



BOY SCOUTS
OF AMERICA®

NORTHERN LIGHTS COUNCIL

CHARTER RENEWAL INSTRUCTIONS

www.nlcbsa.org/CharterRenewal

Table of Contents

CONTENTS

Getting Started	3
Confidentiality Statement	3
Important Dates	4
Using the Online Charter Renewal System	6

APPENDIX

Annual Charter Renewal Checklist	10
Additional Information and Forms	11
Social Security Number Entry	12
Charter Presentation Ceremony	13
Unit Depository Accounts	16

Changes for this Year

- Accident and sickness insurance fees are \$4.00 per youth and adult (no change in the registration fee of \$33.00)
- The **new** Youth Protection Training is required for each registered leader – the online system will not allow submittal until all leaders are certified in with the new training that came out in February 2018
- Units chartered by the Church of Jesus Christ of Latter-Day Saints (LDS) will automatically be renewed through the church. No paperwork needs to be completed locally.

PLEASE NOTE:

We encourage every unit to use the Online Charter Renewal System.

The manual method, using printed paperwork is still available (if requested).

Getting Started

Items you need to gather before you begin the charter renewal process:

- Current unit roster - this can be obtained from www.my.scouting.org
- Completed applications for youth and adults that are not shown on the current unit roster (adults will also need Youth Protection Training certificates)
- Unit access code for the charter renewal system (on charter renewal packet or from the council registrar) – the code changes each year.

Note - submit applications to the Northern Lights Council as soon as possible. This is a year-round process; do not wait to update your unit records during charter renewal. Youth and adults not properly registered are not part of the unit, not insured, not eligible for youth advancement and generally cannot participate in activities. The charter renewal process is *MUCH* easier if your paperwork is current at the council office.

IMPORTANT: You are going to view and handle information confidential to your unit and the Boy Scouts of America. By working with this private information, you accept the responsibility of maintaining the privacy and confidentiality of this information. You agree you will share this information only with individuals in your unit or the Boy Scouts of America. This information must never be shared outside of the Boy Scouts of America for privacy reasons. If you cannot accept this responsibility, you must notify your unit committee chair and withdraw from seeing or working with these materials.

Identify the key charter renewal team members for your unit

This team plans and leads the charter renewal effort. Suggested attendees:

- Unit committee chair
- Unit “renewal processor” – this is the person in charge of processing the charter renewal data. We recommend someone who is comfortable using computers.
- Unit commissioner.
- Other unit leaders

Important Dates

Charter Expiration Date:

December 31, 2018 (Online system opens 10/1/18)

- Northern Sky
- Lake Agassiz
- Roughrider
- Voyageur Trails
- Tomahawk
- Frontier Trails
- Great Plains

Dates & Deadlines:

Oct. Roundtable (packet distribution)

Nov. Roundtable (help session)

Nov. 21 (due to district)

Nov. 22 – Dec. 13 (fix defects)

Dec. 14 (due to Service Center)

January 31, 2019 (Online system opens 11/1/18)

- Flickertail
- Lakes

Nov. Roundtable (packet distribution)

Dec. Roundtable (help session)

Dec. 19 (due to district)

Dec. 20 – Jan. 17 (fix defects)

Jan. 18 (due to Service Center)

February 28, 2019 (Online system opens 12/1/18)

- Oxcart Trails (some units in Sept & Oct)

Dec. Roundtable (packet distribution)

Jan. Roundtable (help session)

Jan. 23 (due to district)

Jan. 24 – Feb. 14 (fix defects)

Feb. 15 (due to Service Center)

Review this guide

Attend charter renewal training in your district. This is a great time to ask and receive answers to your questions.

Correct a copy of your most recent unit roster before correcting originals and software. Write unit roster changes in another color (e.g. red) to make official data entry easier. During this time confirm every family member.

- Invite members to return and confirm that they are staying active with your unit.
- Confirm accuracy of birth dates, school grade, addresses, and if they want Boys' Life.
- Date of birth and social security numbers are required for every registered adult. Social Security numbers are not required for adults that are only filling the role of

- Tiger Cub Adult Partner.
- Youth Protection Training is required for every registered adult. (Crew/Ship leaders must take complete the Venturing version of Youth Protection Training – if an adult is in a Pack, Troop, Team and a Crew or Ship they must take both versions of Youth Protection Training).

Important Note on Social Security Numbers

Social Security Numbers are a critical part of the BSA's youth protection efforts and are not used, shared, printed, or divulged for any reason. If an adult has concerns about revealing their Social Security Number, they should contact their district executive or the Northern Lights Council.

