

Unit Charter Renewal Handbook



Longhouse Council, BSA

REMINDER:

Your completed renewal package (including checklist with all required pages) is due for review no later than:

2803 Brewerton Rd
Syracuse, NY 13211

(315) 463-0201
longhouse@scouting.org
www.cnyscouts.org

PRIVACY POLICY

THIS CHARTER RENEWAL PROCESS 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 COMMITTEE CHAIR AND WITHDRAW FROM VIEWING OR WORKING WITH THESE DOCUMENTS.



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Appendix

These documents have been included to help assist you with completing your charter renewal and prepare your Charter Renewal Application for quick and efficient processing.

- A - Charter Renewal Fees
- B - Top Mistakes Made During Renewal
- C - Glossary of Common Terms
- D - Adult Position Code Reference
- E - Charter Renewal Checklist
- F - Council Balance Sheet (Cover Page)
- G - Annual Charter Agreement
- H - Journey to Excellence Forms



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 part of its service to youth - and the Boy Scouts of America, setting expectations for the quality of the 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 one year (12 consecutive months); hence, chartered organizations must submit an application to the Council annually to renew its charter. The requirements to renew a charter:

- Fosters a formal, timely plan for regular dialogue between chartered organization and BSA, and
- Assures membership is current so Scouts can participate in Scouting activities and advance in rank.

What is in this handbook?

We realize that the renewal process can be daunting or downright challenging for new individuals charged with renewing their organization's unit(s). We also realize that previous documentation provided during renewal time was disjointed, conflicting, and confusing for some individuals to use.

This new *Charter Renewal Handbook*, drawn heavily from handbooks published by the National Capital Area Council in Washington DC, explains the timeline, key roles, major process steps, and common challenges associated with your renewal. Use this handbook along with resources found on the Charter Renewal support pages at cnyscouts.org, the Internet Rechartering Tutorial, and your district's commissioner staff to submit your Charter Renewal Application on time and error free.

What if I have other questions?

The commissioner staff for your district is made up of several veteran Scouters, many of whom have shared your role of completing a charter renewal package. Reach out to your assigned Unit Commissioner or your district's District Commissioner for guidance and assistance. For more technical questions, you may need to speak with your District Executive or the Council support staff for resolution.

Best wishes for a smooth and successful charter renewal season.



CHARTER RENEWAL OVERVIEW

Since 1916, annually, chartered organizations renew their charters. In this process, the unit Key 3 (committee chair, chartered organization representative, and unit leader) 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 committee chair 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, inventorying members, updating leader training, confirming leader positions, collecting fees, entering data into Internet Rechartering, 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 will assist the committee chair and the committee throughout the renewal process.

RENEWAL DATES AND TIME PERIODS

Units turn in charter renewal packets the month prior to the unit charter expiration month. The month to turn in packets varies by district; refer to your current charter roster for the month in which your unit expires. Units and district renewal dates are staggered across the calendar year to allow for timely resolution of any errors and for expeditious processing by the registration team.

Access to the Unit Charter Renewal System (UCRS) or Internet Rechartering starts **60 days before** the unit’s charter expiration date. In practical terms, units must accomplish the precursor activities before updating the charter using Internet Rechartering. Contact your Unit Commissioner to coordinate the date for the unit’s charter review meeting.

February Renewals (Expire 2/28/xx)	March Renewals (Expire 3/31/xx)
<ul style="list-style-type: none"> • Charters Expire 2/28 • UCRS Access opens 1/1 • Turn in finished packet before 1/31 • Errors Resolved during month of February 	<ul style="list-style-type: none"> • Charters Expire 3/31 • UCRS Access opens 2/1 • Turn in finished packet before 2/28 • Errors Resolved during month of March



ROLES & RESPONSIBILITIES

The unit's roles and tasks for charter renewal can be divided into four phases:

1. Activities and planning accomplished before Internet Rechartering
 - 120 - 60 days before charter expiration

Chartered Organization Rep	Committee Chair	Unit Leader	Recharter Processor	Commissioner
1. Assist Committee Chair with selection of leaders for next charter year	1. Identifying charter renewal team 2. Establish unit charter renewal event timeline 3. Select a renewal processor (RP) 4. Attend district charter renewal training 5. Designate a committee member to conduct membership inventory 6. Designate committee member to coordinate YPT expirations 7. Designate committee member to collect registration fees 8. Assigning adult leadership positions for coming year. 9. Monitoring membership inventory, YPT completions, and fees collected.	1. Advise Committee Chair on direct contact leadership recommendations for the new year	1. Attend district charter renewal training 2. Obtain list of adult and youth members, associated membership applications (if needed), background check authorizations, YPT certificates, Boys' Life requests and payment status.	1. Help unit obtain all charter renewal materials 2. Provide guidance for processing and meeting district's charter turn in deadline 3. Participate in unit preparation training and organizational meetings 4. Facilitate application processing

Note that for the 2020 renewal cycle, each adult leader will need to complete a new Background Check authorization form. This new form is a mandatory requirement from the BSA's national office to ensure that all leaders comply with the Youth Protection and Membership standards of the BSA. Please contact your District Executive with any questions.



ROLES & RESPONSIBILITIES

2. Entering data during Internet Rechartering
 - 60 - 45 days before charter expiration

Chartered Organization Rep	Committee Chair	Unit Leader	Recharter Processor	Commissioner
			3. Updating unit charter with Internet Rechartering. 4. Assembling final charter renewal package	5. Coaching RP on Internet Rechartering.

3. Finalizing and approving the charter renewal packet
 - 45 - 30 days before charter expiration - commissioner staff reviews
 - 30 - 0 days before charter expiration - Registration team processes and posts new charters and membership rosters

Chartered Organization Rep	Committee Chair	Unit Leader	Recharter Processor	Commissioner
2. Participate in the Key 3 review of the Charter Renewal Application 3. OPTIONAL: Work with Executive Officer of organization to approve online Charter Renewal Application (you'll still need to print & submit the paper copy). 4. Help coordinate meeting with organization's Executive Officer/Institutional Head (IH) to sign charter renewal application.	10. Participating in the Key 3 review of the Charter Renewal Application, directing correction as needed. 11. Use the Council Balance Sheet (in Appendix) to forward complete payment to Council Service Center. 12. Ensuring the Charter Renewal Application is submitted to the commissioner staff prior to the district due date. This ensures mistakes are taken care of quickly.	2. Participate in the Key 3 review of the Charter Renewal Application. Sign the Renewal Application.	5. Participate in the Key 3 review of the draft renewal packet. 6. "Update Unit Roster" frequently (see page 16) to ensure current information is loaded prior to submission. 7. Review draft again after roster is updated! 8. After draft is reviewed, click "Submit to Council" in Internet Rechartering UCRS. 9. PRINT TWO COPIES and submit to unit Key 3 for final approval and signatures.	6. Participate in the Key 3 review of the draft renewal packet. 7. Assist with correcting incomplete or defective charter renewal packets prior to submission. 8. Accepting and delivering final charter renewal packet to the district commissioner & district Key 3.



ROLES & RESPONSIBILITIES

4. Reviewing and presenting new charters
 - Review new data posted in Member Manager in My.Scouting Tools. Unit Key 3 members must print membership cards and charter certificate from Member Manager tool.
 - The Committee Chair and Unit Leader review the membership cards and charter certificate for accuracy.
 - The Chartered Organization Representative schedules and Unit Commissioner conducts a charter presentation.

Chartered Organization Rep	Committee Chair	Unit Leader	Recharter Processor	Commissioner
5. Schedule charter presentation 6. Participate in Charter Presentation.	13. With unit leader, verify all members were correctly renewed in my.Scouting.org Member Manager. 14. Participate in Charter Presentation.	3. Verify all members were correctly renewed in my.scouting.org Member Manager and print membership cards. 4. Distribute membership cards. 5. Participate in Charter Presentation.		9. Participate in Charter Presentation.

PRIVACY POLICY

This charter renewal process 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 Committee Chair and withdraw from viewing or working with these documents.



Phase 1 – Be Prepared: Updating Members, Leaders & Training

Identify Team and Timelines

To prepare for charter renewal, the committee chair and committee focus on key tasks for the next Scouting year. The Committee Chair normally appoints committee members to inventory members, verify training, and collect applications and fees. In addition, the chair selects one individual to serve as the renewal processor to update records using the Unit Charter Renewal System.

The charter renewal team develops a plan for your unit. Include the following key dates in the unit's annual program plan:

- Membership inventory completion date
- Scouts and adult leaders' fees due date
- Training - especially YPT - completion date
- Application completion date
- Charter renewal meeting date (to review and sign final paperwork)
- Charter renewal packet turn-in date

Membership Inventory

Conducting a thorough inventory of youth and adult members is key to successful charter renewal. Compare the unit's local roster to the member roster contained in Member Manager. Contact all inactive members and attempt to reactivate them. Make every effort to recruit additional youth and adults so that the unit reregisters with no loss in membership. Also, be sure to register any youth who are participating but are not yet registered.

A committee member should contact every family to:

- Verify members re-registering with the unit.
- Verify birth date, grade, telephone number, mailing address, and Boys' Life subscription.
- **Verify email address.** An accurate email address allows for each family to receive important information from the Council and the twice-yearly national Voice of the Scout surveys.
- Confirm fees and payment due date.
- Note the reason for members who are not reregistering and extend an invitation to continue in Scouting. The reason for dropping from Scouting will be subsequently recorded in the UCRS.



Commissioner Support for Membership Inventory

Unit commissioners can help with your unit's membership inventory. Give your commissioner the latest version of your unit roster. Ask your unit commissioner to help place a youth in another unit if a change will continue or enhance a Scout's experience.

The Council Scout Executive must approve charter applications for units with 100 or more youth, units with a loss of 50% or more youth from the previous year, units with no change in youth, and units with less than 5 youth. If your unit is one of these types, your commissioner will coordinate with the District Executive to seek Scout Executive approval.

Submit Applications Now

Complete and submit applications immediately. Do not hold youth or adult applications for submission with the charter renewal package. Scouts cannot advance or receive Boys' Life if they are not registered members of the Boy Scouts of America.

A completed application is required for all new youth and adult leaders added to a unit's roster during Phase 2 Internet Rechartering. If applications previously submitted to the Council office have not processed, when updating the roster in Internet Rechartering, submit the application again with the charter renewal packet. A copy of an application previously submitted will suffice; for adult applications, the Social Security Number must be visible on the application.

For all online Be-A-Scout applications completed before you begin your renewal, ensure they are approved and show in the unit's Member Manager list.



Identify Unit Leaders

The Chartered Organization Representative approves adult leaders. Unit leaders may recommend direct contact leaders for appointment while the Committee Chair 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 number of required leaders.

Packs	Troops	Crews
<ul style="list-style-type: none"> • 1 Chartered Organization Representative (CR may be dual registered as CC or MC) • 1 Committee Chair (CC) • min. 2 Committee Members (MC)* • 1 Cubmaster (CM) • min. 1 Den Leader (DL) <p>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 their Tiger/Lion. Note: an AP/LP registering in a Pack adult leader position must complete YPT and an adult application.</p> <p>* Pack Trainer (PT) or New Member Coordinator (NM) may be substituted for a Committee Member position.</p>	<ul style="list-style-type: none"> • 1 Chartered Organization Representative (CR may be dual registered as CC or MC) • 1 Committee Chair (CC) • min. 2 Committee Members (MC)* • 1 Scoutmaster (SM) <p>* New Member Coordinator (NM) may be substituted for a Committee Member position.</p>	<ul style="list-style-type: none"> • 1 Chartered Organization Representative (CR may be dual registered as CC or MC) • 1 Committee Chair (CC) • min. 2 Committee Members (MC)* • 1 Crew Advisor (NL) <p>* New Member Coordinator (NM) may be substituted for a Committee Member position.</p>

Adult Position Changes

Adults changing position during the current charter year must submit an Adult Application verifying approval by the Chartered Organization Representative. Submit applications to change adult positions without delay. If a currently registered adult will only assume the position in the new charter year, do not submit an application to change the position. The Institutional Head/Executive Officer's approval of the Charter Renewal Application noting the change is sufficient.

