



BOY SCOUTS OF AMERICA
ORANGE COUNTY COUNCIL

2024 OFFICIAL RECHARTER INSTRUCTION BOOKLET



Prepared. For Life.™

Key Contacts: District Commissioners

• Canyons	Valerie Venegas	vvenegasgwc@yahoo.com
• El Camino Real	Gary Ibanez	Gary.g.ibanez@gmail.com
• Golden West	Jaime Finnsson	missimpos@aol.com
• Pacifica	Robert L Batman	robert.l.batman@kp.org
• Valencia	Robert Flynn	troop1201sm@gmail.com
• Rancho San Joaquin	Paul Strasma	paul.strasma@gmail.com
• Saddleback	Bob Murillo	bmurillo@usa.net

Orange County Council
2 Irvine Park Rd., Orange, CA 92869
(714) 546-4990 Fax (714) 546-0415
www.ocbsa.org/recharter

Council Registrar
(714) 546-8558 x158
Email: recharter@ocbsa.org

TABLE OF CONTENTS

Preparing – Intro to Recharter

Recharter Checklist.....

Scouter Reserve Positions.....

Unit Key 3.....

Tips for Success

Recharter Check list

Steps to Recharter

Scouts' Life Subscriptions.....

Multiple Registrations.....

Defective Charters

Frequently Asked Questions

What's New for 2024?

Annual Membership Fees

	<u>Youth</u>	<u>Adult</u>
National	\$80.00	\$60.00
OCBSA	\$75.00	\$21.00

Scouts' Life Subscription **\$15**
Unit Liability Insurance Fee **\$100**

All new youth & adults must complete online applications and pay a one-time \$25.00 joining fee and the full annual membership fee for 12 months. First year membership is no longer prorated. New members joining after August 2023 will show as pre-paid on roster during recharter.

Merit Badge Counselor Fee \$25.00

Only for adults not registered in a unit position.

California Law AB506 Training Certificate & CA Disclosure Form

must both be uploaded to
<https://californiascouting.org/oc/>

BSA youth protection training must be completed **annually** for all adults and 18+ participants.

Position specific training must show as complete for each registered unit position.

Hazardous weather training must be current.

- E-Signature now accepted for IH/CR
- E-Payment Options – Check or CC
- **BeAScout unit Pins** must be reset after renewal posts for the 2024 year.

Thank you in advance for helping us make the most effective use of our limited resources while we assist you in providing the best possible Scouting program for the youth in Orange County!

All unit recharterers will be submitted through My.scouting.org using Internet Advancement 2.0.

Details on how to navigate the online recharter system and ensure successful posting are included in this guidebook. Additional information including a video, user guide and national FAQs may be found at <https://www.scouting.org/resources/internet-rechartering/>.

Accessing Internet Recharter

Access via <https://advancements.scouting.org> using your my.scouting.org username and password. You may also go to <https://my.scouting.org> ➤ BSA Web Links ➤ Internet Advancement 2.0. Once the recharter system is live you will see a Recharter entry at the bottom of left side menu.

System requires Google Chrome, Firefox, or Explorer 11 (if not using Explorer 11, you may need to select compatibility mode.) Please clear browsing history before beginning.

NO ACCESS CODE is needed. You must be currently registered in a Key 3 unit position (CR, CC, CM, SM, NL and SK) or assigned as a Key 3 or COR Delegate functional position. These delegate roles may be assigned to any registered unit leader by a Key 3 member using the using my.scouting.org position manager. You or your delegate can do it from home or office, anytime that is convenient.

RECHARTER TIMING

*Recharterers are to be completed **no later** than the December Roundtable on December 14, 2023.*

Units have access to the online recharter system beginning October 1st. We recommend not submitting until mid-November to allow time for recruitment and new members to be processed prior to upload for renewal. Please be sure to process your recharter accurately, review with your Unit Commissioner, and then submit no later than the December 14, 2023 Roundtable.

