

# 2022 Charter Renewal Guidebook

**Charter Renewal is the process of renewing the charter agreement between the BSA and your charter organization, and renewing the registration of youth and adult members. Every unit must recharter annually.**

## Table of Contents

Important Information	1
How to Get Started	2
Rechartering Tips	3
Ensure adequate leadership entries and youth are available	3
Position changes and new applications	3
Fees	4
Journey to Excellence	4
Youth Protection Training	4
12 Most Common Rechartering Errors	5
Still have questions? District Contacts	5
Service Center Locations	5

## 2022 Calendar

### Late October

- Key 3 will receive recharter information by email

### November

- Monday, November 1  
Online Rechartering Starts

### December

- Friday, December 17  
All recharterers due and completed online including signatures and payment.



# Rechartering

The purpose of this Guidebook is to help you through the recharter process and to ensure successful on-time rechartering. Our council Registrar, your District Executive and your Unit Commissioner are all available to help.

## IMPORTANT INFORMATION

- All adults seeking to become a leader or reregistering as a leader in the Boy Scouts of America (BSA) must complete Youth Protection Training (YPT). The course can be taken online at [my.scouting.org](http://my.scouting.org). You must complete the YPT course every two years. For more information see Youth Protection Training on page 5.
- **Again this year!** The recharter will be completed fully online this year including all approvals and payment.
- All youth age 18 or older participating in Sea Scouts, Venturing, or Exploring are required to fill out an adult application, sign a CBC disclosure form and complete Youth Protection Training in order to stay registered in their respective program.
- Fees are listed on our recharter page under helpful documents. [Find those here.](#)
- All Unit Charter Renewal Applications must be submitted online before December 17.
- Any unit whose recharter is not completed and received on time may be prohibited from participating in Scouting activities until their unit charter is reinstated, and may require additional documentation.
- A unit's recharter will be considered defective if there are: missing documents and/or signatures; leaders without current Youth Protection Training or a missing Background Check Authorization form; incorrect/blank entries; too few registered youth; missing required leaders, etc. Please fill out all applications completely.

While the basic rechartering process will continue to be essentially the same as previous years, moving the recharter process fully online will save time and stress! The online recharter application submission deadline is December 17, 2021. We want to avoid the pitfalls of units conducting programs without essential BSA services and loss of liability protection for leaders and charter partners.

## HOW TO GET STARTED

1. **Appoint a Charter Renewal Person (CRP):** The unit designates an adult member as the CRP who has knowledge of Scouting terminology, familiarity with the day-to-day operations of their Scouting unit, and is proficient in computer and Internet use. This is NOT a good position to assign to a parent who is new to Scouting.
2. In the [my.scouting.org](https://my.scouting.org) Organization Manager, make this person a Key 3 Delegate.
3. When you are ready to begin, click here <https://pacskey.org/resources/unit-recharter-instructions>, then scroll down and click the link to Scoutbook or my.scouting.
4. Select RECHARTER.
5. Proceed with the Recharter process and complete the information requested on each screen. You can stop at any time, log off the system, and begin again where you left off.
6. Help and tutorial screens are available throughout the process that should answer most questions--full details in the step-by-step guide. More helpful tips can be found on page three of this booklet.

**Note: Unit number should be entered as four digits. Add leading zeros if necessary. Example: Troop 81 should be entered as as 0081.**

### **BEFORE beginning the Online Recharter process you will need to:**

- Verify that all adults have Youth Protection Training valid through Jan 31, 2021.
- Review your roster and make changes on paper so you know what changes and additions need to be made on your charter and which BSA member applications to collect in order to complete the on-line rechartering. Please verify the accuracy of addresses and phone numbers and collect email addresses for all adult members.
- Have new Scouts, new adults, and transfers complete their applications online before recharter begins. If you must use paper applications, follow these instructions: Collect completed Youth Applications for new Scouts and confirm that each application is signed by the parent and unit leader. Collect completed Adult Leader Applications for adults being added to your unit. The leader application must be signed by the applicant and the Chartered Organization Representative. Confirm that the Disclosure/Authorization page of the application has been signed and dated by the applicant.
- If you complete applications online or turn in paper applications at least one week before recharter, they will be on your roster before you begin, thus saving you time and effort.

### **Packs Rechartering with Lion or Tiger Adult Partners**

- They will receive a BSA Member ID number but they are not considered "registered" leaders.
- Lion and Tiger Adult Partners are listed on the roster because they registered their son/daughter as a Lion or Tiger and these programs require each Lion and Tiger to have an Adult Partner. Lion and Tiger Adult Partners are NOT registered leadership positions. (An adult application has not been completed, a criminal background check has not been conducted, and a registration fee has not/will not be collected.)
- AN ADULT LEADER APPLICATION MUST BE SUBMITTED ONLINE (OR TO THE COUNCIL SERVICE CENTER) if you have someone who is listed on your roster in the Lion or Tiger Adult Partner position and they are now going to register in a leadership role such as a Tiger Den Leader or a Lion Guide or move to a Den Leader or Assistant Den Leader role.