Every paper-form adult application must include the signed application, signed Criminal Background Check authorization/disclosure form, and a valid Youth Protection Training certificate of completion. Online applications for adult leaders are currently not supported or approved for use in this Council.



Trained Leaders

Every Scout deserves a trained leader. All registered adults are expected to complete position-specific training. Scouting University provides position-specific training via the BSA Learn Center available at <http://my.scouting.org>. In-person position-specific training and outdoor training is offered frequently by your district and nearby districts, as well as at the council level.

In-Person Youth Protection Training will be offered on January 16, 2020 at the Luther Memorial Lutheran Church in North Syracuse (enter parking lot from South Bay Rd). Class starts promptly at 6:30pm. Contact Thom Kubicki (thomas.kubicki@oswego.edu) with any questions.

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!

Unit Key 3s should monitor the status of every adult leader's Youth Protection Training (YPT) status and should not wait until it is time to renew the unit's charter to make sure all YPT is current. A reminder that expiration dates of Youth Protection certificates must be *after* the expiration date of the new unit charter year. Please review your unit's YPT aging report in My.Scouting's Training Manager to ensure all adults are in compliance.

My.Scouting Tools & Resources

As noted previously, tools are available at <http://my.scouting.org> to help leaders manage membership and training. The portal works best with the latest versions of Chrome, Firefox, Safari, Edge, or Internet Explorer (v11 or higher). Older versions of web browsers are no longer supported. Each my.Scouting tool has a help menu, accessible from the icon located in the lower right corner of the window.

The unit Key 3 (Chartered Organization Representative, Committee Chair, Unit Leader), plus three other registered leaders (assigned by the Key 3) may use my.Scouting tools to update

- Member profiles and
- Training records, including YPT completions

Note that the logged-in user cannot update their own training records. Another member of the group listed above can update the others' information should the situation warrant.

Your Unit Commissioner can coach your unit on using my.Scouting tools. If you need help designating your "plus three" or if you have questions about using the tools, please contact your Unit Commissioner. If you have questions about accessing the tools (or for technical difficulties), please contact the National Member Care Contact Center at (972) 580-2489 or send an email to myscouting@scouting.org. Local council staff cannot assist with My.Scouting service issues.



Unique Situations & Special Scenarios

Certain times, additional rules set by the BSA will add a few extra steps and forms to your charter renewal process. This list is not designed to be all-inclusive; if you have additional questions or need more help through the process, please contact your commissioner staff, District Executive, or the Council support staff for more direction. These scenarios are some of the more common and the steps outlined below will help you resolve these issues as quickly as possible.

Our Organization has a new Executive Officer

The Executive Officer position, in BSA terminology, is the head or CEO-equivalent position of legal authority for the organization that sponsors Scouting units. Should this position change and information on the charter renewal is out-of-date, please download and attach a **New-Unit Application** (there is no specific form from the BSA to make this change) noting the organization name, new Executive Officer, and their signature “for the organization.” On the finished charter renewal application, cross out the name of the old Executive Officer and print their name next to the typed information. Have the new Executive Officer sign the renewal package and the Annual Charter Renewal page.

If the new Executive Officer is also registering as the Chartered Organization Representative for the organization, encourage them to appoint another person to the representative position so that two individuals from the organization can sign off on adult applications. If the new representative is not currently registered in the unit, follow the additional steps in the following section.

Our Chartered Organization has named a new Representative

The Chartered Organization Representative position is an important link between your unit and the organization that sponsors it. This individual is a voting member on the Council’s Executive Board, on the local District Committee, and responsible for maintaining good two-way communication between the unit and the district and council. This position is considered a registered leader position in the unit, and is subject to registration fees, Youth Protection Training compliance, and there is a position-specific training course relative to the discharge of their duties.

Should an organization change their Chartered Organization Representative (COR) during the charter renewal process, they should expire - or change the position of - the current COR, depending on if they will continue to be involved in the unit. The organization should then have the new COR fill out and sign a new adult leader application; the Executive Officer of the organization must be the one to sign on behalf of the organization. The new COR is then added to the roster like any other new adult to the unit and pays the required registration and insurance fees.

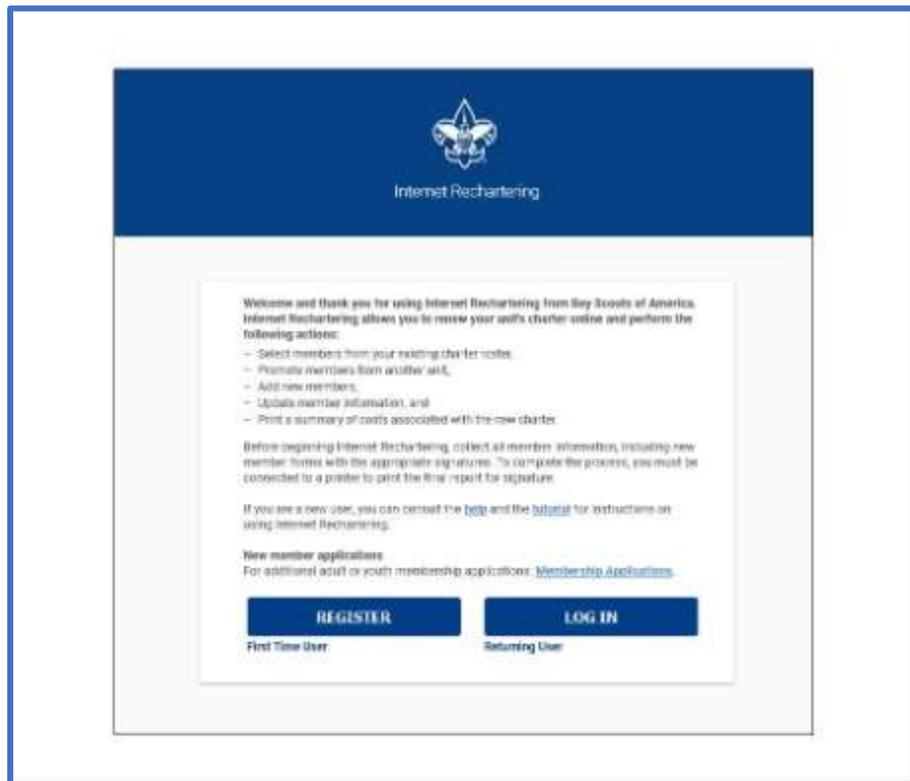
Additional Questions?

Give your commissioner staff or field professional a call! They are here to help!



Phase 2 – Do Your Best: During Internet Rechartering

Your renewal processor can access the Internet Rechartering system (UCRS) on the Charter Renewal support page on the council website. This page also contains additional resources to aid in your charter renewal process.



Read this handbook and review the resources on this page before proceeding. Collect the following from the unit charter renewal team:

- 1) Updated Membership Inventory, including:
 - a) Reregistering youth, updated personal data, Boys' Life subscription election, multiple registration (if applicable, including unit in which paid)
 - b) New youth with applications
 - c) Youth NOT renewing - and reason for not renewing
 - d) Reregistering adults, updated personal data, Boys' Life subscription election, multiple registration (if applicable, including unit in which paid) and leadership position
 - e) New adults with application, including background check authorization/disclosure form, YPT certificate, and leadership position
 - f) Note that youth and adults promoted from a unit with the same chartered organization are considered new to your unit and require a completed application.



- 2) Updated leadership positions
- 3) Training Report listing expiration dates of YPT for all adult leaders.
 - a) Note that the Training Report calculates “yes/no” compliance status based on the date the report is generated and may not take all variables into consideration for charter renewal.
 - b) Commissioner staff is available to help confirm whether adults comply or need to re-take the course.

To begin Internet Rechartering, the Renewal Processor will sign on to the Council website (www.cnyscouts.org/CharterRenewal) and select the access link to the Internet Renewal system. The Renewal processor and other members of the charter renewal team are highly encouraged to view the Charter Renewal Tutorial pages located on the same page.

When ready to enter data:

- Click REGISTER - you are considered a first-time user every year for the first time accessing this system.
 - Once you have signed in for the first time, you can exit the program and pick up where you left off by clicking LOG IN as a returning user (until you click “Submit to Council” at the end of this process).
 - Note that if you return to UCRS and have forgotten your password, click on LOG IN and then **Forgot Password?**
- Enter the 9-digit access code emailed to you by the Registration Shared Services team.
 - Email will be sent to the Unit Key 3 (Unit Leader, Committee Chair, and Chartered Organization Representative).
 - Code is normally emailed 60 days from the end of your renewal cycle. Be sure to check your “spam” folder in case you do not receive the code.
 - This 9-digit code will be different than the renewal code used in prior years.
- Agree to confidentiality
- Enter your contact information and create a password
- Read about the 5 stages of Internet Rechartering. The 5 UCRS stages are:
 - Loading the roster
 - Updating the roster
 - Checking the roster
 - Summary (a final review and *last chance* to make change)
 - Final Submission (no changes can be made in/after this step)
- Click *Begin*

If you are a new user, you can consult the using Internet Rechartering.

New member applications
For additional adult or youth membership a

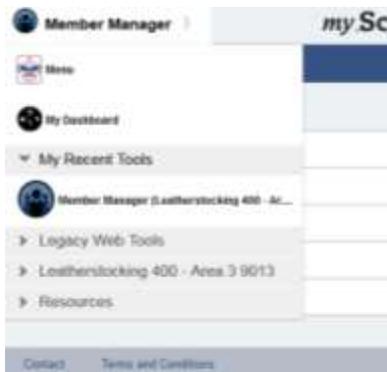


If you have trouble with the software loading, click on Frequently Asked Questions in the blue bar at the top right of the page.



Recharter Stage 1 – Loading your Roster

Using the online charter renewal system is designed to be fast, easy, and to reduce the number of errors in updating information for youth and adults in Scouting units across the council. For this and future renewal cycle, Internet Renewal will be the primary way of processing charter renewals. As such, paper copies of rosters will no longer be provided, as units can sign in to my.Scouting Tools and view registration information via the Member Manager.

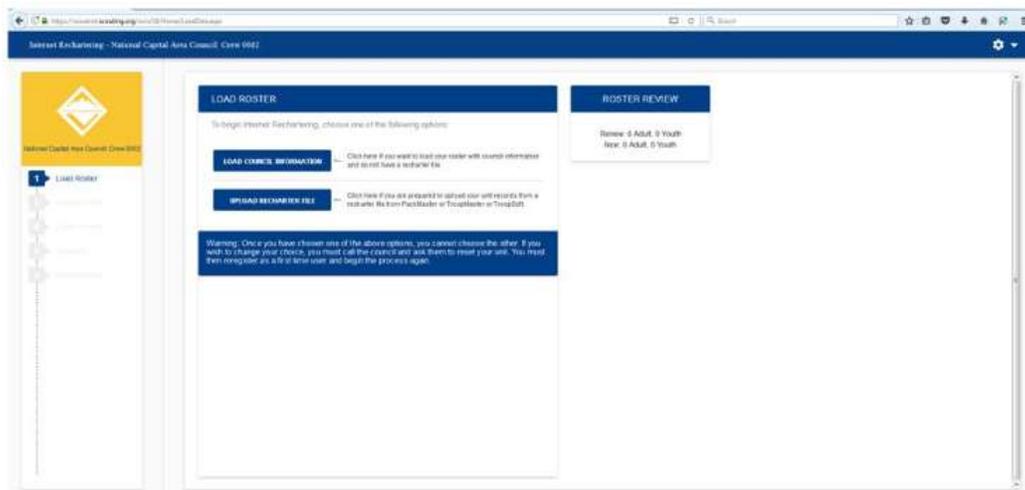


Member Manager can be accessed by finding your unit in your menu (top left corner of page) and clicking on Member Manager. A menu for your unit should appear below where “Legacy Web Tools” appears in the photo to the left.

