Key Contacts: District Commissioners

- Canyons  Gary Hodgson  dc.canyons@yahoo.com
- El Camino Real  Curtis Porter  cmporter@hotmail.com
- El Capitan  Michael Mannix  mlmannix@hotmail.com
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- Orange Frontier  Tom Miller  occnslt@gmail.com
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- Rancho San Joaquin  Joseph Vieyra  bigjoe@cox.net
- Saddleback  Craig Duerr  cduerr@gmail.com
- Venturing/Sea Scouts  Scott Murphy  scott.murphy@scouting.org

National BSA Service Desk 972-580-2489, for technical problems

Orange County Council
1211 East Dyer Road, Santa Ana, CA  92705
(714) 546-4990  Fax (714) 546-0415
www.ocbsa.org/recharter

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

**Effective January 1, 2020**

*A new Registration Fee* will be announced on October 23rd.

**Disclosure Form Required**

For all individuals 18 years an older.

**No Paper Applications**

All new members must complete online applications prior to recharter.

**New Position - Unit Participant (UP)**

For qualified boys and girls over age 18 working towards their Eagle Scout Rank.

**Required Training**

All adult positions must complete their position specific and hazard weather trainings.

**Print Unit Recharter Certificate**

Units can now print their own charter certificates.

---

**Remains the Same:**

- Insurance Recovery Fee $12
- *Boys’ Life* Subscription $12
- Unit Liability Insurance Fee $40

- Simple Navigation between screens
- YPT Requirement
- E-Signature for IH/CR
- E-Payment Options - Credit Card, Check

---

**BE ON TIME – ERROR FREE**

Every hour spent by volunteers and Council staff chasing down late recharters and fixing errors can’t be spent helping youth succeed.

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!
RECHARTERING CHECKLIST

Details on how to navigate the online recharter system is included in this guidebook.

All new members must complete the online application and pay their fees to the unit before they will be included in the recharter process. Do not start until all members have been submitted. Additional registrations can be added after the recharter is submitted online.

All adults must have current Youth Protection, Position Specific and Hazardous Weather Trainings before beginning the recharter process. Adults changing positions during the recharter process have 30 days to finish their position specific and hazardous trainings or they will be deleted from the charter.

All members 18 years old and over, must submit with the charter a signed copy of the New Disclosure Form.

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

☐ “Submit” and Print Full Recharter Report (no draft copy or EZ Form accepted)

☐ All new applications for youth or adults must be completed through the unit beascout.org link and payments collected through the Council Square account. No paper applications can be attached to the recharter package. New members cannot be added in the online renewal system.

Lion (LP) and Tiger (AP) Partners are not members and no fees are collected – their information comes only from the youth. If these individuals wish to register as leaders, they will need to complete an online application and be uploaded into the renewal system prior to submitting the charter.

☐ Minimum 10 paying registered youth (except Venture Crews)

☐ No Transfers

☐ Membership fees
  ☐ $40 Unit Liability Insurance fee.
  ☐ Appropriate registration fees plus $12 for insurance per member.
  ☐ $12 per Boys’ Life subscription (available for any registered youth or adult) The unit is considered 100% Boys’ Life if at least one person from each family receives a copy of the magazine.

☐ Signed Disclosure Form for every member 18 years and older attached to the recharter package.

☐ Charter Agreement – Form is available to print in final stage of the online charter process. Must be signed by the Institutional Head (Executive Officer) and Charter Representative of the charter organization.

☐ Journey to Excellence Scorecard – Regardless if the unit qualifies, please submitted completed form with the recharter package.

☐ Return Completed Recharter package to your commissioner no later than December 1, 2019.
INTRODUCTION TO RECHARTERING

What is a Charter?
The chartering process is one of the oldest traditions in Scouting. 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.

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.

Units have access to the online recharter system for 60 days before the unit expiration date and ending 30 days after to fix problems. Please be sure to process your recharter accurately and on-time.

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.

**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 contact the unit committee chair 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 Boys’ Life subscriptions and advancement purchases.
GETTING STARTED

Congratulations, you have been selected as the Online Recharter Processor for your unit. The Online Rechartering process allows you to be in complete control of your information, and you can do it from home or office, anytime that is convenient for you.

It is highly recommended that you attend the District’s Recharter Workshop. During this training, you will receive information and help on how to log on and process your recharter. An online tutorial and PowerPoint presentation are also available. Access to the Online Recharter system will open November 1st.

To be eligible for the Journey to Excellence Unit Award, your recharter must be turned in On Time. This means the recharter must be submitted, paid and delivered to your Unit Commissioner between November 2nd and December 1st.

Recharts are due to your Commissioner no later than the December 1, 2019.

Here is what you’ll need to get started:

Gather appropriate information:

a. Current Unit Roster (can be obtained from your Unit Advancement Processor or from Council)
b. List of youth and adults to remain on roster.
c. List of youth and adults to be removed from roster.
d. List of youth and adults who want Boys’ Life.
e. New youth and adults would have submitted an online application. Use the Update Roster Button often to make sure all are listed in the charter renewal.
f. Verify that all adults have completed their required trainings.
g. Review information on the council webpage: www.ocbsa.org/recharter

1. Go to https://my.scouting.org ➢ Legacy Web tool ➢ Internet Recharter. The Online Rechartering 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.

