

How to Recharter

Updated by Noji Ratzlaff

03-23-2015

What exactly is rechartering?

It's that time of year again. You know because of that inescapable knot in your stomach. The fear is so great that you would rather schedule dentist appointments than perform this annual chore. But you know it has to get done, or the BSA will start putting pressure on the stake to send hit men after you.

A charter is an agreement between the BSA and the chartered organization for a particular scouting unit, and identifies the roles and responsibilities of the two in relation to the unit. Each year the BSA requires all officially registered units to renew their charters by re-registering with them. This guide is intended to help lessen the pain normally associated with that process. After all, we're doing this for the young men.

Long before you recharter

The time to prepare for rechartering is long before it's time to recharter. As in January. *The goal here is to enable you to submit your charter renewal without turning in any registration applications.* That might sound like wishful thinking, but it can save you hours, and maybe days, of grief. This is when the bulk of your task takes place, so here are some tips that could help:

1. Assign all of the following to a registered adult leader, typically the Advancement Coordinator, who is a member of the Scout Committee and has password access to the Internet Advancement site for all four scouting units
2. With *every change* in adult scout leadership or a change in bishopric,
 - Fill out the Adult Registration form right away
 - Get the new leader's SSN, driver's license number, and date of birth
 - Get all four signatures
 - If the new leader's Youth Protection Training is not current, ask him / her to get it done (the COR, Venture Leaders, Scout Committee Chair, Advancement Coordinator, and Eagle Coordinator must complete the Venturing Youth Protection Training in addition to the regular training)
 - Do **not** submit the registration application to the Scout Office until the Youth Protection Training is complete; *you'll come to find that this step alone will save you a big headache*
 - Your bishop already knows he shouldn't publicly announce an adult scout leader calling for new leaders until they have been cleared by the BSA, so check the Internet Advancement site periodically and inform your bishop or COR as soon as the leader is listed
3. When a young man turns 8, 11, 14, or 16, or is new in your ward,
 - Fill out the Youth Registration form right away
 - Get both (all three if the young man is a Venture) signatures
 - If the young man is simply being promoted from one unit into the next one due to his age, you still need to re-register him, but be sure to mark that he is transferring from Council 591, and indicate from which unit type and number
 - *Unless he's turning 11, it's not mandatory that a young man be promoted to the next unit, but is left to your ward to determine whether he should be*
4. Ask for lists to keep you informed
 - Your bishop is known by the BSA as the *Executive Officer or Institutional Head*, and can supply you with a list of the following:
 - Chartered Organization Representative (COR): this is usually one of his counselors
 - Cub Committee Chair
 - Scout Committee Chair
 - Primary President and counselor assigned to scouts
 - Young men 7 through 18 from your ward clerks
 - The following adult cub leaders from your Cub Committee Chair:
 - Committee Secretary, other committee members

- Cubmaster, Webelos Leader, Den Leaders, their assistants
 - The following adult scout leaders from your Scout Committee Chair:
 - Committee Secretary, Advancement Coordinator, Eagle Coordinator, other committee members
 - 11-Year-Old Leader, Scoutmaster, Varsity Coach, Venture Advisor, their assistants
5. Make sure all the people listed on all these lists are registered and that all the adults have current Youth Protection Training (the COR, Venture Leaders, Scout Committee Chair, Advancement Coordinator, and Eagle Coordinator must complete the Venturing Youth Protection Training in addition to the regular training)
 6. Re-check these registrations quarterly to keep up-to-date; to keep track of current Youth Protection Training, get hold of the adult leader's Member ID (from the *Unit Roster* in Internet Advancement) and validate the training in **MyScouting.org** (left nav)

Handle the packet

You've been handed a large, white envelope that has your four units listed on the outside and your rechartering instructions on the inside. This is your *rechartering packet*, and here's what you do with it:

- Keep the envelope, because it has the access codes printed on the outside for your four units
- Read over the instructions, which might be more up-to-date than those you read on this document (I will try and not let that happen)
- Fill out the *Annual Charter Agreement*, and get your COR to sign it
- Distribute the copies of the *Journey to Excellence* papers to the respective unit leaders and ask them to fill them out, have them signed by the appropriate people, then return them to you by the time you're required to submit the recharter packet

Get online

You can enter your rechartering information online starting October 1, and must get it done by October 15. You need to set aside about ten minutes per unit to get this done.