Access to these features is available only to currently-registered Cubmasters, Scoutmasters, Committee Chairs and Chartered Reps (the “unit Key 3”). The Unit Key 3 can grant access to three additional people to perform similar tasks. Contact the council office if you think you should have access and do not.

From the Member Manager, any of the unit Key 3 or “plus three” (see page 9) can edit the directory information of any youth or adult prior to beginning the charter renewal process. Any changes made here will update the national membership database and will automatically show up in the charter renewal system when you click Load Council Information (see below). There may be a delay of 24-48 hours depending on the amount of changes being processed by this system.

The use of uploaded files from third-party software is supported by this system but discouraged due to the potential for name discrepancies: nicknames, shortened names, and middle names incorrectly formatted will cause errors in starting this process. In addition, once you choose one of these options, you cannot change your mind unless the entire system is reset for your unit.





Recharter Stage 2 – Review & Update your Roster

There are several steps involved in updating a unit roster, as well as numerous things to keep in mind when completing this step:

- Update information on the chartered organization
- Select adult and youth members for renewal (all should be checked, uncheck those not renewing)
- If your chartered organization *sponsors* another unit, you may “Promote” adult members from the other sponsored unit into your unit. This includes “promoting” youth who have turned 18 into adult status.
- New adults, even those being promoted, *must complete Adult Application forms!* The “promotion” step just saves you from having to re-enter all their personal information!
- **DO NOT USE** the “transfer” function for youth or adults during Internet Rechartering. You are not transferring the membership for the current year. Internet Rechartering registers the member for the new charter year, not the one you are currently in.
- Add new adult members. Enter the information found on their paper applications.
- Add new youth members using the same method as adults.
- Update existing member data, such as phone numbers and email addresses.
- Update the adult’s unit leadership positions.
- When entering names - for data entry consistency - follow these rules:
 - Use full, legal names, not nicknames
 - NO spaces between prefixes (DeCarlo, not De Carlo)
 - NO apostrophes (Obrien, not O’Brien)
 - NO hyphens (John Smith Payne, not John Smith-Payne)
- **DO NOT TYPE OVER AN EX-MEMBER’S INFORMATION TO ADD A NEW MEMBER!**
- You cannot change a Scout’s rank using Internet Rechartering.
- Registration in multiple units is allowed, e.g., an adult may serve in both a pack and a troop, or a youth in a troop and a crew/ship.
 - “Multiples” pay the registration, insurance, and resource fees in only one unit.
- Units with the same chartered organization **MUST** have the same executive officer/institutional head name and signature and the same chartered organization representative listed on all rosters.
- 100% Boys’ Life subscription status is strongly encouraged for all Packs and Troops. One subscription per family counts toward 100%, even if the Scouts are in different units.



Changing Programs

For Arrow of Light Scouts at charter renewal time (formerly known as Webelos II Scouts):

- For Scouts who have crossed over or will cross over to a Troop before the Pack's charter renewal date, the Troop should register them promptly and include them in its charter renewal submission. The Pack should ensure that Scoutbook is updated with their Arrow of Light rank date where applicable, as soon as earned, before the youth registers in a Troop. A Troop cannot update Cub Scout advancement.
- For those who will not cross over and register in a Troop until after the Pack's charter renewal date should remain on the Pack roster for the new year to ensure that there is no gap in the Scout's registration and Boys' Life subscription. They should then be transferred via a new youth application at the time of crossover from a Pack to a Troop.

For members who reach age 18:

- A Scout who has reached the age of 18 cannot be registered in a Troop as a youth.
- Venturing/Sea Scout youth who are 18 years old or older at the time of their first application into a unit (Crew or Ship) must complete an Adult Application and Youth Protection Training and register as a Venturing Participant (VP). Venturers who are already in a unit and have turned 18 or will turn 18 before the effective date of the renewal must also complete an adult registration form and YPT and register as a Venturing Participant if they have not previously done so.

For security reasons, Social Security Numbers for registered members are not shown. When registering new adults, the registration team will enter Social Security Numbers from the adult application (you won't be able to make that entry when inputting information for a new adult in UCRS).

Important: Update Unit Roster Frequently

The Longhouse Council has over 150 Packs, Troops, Crews, and Posts that renew on a variety of schedules in our service area. During periods of heavy volume (such as charter renewal season and fall membership recruitment), it may be a few days before applications, advancement, and training records are fully updated and entered into the BSA's membership system for you to see during charter renewal. Using the "Update Unit Roster" feature allows you to receive updated information (especially YPT completion dates) into the charter renewal application system.



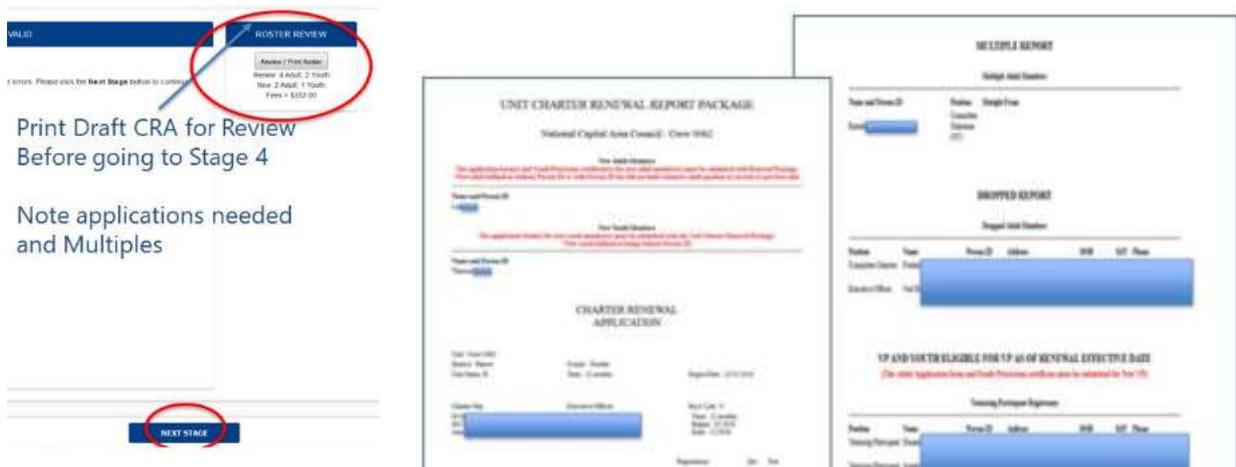


Recharter Stage 3 – Check your Roster

At this point, the Internet Renewal system will run some basic checks on the data you've input to ensure that it complies with BSA policies and guidelines:

- **WARNINGS** will NOT prevent continuance
- **ERRORS** will STOP the process until the error is corrected.
- **ADULTS WITHOUT A VALID YPT DATE WILL CAUSE AN ERROR.** Please be sure to review the YPT Aging Report available from the Training Manager to ensure full compliance and to avoid any unnecessary delays.

Print and review your draft Charter Renewal Application. **DO NOT SUBMIT THIS DRAFT COPY.** Identify on this draft copy any applications needed and individuals with “multiple” registrations (those registered and paid in another unit).



DO NOT SUBMIT a draft copy of your unit roster, or a copy of your renewal without the Council Balance Sheet or Charter Renewal Checklist! These forms help to ensure that you have all of the required documentation for your charter renewal and head off many common problems before they become problems!

Checklists, forms, and JTE rubrics are available on the Council website and Scouting.org in case you need additional copies beyond what is included in this guide. These forms will help you catch any mistakes before your finished package is received at the Council Service Center!

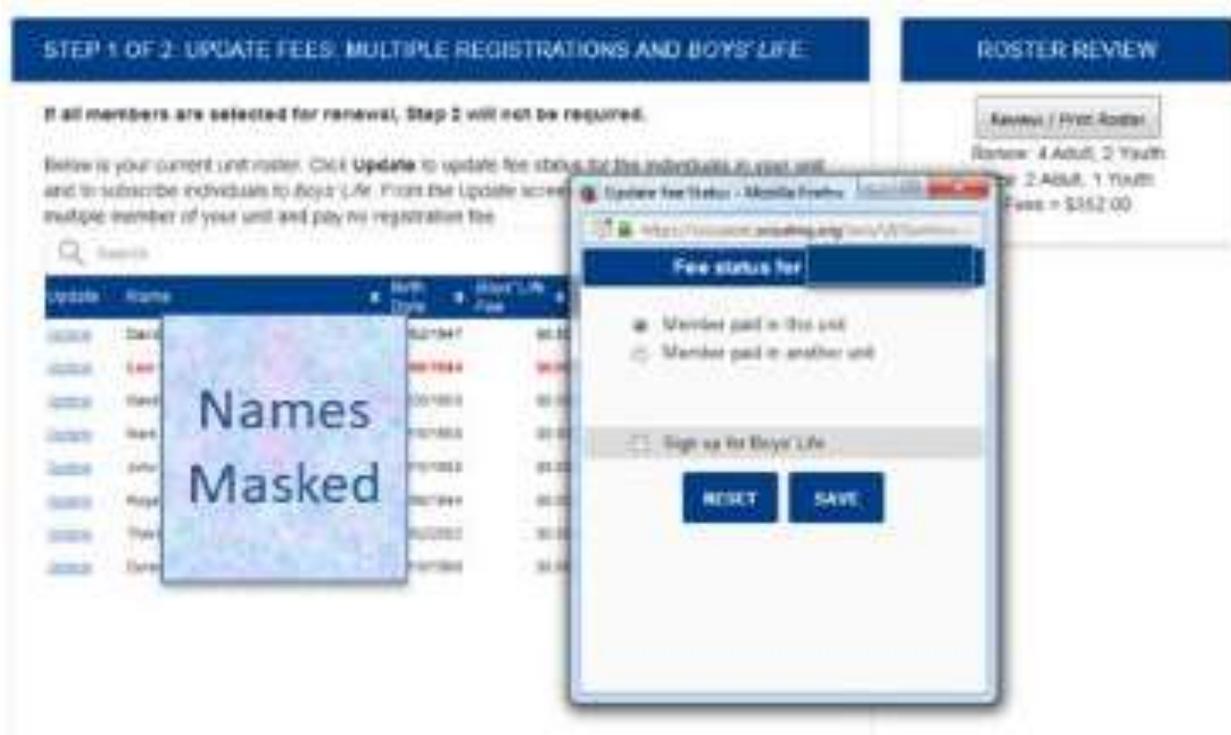
Since a draft copy of your charter renewal is not finalized, it does not come with signature lines and cannot be used in place of a finalized, signed copy. Please use it for **reference only**, and **DO NOT SUBMIT A DRAFT COPY OF YOUR CHARTER RENEWAL FOR FINAL PROCESSING!**



Recharter Stage 4 – Summary & Update Fees

This is the step where you set the fees at \$0.00 for “Multiples” - members that have paid in another unit and identify that unit.

This is also where you include the fee for Boys’ Life, if appropriate. Note that member registration fees paid to the National Office are calculated by this system using the new fee structure announced by the BSA in the fall of 2019.



To mark a member as a multiple (and reflect their registration fee as \$0.00 in your unit), select the member in this step and click “Update” next to their name. A smaller window will appear, where you can mark that this member is “paid in another unit.” Type in the information for this other unit (or other non-unit position, such as district or council committees), and click Save.

Note that this process is also for youth and adult members interested in receiving Boys’ Life subscriptions. Selections updated here will have their circulation preferences and fees saved.

The National liability insurance fee of \$60.00 per unit (not per member) is not listed here but is listed on page 2 of the final Charter Renewal Application printout. A Council-imposed supplemental insurance fee of \$12.00 per person is also listed in the UCRS charter renewal software. This charge helps to defray the cost of the accident and sickness insurance the Council carries for all registered members, both youth and adult. Both insurance fees are listed and calculated on the Balance Sheet that must be attached to your completed renewal.