- Confirm you have applications for all new youth and adults. Verify that the applications for all new members are complete (e.g. all required signatures, social security number for adults, completed BSA Disclosure/Authorization forms for adults (*located on the inside top cover of the adult application*)). You **should not** process a registration if you do not have a completed application on hand.

Fees

Most youth and adults will remit \$33 for annual registration, \$4.00 for insurance and \$12 for Boys' Life (optional).

- Tiger Cub Adult Partners (AP) do not pay a registration fee because they are not technically a "registered" leader. If they accept another adult leader position, they **must** complete an adult application and pay the registration and insurance fees.
- There is no charge for the Institution Head (IH) and an application is not required – unless they hold another leadership position within the unit.
- LDS units pay the same rates as last year.
- Adults or youth members who have paid their primary registration fee elsewhere in the Northern Lights Council (e.g. another unit, district or council-level) are considered "multiple" registrations and do not pay registration or insurance fees again within the current charter year.

Using the Online Charter Renewal System

Register and Log In

- Go to www.nlcbsa.org – look on the right hand side of the screen and scroll down until you see the box titled “Online Charter Renewal”.
- Unit “Renewal Processors” must register as a first time user each year. Do not click on “returning” to start the process. You can begin the work and stop before finishing. When you return, you log in as a “returning” user.
- When you click on “First Time User”, you will need to enter the Access Code (new each year), unit type, and unit number (must be a four-digit number, e.g. 0002).

Data Entry Cautions

Your data entry overwrites council data – be careful!

DO NOT change a name already in the system – if the spelling is incorrect, note it on the print out that you submit.

DO NOT put spaces between prefixes (DeCarlo not De Carlo)

DO NOT enter apostrophes (OBrian not O’Brian)

DO NOT use hyphens (John SmithPayne, not John Smith-Payne)

DO NOT enter “bogus” data to bypass a prompt – contact the Northern Lights Council service center for assistance.

Fargo (877) 293-5011, Bismarck (701) 223-7204 or Grand Forks (701) 775-3189

Stage 1: Load roster

The first step will require you to load roster either from ScoutNet or upload from Packmaster/Troopmaster. If you load from ScoutNet you will only get the members currently posted to your unit. In **Stage 2, Step 2** (*select members for renewal*) if additional enrollments are posted by the council after the “renewal processor” has started; you will be able to import them (upper right hand corner) as long as this is done before you select submit in Stage 5.

Stage 2: Update Roster

Step 1 – Update information for the Chartering Organization. Organization telephone number is required.

Step 2 - Select members

The current roster for the unit is displayed. Confirm the youth and adult members who are renewing (*all members are automatically selected; deselect the members who will not be renewed*). If a member is not renewing, uncheck the box. Beginning in this stage you can review/print your roster (upper left hand corner). The next page is a confirmation of who is being renewed and who is not being renewed.

Step 3 – Promote members

You have the option to Promote Members from another unit. When you click **Promote** you will see a Unit Selection screen that will display any units that are chartered to the same organization as your unit. If you are in a unit eligible to convert youth members into adult leaders (troop, team, crew, and ship only) you will see your own unit listed also. If you are promoting a member from youth to adult or from another unit you must have an application to register them (*consider them new members*).

Step 4 – Add new members

You must have their completed applications before you begin this process. Complete new adults first (review adult applications for age requirements) and then add new youth (review youth applications for age and grade requirements). You must enter an ethnic background (*if not provided select not provided*). Enter and confirm new registrants' information to ensure accuracy. **DO NOT** enter a new member if you **do not** have an application. **Note:** There are no transfers during charter renewal.

Step 5 - Update members

Review member data and make necessary changes to member records (i.e. address, phone number, position, etc). **DO NOT change a name** *if the information is incorrect note it on the print out after you submit the final version*. Use the remove selection to delete a member from the renewal. This screen now shows whether an adult is Youth Protection Trained or not (*must be current- within the last 2 years*) and the date it was last taken. If the youth protection training is going to expire shortly after your charter expires then it should be retaken before the current charter expires.

Step 6 - Update member position

This page displays a list of the required positions for your unit and information on who is filling these positions. The unit adult positions table presents a summary of required positions. The number in the **Current** column must be within the minimum and maximum requirements. To change the position(s) for an individual,

click the update button to the left of the individual's name. **Note:** JTE recognition requires an assistant unit leader.

