

INSTRUCTIONS FOR RECHARTERING YOUR SCOUTING UNIT

Sam Houston Area Council • Boy Scouts of America

Attach Internet Rechartering
Access Code label in this box.

GENERAL INFORMATION *Please read this even if you don't read anything else!*

- The council recharter website, www.shac.org/recharter, contains additional information as well as links to the online recharter roster tools referenced below. If there are updates to these instructions, the updates will be posted there.
- Membership requirements for Venturing youth, aged 18 and up, changed in 2015. All Venturers, aged 18 and up, must complete an adult application as a "Venturing Participant" and otherwise meet adult membership requirements including completion of Venturing Youth Protection (Y02). If a YOUTH MEMBER is changed to a VENTURING PARTICIPANT during recharter, the crew must include a completed adult application and proof of completion of Y02 in the submitted paperwork.
- Use of the online Internet Rechartering application is required for all recharterers.
 - Packs, troops, teams, crews, and ships must use the version in the "legacy applications" in my.scouting.org.
 - Posts are to use the Exploring version on the lfl.myparticipation.org website. If the Exploring version is unavailable to the post, manual recharter must be used.
- ALL RECHARTERS ARE DUE IN THE COUNCIL OFFICE ON OR BEFORE DECEMBER 15, 2016.
- If your Scouting unit follows the following schedule, it should be able to turn in its recharter on time:
 - **October 1-October 31:** Prepare for recharter by conducting a membership inventory.
 - Use the Member Manager at my.scouting.org to view your unit's current roster. The online roster will be more up-to-date than the paper roster in the recharter packet.
 - If youth or adults not shown on the online roster are participating in your unit's program, get them to fill out membership applications and turn them in right away.
 - Contact all members.
 - If they will continue as members, collect their BSA and unit fees so that task is completed.
 - If they will NOT continue as members, find out why (too old for unit, no time, lost interest, don't like what they have been doing, moved, etc.). Internet Rechartering will ask you to supply a reason for any youth that you delete from your roster.
 - Ensure all adults have completed the **Youth Protection Training** required for your type of unit after 3/1/2015.
 - Ensure that the **top unit leader** (Cubmaster, Scoutmaster, etc.) has all training required by BSA to be "TRAINED" for his/her position. Our council requires this training to recharter your unit.
 - Determine what computer(s) you will use to access Internet Rechartering which requires Microsoft Internet Explorer version 7 or higher. If version 10 or version 11 is used, "compatibility mode" must be enabled so that those versions behave like version 9. Other browsers are known NOT TO WORK.
 - **November 1:** Internet Rechartering will be available to all units.
 - **November 7:** Complete Stage 1 of Internet Rechartering to make a working copy of the unit roster to which you will make changes in the following stages.
 - **November 18:** Complete Stage 2 of Internet Rechartering in which you make changes to the working copy of the roster made in Stage 1. This is where most of the work is done, so this stage has the longest time allocated to it.
 - **November 21:** Complete Stage 3 of Internet Rechartering in which you correct any errors that found by Internet Rechartering and act on any warnings it gives you.
 - **November 24:** Complete Stage 4 of Internet Rechartering in which you adjust fees for members registered in more than one Scouting unit and correct Boys Life subscriptions. This is also where you will provide a reason why any youth member being deleted is not rechartering.
 - **November 27:** Complete Stage 5 of Internet Rechartering in which you electronically submit the updated roster and print out the updated roster for signatures.
 - **On or before December 15:** collect applications for all new members, get signatures on the roster and applications from the Chartered Organization Executive Officer and top unit leader, calculate the insurance fee, and get a check payable to "Sam Houston Area Council" for the total fee (recharter roster total PLUS the insurance fee). **Turn in the entire recharter printout** from Stage 5 and all other paperwork to your district or to the registration desk in the council office.
- Your district will inform you of the places and times that you may turn in your recharter without visiting the council office. Also, the registration desk at the council office will be open from 9AM-noon on the first two Saturdays in December to receive recharterers in addition to the usual Monday-Friday from 8AM-4:30PM.
- Your commissioners or District Executive will inform you if errors are found. Corrections must be completed by the end of February or the unit will be dropped.

Resources • How Recharter Is Done

IF THIS IS YOUR FIRST TIME TO BE INVOLVED WITH RECHARTER, OR EVEN IF YOU ARE AN "OLD HAND" WHO NEEDS TO "BRUSH UP" ON HOW RECHARTER IS DONE, PLEASE READ PAGE 3 BEFORE CONTINUING. DOING SO WILL HELP MAKE THE POINTERS TO RESOURCES BELOW MORE USEFUL!