For this renewal cycle, the UCRS does not include calculations for the Longhouse Council’s Resource fee of \$24 per member (both youth and adult). The resource fee will



not be computed in the figures presented by the UCRS and will still result in a balance due if payment is made online via e-check or credit card. To simplify your renewal, it is **STRONGLY** encouraged that the unit **NOT** pay their renewal online. A copy of the Council Balance Sheet is included in the Appendix to ensure that the correct fees are collected the first time.

In future renewal cycles, the resource fee will be included as part of the renewal process. We apologize for any inconvenience this may cause.

This step is also where the BSA collects data on non-renewed members. This information is critical to improving our program. Enter the reason that a member is dropping from Scouting and ensure that all members have been contacted and given the opportunity to re-join this unit or to join another unit.



Phase 3 – Do Your Duty: Finalizing, Approving, & Posting

Now that all fees (Boy’s Life and multiple registrations) have been set, print or save another copy of your DRAFT charter renewal application to work from for these next few steps (see page 15).

Gather new youth and adult applications for members named on the first page of the Draft application! Applications are required for all members added to your roster in Stage 2 of the Internet Rechartering process.

Gather Youth Protection Training certificates from those needing it. See the list on the last page of the Draft application, and be sure to confirm all other adults using the expiration dates listed on the printout you obtained from the my.Scouting Tools “Training Manager.”

After the Committee Chair and the charter renewal team has verified and finalized the membership, leadership, and training data in UCRS and on all applications and YPT completions, then the Renewal Processor and Charter Approver (IH- Executive Officer) can proceed to Stage 5.

Recharter Stage 5 – Submit Roster

At Stage 5, you and the Executive Officer for your sponsoring organization can approve this renewal application electronically. Once approval has been obtained (or if you choose to obtain non-electronic approval), you may also pay the required fees online.

Regardless of the electronic options you may select (approval and/or payment), a final paper copy of your Charter Renewal Application must be printed and submitted as part of your Charter Renewal package. **Be sure to include the Council Balance Sheet to ensure that the proper payment has been made by your unit.**

APPROVE ROSTER		REGISTRATION	
Our Organization approves this application and all registering adults understand the responsibility for the approval of new adults can be given to our chartered organization. Select Approver: [Dropdown] Approver's Initials: [Text Field] Give Approver's Signature: [Signature Line] CLEAR SIGNATURE SIGN DOCUMENT		Paid Youth: 3,180.00 Paid Adult: 4,812.00 Paid Adult BL: 1,812.00 Unit Liability Insurance Fee: 1,540.00 Accident and Sickness Insurance Fee @ \$5: 7,342.00 Total Fee: \$12,686.00	

IMPORTANT CHOICE:

1. IH or CR Approve Electronically. Printed CRA will not show Approver's Signature line (Do Not insert RP's initials.)
2. Click Next to skip this screen. Printed CRA will contain Approver Signature line and permit changes on the printed CRA

NEXT



Payment can be made electronically by credit card or e-check or by cash/check. A 3% administrative fee is added when paying by credit card. All monies collected as part of the charter renewal process are sent directly to the National Office for registration purposes.

For this renewal cycle, the UCRS does not include calculations for the Longhouse Council's Resource fee of \$24 per member (both youth and adult). The resource fee will not be computed in the figures presented by the UCRS and will still result in a balance due if payment is made online via e-check or credit card. To simplify your renewal, it is **STRONGLY** encouraged that the unit **NOT** pay their renewal online. A copy of the Council Balance Sheet is included in the Appendix to ensure that the correct fees are collected the first time.

PAYMENT		REGISTRATION	
Payment Methods			
		Paid Youth	3 @ \$99.00
Credit Card	Cash	Paid Adults	3 @ \$99.00
3% Administrative Fee	No Fee	Paid Adult DL	1 @ \$12.00
		Unit Liability Insurance Fee	1 @ \$48.00
		Accident and Sickness Insurance Fee @ \$5	2 @ \$30.00
		Total Fee	\$286.00

If you do NOT want to use the online approval or payment systems, simply click NEXT and you will skip the step.

If you intend to use the online approval, the IH initials must be inserted, and they must sign in the block shown on screen with a mouse or stylus. As mentioned previously, the Renewal Processor can sign out and sign in using the System Access Code and password you created when signing in for the very first time. **DO NOT** insert the renewal processor's initials.

APPROVE ROSTER

Our Organization approves this application and all registering adults. I understand the responsibility for the approval of new adults can be given to our chartered organization.

Select Approver: Roger Smith - Executive Officer

Approver's Initials: [Dropdown]

Draw Approver's Signature: [Signature Line]

CLEAR SIGNATURE SIGN DOCUMENT

REGISTRATION

Paid Youth	3 @ \$99.00
Paid Adults	3 @ \$99.00
Paid Adult DL	1 @ \$12.00
Unit Liability Insurance Fee	1 @ \$48.00
Accident and Sickness Insurance Fee @ \$5	2 @ \$30.00
Total Fee	\$325.00

IMPORTANT CHOICE:

1. IH or CR Approve Electronically. Printed CRA will not show Approver's Signature line (Do Not insert RP's initials.)
2. Click Next to skip this screen. Printed CRA will contain Approver Signature line and permit changes on the printed CRA

NEXT



SUBMIT ROSTER

Check if you wish to request and authorize the council to charge your unit deposit account for your charter renewal fees, providing that your unit has sufficient funds on 06/30/18.

From this page, you submit the final version of your electronic roster to the council. You also print your final paperwork to send along with your fee payment to the council.

Warning: Once you submit to council, you cannot change the roster through internet rechartering. The only way to make changes will be to note these changes directly on the printed Charter Renewal Application that you submit to the council as part of the Unit Charter Renewal Report Package.

To review your roster before submitting, click the [\[Review Print Roster\]](#) link.

To submit your roster to the council, click below:

ROSTER REVIEW

Review / Print Roster

Range: 4 Adult, 1 Youth
New: 2 Adult, 1 Youth
Fees = \$306.00

SUBMIT TO COUNCIL

Your last opportunity to make changes is at Stage 5, Step 3, **BEFORE** you click **SUBMIT TO COUNCIL**. Once you click **SUBMIT TO COUNCIL**, congratulations! The electronic part is done, but the paperwork remains...

SUBMIT ROSTER, PRINT CHARTER RENEWAL APPLICATION

Congratulations!
Your charter renewal information has been submitted successfully. You are finished with the online portion of Unit Charter Renewal.

The Unit Charter Renewal process is not complete, however, until you complete the following:

- As requested by your council, print the Summary Renewal Report E-Z OR the Unit Charter Renewal Report Package (if not used). Please follow the instructions of your council in regard to which renewal application format is required. You may view these PDF files for reference.
- Unless Online Approval was done, obtain the appropriate signatures for the renewal application (or Unit Charter Renewal Representative OR Executive Officer and Unit Leader).
- Select the signed new member sign cards, and the substitutes of youth (Proficiency Training compulsory) as applicable. If a new adult unit leader is being added, the application is required.
- Follow the link buttons of your council to report to payment of fees. If Online Payment was done the confirmation is on your report.
- Deliver the Summary Renewal Report E-Z OR all pages of the Unit Charter Renewal Report Package, new member applications, any other requested forms, and make payment of fees due to your council.

Thank you for using internet Rechartering from the Boy Scouts of America.

To print the charter renewal application, click here: PRINT RENEWAL APPLICATION

To print the Renewal Report E-Z, click here: PRINT RENEWAL REPORT E-Z

To access the journey to excellence unit scorecard, click here: UNIT SCORECARD

To print the initial Charter agreement, click here: INITIAL CHARTER AGREEMENT

ROSTER REVIEW

Range: 00 Adult, 00 Youth
New: 2 Adult, 0 Youth
Fees = \$000.00

CLICK ON: Print Renewal Application

Print the full Renewal Application. **Do not print the Renewal Report E-Z**. It is also highly recommended to save the resulting PDF document in a safe location for your records and print a second copy of the full Renewal Application for your unit's records.



Even if you have paid electronically, have your unit treasurer provide a **blank** check to pay the balance your charter renewal fees. Again, before you fill in the amount due, confirm that the amount you calculated is correct! Your commissioner is available to review your final roster and confirm your amount due. Bring all documents to your district's charter turn-in day to ensure that funds are available should you wish to use funds in your Unit Account.

Have you used and attached the Council Balance Sheet and Charter Renewal Checklist to your renewal?

Units using the electronic authorization method will have their approval checked to ensure the Executive Officer's initials are listed and that they did indeed approve your renewal.

For those units that did not elect for electronic approval, you will need your Renewal Application signed by:

- The Executive Officer/Institutional Head of the chartered organization, as they are **the only person that can sign paper renewal copies. The Chartered Organization Representative CANNOT sign on behalf of the organization for the renewal.**
- The unit leader (Cubmaster, Scoutmaster, Crew Adviser, or Ship Skipper), **no designees.**
- The District Executive or Commissioner, as Council Representative.

Signature of the unit leader or designee on all youth applications. **The designee can only be the executive officer/institutional head, chartered organization representative, or the committee chair if the unit leader is not available.**

The Chartered Organization or Executive Officer/Institutional Head of the chartered organization must sign all adult applications, showing approval that the organization approves the adult's membership in the unit they "own."

Confirm you have all pieces assembled as per the Checklist (in the Appendix).

Review and submit everything to your commissioner or District Executive who will verify that the charter renewal packet is ready for turn-in. **Helpful tip:** Bring a signed, blank check to ensure that the fees calculated are in fact correct.

Charter Renewal Package Review

District staff conduct a detailed review of all packages to ensure they can be processed expeditiously by the council's registration team. To accomplish this, please provide the complete Renewal Application, not merely the E-Z Report to conduct the review. Staff members will contact the Committee Chair and Renewal Processor to resolve issues as required.

After a successful review, the package is sent to the registration team for final review and processing. When your unit charter is processed for the new charter year, unit and member expiration dates are updated in Organization and Member Manager respectively.



Phase 4 – Raise the Colors: Recognition after Charters Post

Ceremony is important to individual and unit identity. Plan a charter presentation ceremony to acknowledge the sponsor's and unit's commitment to a new year of Scouting. Charter certificates can be printed directly from My.Scouting Tools.

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

Verify all youth and adults are listed in my.Scouting Member Manager and print membership cards from Member Manager for distribution to Scouts, leaders, and their families.

Distribute membership cards with panache - they represent membership in a national "club" and a worldwide movement.

APPENDIX

Charter Renewal Fees

Calculate all fees using the Longhouse Council Balance Worksheet. The fees calculated in UCRS should include registration and Boys' Life fees submitted to the National office and Longhouse Council supplemental insurance fees. The **Council Resource Fee** is not calculated and will result in a balance due if paid directly from the fees shown on the renewal.

A reminder that a balance due on the unit's charter renewal will hold up processing until your balance is paid in full.

The unit charter fee is \$60 per year. All units are required to pay this annual general liability insurance fee.

- Adult Registration \$36
- Adult Accident & Sickness Insurance \$12
- Adult Resource Fee..... \$24

- Youth Registration..... \$60
- Youth Accident & Sickness Insurance \$12
- Youth Resource Fee \$24

- Boys' Life Subscription..... \$12

- Transfers: There are no transfers during Charter Renewal
For youth and adults that are transferring into a unit, their new unit should add them as new members to their roster and note on their attached application that they were formerly members of another unit.

- Multiple Registrations: \$0 (pay once, register anywhere)

- Make **ONE** check payable to **Longhouse Council, BSA**
- Keep a copy of all forms you submit

We strongly encourage all Packs and Troop families to subscribe to Boys' 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 families subscribe to Boys' Life magazine.