1. Get on a Windows® computer that has Internet Explorer™ installed and is attached to a printer
2. Go to the Recharter website and scroll down to the bottom:
<http://www.utahscouts.org/volunteer-helps/unit-charter-renewal/43765>
3. Click *Recharter Now*
4. Do the following for each unit:
 - Click *First Time User* to access the Rechartering System
 - Enter the access code for your Pack (or Troop or Team or Crew), select *Pack*, enter your unit number, then click *Continue*
 - Click *I agree*
 - Enter your name, new password, email address, and phone number, then click *Register*
 - Click *Begin* then *Load Council Information* then *Next Step*
 - Enter your own phone number as the U.S. telephone number.
 - Click *Next Step* if all other ward and unit information appears correct
 - Un-check all those on the list who will not be part of the unit in January, then click *Next*
 - The Rechartering System will display your selections of those you had selected to be removed from this unit.
 - Click *Next Step* if this looks correct, or click *Previous* to go back and make changes.
 - On this page you'll see the option to promote some of your youth; resist the urge to do so. After all, since you have diligently followed the procedure outlined in *Long before you recharter* above, this should not be necessary anyway. And if you *must* promote a young man, wait until after you submit the recharter packet and do it separately.
Click *Next Step*
 - On this page you'll see the option to add a new adult to your unit leadership. Again, resist the urge to do so. If you *must* add adult leaders, wait until after you submit the recharter packet and add them separately.
Click *Next*
 - On this page you'll see the option to add new youth to your scout membership. Again, resist the urge to do

so. If you *must* add new youth, wait until after you submit the recharter packet and add them separately.

Click *Next Step*

- On this page you can update information for individual members of your unit roster, which you should not need to do.
Click *Next Step*
- On this page you can update leadership positions for adult leaders, which you should not need to do, unless the chart on your right shows that you are missing one or more necessary positions to make a minimum number.
Click *Next Stage*
- Click *Check Roster* to start validating your information.
- If the Rechartering System detects no issues, just click *Next Stage*
- If it does detect errors with your data, it'll display them on the subsequent page, and you should do what you can to satisfy the Rechartering System.
- Afterwards, click *Re-Validate*
- *If you're unable to satisfy the validation due to lapsed or missing Youth Protection Training dates for adult leaders, ask the adult leader to log into **MyScouting.org** and print you a copy of their training certificate so you can include it in your recharter packet submission*
- Click *Summary*
- On this page the Rechartering System will display all the people whose registration you are renewing for the coming year, plus payment information for each registration
- Note: **this is now optional**, but if you want to remove redundant payments for an individual who is registered in more than one unit, do the following:
 - Click **Update** for the leader you want to check
 - Check **Member paid in another unit**
 - Indicate which unit this particular leader has already been paid for
 - Click **Save**
- Click *Next*
- If you have removed a youth from your roster, his name will be listed on this next page.
- Select **Yes** from the drop-down, then check the primary reason that you removed this individual from your roster.
- Click *Save* and then *Next*
- Click *Submit to Council*
- Click *Print Renewal Application* to print your *Charter Renewal Application*, which you need to have signed by your bishop and your unit leader

If you don't already have a copy of the *Charter Agreement* (should be in your packet), you can print out one for all four of your units (only need one sheet for all four units)

If you don't already have copies of the *Journey to Excellence* scorecards (should be in your packet), you can print out one for each of your units (each unit needs a separate sheet)

Turn it all in

1. The Stake Young Men Presidency will announce a date on which you need to submit all your rechartering paperwork. Do your best to accommodate that date by sending somebody in your place if you're not able to make it on time.
2. It's good, but not mandatory, to have your COR there with you, in case his signature is needed
3. When you turn in your complete rechartering packet, submit the following together:
 - Four sets of the *Renewal Application*, one for each of your four units, complete with signatures
 - The *Charter Agreement*, one sheet for all four units, complete with signatures
 - Four sheets of *Journey to Excellence* (optional), one for each of your four units and complete with signatures
 - Copies of *Youth Protection Training* certificates for those adult leaders with missing or lapsed training dates
 - If you are submitting copies of the MLS records, each copy must be signed by your bishop and the respective unit leader
4. Either keep the large, white rechartering packet envelope or the access codes printed on it, in case you need to look up your submission information later

5. The Stake YM Presidency will examine your rechartering packet while you're there, to make sure everything appears to be complete, then take the packet from you and dismiss you if it does
6. *Do not modify your recharter in any way after you have submitted it, even if large changes have recently been made in your ward. Contact me if you feel you must update it.*

Good luck,
Noji Ratzlaff,
Stake Eagle Coordinator
Orem Aspen Stake

801-368-1865

Note: this document is not produced by the Boy Scouts of America (BSA), but is the sole personal authorship and responsibility of Noji Ratzlaff. All its content are to be considered personal suggestions and recommendations by Noji Ratzlaff rather than definitive works of the BSA. I alone am responsible for all the content of this document, and any and all errors and omissions are completely my responsibility, and in no way reflects upon the BSA or any of its Councils, Districts, or leadership. Also please note that this document is subject to change.