RESOURCES

RECHARTER WEBSITE

The Council Recharter website contains helpful information about recharter including

- All updates to the printed instructions.
- Links to BSA's Internet Rechartering website, its tutorial, and its help system
- Links to the Recharter Workshop PowerPoint tutorial
- Documents and forms used in recharter
- Hints and frequently asked questions

Access it at www.shac.org/Recharter.

NEW FOR 2016

We have been told to expect minor changes to Internet Rechartering on October 1, 2016, that improve its usability and performance. We will update the recharter website as we have more information.

Don't forget these important changes from recent years:

- All unit and district recharterers ARE DUE NO LATER THAN December 15, 2016. See **SCHEDULE** for key dates for unit rechartering. Use the enclosed checklist to avoid recharter errors. We urge all units to BE PREPARED with an ON-TIME ERROR-FREE recharter!
- The BSA membership fee for all youth and all adults is \$24/yr. Boys Life subscription fee is still \$12/yr. The council insurance fee is \$1/person (except members of units chartered by the LDS Church).
- Venturing youth, aged 18 and up, must register as adults and complete Youth Protection Training Y02.
- No membership fees are collected for LDS units. The LDS Church pays membership fees to BSA directly on behalf of its wards. Units must pay Boys Life fees!
- All registered adults must have completed the Youth Protection Training for the unit's program within two years of the renewal. To avoid delays, we suggest that units ask adults to retake YPT if the most recent date completed is March 1, 2015, or earlier.
- SHAC requires all top unit leaders (CM, SM, VC, NL, SK, EA) to have completed BSA required training for their position prior to recharter.
- All recharterers must use Internet Rechartering (IR). Units, other than posts, will use the version on my.scouting.org. Exploring posts with access to version of IR on lfl.myparticipation.org (the Exploring support site) are expected to use that version. Otherwise, the post will do a manual recharter.

SCHEDULE

Units should follow this schedule which will enable them to turn in recharterers on or before the due date: December 15.

October - training and membership inventory	11/27-IR stage 5 complete
11/1-IR available	12/1 & 12/8-district turn-ins*
11/7-IR stage 1 complete	12/3 & 12/10-Saturday 9AM-noon turn-in at council
11/18-IR stage 2 complete	
11/21-IR stage 3 complete	12/15-all recharterers due
11/24-IR stage 4 complete	

Registration hours are 8:00 A.M. – 4:30 P.M., Monday-Friday. Please arrive before 4:00 P.M.; the office closes at 4:30 **sharp**. We encourage you to use recharter turn-in opportunities provided by your district to save yourself a trip to the council office.

*Your district may schedule different dates for district turn-ins! Use your district's dates if they are different.

INTERNET RECHARTERING (IR)

This web-based system provided by the BSA National Council helps you update your unit's roster to correct errors for existing members, add new members, and remove members who are no longer in your unit. IR is available to you starting November 1. Attend your district's Recharter Workshop or see the Recharter Workshop PowerPoint tutorial linked in the "Resources" section of the recharter website for detailed information. We expect minor changes to this system on October 1 and will update the recharter website after we have more information.

IR ACCESS CODE

The access code required to use IR is on a brightly-colored label in the right-hand corner above. The access code changes every year – do not use last year's code because it will attempt (and fail) to access last year's information. YOU ARE A "FIRST TIME USER" WHEN YOU BEGIN YOUR FIRST SESSION EVERY YEAR!

RECHARTER HELP

Your district's Commissioner Team is your first point of contact if you need help. If they don't already know the answer to your question, they will help you find it. Contact your Unit Commissioner or, if you do not know who your Unit Commissioner is, your District Commissioner or District Director or Executive.

BE "ON TIME – ERROR FREE". Every hour spent by volunteers and Council staff chasing down late recharterers and fixing errors can't be spent helping youth. **THANK YOU** in advance for making good use of our limited resources!

HOW RECHARTER IS DONE

If you are reading this, you probably have just been asked to “recharter” your “unit” and are full of questions. You also may be a little anxious, wondering “what in the world have I gotten myself into?” because *everyone else* was so relieved when you agreed to do it.

RELAX. Unit recharter has earned a reputation as being difficult when, in fact, **it is pretty easy**. If there is a hard part, it’s that some rules have to be followed for each member and that you have to finish on time.