TOP CHARTER RENEWAL MISTAKES

- 1) Forgetting about the 9-digit **UNIT ACCESS CODE** for Internet Rechartering. It is emailed to your Unit Key 3 (did you check your “spam” folder?) and is available from your Commissioner or District Executive.
- 2) Not selecting **FIRST TIME USER** the first time you log in each year.
- 3) Forgetting your password and delaying. If you forget your password, select **LOG IN** (as a returning user), then select the **Forgot Password?** link to begin the reset process.
- 4) Not **PROOFREADING**. Before you hit Submit, print a draft copy and check it over. If you find a typing error or other mistake after submitting, note it **neatly in red ink** on the final, printed Renewal Application so that we can fix it!
- 5) Adult leaders with **no or expired Youth Protection Training**. All adults must have a YPT certificate that expires past the expiration date of the charter “year” you are applying for. Contact your commissioner staff or District Executive if unsure.
- 6) Missing **REQUIRED SIGNATURES** or incorrect initials on your Charter Renewal Application (the final, printed piece). If not done online (or if done online with incorrect initials), you’ll need **THREE**: unit leader (Cubmaster, Scoutmaster, Crew Advisor or Ship Skipper), **executive officer/institutional head** (no substitutions), and Council representative (commissioner or district professional).
- 7) Missing **APPLICATIONS** for new youth and adults added to your charter. If turned in previously, but a name is not on the charter, submit a copy of the original application with the Charter Renewal Application (and add the name/information to the electronic system).
- 8) Missing **Social Security Numbers** and **Driver’s License/ID Numbers** on new adult applications. You will neither see nor can enter a SSN online, but they are required to conduct the background check.
- 9) **MULTIPLE REGISTRATIONS** - An adult registered in more than one unit only *pays ONCE* and is shown as a **MULTIPLE** in all other positions. *The COR is the only adult who may “multiple” in the SAME unit.*
- 10) Not adding **INSURANCE FEES** or **RESOURCE FEES** for each paid member when turning in your Renewal Application.
- 11) **KNOWING WHEN YOU ARE DONE** - You are NOT done until you print the full-form Charter Renewal Application, obtain any required signatures, and turn in all paperwork, forms, checklists, and money for a final review. Be sure to complete and attach the Charter Renewal Checklist to your package as required!
- 12) **LATE SUBMISSIONS**. Turn in your packet on or before the deadlines set by your district.

GLOSSARY

Chartered Organization Certification - The **Executive Officer** (also known as the Institutional Head) of the **Chartered Organization** signs the **Charter Renewal Application**. This certifies that the organization has approved all registering adults.

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 \$60.00. This fee is submitted with the unit's application and helps defray costs of the BSA's national General Liability insurance program.

Insurance & Resource Fees: A fee of \$12.00 per paid registered member is collected by the Longhouse Council to help defray the costs associated with the required accident and sickness insurance carried by the Council for all active, registered members. A fee of \$24.00 is collected for the Council Resource Fee.

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 at a district or council position) does **not** pay a registration fee in any additional unit or position. Youth members paid in more than one unit are **not** required to pay more than once.

ADULT POSITION CODES

Each adult position has a corresponding code used on the adult application. All adult positions can be held by males or females. Positions are listed below based on the minimum age necessary to hold each position.

21 or older

Position Code	Position Name
IH	Executive Officer / Institutional Head
CR	Chartered Organization Representative
CC	Committee Chair
MC	Committee Member
SM	Scoutmaster
NL	Crew Advisor
NA	Crew Associate Advisor
SK	Ship Skipper
MT	Mate
CM	Cubmaster
WL	Webelos Den Leader (grades 4-5)
DL	Cub Scout Den Leader (grades 2-3)
TL	Tiger Den Leader (grade 1)
LL	Lion Guide (grade K)
PT	Pack Trainer
NM	New-Member Coordinator
91U	Unit Scouter Reserve

18 or older

Position Code	Position Name
SA	Assistant Scoutmaster
92U	Unit College Scouter Reserve
CA	Assistant Cubmaster
WA	Assistant Webelos Den Leader (grades 4-5)
DA	Assistant Cub Scout Den Leader (grades 2-3)

Tiger/Lion Adult Partners (AP/LP) complete the bottom half of the youth application, except under special circumstances listed on youth application.

CHARTER RENEWAL CHECKLIST

Please place this form behind the Council Balance Sheet in your package

Do you have the following? :

- Required minimum membership (see page 9)
Contact Council Service Center if you have less than 5 youth and would like to discuss your options.
- Completed Annual Charter Agreement form included in package
- Completed Charter Balance Sheet & payment of all fees (did you bring a blank check?)
- Completed 2019 Journey to Excellence Award included in package
 Turned in to Commissioner Paper Copy enclosed
- Internet Renewal Cover Page (first page of final renewal package) – even if it's blank!
- Roster Signature Page signed by Executive Officer and Unit Leader (second page of renewal package) if not electronically approved
- Roster with appropriate changes (all position changes can be made online!)
- Completed applications for new youth (see instruction page)
- Completed applications for new adults (see instruction page)
- Completed Additional Disclosures & Background Check Authorization forms (ALL adults!)
(new style, required for all adults, including those already registered)
- All registered adult members have current Youth Protection Training as evidenced by my.Scouting Training Manager report included in this package.
- Our unit plans a Friends of Scouting presentation to our parents on _____ or _____
For more information on Friends of Scouting, contact District Chair Bob Lombardi.
- Our unit meets on _____ nights, starting at ____:____ at _____
Packs, please note the above for each den:
Lion: _____ night, starting at ____:____ at _____
Tiger: _____ night, starting at ____:____ at _____
Wolf: _____ night, starting at ____:____ at _____
Bear: _____ night, starting at ____:____ at _____
Webelos: _____ night, starting at ____:____ at _____
Arrow of Light: _____ night, starting at ____:____ at _____
- LEGIBLE Contact info for person responsible for renewal:

Unit Representative E-mail address

Unit representative phone number

Unit Representative Sign & Print Name

Council Representative Signature

Date



Charter Renewal Balance Sheet

District _____

Troop # _____

Pack # _____

Crew # _____

Ship # _____

National Registration fee _____ X \$60.00 = \$ _____
(# of youth, includes Lions)

National Registration fee _____ X \$36.00 = \$ _____
(# of registered adults)

Unit General Liability Insurance Fee + \$60.00

Council Insurance Fee _____ X \$12.00 = \$ _____
(Total # of Youth & Adults)

Council Resource Fee _____ X \$24.00 = \$ _____
(Total # of Youth & Adults)

BOY'S LIFE MAGAZINE _____ X \$12.00 = \$ _____
(# of subscriptions)

TOTAL = \$ _____

Please make **ONE** check out to: Longhouse Council, BSA



THE ANNUAL UNIT CHARTER AGREEMENT BETWEEN:

_____ and the _____ Council, BSA
Chartered Organization Local Council

Pack No. _____ Troop No. _____ Team No. _____ Crew No. _____ Ship No. _____

(Please identify those units chartered by the Chartered Organization.)

The purpose of the Boy Scouts of America (BSA) program is to prepare young people to make ethical and moral choices over their lifetimes by instilling in them the values and principles taught in the Scout Oath and Scout Law.

The Chartered Organization, as a duly constituted organization that serves youth, desires to use the program(s) of the BSA to further its mission respecting the youth it supports. The Local Council provides the support and service necessary to help the Chartered Organization succeed in its use of Scouting.

The Chartered Organization agrees to:

- Use Scouting to further the Chartered Organization's aims and values for youth.
- Chartered organizations must utilize the Scouting program to accomplish specific objectives related to one or more of the following:
 - o Youth character development
 - o Career skill development
 - o Community service
 - o Patriotism and military and veteran recognition
 - o Faith-based youth ministry
- Conduct the Scouting program consistent with BSA rules, regulations, and policies. They may be found on the My Scouting website and at the following location: www.scouting.org/Membership/Charter_Orgs/resources.aspx.
- Chartered organizations must not use the Scouting program to pursue any objectives related to political or social advocacy, including partisan politics, support or opposition to government action or controversial legal, political, or social issues or causes.
- Be represented in the Local Council and the local Scouting district by a Chartered Organization Representative (COR), who will be appointed by the Chartered Organization. The COR will be the point of contact between the Chartered Organization and the Local Council; will serve as a voting member of district and council committees on which the COR serves; and will, with the Chartered Organization, select and approve volunteer leaders for submission to the Local Council for its consideration. The COR will work with the unit committees sponsored by the Chartered Organization.
- Support unit committee(s) made up of at least three persons for each unit.

- Assure that adults selected as unit leaders are suitable by, at a minimum, having the appropriate leaders of the Chartered Organization review and sign each application.
- Ensure appropriate facilities for the unit for its regular meetings to facilitate the aims of the Chartered Organization and Scouting.
- Encourage adult leaders to receive additional applicable training made available by the council.

The Local Council agrees to:

- Respect the aims and objectives of the Chartered Organization and assist the Chartered Organization by making available Scouting resources.
- Make available to the Chartered Organization and its units and members program training, program resources, and other Scouting support services.
- Make available training and support for the Chartered Organization and for the COR, the primary link between the Chartered Organization, the Local Council, and the BSA. Track and require all unit leaders to attend BSA Youth Protection Training.
- Conduct criminal background checks on adult leaders approved by the Chartered Organization.
- Provide camping opportunities, administrative support, and professional staff to assist the Chartered Organization in developing a successful Scouting program.
- Provide primary general liability insurance to cover the Chartered Organization, its board, officers, COR, employees, and Scouting members and volunteers for authorized Scouting activities. Indemnify the Chartered Organization in accordance with the resolutions and policies of the National Executive Board of the Boy Scouts of America.

Signed _____ Title _____ Date _____
For the chartered organization

Signed _____ Title _____ Date _____
For the BSA local council

Signed _____ Title _____ Date _____
Chartered Organization Representative

Annual Meeting with Chartered Organization

The annual meeting between the executive officer of a chartered organization and the district professional, or in appropriate cases his or her designee, should be scheduled at least 90 days prior to the renewal date of the unit's charter. If problems in renewing the unit's charter are anticipated or there is significant corrective action needed, the discussion should be held early enough to allow time to take positive corrective action before the renewal deadline.

The meeting must be a face-to-face discussion, as the concept of working together is central to mutual long-term success. Be prepared by reviewing Scouting: It Works for Your Youth. The video can be downloaded from www.scouting.org/Membership/Charter_Orgs.aspx.

1. Chartered organizations must use the Scouting program to accomplish their objectives in a manner consistent with the Bylaws, Rules and Regulations, Guidelines, Policies and other publications available on the BSA National website located at www.scouting.org/membership/charter_orgs/resources.aspx.
 - o The Charter and Bylaws of the Boy Scouts of America
 - o The Mission of the Boy Scouts of America
 - o The Rules and Regulations of the Boy Scouts of America
 - o The Scout Oath and the Scout Law, including Duty to God
 - o BSA youth protection policies and guidelines, including mandatory reporting
 - o The Guide to Safe Scouting:
 - o The Sweet Sixteen of BSA Safety
 - o Scouter Code of Conduct
 - o Chartered Organization Agreement
2. Chartered organizations must not use their chartered organization affiliation or the Scouting brand as a means to imply Scouting's endorsement of the objectives of their organization except with respect to youth development consistent with the goals and objectives of the Scouting program.
3. Chartered organizations must not use the Scouting program to obtain financial support or assistance except as authorized for the chartered unit.

All new organizations applying for a charter must have an approved code issued by the National Council. As a private organization, the Boy Scouts of America is the sole arbiter of whether it will issue a charter to any organization. The Boy Scouts of America may deny a charter for any reason or revoke a previously issued charter failure to abide by these guidelines.

See other side for charter agreement.