It is better to submit an error-free charter a day or two late than to meet the deadline with known errors. After submission, your charter must pass national and OCBSA quality checks before posting. Submitting a known defective charter will result in lengthy delays and consume limited resources unnecessarily.

Preparing for Recharter



First, set a deadline for new members to complete the online application and pay their fees to be included in the recharter process. Registrations can be added any time prior to submitting the recharter. But the recharter packages has been submitted, any further new applications must wait until the charter post successfully.

Second, ensure all adults and 18+ participants have completed their Annual Youth Protection Training, Position Specific Training for their intended 2024 unit position, and if needed Hazard Weather and/or Introduction to Outdoor Leadership Skills. Adults with incomplete training must be dropped prior to recharter submission and then wait until the charter posts to register (once training is complete).

Third, verify that each adults has submitted an AB506 training certificate and CA disclosure form at <https://californiascouting.org/oc/>. Many volunteers who completed AB506 training prior and submitted prior to April 2022 do not have a CA disclosure form on file and must resubmit with both the training certificate and the form.

Failing to complete these actions could delay the recharter from being completed on time.

INTRODUCTION TO RECHARTERING

The annual chartering process is one of the oldest traditions in Scouting. It is the process of renewing the chartering organization's commitment to offer BSA programs, selecting and approving adult volunteers for leadership positions and registering youth for the upcoming year with your unit.

What is a Charter?

It is the formal (legal) document that certifies the agreement between a Chartered Partner – an organization that agrees to utilize Scouting as part of its service to youth and community outreach – and the Boy Scouts of America, setting expectations for the quality of program to be delivered to the Charter Partner's youth population. The current form of the BSA charter agreement must be signed annually by an executive officer of the charter organization (IH: institutional head), a representative of the charter organization who registers as a volunteer leader with BSA (CR: charter organization representative), the unit committee chair (CC) and a representative of Orange County Council (OCBSA).

Why is a Charter Renewed Annually?

- Fosters a formal, timely plan for regular dialogue between charter organization and BSA.
- Assures up to date member registration in district/council Scout activities and rank advancement.
- Makes units eligible to qualify for yearly Journey to Excellence goal setting, review process and recognition.

Unit Charter Renewal

Unit Charters are issued for one year and expire on the last day of the charter renewal month (aka recharter date) printed on the charter. After that, units are “separated” from Scouting, the unit is “dropped” from BSA membership, as are all its members.

When a unit is separated from Scouting, it ceases to exist and CANNOT legally operate in any capacity, including activities and advancement. An expired unit has no status in BSA and no insurance coverage for any of the unit's members and Chartered Organization. Youth and adults are unregistered, cannot attain awards and recognition. Advancement or achievement of any kind for the boys – including Eagle Rank – cannot take place, and tenure in rank and for leadership positions is stopped.

UNIT KEY 3

The Unit Key 3 consists of the unit leader (CM, SM, NL or SK), the chartered organization representative (CR), and the committee chairman (CC). An effective Unit Key 3 leadership team is a critical component to the success of Scouting in your unit. This team should meet periodically with the Unit Commissioner who can advise and provide access to district and council resources.

When rechartering the unit, please distribute leadership positions to implement the Unit Key 3 concept. This means spreading out the positions so that different persons serve as committee chairman, unit leader and chartered organization representative. This three-person structure improves leadership depth and allows each person to contribute their individual strengths, abilities, and perspectives based on the focus of their trained position.

We also recommend that the unit leader and the committee chairman not be married or be planning to depart the unit during the 2024 calendar year. For example, a Pack should not register an Arrow of Light parent for a key 3 leadership position. This ensures timely succession planning and time to train new leaders prior to parents transitioning on to the next program.

BEST PRACTICES

Process all new applications for youth or adults online. Go to beascout.org, search for unit # and then complete application and pay online. New members can also be invited from the new online renewal system. Uploads for scanned paper applications are possible in the recharter package; however, all such adult applications must be signed by the Charter Org Representative and the applicant and include the BSA national disclosure which is the 2nd piece of the BSA adult application.