## RECHARTERING TIPS FOR ALL UNITS

1. One week before starting online rechartering, have all new youth and adults apply online. All transfers should also be submitted online or on paper to a Council Service Center. This will allow for an easier online experience and provide you with an up-to-date roster with which to work.
2. For best results use Google Chrome (preferred) or Mozilla Firefox Internet browsers.
3. Please ensure you update or add email addresses for all adult leaders and parents.
4. A chartering organization that sponsors more than one unit MUST register the same Executive Officer for all units.
5. Ranks can only be updated through the BSA Internet Advancement system. Rank changes are not part of the rechartering process.

### Tips 8-10 below are for Cub Scout Packs only.

6. Keep all Lion and Tiger Adult Partners on the roster. Exception: If you delete a Lion or Tiger youth, also delete his/her adult partner.
  7. If a Lion or Tiger Adult Partner wishes to register in a paid membership position such as Den Leader, they must submit a completed adult leader application (preferably online), including a signed and dated Disclosure/Authorization form, and complete YPT. Applications are best submitted online. The new adult leader application should be submitted online, preferably one week before starting recharter (or with recharter application).
  8. DO NOT delete the 5th Grade Webelos. Webelos transitioning to a troop will need to complete a youth application to join that troop and submit it to the Scoutmaster of that troop.
9. AGAIN THIS YEAR! You must use the online signature system for all signatures. The only paperwork needed to be turned in should be uploaded into the recharter system.
  10. The required method of payment is online via credit card (3% fee) or e-check (\$1 fee).
  11. The annual Charter Agreement ([PDF](#)) must be signed and emailed to your District Executive for your recharter to be considered complete.

## ENSURE ADEQUATE LEADERSHIP ENTRIES AND YOUTH ARE AVAILABLE

- Cub Scout Packs must have: Cubmaster (CM), Committee Chair (CC), Chartered Organization Representative (CR-may be dual registered as CC or MC), two Committee Members (MC) or one MC plus one Pack Trainer (PT), and at least one Den Leader (DL). Den Leaders cannot be dual registered in the positions listed above.
- Scouts BSA Troops, Venturing Crews, and Ships must have one unit leader: Scoutmaster (SM), Crew Advisor (NL), or Skipper (SK),

### AND

- a Committee Chairman (CC), Charter Organization Representative (CR-may be dual registered as CC or MC), plus two Committee Members (MC). Scoutmasters and Assistant Scoutmasters cannot be dual registered as a Committee Member.
- Units must have 5 paid youth to recharter. Youth who are registered in multiple units do not count toward the 5 youth. Software will advise on these areas during online rechartering.

## POSITION CHANGES AND NEW APPLICATIONS

- New Applications are not needed for position changes within a unit at rechartering.
- Returning Youth/Adults DO NOT need new applications.
- Multiple Registrations: An adult who paid a registration fee in another unit does not pay a registration fee in your unit. All adults must pay, or “primary”, in one position. Youth members paid in one unit are not required to pay more than once. If a member is not paying in your unit, a pop-up box will allow you to note which unit they are paying in. If a member is registering in multiple units, please ask them where they wish to be marked primary and pay. The system will let you mark accordingly.

## FEES

Any new youth recruited in the fall MUST be registered with the council BEFORE BEGINNING the online recharter process, preferably using online applications for new members and transfers. However, in the event you have NEW youth that you are adding to the charter please use the following prorated fees **IN ADDITION TO** the annual recharter fees. This will allow us to register these new youth before year end. Please verify that new members have completed applications for all new youth or adults being added to the charter.

November	December
\$36 Registration	\$24 Registration
\$ 3 Scout Life	\$ 2 Scout Life
\$25 New Member Fee	\$25 New Member Fee

### Annual Fees to Recharter (February 1 through January 31)

- Fees are listed on our website, [click here](#) for full details.
- \$12 Scout Life
- Unit Insurance Fee: \$75 per unit

## JOURNEY TO EXCELLENCE

### **YOUR UNIT’S SIGNED JOURNEY TO EXCELLENCE SCORECARD IS DUE WITH YOUR RECHARTER.**

Scouting’s “Journey to Excellence” is the BSA’s council recognition program designed to encourage and reward success and measure the performance of our units, districts, and councils.

### What Journey to Excellence Brings to Your Unit

1. A framework for planning the year.
2. A method for evaluating your unit.
3. Guidance in areas where you might do better.
4. Specific guidelines and standards of what is considered good performance.
5. Early warning of potential problem areas.
6. Recognition for good Scouting.
7. Benchmarking to get ideas and tips from other good units.

A part of the rechartering process is reviewing the JTE score. Where is your unit on your Journey to Excellence? Download your Pack, Troop or Crew JTE scorecard at <http://www.scouting.org/scoutsource/Awards/JourneyToExcellence.aspx>. Please submit your JTE Scorecard to your District Staff by December 17.