Stage 3: Check roster

Step 1 - To begin validation - select **Check Roster**. This allows the “renewal processor” to do a final update on the charter renewal data and to have the unit information validated against BSA unit requirements. If the charter renewal data does **NOT** conform to the BSA unit requirements, the check roster results page will inform the user. *Refer to the appendix for common Recharter problems.* **Or** if you wish to make more changes to your roster before you continue you can select which stage you wish to go back to by selecting the stage at the bottom of the page.

Step 2 – Check roster Errors and Warnings

When the Internet Rechartering has finished validating your information, you will be informed of any errors or warnings concerning your roster. This step will display any warnings and errors in the validation process and give you the opportunity to make corrections. You cannot proceed to the next stage until all errors have been resolved. Warnings should be reviewed and corrected if possible but will not prevent you from continuing to the next stage. Internet Rechartering will provide you with suggestions on how to correct errors and warnings. All adults must have current youth protection training; this information will be entered at the council; however, the unit must provide copies of the youth protection training certificates with the charter renewal application.

Stage 4: Summary

In this stage you can review your final roster and fees.

Step 1 – Update fees

The fees include the member fee, Boys' Life subscription fee, accident and sickness insurance fee and the total fee per member. If you want to update the Boys' Life subscription or if a member holds multiple positions and pays in another unit, select update to the left of the name, select member paid in another unit and complete the requested information (***the renewal processor should verify with the member which unit is their primary registration. Many times each unit that the member is registering with indicates that the member is a multiple and as a result the member is not paid in any unit which could result in the member having their primary registration changed.***) All paying adults receive Scouting magazine. Do not select Boys' Life unless they want to receive both magazines. Please click the **Boys' Life** button to verify and select 100% Boys' Life recognition for your unit.

Step 2 – Membership Inventory

This step is only required if you did not renew some of your members. You must respond to the questions on this page to continue.

Stage 5: Submit roster

Print and Review the draft renewal one more time. If changes are still needed, click Home link to navigate back through the stages.

SUBMIT the renewal. Once the “renewal processor” submits to council they **cannot** go back to make any changes.

- **The process is NOT COMPLETED after you hit submit. The charter renewal MUST be PRINTED and SIGNED (or an electronic approval secured)**

PRINT the Renewal Application. This opens a PDF. It prints with the signature line for the Charter Organization. **Obtain approval signature and attach forms requested by BSA.** The printed renewal application **must** be signed before submitting to the council.

New for this year - The charter renewal must be approved and signed by the Chartered Organization’s Executive Officer or Charter Organization Representative (either on a printed copy or by electronic approval). No other signatures will be required.

Renewal processor should complete the last page.

The following must be included in your charter packet when dropping off:

- **All** completed new adult and youth applications
- Adult applications must include the BSA disclosure/authorization form.
- Signed charter renewal application (all pages) must be signed by the Executive Officer or Charter Organization Representative
- Complete Journey to Excellence Scorecard
- Monies due (*don't forget to add the insurance*)
- Youth Protection Training Certificates for all new registering adults (attach to their paper application)

Remember the charter renewal paperwork is a contract and the correct procedures must be followed. The signature is required to demonstrate that the organization agrees to continue its charter and that all the adults are approved to serve in the positions listed on the charter. Keep a copy of all forms for your unit’s records.

Annual Charter Renewal Checklist

Required Signatures:

- Executive Officer or COR of Charter Organization.

Required Adult members

- Executive Officer (IH) – if new, please include his/her date of birth, address and phone #
- Chartered Organization Representative (COR) – *The only person who can hold more than one position in a unit; he or she can serve as a committee chair or a committee member*
- Committee chair (CC)
- Minimum of 2 Committee members (MC) - *one of which can be a Pack trainer (PT)*
- Unit leader – Cubmaster (CM), Scoutmaster (SM), Crew advisor (NL), Varsity coach (VC) or Skipper (SK)
- Cub packs must also have at least one of the following:
 - Tiger den leader (TL)
 - Den leader (DL)
 - Webelos den leader (WL)
- Adult partner (*No-fee, non-registered position*) for every registered Tiger in Cub Scout packs

Required for Journey to Excellence Award (not to recharter):

- Packs/Troops/Teams/Crews/Ships must also have at least one
 - Assistant Cubmaster (CA), Assistant Scoutmaster (SA), Assistant Varsity Coach (VA), Associate Advisor (NA) or Mate (MT)

Required for New Leaders & Leaders showing Expired Youth Protection Training

- A copy of the Youth Protection Training certificate showing that they have completed training

Applications attached to the Charter Paperwork

Youth applications must be checked for accuracy -

- Unit Type and Number
- Full Name (NO initials or nicknames)
- Address, City, State, Zip
- Phone Number
- Date of Birth (month/day/year)
- Grade
- Boys' Life