Select “Refresh Roster” often through the process. This updates YPT completions and invited members status. You can save at any time, log off the system, and begin again where you left off

MORE TIPS FOR SUCCESS

1. **Each charter partner may have only one IH and CR. If an organization charters multiple units, the IH and CR must be the same on each unit’s roster.** For example, a Pack, Troop and Crew chartered by the one organization must have the same IH and CR registered for each unit.
2. **All adults must have completed Youth Protection Training during calendar year 2023 and show an expiry date of 1/1/2025 or later.** This is an Orange County Council policy and the recharter will not post if any adult leaders or 18+ adult participants are missing current YPT.
3. **Check that you do not have any online applications pending.** If you do, approve them and then refresh! Applications still pending at the time of charter submission will be lost.
4. Please make sure that when unselecting/deleting, you delete the correct person. If a person is deleted by accident, recheck name from drop list on charter screen and continue. **Do Not Re-enter Online.**
5. If you are missing a person on your unit roster, have them apply through the online system and then refresh the roster. You can send the online registration URL to them from your beascout.org pin. Also check the deleted tab to confirm they were not accidentally deleted.
6. **No one should be marked as a transfer;** there are NO transfers at recharter time. Any desired transfers must processed online prior to recharter submission by BOTH incoming and outgoing unit.
7. **There must be at least 5 paying youth for a Unit to Recharter.** The unit paying the registration fee is the primary registration for youth and adults who register with multiple units.
8. Check and confirm all multiple registrations. Ask a representative of the primary unit to confirm they are paying the registration fee. (*See section on “Multiple Registrations”*)
9. Please be sure to **mark Scouts’ Life** so fees are included in final payment.
10. **Confirm that all youth and adults who should be registered are registered.** Unregistered leaders and youth are not BSA members, are not covered by insurance, and cannot process advancement.

RECHARTERING CHECKLIST

Gather appropriate information:

- a. Current Unit Roster online at my.scouting.org
- b. Verify that all adults have completed their required trainings.
- c. List of youth and adults to remain on roster.
- d. List of youth and adults to be removed from roster.
- e. List of youth and adults to subscribe to *Scouts' Life* magazine.
- f. **New** youth and adults who have submitted an online application. Online applications show up on the renewal as prepaid members.

☐ **Minimum 5 paying registered youth.**

☐ **No Transfers**

☐ **Membership fees**

- ☐ \$100 Unit Liability Insurance fee
- ☐ National registration fees youth \$80.00 plus Council fees \$75.00
- ☐ National registration fees adult \$60.00 plus Council fees \$21.00
- ☐ \$15 per *Scouts' Life* subscription (available for any registered youth or adult) The unit is considered *100% Scouts' Life* if at least **one person from each family** receives a copy of the magazine.

☐ **Signed Disclosure form** including scouts who turned 18 this year plus adult application for those who are continuing as VP's with a Crew. Available for upload to charter.

STEPS TO RECHARTER

Step 1 – Log into Internet Advancement at <https://advancements.scouting.org> using your my.scouting.org username & password. Or on my.scouting.org click the BSA Web Links box and select Internet Advancement 2.0. Then click Recharter on the lower side of the left menu.

Step 2 – Update Roster. Select any adult or youth not returning and drop them from roster, change positions. New members can be invited to sign up from charter renewal, completing online application and payment. Accept app and continue the recharter process.

New: You can upload a paper application that must have appropriate signatures.

Step 3 – Check Roster. Review & Validate the data to be submitted conforms to BSA rules (such as adults assigned to all required positions and all Lion and Tiger Cubs members have an adult partner)

Step 4 – Update Member Fees, **assign multiple status**, and sign-up members for *Scouts' Life*.

Step 5 – Review draft version before selecting the “Submit to Council” button. Submit roster and pay fees online: via e-check or credit card (3% credit card convenience fee applied) or submit unit check with final paperwork. Please complete the youth not renewing survey.