## YOUTH PROTECTION TRAINING

All registered adults must complete the BSA Youth Protection Training (YPT) course. An adult’s Youth Protection Training must be valid at least until January 31.

- Units should conduct an inventory of adult leaders that need to complete YPT early in October. Notify the leaders that need to complete this training as soon as possible.
- All new adult applicants should complete the online YPT training and submit a copy of the completion certificate to the unit Committee Chair.
- Adults and youth over the age of 18 participating in Sea Scouts, Venturing, or Exploring must take YPT.

## ANNUAL CHARTER AGREEMENT

**The Annual Unit Charter Agreement defines the relationship between a chartering organization and the Pacific Skyline Council.** This document must be signed by the same institutional head as listed on your charter, and your Chartered Organization Representative. Our office staff will sign for the BSA. This form must be signed and turned in to your district staff by December 17. Forms can be found here:

[https://filestore.scouting.org/filestore/membership/pdf/524-182\\_web.pdf](https://filestore.scouting.org/filestore/membership/pdf/524-182_web.pdf)

### BE ON TIME and ERROR-FREE

#### 12 Most Common Errors:

1. You forgot to collect new youth and adult applications submitted during recharter. These forms for new members must be uploaded before finishing recharter.
2. Applications are not uploaded for youth or leaders listed as NEW on the charter. **FULLY COMPLETED APPLICATIONS MUST BE UPLOADED OR YOU CANNOT FINALIZE YOUR CHARTER.** Applications are required for any new youth or leader listed on page one, for any adult previously registered as Lion or Tiger Adult Partner now registering in a leadership role, and for any currently registered 18-yr-old who is promoted to Assistant Scoutmaster or College Scouter Reserve. Scouts who are 18, but are registering as youth in Venturing, Sea Scouting or Exploring must complete an adult application, including Youth Protection Training.
3. Approvals are missing on the charter. The Executive Officer (EO/IH) or the Chartered Organization Representative (COR) as listed on the charter papers should approve the charter online. This year, the delegate may approve on behalf of the COR. In this case, the COR will receive an email that the charter is approved on their behalf. The preferred method is for the COR to electronically approve the charter.
4. Approvals are missing from the paper applications that have been uploaded. Unit leaders and parents must sign the youth applications. The Applicant and Chartered Organization Representative must sign the adult leader applications. Be sure initials are included on adult applications near the signature box. **(Using online applications is the preferred method and eliminates these errors.)**
5. Social Security Number is missing from Adult Leader Applications. This number must be provided for background checks, no exceptions. **(Using online applications is the preferred method and eliminates these errors.)**
6. The Disclosure/Authorization (CBC) form is not attached with the adult leader application or is attached but not signed. This is a separate page before the applicant information. **(Using online applications is the preferred method and eliminates these errors.)**
7. The right-hand column of information is not filled in on the adult leader application, especially question 6. **(Using online applications is the preferred method and eliminates these errors.)**
8. The Chartered Organization is the same on the pack, troop and crew, but the Chartered Organization Representative is different from one unit to another. All units chartered to the same organization **MUST** list the same person(s) as the Executive Officer and Chartered Org Rep on all units. The COR only pays in one unit. Please indicate which unit the Chartered Organization Representative will pay in.
9. More than one position has been assigned to an adult leader, such as Committee Member. The Chartered Org Rep is the only position that can multiple either as a Committee Member or as the Committee Chair.
10. Payment is not satisfied. The required method of payment is online via credit card (3% fee) or echeck (\$1 fee).
11. The membership fee, Scout Life fee, or insurance fee is not submitted. Remember: End-of-year fees for new members will be added to your total!
12. The Annual Charter Agreement and Journey To Excellence scorecard aren't submitted to the district staff or properly signed.

## STILL HAVE QUESTIONS ABOUT UNIT RECHARTERING?

Contact our Registrar or your District Executive:

- Council Registrar - Adela Wright, (650) 341.5633 x112, [adela.wright@scouting.org](mailto:adela.wright@scouting.org)
- Discovery District - Henry Reyes, (650) 327.5900, [henry.reyes@scouting.org](mailto:henry.reyes@scouting.org)
- Redwood District - Tom Kenney, (650) 341.5633 x114, [thomas.kenney@scouting.org](mailto:thomas.kenney@scouting.org)
- Stanford District - Steve Smith, (650) 327.5900, [stephen.smith2@scouting.org](mailto:stephen.smith2@scouting.org)

## SERVICE CENTER LOCATIONS

**Foster City Service Center** 1150 Chess Drive, Foster City, CA 94404 • (650) 341.5633 **Hours** Mon-Fri 9am-5pm

**Palo Alto Service Center** 1305 Middlefield Road, Palo Alto, CA 94301 • (650) 327.5900 **Hours** Tue-Sat 11am-6pm