- Parent's Name
- Parent's date of birth (required if the youth is a Tiger)
- An adult application is required for Tiger Adult Partners if – the adult is not a parent or is not living at the same address as the youth
- Signature of Unit Leader or Designee
- Parent's Signature

Adult applications must be checked for accuracy -

- Unit Type and Number
- If a Multiple, indicate at the top of the application what unit paid in and circle.
- Full name (NO initials or nicknames)
- Social Security number (an adult cannot register if this is not on the application)
- Address, City, State, Zip
- Home Phone and Business Phone or Cell Phone
- Date of Birth (month/day/year)
- Driver's License
- Occupation and Place of Employment
- Position that will be held in the unit
- Questions 1 – 6f
- Signature of Applicant
- Signature of Committee Chairman and Chartered Organization Representative (or Chartered Organization Head)
- BSA Disclosure/Authorization form (inside front cover of adult application)
- Copy of their current Youth Protection Training certificate. *Crew/Ship members must complete the Venturing version of Youth Protection Training.*

Additional Information and Forms

The following information and forms are available to download from the Northern Lights Council website either on the [Online Charter Renewal](#) page or the [Resources / Forms](#) page (or by clicking on the highlighted links in this document).

Charter Fee Worksheet – an excel document that helps with the math

[My.Scouting](#) website – the place to print a current unit roster and check on the status of Youth Protection Training

Insurance Information

Unit Account Authorization form

Social Security Number Entry during Charter Renewal

Due to privacy concerns, all Social Security Number (SSN) entry fields and references have been removed from the system and replaced with the display of an informational text message as follows: “****Social Security Number is required and will be entered by your council from the adult application.**”

The local council will assume the responsibility for entering SSNs for new adult leader applicants once the renewal has been submitted online and the required paperwork has been received at the council office. The current charter renewal posting process in local councils does not allow an adult leader registration to be posted without a valid SSN, so this implementation will not compromise or change the current SSN requirement or validation.

The following is a sample of the text message box that displays in Internet Rechartering:

The screenshot shows a web interface for 'Step 4 of 6 : Add New Member'. At the top, there are navigation tabs for '1. Load Roster', '2. Update Roster', '3. Check Roster', '4. Summary', and '5. Submit Roster'. A 'Review / Print Roster' button is also visible. The page title is 'Page 2 : Add Personal Data for John Doe'. A red message states: '** Social Security number is required and will be entered by your council from the adult application.' Below this, there are various input fields for personal information: Country (US), Address type (Home), Address 1, Address 2, City, State, Zip, Home telephone type (US telephone), Home telephone, Business telephone type (US telephone), Business telephone, Date of birth (mm/dd/yyyy), Ethnic background (Selected > Choose Ethnic), Driver license number, Driver license state, Sex (Choose M/F), and Mother's Last Name. There are 'Cancel', 'Reset', and 'Next' buttons at the bottom.

Charter Presentation Ceremony

This ceremony may be used at a meeting of a service club or as a part of the regular religious service of a chartered organization religious group.

Opening Statement

I am pleased to be with you to recognize the great relationship that exists between the Boy Scouts of America and _____(name of organization). The Boy Scouts of America exists primarily to serve chartered organizations and their needs as they reach out to serve youth of their respective organizations and youth in the nearby community.

In recognition of this great relationship, I would like to call forward at this time the chair and members of the unit committee.

Charge to the Unit Committee

You have assumed the responsibility of being the board of directors for Boy Scout Pack/Troop/Team/Crew/Post _____(number) at _____(organization). The chair of the committee presides over the monthly meetings of the unit committee and also assumes the direction of the unit should the unit leader or assistants be unable to serve in their leadership capacity. As members of the committee, you have assumed the role of providing the unit with outdoor opportunities, providing advancement opportunities, providing the unit with information on events and activities conducted by the district and council, providing transportation if the need exists for unit activities, and providing financial stability in support of approved money-raising projects for unit activities; and guaranteeing continuity of the unit through the years.

On behalf of the chartered organization, do you accept these responsibilities to be accomplished to the best of your ability? If so, answer 'We do.' (Committee members respond.)

Congratulations! Here are your registration cards." (Present cards to each person.)

Charge to the Unit Leader and/or Assistants

(Call forward the unit leader and assistants before the combined assembly.)