Follow up with any leaders that have a change in position to ensure they have taken or commit to taking the appropriate training for the new position. Leaders have 30 days after the charter is submitted online to complete trainings for the charter to be processed by council. Incomplete trainings will result in the charter failing to post.

The Refresh Button can be selected anytime during the recharter process. This button allows units to upload additional youth and adult applications that were recently posted to the unit roster. The refresh does not overwrite any changes already made to the system.

****Defective Charters****

Charters can be kept on hold for a variety of reasons. We ask that you review this guide to complete an error free recharter package. Should the council staff find errors, we WILL send communication to the District Executive to correct deficiencies. Please be courteous and return communication as soon as possible so that your charter may be processed on time and prevent delays with *Scouts' Life* subscriptions and advancement purchases.

PRIVACY POLICY

Charter renewal involves confidential and/or private information and accepting the responsibility for maintaining the privacy and confidentiality of that information. Private and/or confidential information must never be shared outside the Boy Scouts of America. If the recharter processor cannot accept this responsibility, a different person must be identified to complete the recharter.

SCOUTS' LIFE SUBSCRIPTIONS

SCOUTS' LIFE Is ~~Optional~~ Essential! Unit leaders work hard to bring the best Scouting program possible to their unit members. Surveys and experience have shown that *SCOUTS' LIFE* magazine is **ESSENTIAL** to a strong Scouting program. Successful leaders use **SCOUTS' LIFE**.

MULTIPLE REGISTRATIONS – YOUTH

Youth who are registered in Scouts BSA may dual register as youth of a Venturing Crew or Sea Scout Ship. Registration fees are paid only once at the primary position. Remember that at least 5 youth must have their primary registration with the Crew to meet the minimum paid registration requirement.

Youth should not be registered with both a Pack and a ScoutsBSA Troop. Youth aged 11 or older may not register with a Pack. The Den Chief position of responsibility is not a BSA registered position.

MULTIPLE REGISTRATIONS – ADULT PARTICIPANTS AGE 18-20

Any youth that has turned or will turn 18 years old by Dec. 31, 2023 and will continue in scouting must register for 2024 as an adult participant, complete annual Youth Protection Training and submit a new adult application. Until age 21, they may register as venturing participants (VP) with a Venturing Crew or Sea Scout Ship. AB506 training is not required for adult participants. They may also register in a ScoutsBSA Troop as a College Scouter Reserve (92U) or as an assistant Scoutmaster (SA). AB506 training IS REQUIRED for Troop leadership positions. **The primary paid registration for scouts age 18-20 years old who multiple register should be with the Crew or Ship as an Venturing Participant.** The Troop role should be the no fee multiple registration.

18-Year-Old Youth in Scouts BSA - Qualified male or female scouts over age 18 working towards their Eagle Scout Rank who have an approved extension, must register as a youth member but must use the BSA adult application & use position code UP (Unit Participant).

Any new 18-20 year-olds must submit a BSA adult application to join as a Venturing Participant.

Please ask the Council Registrar or District Executive for assistance.

MULTIPLE REGISTRATIONS - ADULTS

Same Unit registrations - Only the Chartered Organization Rep (COR) can hold more than one BSA registered position in the same unit. The COR may only serve in a multiple capacity as a member of the committee (MC) within the unit. The COR cannot serve as the unit leader (CM Cubmaster, SM Scoutmaster, NL Crew Advisor, or SK Skipper) or Committee Chair (CC).

Unit Leaders (CM, SM, NL or SK) and Den Leaders (DL or WL) cannot multiple register as committee members (MC) in the same unit. It is recommended that no individual be registered as the unit leader for multiple units (e.g. serving as both Scoutmaster and Crew Advisor).

Other adults may register in only one position per unit. For example, a leader may register as an Assistant Scoutmaster (SA) with a ScoutsBSA Troop and a Webelos Den Leader (WL) with a Pack. A leader might also register as a committee member (MC) for a ScoutsBSA Girl Troop and a ScoutsBSA Boy Troop or for a Troop and a Crew.