Pack _____ of _____ District
2019 Scouting's Journey to Excellence
"The BSA method for annual planning and continuous improvement"

Item	Objective	Bronze Level	Silver Level	Gold Level	Bronze Points	Silver Points	Gold Points
Planning and Budget					Total Points: 200		
#1	Planning and Budget: Have a program plan and budget that is regularly reviewed by the pack committee, and it follows BSA policies relating to fundraising.	Have an annual program plan and budget adopted by the pack committee.	Achieve Bronze, plus pack conducts a planning meeting involving den leaders for the following program year.	Achieve Silver, plus pack committee meets at least six times during the year to review program plans and finances.	50	100	200
Membership					Total Points: 500		
#2	Building Cub Scouting: Recruit new youth into the pack in order to grow membership.	Conduct a formal recruitment program by October 31 and register new members in the pack.	Achieve Bronze, and either increase youth members by 5% or have at least 40 members.	Achieve Silver, and either increase youth members by 10% or have at least 60 members.	50	100	200
#3	Retention: Retain a significant percentage of youth members.	Reregister 60% of eligible members.	Reregister 65% of eligible members.	Reregister 75% of eligible members.	50	100	200
#4	Webelos-to-Scout transition: Have an effective plan to graduate Webelos Scouts into troops.	With a troop, hold two joint activities or 75% of second year Webelos have completed "The Scouting Adventure."	60% of eligible Webelos register with a troop.	80% of eligible Webelos register with a troop.	25	50	100
Program					Total Points: 900		
#5	Advancement: Achieve a high percentage of Cub Scouts earning rank advancements.	50% of Cub Scouts advance one rank during the year.	60% of Cub Scouts advance one rank during the year.	75% of Cub Scouts advance one rank during the year.	100	200	300
#6	Outdoor activities: Conduct outdoor activities and field trips.	Each den has the opportunity to participate in three outdoor activities or field trips during the year.	Each den has the opportunity to participate in four outdoor activities or field trips during the year.	Each den has the opportunity to participate in five outdoor activities or field trips during the year.	50	100	200
#7	Day/resident/family camp: Cub Scouts attend day camp, family camp, and/or resident camp.	33% of Cub Scouts participate in a camping experience or have improvement over the prior year.	50%, or 33% and have improvement over the prior year.	75%, or 50% and have improvement over the prior year.	50	100	200
#8	Service projects: Participate in service projects.	Participate in two service projects and enter the hours on the JTE website.	Participate in three service projects and enter the hours on the JTE website.	Achieve Silver, plus at least one of the service projects is conservation-oriented.	25	50	100
#9	Pack and den meetings and activities: Dens and the pack have regular meetings and activities.	Hold eight pack meetings a year. Den or pack meetings have started by October 31.	Achieve Bronze, plus dens meet at least twice a month during the school year.	Achieve Silver, plus earn the Summerline Pack Award.	25	50	100
Volunteer Leadership					Total Points: 400		
#10	Leadership recruitment: The pack is proactive in recruiting sufficient leaders.	Have a registered assistant Cubmaster.	Achieve Bronze, and prior to recruiting event, the committee identifies pack and den leadership for the next year.	Achieve Silver, plus every den has a registered leader by October 31.	50	100	200
#11	Trained leadership: Have trained and engaged leaders at all levels. All leaders are required to have youth protection training.	Cubmaster or an assistant Cubmaster or pack trainer has completed position-specific training.	Achieve Bronze, plus the Cubmaster and den leaders have completed position-specific training or, if new, will complete within three months of joining.	Achieve Silver, plus two-thirds of committee members have completed position-specific training.	50	100	200

Bronze: Earn at least 525 points by earning points in at least 7 objectives.

Silver: Earn at least 800 points by earning points in at least 8 objectives.

Gold: Earn at least 1,050 points by earning points in at least 8 objectives and at least Bronze in #6.

Total points earned: _____

No. of objectives with points: _____

Our pack has completed online rechartering by the deadline in order to maintain continuity of our program.

We certify that these requirements have been completed:

Cubmaster _____ Date _____

Committee chair _____ Date _____

Commissioner _____ Date _____

This form should be submitted to the Scout service center or your unit commissioner, as directed by your council.

Scouting's Journey to Excellence

2019 Pack Planning, Performance, and Recognition

Journey to Excellence uses a balanced approach to measure performance. It guides program planning before the year begins, monitors activities for continuous improvement during the year, and recognizes performance at the end of the year. In planning your strategy, use actual numbers from the previous year to guide your performance improvement goal planning. The period for measuring performance will be the calendar year.

Planning and Budget Measures	
1	The pack has a program plan and budget that is reviewed at all pack committee meetings, and the pack follows BSA policies relating to fundraising and fiscal management as found on the Unit Money-Earning Application form and any other publication that the council has developed for fundraising and fiscal management. Program plans and budget are reviewed with den leaders and parents at the start of the program year. The pack's program plan should be shared with the unit commissioner.
Membership Measures	
2	A formal recruitment event is conducted and new members are registered by October 31, 2019. On December 31, 2019, the pack has an increase in the number of youth members as compared to the number registered on December 31, 2018. A membership growth plan template can be found at www.scouting.org/membership . The pack has an up-to-date pin on the "Be a Scout" website.
3	Number of youth members on the most recent charter renewal (A) divided by the number of youth registered at the end of the prior charter year (B) minus any age-outs (C). Total = (A) / (B-C). Age-outs are youth who are too old to reregister as Cub Scouts. If the pack has a December charter, use the one expiring on December 31, 2018; otherwise use the one expiring during 2019.
4	Hold at least two joint activities with a troop or troops, and have graduating boys or girls register with a troop. "The Scouting Adventure" for second-year Webelos is described in the <i>Webelos Scout Handbook</i> . If the pack has no second-year Webelos Scouts, this requirement is met at the Bronze level.
Program Measures	
5	Total number of Cub Scouts advancing at least one rank (Bobcat, Lion, Tiger, Wolf, Bear, Webelos, Arrow of Light) during the calendar year (A), divided by the number of youth registered at the end of the year (B). Advancement = (A) / (B). The pack is encouraged to use Scoutbook to track each individual's advancements.
6	The pack has activities and field trips in the outdoors, which could include outdoor pack meetings, hikes, family campouts, parades, outdoor service projects, etc. All dens have the opportunity to participate.
7	Cub Scouts attend an in-council or out-of-council Cub Scout day camp, family camp, and/or Cub Scout resident camp in 2019. STEM programs either as a day camp or resident camp are also included. All levels are total number of different Cub Scouts attending (A) divided by total number of Cub Scouts registered in the pack as of June 30, 2019 (B). Total = (A) / (B).
8	The pack participates in at least two service projects during the year and enters them on the Service Hours website or through Scoutbook. The projects may be completed as joint projects with other organizations. At least one project must benefit the chartered organization.
9	Have at least eight pack meetings or activities within the past 12 months, with one of those meetings being to review the pack's program plans and asking for parental involvement in the pack. Den meetings start by October 31, 2019, and all dens meet at least twice each month within the past year. Pack earns the Summertime Pack Award.
Volunteer Leadership Measures	
10	The pack has a Cubmaster, an assistant, and a committee of at least three members. Ideally, the chartered organization representative should not be dual registered as one of the committee members. The pack identifies persons for next year's leadership for existing dens, including Cubmaster, Den Leaders, and Webelos Den Leaders prior to the start of the program year. All dens have a registered leader by October 31, 2019. Program plans are shared with parents at pack meetings.
11	All leaders have completed youth protection training. <i>Bronze</i> : Cubmaster, an assistant, or pack trainer has completed position-specific training. <i>Silver</i> : Bronze, plus the Cubmaster and den leaders have completed position-specific training or, if new, will complete within three months of joining. <i>Gold</i> : Silver, plus 2/3 of committee members (including chartered organization representative) have completed training.

Scoring the pack's performance: To determine the pack's performance level, you will use the above information to determine the points earned for each of the 11 criteria and then add those individual point scores to determine a composite score. Count only the highest point total achieved in any one criterion. Bronze level requires earning at least 525 points in at least 7 criteria, Silver level requires earning points in at least 8 criteria and 800 points, and Gold level requires earning points in at least 8 criteria, meeting at least bronze standards in outdoor activities, and earning at least 1,050 total points.

For more resources including workbooks and planning guides: www.Scouting.org/jte



JOURNEY TO EXCELLENCE

Troop _____ of _____ District
2019 Scouting's Journey to Excellence
"The BSA method for annual planning and continuous improvement"

Item	Objective	Bronze Level	Silver Level	Gold Level	Bronze Points	Silver Points	Gold Points
Planning and Budget					Total Points:		200
#1	Planning and budget: Have a program plan and budget that is regularly reviewed by the committee, and it follows BSA policies related to fundraising.	Have an annual program plan and budget adopted by the troop committee.	Achieve Bronze, plus troop conducts a planning meeting involving youth leaders for the following program year.	Achieve Silver, plus troop committee meets at least six times during the year to review program plans and finances.	50	100	200
Membership					Total Points:		500
#2	Building Scouting: Recruit new youth into the troop in order to grow membership.	Have a membership growth plan that includes a recruitment activity and register new members in the troop.	Achieve Bronze, and either increase youth members by 5% or have at least 25 members.	Achieve Silver, and either increase youth members by 10% or have at least 35 members.	50	100	200
#3	Retention: Retain a significant percentage of youth members.	Reregister 75% of eligible members.	Reregister 80% of eligible members.	Reregister 85% of eligible members.	50	100	200
#4	Webelos-to-Scout transition: Have an effective plan to recruit Webelos Scouts into the troop.	With a pack or Webelos den, hold two joint activities.	Achieve Bronze, plus recruit two Webelos Scouts.	Achieve Bronze, plus provide at least one den chief to a pack and recruit five Webelos Scouts.	25	50	100
Program					Total Points:		900
#5	Advancement: Achieve a high percentage of Scouts earning rank advancements.	40% of Scouts advance one rank during the year.	50% of Scouts advance one rank during the year.	60% of Scouts advance one rank during the year.	50	100	200
#6	Short-term camping: Conduct short-term or weekend campouts throughout the year.	Conduct four short-term overnight campouts.	Conduct seven short-term overnight campouts.	Conduct nine short-term overnight campouts.	50	100	200
#7	Long-term camping: Participate in a long-term camp with a majority of the troop in attendance.	The troop participates in a long-term camp.	60% of Scouts attend a long-term camp.	70% of Scouts attend a long-term camp.	50	100	200
#8	Service projects: Participate in service projects, with at least one benefiting the chartered organization.	Participate in three service projects and enter the hours on the JTE website.	Participate in four service projects and enter the hours on the JTE website.	Participate in five service projects and enter the hours on the JTE website.	25	50	100
#9	Patrol method: Use the patrol method to develop youth leaders.	The troop has patrols, and each has a patrol leader. There is an SPL, if more than one patrol. The PLC meets at least four times a year.	Achieve Bronze, plus PLC meets at least six times. The troop conducts patrol leader training.	Achieve Silver, plus PLC meets at least ten times. At least one Scout has attended an advanced training course, such as NYLT or Order of the Arrow Conference.	50	100	200
Volunteer Leadership					Total Points:		400
#10	Leadership and family engagement: The troop is proactive in recruiting sufficient leaders and communicates regularly with parents.	Have at least one registered assistant Scoutmaster.	Achieve Bronze, plus the troop holds two courts of honor, where troop plans are reviewed with parents.	Achieve Bronze, plus the troop holds three courts of honor, where troop plans are reviewed with parents.	50	100	200
#11	Trained leadership: Have trained and engaged leaders at all levels. All leaders are required to have youth protection training.	Scoutmaster or an assistant Scoutmaster has completed position-specific training.	Achieve Bronze, plus the Scoutmaster and 60% of assistants have completed position-specific training or, if new, will complete within three months of joining.	Achieve Silver, plus two-thirds of active committee members have completed position-specific training and at least one person has attended an advanced training course involving a total of at least 5 days.	50	100	200

Bronze: Earn at least 525 points by earning points in at least 7 objectives.