You have accepted a major role on behalf of this chartered organization by assuming leadership of young people who will enjoy the Scouting program. You have accepted the responsibility of providing weekly programs, monthly activities, and participation in council and district events for your unit members. The time you devote to these young people will only be rewarded in the satisfaction you get from seeing them grow into great American citizens who will live by the Scout Oath and Law. Do you accept the mantle of this great responsibility? If so, answer 'We do.'

Congratulations! Please accept these registration cards as a token of your commission in Scouting.

Charge to the Chartered Organization Representative

(Call the Chartered Organization Representative forward.)

You have been appointed by your chartered organization to represent it as a voice in the local council of the Boy Scouts of America. You become an automatic voting member of the Northern Lights Council and represent your organization at the annual council meeting, which selects leadership for the council for each ensuing year. In addition, you have the responsibility of coordinating the various Scouting units that exist in your chartered organization, making sure that they work one with the other to coordinate a natural graduation program from the Cub Scout pack to Boy Scout troop to Varsity Scout team or Venturing crew or Explorer post. We hope you will also provide assistance to the district whenever and wherever your time could be made available, in addition to your responsibilities to your local organization and the local council. Will you accept this responsibility? If so, answer "I will". (Present registration card)

Junior Leaders (if Troop)

(Call forth all youth leaders)

You have been selected as the youth leaders this unit. You will be expected to be an example and you will be asked to provide leadership, program ideas, and initiative to all members of the unit who fall under your influence. You are, above all, expected to abide by the Scout Oath and Law and set a leadership pattern for all to follow. Will you accept these responsibilities? If so, answer "We will". (Present registration cards)

Charge to Members of Pack

Will all members of the pack please stand? As members of the Scout unit will you do your best to attend meetings regularly, provide assistance to your leaders, take the opportunity to pursue advancement and demonstrate your willingness at all times to abide by the Scout Oath and Law? If so, answer "We will". (Present cards)

Charge to Parents

Will all parents stand? As parents you are expected to attend all parent's meetings of the unit, assist with needed transportation, provide leadership support when needed, and be willing helpers in time of need in order to provide the unit with an outstanding program, quality leadership and good parental support. If you are willing to do your best to support the leadership of the chartered organization and provide what assistance you can give to the program, please answer "We Will".

Charge to the Organization

Will all members of _____ (name of chartered organization) please stand? You have heard the unit committee, the unit leadership, the Chartered Organization Representative, the junior leaders (if troop), members of the unit, and parents all pledge their support to the Scouting program in this chartered organization. May we ask you to cooperate and work with the Scout leadership chosen by your chartered organization and provide, whenever called upon, assistance and help to make this program a vibrant living part of the youth outreach of your congregation? If so, answer "We Will".

Charge the Head of the Organization

You have heard the pledge of commitment of all these members of your organization and the unit in supporting the BSA Scouting program as a major youth program for your organization. With the acknowledgment of this support, I am pleased to present to you the charter signifying your right to use the Scouting program for the year ahead in a way that conforms with both the rules and regulations of your chartered organization and those of Scouting. On behalf of the National Council of the Boy Scouts of America, I present your charter and pledge the cooperation of the local district, council, area, and region to help make the program a vibrant living part of your organization and community.

I would also like at this time to introduce the volunteers (if present) from our district who will provide support for you. May I introduce (the district chair, your commissioner and/or district commissioner, and any other visiting Scouters) who will help you carry out an effective program of Scouting for the year ahead.

Thank you for the opportunity to present the charter and thank you for accepting Scouting as a program of action for your organization.

Unit Depository Accounts

The council has established a unit depository account (UDA) for all chartered units. The UDAs are maintained in the council's accounting records and will have balances reflecting all overpayments of registration and insurance fees and any other amounts left on deposit with the council at the unit's request. Those individuals designated in writing by the committee chair can spend the balances in these accounts. The council registrar will also be able to use balances in these accounts to pay for registration when insufficient funds are provided at the time of registration. The registrar will advise unit leaders by note when funds are withdrawn from a unit account for registration.

Units can access their UDA after the council has received the names of the people who have authority to spend unit's funds and a balance has been established.

The authorization form should contain the names and signatures of those authorized to use the unit's funds and should be signed and dated by the committee chair. A copy is attached.

Once a UDA has been established and a positive fund balance is established. The unit can:

- Pay camp and activity fees
- Purchase items in the Scout Shop
- Pay for registration when the funds presented are insufficient to cover the registration balance due
- Request that a check be issued to the unit for balances on deposit with the council

UDAs are such that a unit cannot go into the red (create a negative balance) when making purchases or paying registration fees. Leaders may obtain the UDA balance by contacting the service center.