and why it’s renewed each year
- Successful keys to completing a unit charter
- Unit recharter timeline
- Understanding the Internet Recharter 2.0 app
- Review of available recharter resources
A charter authorizes an organization to operate BSA Scouting units. It certifies a yearly agreement between a chartered organization and the Boy Scouts of America. The benefits of a yearly process include fostering a regular dialogue between the BSA and charter partner, facilitating yearly membership renewal for all youth and adults, enabling fee collection to complete membership renewal, and migrating the process from a paper-only process to a simplified two-step online process.
Keys to a Successful Recharter

1. Follow a 3-Stage process by starting early
   • Success begins with recharter prep and a recharter champion
   • Use the Internet Recharter 2.0 app
   • Allow sufficient time for council to process charter
2. Review all online resources
3. Avoid the typical defects
4. Work closely with your unit commissioner or the district executive
How to assign a delegate

My.Scouting.org > Menu > Your Unit > Organization Manager > Position Manager > Functional Role

The Committee Chair and Charter Org Rep have the ability to add delegates. The delegates will have the same authority in My.Scouting to approve applications.

Click on the ADD buttons to add a registered leader into these roles. COR delegates have the ability to review and approve online adult applications and Key 3 delegates have the ability to review and approve youth applications. Either one will enable the ability to access the Online Recharter App.
December Recharter Unit Timeline

Stage 1 - Recharter Prep
1. Meet with unit commissioner review recharter timeline
2. Assign recharter champion
3. Review recharter resources
4. Begin membership inventory
5. Identify YPT expiring before Mar 1

Stage 2 - Internet Recharter
1. Update/Add/Remove members from roster
2. Re-check and verify YPT training
3. Finalize membership inventory/fall recruitment
4. Collect fees & submit roster
5. Member of Key 3 approves

Stage 3 - Council Process
1. Council receives recharter
2. Validates recharter
3. Unit resolve defects or missing paperwork
4. Unit verifies My.Scouting roster
Stage 1 - Recharter Prep

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Membership Inventory

The Committee Chair or recharter champion should log into their my.scouting.org account and download a copy of their unit’s roster. Comparing the local unit roster against the official membership file will reveal any adults and youth who are not officially registered in the BSA. An application should be collected from any member on the unit roster that is not on the official membership file.

A committee member should contact every family to:
- Verify members re-registering with the unit, noting what unit is their primary registration if in multiple units
- Verify Scout Life subscription
- Communicate fees and unit payment due date
- Once the membership inventory is completed, retain the roster - needed during the data input process

Membership Inventory Report
1. My.scouting.org account and click on “MENU” on the top left of the page
2. Scroll down then click on the unit and select “ROSTER”
3. Select “EXPORT ROSTER” then click on “EXPORT TO CSV” and click on “CONFIRM”
4. The exported roster file will show up in a pop up box click on it
5. Save as an Excel file
Youth Protection Training

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. Units should not wait until it is time to renew the unit’s charter to make sure all YPT is current. Unit Key 3s should regularly review their unit’s YPT status.

Youth Protection Training Aging Report
1. Log into your My.scouting.org account and click on “MENU” at the top of the page on the left
2. Scroll down then click on the unit and select “YPT Reports”
3. Select “EXPORT to PDF or CSV” then click on “CONFIRM”
4. The exported roster will show up as a link to download or will open in a new window
5. Save the file
6. Review for any adults with YPT expiring before **March 1** (for December units) and contact them to retake YPT before submitting your final recharter paperwork
December Recharter Unit Timeline

Stage 2 - Internet Recharter

1. Update/Add/Remove members from roster
2. Re-check and verify YPT training
3. Finalize membership inventory/fall recruitment
4. Collect fees & submit roster
5. Member of key 3 approves
Typical Defects

Common Defects

• Criminal Background Check Missing
• Youth Protection Training Missing or Expired
• Signatures Missing (e.g., New Application)
• Adult Application(s) Missing
• Key 3 Approval Missing
• Incorrect Payment Amount
• Youth Turned 18 – Needs Youth Protection Training, Criminal Background Check, and Application
• Loading a blank or incomplete document

Tips to Avoid Defects

• Ensure ALL Adults have a signed form on file at Scout Office
• Review YPT Aging Report and have ALL adults up-to-date
• Have ALL New Member Applications Completed On-line
• Take inventory prior to start of charter for ALL adult
• Agree in advance of recharter who will complete approval
• Double and maybe triple check all arithmetic including collection of funds from families
• Be aware of youth turning 18 and remaining with unit that these are Requirements
• Be sure any document loaded has a purpose & is complete
Stage 3 - Council Process

1. Council receives recharter
2. Validates recharter
3. Unit resolve defects or missing paperwork
4. Unit verifies My.Scouting roster
December Recharter Unit Timeline

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**Stage 3 - Council Process**
1. Council receives recharter
2. Validates recharter
3. Unit resolve defects or missing paperwork
4. Unit verifies My.Scouting roster
• 2022 Changes to enhance the recharter experience
• Review of the simple steps for using the Recharter app
• Review available recharter resources
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Important Changes for 2022

- YPT non-compliance now an Error for the unit
- Council Registrar enabled to view charter and assist unit in real-time
- Enabled printing of unit charter prior to submittal for review
- Updated features to both register and identify multiples
- Improved recharter validation (e.g., min # of ldrs, too many ldrs in a position, CBC, YPT)
- Improved payment processes, particularly using ACH
- Improved recharter support for Exploring Posts and Clubs
- Email approval will be sent to both Unit Key 3 and Key 3 Delegate
- Demo Tool for Commissioners (aka Sandbox)
Important Changes for 2022