So let’s start with some of those questions:

What is a unit? That’s the Pack, Troop, Team, Crew, Ship, or Post that asked you to do this. Units in our area operate under the **Sam Houston Area Council (SHAC)**, the local operating arm of the Boy Scouts of America (BSA). The Council assigns each unit to a **District**, a geographic part of SHAC’s area of operations. A unit always has a **Unit Leader** who is responsible for seeing that a program is delivered to the youth members. The Unit Leader has a title like **Advisor, Cubmaster, Scoutmaster, Coach, or Skipper**. A unit has at least three adults who serve as the **Unit Committee** that supports the Unit Leader.

What is recharter? BSA issues a charter through the local Council to a Chartered Organization, like the Church or other organization that owns your unit, which allows it to use a BSA program to serve youth in its community. For example, a Cub Scout Pack uses Cub Scouting to serve boys in the first through fifth grades. BSA requires that the charter be renewed annually to continue using the program. We call that annual renewal “recharter”.

What else happens during recharter? In addition to renewing the unit charter, recharter time is when all youth and adult members (leaders) renew their membership in BSA. Member renewals are most of the work. Your unit should also complete the application for the Journey To Excellence Award.

What is the process? Briefly, it goes like this:

Attend your District’s Recharter Workshop. Each District is to hold one or more workshops to discuss recharter. Attending it also gives you a chance to meet your Commissioner Team, your first line of help in case you need it. You may have received your unit’s recharter packet at the workshop. The PowerPoint presentation used at the workshop is available on the recharter website via the “Resources” section above.

Inventory your members and collect fees. Collect BSA registration fee, Boys Life subscription fee, and Council accident insurance fee from each member that will be continuing membership. The unit’s Treasurer or another leader may do the actual collection, but you must know who is renewing and any changes to their personal data (address, phone#, etc.) and, for adults, Scouting position. Involve the Unit Leader and Committee in determining the status of those who do not respond about renewing. Get complete, new applications, including all required parts and signatures, for any new youth or adult members. All adult

applications should include proof of having completed Youth Protection Training. This course is available online the E-Learning Center in my.scouting.org. (If the course is not completed prior to turning in the application, it **MUST** be completed in the next 30 days to avoid cancellation of the new leader’s membership!) Attach a copy of the training certificate to the application and the criminal background check authorization before submitting the application. Your UNIT LEADER also must have completed BSA basic training for his or her position.

Update the unit roster. The recharter process uses a unit roster in a special format to provide an updated list of members and to provide BSA with the signatures to approve the renewal. You create this roster using Internet Rechartering (IR). The paper roster in your recharter packet is for reference only, is not in the correct format, and cannot be turned in. IR will import a current roster from BSA’s registration system after you first access the system. It will record any changes you make – corrections, added or deleted members – and send them to the Council Registration staff so they will have exactly what you want them to have! At the end of the Internet process, you will print out the paper roster to use for the rest of the process. More information about IR and how to get started are on page 1. Consider the tutorial if you have not used IR before.

Calculate insurance, new member fees. Complete the blue Accident Insurance Information form from the packet. The fee is \$1 per person, including Tiger Cub Adult Partners for Cub Packs. If you added any new members and want them to be members before your new charter starts January 1, add a fee of \$2/month/member. Use the checklist worksheet to calculate the total payment due.

Obtain signatures on recharter roster. Before you turn-in your paperwork, you must get two signatures on the first page of the recharter roster. The person named as the Executive Officer on the roster must sign the top line for the Chartered Organization. The person named as the Unit Leader (Cubmaster, Scoutmaster, etc.) must sign the bottom line as Unit Leader. The middle line, Council Representative, can be completed at turn-in and will be signed by a Commissioner and/or the professional Scouter responsible for supporting your unit’s District.

Turn in all paperwork. Take the following to turn-in: signed updated roster, complete applications for new members, completed Accident Insurance Information form, and Journey to Excellence application. Bring your unit’s check with you to turn-in; we suggest that the amount not be filled in until someone has checked the total you calculated. When your District has a turn-in, district personnel will take the paperwork to the Council office. Otherwise, your unit must turn it in at Registration in the Council office at 2225 North Loop W, between 8:00 A.M. and 4:30 P.M. Monday-Friday, on or before December 15th. Any errors found by the registration staff after turn-in must be corrected promptly or your unit will be dropped, losing its right to use Scouting’s programs to serve its youth members