

Dear Scouting Volunteer,

As an administrative task, charter renewal is headed up by the unit committee chair in cooperation with the unit commissioner with support from the unit committee and input from the unit leaders. The committee chair does have the option of appointing a designee from the unit committee to take the lead, with that person keeping the committee chair informed regularly of the progress being made.

**Before accessing the online charter renewal system, you should complete the following tasks.**

If you need additional support to begin any of these items, contact your Unit Commissioner, District Commissioner, or District Executive.

### **Preparation steps before logging on to the online charter renewal system:**

1) Make an appointment with your Chartering Institution Head, the week your charter renewal is due, so they may sign the completed Charter.

2) log onto [my.scouting.org](http://my.scouting.org) membership manager and review the unit roster, both youth and adult, to identify any missing registrations or other issues (remember there may be pending items in the pipeline, just identify these and follow up to ensure their completion by working with your commissioner to ensure any corrections needed are completed)

2a) check the contact data for each member and **MAKE CORRECTIONS** to addresses, phone numbers, and email addresses so when you download the unit roster for renewal the data will be complete and up to date

2a.1) **ENSURE EVERY MEMBER HAS AN EMAIL ADDRESS AND THAT ONE IS MARKED PRIMARY**, even if they only have one on record; this includes youth, but a parent's email may be used on youth records

2b) conduct a **membership inventory** ([http://www.scouting.org/filestore/pdf/524-176\\_WB.pdf](http://www.scouting.org/filestore/pdf/524-176_WB.pdf)) as required so that each potential drop has been contacted and you have established a reason code as requested for data entry on the charter (you can use the unit roster available as a report from online advancement for this)

2c) **collect a completed application for any members not listed** to facilitate registration (adult application, need pages 3&15: <https://filestore.scouting.org/filestore/pdf/524-501.pdf> youth application, need page 3: <https://filestore.scouting.org/filestore/pdf/524-406.pdf> and **submit these for processing NOW** to ensure a complete and correct roster before you begin your charter renewal

3) generate the unit YPT aging report in [my.scouting.org](http://my.scouting.org) and have all adults whose YPT expires before the charter will renew update their training. You will be unable to renew adults whose YPT is not current. Edits have been added this year to prevent this.

4) estimate fees that will be necessary using the attached balance sheet and set aside adequate funds now; identify multiple registered adults and where their primary paid registration is held

5) if the charter executive officer is changing, complete a new unit application to submit the new officer's data for entry ([https://www.scouting.org/filestore/pdf/524-402\\_WB.pdf](https://www.scouting.org/filestore/pdf/524-402_WB.pdf))

6) remember that, in addition to the completed and signed unit roster with completed and signed applications for any new registrations, the balance sheet and a check for annual fees, a signed (by both the executive officer AND the charter rep) charter agreement must be submitted at the time the charter is turned in; this can be generated at the end of the online process or printed from the National site at any time  
([https://www.scouting.org/filestore/membership/pdf/524-182\\_web.pdf](https://www.scouting.org/filestore/membership/pdf/524-182_web.pdf))

Finally, **BEFORE** you start your actual charter renewal, review the step by step tutorial found online

(<https://www.scouting.org/commissioners/internet-rechartering/>) which covers the entire process, including changes and updates made for this year, and should deal with all of your questions.