Silver: Earn at least 750 points by earning points in at least 8 objectives.

Gold: Earn at least 1,000 points by earning points in at least 8 objective and at least Bronze in #6 or #7.

Total points earned: _____

No. of objectives with points: _____

Our troop has completed online rechartering by the deadline in order to maintain continuity of our program.

We certify that these requirements have been completed:

Scoutmaster _____ Date _____

Committee chair _____ Date _____

Commissioner _____ Date _____

This form should be submitted to the Scout service center or your unit commissioner, as directed by your council.

Scouting's Journey to Excellence

2019 Troop Planning, Performance, and Recognition

Journey to Excellence uses a balanced approach to measure performance. It guides program planning before the year begins, monitors activities for continuous improvement during the year, and recognizes performance at the end of the year. In planning your strategy, use actual numbers from the previous year to guide your performance improvement goal planning. The period for measuring performance will be the calendar year.

Planning and Budget Measures	
1	The troop has a program plan and budget that is reviewed at all troop committee meetings, and the troop follows BSA policies relating to fundraising and fiscal management as found on the Unit Money-Earning Application form and any other publication that the council has developed for fundraising and fiscal management. A meeting is held with youth leaders where they are involved in developing the plan for the next program year. The troop's program plan should be shared with the unit commissioner. Separate troops for males and females under the same chartered organization may have a shared unit committee.
Membership Measures	
2	The troop has a growth plan, and conducts a formal recruiting event. On December 31, 2019, the troop has an increase in the number of youth members as compared to the number registered on December 31, 2018. A membership growth plan template can be found at www.scouting.org/membership . The troop has an up-to-date pin on the "Be a Scout" website.
3	Number of youth members on the most recent charter renewal (A) divided by the number of youth registered at the end of the prior charter year (B) minus any age-outs (C). Total = (A) / (B-C). Age-outs are youth who are too old to reregister as Scouts. If the troop has a December charter, use the one expiring on December 31, 2018; otherwise use the one expiring during 2019.
4	Hold at least two activities with a pack or Webelos den, and recruit new Webelos Scouts into the troop. Den chiefs are provided to one or more Cub Scout dens.
Program Measures	
5	Total number of Scouts advancing at least one rank (Scout, Tenderfoot, Second Class, First Class, Star, Life, Eagle) during the calendar year (A), divided by the number of youth registered at the end of the year (B). Advancement = (A) / (B). The troop is encouraged to use Scoutbook to track each individual's advancements.
6	Conduct short-term (at least one overnight) campouts throughout the year.
7	Number of Scouts who attend any in-council or out-of-council long-term summer camp (of at least five nights), high-adventure experience, or jamboree, or serve on camp staff within the past year, divided by the Scout membership on June 30, 2019. Youth attending long-term specialty camps such as NYLT or STEM are also counted.
8	The troop participates in service projects during the year and enters them on the Service Hours website or through Scoutbook. The projects may be completed as joint projects with other organizations. At least one project must benefit the chartered organization.
9	The troop is separated into patrols and each patrol has an elected patrol leader. If the troop has more than one patrol, there is an elected senior patrol leader. If the troop has more than one patrol, the PLC meets at least four times each year. The troop holds patrol leader training each year, and youth have the opportunity to participate in advanced training.
Volunteer Leadership Measures	
10	The troop has a Scoutmaster, an assistant, and a committee of at least three members. Ideally, the chartered organization representative should not be dual registered as one of the committee members. The troop conducts courts of honor where youth are recognized and program plans are shared with parents.
11	All leaders have completed youth protection training. Scoutmaster and 60% of the assistants have completed position-specific training or, if new, will complete within three months of joining. Two-thirds of active committee members (including chartered organization representative) have completed position-specific training. For Gold, one leader must have attended an advanced training course involving a total of 5 days or more, such as Wood Badge, Summit or Philmont Training Center, at some point in their Scouting tenure.

Scoring the troop's performance: To determine the troop's performance level, you will use the above information to determine the points earned for each of the 11 criteria and then add those individual point scores to determine a composite score. Count only the highest point total achieved in any one criterion. Bronze level requires earning at least 525 points in at least 7 criteria, Silver level requires earning points in at least 8 criteria and 750 points, and Gold level requires earning points in at least 8 criteria, meeting at least bronze standards in either short-term or long-term camping, and earning at least 1,000 total points.

For more resources including workbooks and planning guides: www.Scouting.org/jte



JOURNEY TO EXCELLENCE

Crew _____ of _____ District
2019 Scouting's Journey to Excellence
"The BSA method for annual planning and continuous improvement"

Item	Objective	Bronze Level	Silver Level	Gold Level	Bronze Points	Silver Points	Gold Points
Planning and Budget					Total Points: 200		
#1	Planning and budget: Have a program plan and budget that is regularly reviewed by the committee, and it follows BSA policies relating to fundraising.	Have an annual program plan and budget adopted by the crew committee.	Achieve Bronze, plus crew conducts a planning meeting involving youth leaders for the following program year.	Achieve Silver, plus crew committee meets at least six times during the year to review program plans and finances.	50	100	200
Membership					Total Points: 500		
#2	Building Venturing: Recruit new youth into the crew in order to grow membership.	Have a membership growth plan that includes a recruitment activity and register new members in the crew.	Achieve Bronze, and either increase youth members by 5% or have at least 10 members.	Achieve Silver, and either increase youth members by 10% or have at least 15 members with an increase over last year.	100	200	300
#3	Retention: Retain a significant percentage of youth members.	Reregister 50% of eligible members.	Reregister 60% of eligible members.	Reregister 75% of eligible members.	50	100	200
Program					Total Points: 800		
#4	Adventure: Conduct regular activities including a Tier II or Tier III adventure.	Conduct at least four activities including a Tier II or Tier III adventure.	Conduct at least five activities and at least 50% of youth participate in a Tier II or Tier III adventure.	Conduct at least six activities and at least 50% of youth participate in a Tier II or Tier III adventure.	50	100	200
#5	Leadership: Develop youth who will provide leadership to crew meetings and activities.	Have a president, vice president, secretary, and treasurer leading the crew.	Achieve Bronze, plus officers meet at least six times. The crew conducts officer training.	Achieve Silver level, plus each crew activity has a youth leader.	50	100	200
#6	Personal growth: Provide opportunities for achievement and self-actualization.	Crew members earn the Venturing award.	Achieve Bronze, plus crew program includes at least three experiential training sessions.	Achieve Silver level, plus the crew has members earning the Discovery, Pathfinder or Summit awards.	50	100	200
#7	Service: Participate in service projects, with at least one benefiting the chartered organization.	Participate in two service projects and enter the hours on the JTE website.	Participate in three service projects and enter the hours on the JTE website.	Participate in four service projects and enter the hours on the JTE website.	50	100	200
Adult Volunteer Leadership					Total Points: 500		
#8	Leadership recruitment: Have a proactive approach in recruiting sufficient leaders and communicating with parents.	Have a registered associate advisor.	Achieve Bronze, plus the crew holds a meeting where plans are reviewed with parents.	Achieve Silver, plus adult leadership is identified prior to the start of the next program year.	50	100	200
#9	Trained leadership: Have trained and engaged leaders at all levels. All leaders are required to have youth protection training.	Advisor or an associate Advisor has completed position-specific training.	Achieve Bronze, plus the advisor and all associates have completed position-specific training or, if new, will complete within three months of joining.	Achieve Silver, plus at least two committee members have completed crew committee training.	100	200	300

- Bronze:** Earn at least 550 points by earning points in at least 6 objectives.
- Silver:** Earn at least 800 points by earning points in at least 7 objectives.
- Gold:** Earn at least 1,100 points by earning points in at least 7 objectives.

Total points earned: _____

No. of objectives with points: _____

- Our crew has completed online rechartering by the deadline in order to maintain continuity of our program.
- We certify that these requirements have been completed:

Advisor _____ Date _____

Crew President _____ Date _____

Commissioner _____ Date _____

This form should be submitted to the Scout service center or your unit commissioner, as directed by your council.

Scouting's Journey to Excellence

2019 Crew Planning, Performance, and Recognition

Journey to Excellence uses a balanced approach to measure performance. It guides program planning before the year begins, monitors activities for continuous improvement during the year, and recognizes performance at the end of the year. In planning your strategy, use actual numbers from the previous year to guide your performance improvement goal planning. The period for measuring performance will be the calendar year.

Planning and Budget Measures	
1	The crew has a program plan and budget that is reviewed at all crew committee meetings, and the crew follows BSA policies relating to fundraising and fiscal management as found on the Unit Money-Earning Application form and any other publication that the council has developed for fundraising and fiscal management. A meeting is held with youth leaders where they are involved in developing the plan for the next program year. The crew's program plan should be shared with the unit commissioner.
Membership Measures	
2	The crew has a growth plan, and conducts a formal recruiting event. On December 31, 2019, the crew has an increase in the number of youth members as compared to the number registered on December 31, 2018. A membership growth plan template can be found at www.scouting.org/membership .
3	Number of youth members on the most recent charter renewal (A) divided by the number of youth registered at the end of the prior charter year (B) minus any age-outs (C). Total = (A) / (B-C). Age-outs are youth who are too old to reregister as Venturers. If the crew has a December charter, use the one expiring on December 31, 2018; otherwise use the one expiring during 2019.
Program Measures	
4	The crew conducts regular activities outside of meetings. At least one is a Tier II activity (may be less than four days, but requires planning and skill development) or a Tier III activity (at least 4 days and is mentally and physically challenging.)
5	The crew has youth leaders serving as president, vice president, secretary, and treasurer who are leading the activities of the crew. Crew officers hold regular meetings and receive training. Each crew activity has a youth leader.
6	Crew members complete the Venturing award shortly after joining. Experiential training at meetings allows crew members to learn from hands-on experiences. The crew encourages achievement through the advanced Venturing awards.
7	The crew participates in service projects during the year and enters them on the Service Hours website or through Scoutbook. The projects may be completed as joint projects with other organizations. At least one project must benefit the chartered organization.
Volunteer Leadership Measures	
8	The crew has an Advisor, an associate, and a committee of at least three members. Ideally, the chartered organization representative should not be dual registered as one of the committee members. The crew holds a meeting where program plans are shared with parents. Volunteer leaders are selected prior to the next program year.
9	All volunteer leaders have current youth protection training. Advisor and associates have completed position-specific training or, if new, will complete within three months of joining. Two committee members have completed Crew Committee Training.

Scoring the crew's performance: To determine the crew's performance level, you will use the above information to determine the points earned for each of the 9 criteria and then add those individual point scores to determine a composite score. Count only the highest point total achieved in any one criterion. Bronze level requires earning at least 550 points in at least 6 criteria, Silver level requires earning points in at least 7 criteria and 800 points, and Gold level requires earning points in at least 7 criteria and 1,100 points.