Multiple registration as a no-fee Merit badge counselor (42) is encouraged for registered ScoutsBSA adults. However, this registration is processed separately during the district recharter. It is not appropriate to register adults who are actively participating with a ScoutsBSA unit as a Merit Badge counselor with fee (42F). This position is intended for community members serving youth as counselors.

Some leaders choose to have their primary registration with the District or Council. Mark them as multiple in the recharter process and remind them to pay their registration fees to their Council Unit Serving Executive by December 31st.

Indicating dual will remove \$\$ - please list where the primary membership is and the unit #

SCOUTER RESERVE POSITIONS

These positions are for adults that wish to remain on their unit roster for continuous membership with the BSA. The positions use the same application, fees and registration process, as any other adult volunteer or scout over 18 years old but the only training requirement is Youth Protection and AB506. If an adult supports the unit but does not participate in meetings, activities and outings the Unit Scouter Reserve would be the appropriate method of maintaining their registration with the unit.

If a young person is away at college, on a mission, or in the service and wants to stay registered with BSA through the unit, the Unit College Scouter Reserve or Venturing College Scouter Reserve would be the appropriate method of maintaining their registration with the unit.

If a young person or adult continues to be highly active with the unit (attending at least 1 meeting per month and/or participating in any campout or other activity during the program year), then registering them as a leader is required. In that case, they will need to complete the appropriate Position Specific Leader, Hazard Weather, and outdoor leader trainings.

UNIT COLLEGE SCOUTER RESERVE
(Position code 92U)

For Packs and Troops
Minimum age requirement of 18

VENTURING COLLEGE SCOUTER RESERVE
(Position code 92V)

For Crews and Ships
Minimum age requirement of 21

UNIT SCOUTER RESERVE
(Position code 91U)

For Packs, Troops, Crews and Ships
Minimum age requirement of 21

FREQUENTLY ASKED QUESTIONS

Where can I get a copy of our current BSA Roster? My.scouting.org - unit link and roster.

Rosters are available through the Online Advancement System and my.scouting.org or from the Council Service Center, email the registration department.

Where can I check the training status of unit leaders?

If you are a Unit Key 3 leader, Go to <https://my.scouting.org>. Go to Training manager icon and run the Training Detail Report or email registration department. The unit may have assigned a Training chair which would also have access to the report from my.scouting.org

How do I change my Charter Organization's Executive Officer/IH?

Unselect the previous IH. Add the new Executive Officer as new adult and choose position IH.
Do not type over the existing IH.

How do we change our Chartering Organization?

Contact your District Executive and Unit Commissioner. Attach a signed new unit application to your Recharter, along with a unit release form or letter signed by an officer of the previous Charter Organization releasing the number and all property to the new Charter Organization.

Recharter was submitted to Council prior to year-end and forgot to add someone, what can I do?

Have the new member complete an online application through BeAScout.org and submit fees for current year.

Why do you need my Social Security Number?

All adults must supply their social security for a National BSA background check. It is policy and BSA takes youth protection seriously.

I'm changing my position do I need to fill out a new application? No, not during renewal. At recharter adults can be moved to a new position. After the annual renewal, any time you change positions the COR from the unit should process this via their Organization Manager tool. To transfer yourself during the year to a different unit, go to your user account on my.scouting.org account and click the options under My Applications.

I'm turning 18. What paperwork do I need to complete? Complete an adult application and get it signed by the COR. At recharter you must drop the youth record (member) and then upload the BSA Adult app for an 18-year-old. However they will use the same MID #.

Do I need to take AB506 training, California Background and Live Scan? Yes this is required for all registered adult volunteers including unit level, district level, council level positions and community members serving as Merit Badge Counselors. Complete the 2 hour volunteer training then submit your certificate and the CA background consent form at <https://californiascouting.org/oc/>. You must also download the live scan form and complete the finger printing process with OCB SA or at a third-party facility.