- YPT non-compliance now an Error for the unit
  - YPT is a requirement for ALL Scouters
  - It needs to be continuously current
  - If any leader is not current with YPT, it will be flagged on the main screen
  - It will also show as an error at the validation stage
  - A charter ‘Submit’ button will not be active until ALL Leaders have a current YPT
Important Changes for 2022

- Council Registrar enabled to view charter and assist unit in real-time
  - In most cases a commissioner can assist with recharter questions
  - If additional help is needed, unit leaders can work real-time by phone with their council registrars
Important Changes for 2022

- Enabled printing of unit charter prior to submittal for review
  - It’s often-times beneficial to review charter details with a commissioner or other leaders before submittal
- Last year printing a charter before submittal was not possible
- Now it is
Updated features to both register and identify multiples

- Click on a person’s name, click on the Manage Member dropdown, click on Mark as Multiple
- Then identify where else there are registered: council, unit type, and unit
- After clicking Mark as Multiple, a “+” sign appears by their name
Improved recharter validation (e.g., min # of ldrs, too many ldrs in a position, CBC, YPT)

- Here are examples of too many Cubmasters and not enough committee member positions filled

### Important Changes for 2022
• Improved payment processes, particularly using ACH
  • Payment processes were not well communicated last year
  • ACH is a convenient method of payment
  • Better communication with respect to the micro-payments from WePay are now well explained in the User Guide
  • Paying by either ACH or credit card will also save unit leader’s and council personnel time
  • Some councils administer an administrative fee if paying by check
Important Changes for 2022

- Improved recharter support for Exploring Posts and Clubs
  - Exploring Posts and Clubs have different terminology and positions than traditional units
  - Instructions were not well explained for how to manage those differences
  - The User Guide now has an addendum to address how to manage with recharter for Exploring Posts and Clubs
Important Changes for 2022

- Email approval will be sent to both Unit Key 3 and Key 3 Delegate
  - Key 3 Delegates have the same authority to manage a recharter as any Key 3 registered position
    - Unit Leader, Committee Chair, Charter Representative
  - This includes approving the charter
  - It is highly recommended that the Charter Representative or Institutional Head approve the charter
  - There are some cases when that is not possible
  - Previously, the Key 3 Delegate was not included in the approval email
  - That is a change for 2022, now enabling the Key 3 Delegate to approve the charter, if required
Important Changes for 2022

- Demo Tool for Commissioners (aka Sandbox)
  - A Recharter ‘Sandbox’ was available for a brief time last year
  - Due to technical difficulties, it was not available as long as volunteers needed
  - A new Demo tool is now available for all commissioners to use
  - Details for use are available in the Recharter Resource page or directly at [Internet-Recharter-2-Demo-Site-instructions.docx (live.com)](Internet-Recharter-2-Demo-Site-instructions.docx (live.com))
(2) Ways to Login into the Recharter App

- My.Scouting Account/Internet Advancement
- [https://advancements.scouting.org/](https://advancements.scouting.org/)

Each access point uses the same Login ID & PW
- Majority of work done on this screen
  - Roster Update
  - YPT Check
  - CBC Form Check
  - Scout Life
  - Change Adult Leader Position
  - Add New Members
  - Delete Members
  - Manage ‘Multiple’ registration positions

**Note:** Refer to New User Guide & Training Video for details of each task
Main Screen

- Majority of work done on this screen
  - Roster Update
  - YPT Check
  - CBC Form Check
  - Scout Life
  - Change Adult Leader Position
  - Add New Members
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  - Delete Members
  - Manage ‘Multiple’ registration positions
• (2) Features on Payment Screen
  • Payment Summary
  • Payment Method
• (3) Payment Options
  • Credit Card (3% fee)
  • ACH ($1.00 handling fee)
  • Check (Some councils may charge a fee)

Note: Refer to New User Guide & Training Video for details of each task
Final Step

• Charter Approval
  • Letter sent to Key 3 and Key 3 Delegate
  • Either may approve
  • Preferred approval is by COR

Note: Refer to New User Guide for additional details
• Council Dashboard
  • Lower Right-Hand Corner
  • Several Categories of Status
  • Hover of (?) for definition
  • Click on Report for unit-by-unit status
  • Unless in Pre-Posted or Posted, additional work is necessary (e.g., defects to be resolved, signature, etc.)
  • Work with Council Registrar and DEs to resolve issues - promptly
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Charter Renewal Resources

- Internet Recharter 2.0 App - https://advancements.scouting.org
- New Recharter Guidebook Information – (3) Resources available
- New/Updated Internet Recharter app User Guide
- New/Updated Training Video
- Updated FAQs
- Summary of Recent Updates, Changes, and Enhancements
- Demo tool for commissioners (similar to a ‘sandbox’)
- Internet Recharter Responses to Forum-Related Questions/Discussions helpdesk

Your Unit Commissioner, District Commissioner, Council Registrar or Council Recharter Lead
Four Take-Aways

- Get started early and do your homework (reference the Timeline)
- The updated Recharter app has been significantly improved (reference Resource webpage for help)
- Avoid defects before submitting charter (reference defect slide)
- Complete the charter and submit it prior to the expiration date
Thank You!
Questions
During the Breakout:

- First self-select a leader to keep notes and help guide discussion
  - May want to ask for assistance in taking notes
- Breakout Question: How can your District or Council best prepare and support your commissioners and units for completing their charters with no defects and on time?
- The leader will take 2-3 minutes to summarize their group discussions for entire group
Take What You Learned Today, Share With Other Leaders In Your Council & District, and Be Prepared For A Successful Recharter