For more resources including workbooks and planning guides: www.Scouting.org/jte



Ship _____ of _____ District
2019 Scouting's Journey to Excellence
"The BSA method for annual planning and continuous improvement"

Item	Objective	Bronze Level	Silver Level	Gold Level	Bronze Points	Silver Points	Gold Points
Planning and Budget					Total Points: 200		
#1	Planning and budget: Have a program plan and budget that is regularly reviewed by the committee, and it follows BSA policies relating to fundraising.	Have an annual program plan and budget adopted by the ship committee.	Achieve Bronze, plus ship conducts a planning meeting involving youth leaders for the following program year.	Achieve Silver, plus ship committee meets at least six times during the year to review program plans and finances.	50	100	200
Membership					Total Points: 500		
#2	Building Sea Scouting: Recruit new youth into the ship in order to grow membership.	Have a membership growth plan that includes a recruitment activity and register new members in the ship.	Achieve Bronze, and either increase youth members by 5% or have at least 10 members.	Achieve Silver, and either increase youth members by 10% or have at least 15 members with an increase over last year.	100	200	300
#3	Retention: Retain a significant percentage of youth members.	Reregister 50% of eligible members.	Reregister 60% of eligible members.	Reregister 75% of eligible members.	50	100	200
Program					Total Points: 800		
#4	Activities: Conduct regular activities including a super activity or long cruise.	Conduct at least four activities including a super activity or long cruise.	Conduct at least five activities and at least 50% of youth participate in super activity or long cruise.	Conduct at least six activities and at least 50% of youth participate in a super activity or long cruise.	50	100	200
#5	Leadership: Develop youth who will provide leadership to ship meetings and activities.	Have an elected boatswain, boatswain's mate, yeoman, and purser leading the ship.	Achieve Bronze, plus officers have Quarterdeck meetings at least six times. The ship conducts Quarterdeck training.	Achieve Silver, plus each ship activity has a youth leader.	50	100	200
#6	Advancement: Provide opportunities for advancement and personal development.	Ship members participate in advancement by earning the Apprentice Rank.	Achieve Bronze, plus ship has organized programs addressing fitness and citizenship.	Achieve Silver, plus the ship has members earning the Ordinary, Able or Quartermaster Ranks.	50	100	200
#7	Service: Participate in service projects, with at least one benefiting the chartered organization.	Participate in two service projects and enter the hours on the JTE website.	Participate in three service projects and enter the hours on the JTE website.	Participate in four service projects and enter the hours on the JTE website.	50	100	200
Adult Volunteer Leadership					Total Points: 500		
#8	Leadership recruitment: Have a proactive approach in recruiting sufficient leaders and communicating with parents.	Have a registered mate to assist the Skipper.	Achieve Bronze, plus the ship holds a meeting where plans are reviewed with parents.	Achieve Silver, plus adult leadership is identified prior to the start of the next program year.	50	100	200
#9	Trained leadership: Have trained and engaged leaders at all levels. All leaders are required to have youth protection training.	Skipper or a mate has completed position-specific training.	Achieve Bronze, plus the skipper and all mates have completed position-specific training or, if new, will complete within three months of joining.	Achieve Silver, plus at least two committee members have completed committee training.	100	200	300

- Bronze:** Earn at least 550 points by earning points in at least 6 objectives.
- Silver:** Earn at least 800 points by earning points in at least 7 objectives.
- Gold:** Earn at least 1,100 points by earning points in at least 7 objectives.

Total points earned: _____

No. of objectives with points: _____

- Our ship has completed online rechartering by the deadline in order to maintain continuity of our program.
- We certify that these requirements have been completed:

Skipper _____ Date _____

Boatswain _____ Date _____

Commissioner _____ Date _____

This form should be submitted to the Scout service center or your unit commissioner, as directed by your council.

Scouting's Journey to Excellence

2019 Ship Planning, Performance, and Recognition

Journey to Excellence uses a balanced approach to measure performance. It guides program planning before the year begins, monitors activities for continuous improvement during the year, and recognizes performance at the end of the year. In planning your strategy, use actual numbers from the previous year to guide your performance improvement goal planning. The period for measuring performance will be the calendar year.

Planning and Budget Measures	
1	The ship has a program plan and budget that is reviewed at all ship committee meetings, and the ship follows BSA policies relating to fundraising and fiscal management as found on the Unit Money-Earning Application form and any other publication that the council has developed for fundraising and fiscal management. A meeting is held with youth leaders where they are involved in developing the plan for the next program year. The ship's program plan should be shared with the unit commissioner.
Membership Measures	
2	The ship has a growth plan, and conducts a formal recruiting event. On December 31, 2019, the ship has an increase in the number of youth members as compared to the number registered on December 31, 2018. A membership growth plan template can be found at www.scouting.org/membership .
3	Number of youth members on the most recent charter renewal (A) divided by the number of youth registered at the end of the prior charter year (B) minus any age-outs (C). Total = (A) / (B-C). Age-outs are youth who are too old to reregister as Sea Scouts. If the ship has a December charter, use the one expiring on December 31, 2018; otherwise use the one expiring during 2019.
Program Measures	
4	The ship has regular activities (not including normal ship meetings). Number of youth participating in at least one super activity/long cruise, divided by the number of Sea Scouts registered in the ship on June 30, 2019.
5	The ship has elected youth leaders as boatswain, boatswain's mate, yeoman, and purser who are leading the activities of the ship. Officers hold regular Quarterdeck meetings and receive training. Each ship activity has a youth leader.
6	Ship members earn the Apprentice Rank shortly after joining. Meetings allow ship members to participate in fitness and citizenship activities. The ship encourages achievement through the advanced Sea Scout ranks.
7	The ship participates in at least two service projects during the year and enters them on the Service Hours website or through Scoutbook. The projects may be completed as joint projects with other organizations. At least one project must benefit the chartered organization.
Volunteer Leadership Measures	
8	The ship has Skipper, mate, and a committee of at least three members. Ideally, the chartered organization representative should not be dual registered as one of the committee members. The ship holds a meeting where program plans are shared with parents. Volunteer leaders are selected prior to the next program year.
9	Skipper and mates have had an orientation and have completed youth protection training. Skipper and mates (paid or multiple registration) have completed position-specific training or, if new, will complete within three months of joining. Two committee members have completed committee training.

Scoring the ship's performance: To determine the ship's performance level, you will use the above information to determine the points earned for each of the 9 criteria and then add those individual point scores to determine a composite score. Count only the highest point total achieved in any one criterion. Bronze level requires earning at least 550 points in at least 6 criteria, Silver level requires earning points in at least 7 criteria and 800 points, and Gold level requires earning points in at least 7 criteria and 1,100 points.

For more resources including workbooks and planning guides: www.Scouting.org/jte



Post / Club _____ of _____ District
2019 Exploring's Journey to Excellence
"Exploring's method for annual planning and continuous improvement"

Item	Objective	Bronze Level	Silver Level	Gold Level	Bronze Points	Silver Points	Gold Points
Committee and Planning					Total Points: 300		
#1	Committee and planning: Have an active post or club committee.	Post or club committee adopts an annual plan and meets at least twice a year.	The post or club committee meets at least four times a year.	The post or club committee meets at least six times a year.	100	200	300
Participants and Growth					Total Points: 500		
#2	Open house: Conduct an open house or recruitment event.	Conduct an open house or recruitment event.	Conduct an open house or recruitment event in November.	Conduct an open house or recruitment event in September or October.	100	200	300
#3	Growth: Recruit and retain youth in the post or club in order to grow membership.	Maintain or grow number of youth participating in post or club programs as compared to the prior year.	Achieve Bronze, plus at least half of the youth remain involved throughout the year.	Achieve Bronze, plus at least two-thirds of the youth remain involved throughout the year.	50	100	200
Program					Total Points: 700		
#4	Post or club program: Include interactive activities in the post or club program/meetings.	40% of meetings include interactive activities.	70% of meetings include interactive activities.	85% of meetings include interactive activities.	50	100	200
#5	Youth leadership: Have trained youth leadership.	Have active youth officers.	Achieve Bronze, plus post or club Officers' Seminar is conducted for all youth officers.	Achieve Silver, plus at least 3 Explorers complete the requirements as outlined in the Officers' Seminar.	50	100	200
#6	Super activity: The post or club plans and/or participates in a super activity.	Explorers participate in an activity, either nationally, regionally, or locally.	The post or club will plan and conduct it's own super activity.	Achieve Silver with at least 50% Explorers in attendance.	50	100	150
#7	Service projects: The post or club participates in one or more community service projects.	Explorers performed one or more community service projects averaging three hours per registered Explorer.	Explorers performed one or more community service projects averaging four hours per registered Explorer.	Explorers performed one or more community service projects averaging six hours per registered Explorer.	50	100	150
Volunteer Leadership					Total Points: 500		
#8A	Post adult leadership: Have registered and engaged adult leaders.	Have five registered adult leaders including: Advisor, associate Advisor, committee chair, and two committee members.	Have six registered adult leaders including: Advisor, associate Advisor, committee chair, and two committee members.	Have eight or more registered adult leaders including: Advisor, associate Advisor, committee chair, and two committee members.	100	200	300
#8B	Club adult leadership: Have registered and engaged adult leaders.	Have three registered adult leaders including: Sponsor, a co-sponsor, and a committee member.	Have four registered adult leaders including: Sponsor, co-sponsor, and two committee members.	Have five registered adult leaders including: Sponsor, co-sponsor, and three committee members.	100	200	300
#9	Trained adults: Have trained adult leaders. All adult volunteers have current youth protection training.	Advisor, an associate advisor, sponsor, or a co-sponsor has completed position-specific training.	Achieve Bronze, plus 50% of registered adults have completed Adult Explorer Leader Training.	Achieve Silver, plus 75% of registered adults have completed Adult Explorer Leader Training.	50	100	200

- Bronze:** Earn at least 600 points by earning points in at least 6 objectives.
- Silver:** Earn at least 900 points by earning points in at least 7 objectives.
- Gold:** Earn at least 1,200 points by earning points in at least 7 objectives.

Total points earned: _____

No. of objectives with points: _____

- Post/Club leaders have met with the executive officer of the participating organization.
- Our post/club has submitted our renewal forms with the necessary signatures and fees prior to the deadline.
- We certify that these requirements have been completed:

Advisor/Sponsor _____ Date _____

President _____ Date _____

LFL Representative _____ Date _____

This form should be submitted to the local Learning for Life office.

Exploring's Journey to Excellence

2019 Post/Club Planning, Performance, and Recognition

Journey to Excellence uses a balanced approach to measure performance. The objectives were developed following extensive research into proven indicators of enduring post and club programs. It guides program planning before the year begins, monitors activities for continuous improvement during the year, and recognizes performance at the end of the year. In planning your strategy, use actual numbers from the previous renewal year to chart your progress. Use the criteria in planning your strategy for the coming year to guide your performance improvement. The youth officers should take the lead in making this assessment. The period for measuring performance will be the calendar year.

Committee and Planning Measures	
1	The post or club has a committee that meets throughout the year to support the program.
Participants and Growth Measures	
2	The post or club annually conducts an open house or similar recruiting event.
3	The post or club has an active recruiting program and maintains youth involvement in an annual program.
Program Measures	
4	Post or club meetings consist of interactive activities to engage Explorers beyond listening to lectures, reading handouts, or watching slide shows. This is a proven indicator of post success.
5	The post or club provides youth leadership opportunities and training. Explorers are encouraged to complete the requirements of an officers' seminar.
6	A super activity is a major trip, activity, or project requiring advanced planning and promotion by Explorers. Qualify for Bronze by participating in an activity planned by another group.
7	The post or club participates in one or more community service projects during the year. The projects may be completed as joint projects with other organizations. Criteria is based on average hours per Explorer, not total hours for each Explorer.
Volunteer Leadership Measures	
8	Having a sufficient number of adults is a proven indicator of success and longevity. Posts use the measures outlined in Criterion 8A on the reverse side, while clubs use those described in 8B.
9	All adult volunteers have current youth protection training. Registered leaders have completed Adult Explorer Leader Training.

Scoring the post's or club's performance: To determine the performance level, the council will use the above information to measure the points earned for each of the 9 individual criteria and then add those individual point scores to determine a composite score. Bronze level requires earning 600 points in at least 6 criteria, Silver level requires earning 900 points in at least 7 criteria, and Gold level requires earning 1,200 points in at least 7 criteria.





For issues with Scoutbook, my.Scouting Tools,
and YPT Completion certificates, please review the
My.Scouting Help Documents and Scoutbook
Knowledge Base at help.scoutbook.com.

BSA National Member Care Contact Center
(972) 580-2489

Longhouse Council Recharter Questions?
Contact your commissioner staff or District Executive:

Longhouse Council, BSA
2803 BREWERTON RD, SYRACUSE, NY 13211
(315) 463-0201
<http://www.cnyscouts.org/CharterRenewal>