2. A PowerPoint presentation is available which will walk you through each step of the system.

3. Select First-time user and enter the unit access code (label affixed to the front of this booklet). Each year you are a First-time user when accessing the system for the initial set up. Codes and passwords from prior years are no longer active.

4. Select the unit type and enter the unit four-digit number. (ex: unit 70 will be 0070)

5. Create a password as instructed.

6. Complete the information requested on each screen.

Note: You can stop at any time, log off the system, and begin again where you left off by reentering your access code and password. Best Practice: Select “Update Roster” each time you log back into the system.
RECHARTERING TIPS FOR SUCCESS

*From the Council Registrar*

1. The Online Rechartering system requires Google Chrome, Firefox, or Explorer 11 (if not Explorer 11, you will need compatibility mode.) Be sure scouting.org is added to compatibility view.

2. **The same IH and CR are required for each unit under the same unit number.** For example, a Pack, Troop and Crew chartered by the same organization (P0123) must have the same IH and CR registered. It is preferred that IH and CR not be the same person within the unit.

3. Please make sure all mailing addresses and email addresses are up-to-date. Returned mail means a Scouting family is missing out on valuable Scouting information.

4. DO NOT overtype on an existing record. If you are missing a person, they need to submit an application through the online system. You can send the URL to them for the same purpose.

5. Tiger and Lion Parents (positions AP & LP) cannot be changed to a registered position without completing the online application process.

6. All adults must have current (cannot expire prior to January 1, 2019) Youth Protection Training or you will not be allowed to move forward in the processing of renewing the charter for 2020.

7. Take advantage of the UPDATE Button use it multiple times throughout your charter process.

8. Simplify your recharter process: Have online apps paid for and approved at least 15 days prior to starting your recharter. This will make the process go much faster.

9. Please make sure that when unselecting/deleting, you delete the correct person. If deleted by accident, recheck name in Stage 2 and continue. **Do Not Reenter online.**

10. **No One should be marked as a transfer:** there are NO transfers at recharter time.

11. **There must be at least 10 paying youth for a Unit to Recharter:** (Crews excluded)

12. Check and confirm all multiple registrations. (See section on “Multiple Registrations”)

13. If a Scout or adult leader wants *Boys’ Life*, please be sure to mark it during stage 4 in the online rechartering process and include fees in final payment.

**Note:** Please make sure that all youth and adults that should be registered are registered. Unregistered leaders and youth are not covered by insurance and the youth may not qualify for advancement. Be sure to quickly approve and pay for the online applications anytime during the year.

**BOYS’ LIFE SUBSCRIPTIONS**

*BOYS’ 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 *BOYS’ LIFE* magazine is ESSENTIAL to a strong Scouting program. Successful leaders use *BOYS’ LIFE*.

Units can qualify for a **100% Boys’ Life Streamer** if every family receives at least one subscription. If your unit is a Journey to Excellence Unit, you will also qualify to wear the **Journey to Excellence/100% Boys’ Life emblem.**

**JOURNEY TO EXCELLENCE UNIT ASSESSMENT (JTE)**

The Journey to Excellence Unit Assessment includes recognition for outstanding packs, troops, and crews, that strive for continuous improvement and conducts a quality program for their youth on an annual basis. **All units must turn in the JTE scorecard with their recharter paperwork** to be considered for the JTE award. Units that qualify may wear special emblems ordered through a Council Scout Shop.

Orange County Council

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Boy Scouts of America

2020 Recharter Booklet
RECHARTER STEPS
Stage 1 – Load Unit Information. This will populate the online system using your current membership.
Stage 2 – Update Roster. Select which members to drop from next year’s roster, update member data, and update member positions.
Stage 3 – Check Roster. Validate the data to be submitted conforms to BSA rules (such as adults in required positions and all Lion and Tiger Cubs members have an adult partner)
Stage 4 – Update Member Fees, assign multiple status, and sign up members for Boys’ Life.
New Step Give Access Code and password to the Charter Org. Rep who is listed on the charter, they will log into the system and are required to do an E-signature to approve charter.
Stage 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.

UPDATING ONLINE ROSTER – STAGE 2
There are six steps in Stage 2: Update Roster:
1. Update Chartered Organization Information (contacts, addresses, phone #)
2. Select Members for Renewal: Select only the members who will be renewing with your unit.
3. Promote Members (see page 8 for instructions)
4. New Members: New members cannot be added to the recharter system. If you have new members, STOP the recharter process. Ask new members to complete online application and payment. Then reopen the recharter system, use the update button to pull new members in, and continue the recharter process.
5. Update Member Data: Update personal information for all members (birthday, email address, home address, phone number and occupation). Every Scout & leader should have an email address. Parent emails should be used for youth members.
6. Update Adult Positions: Be sure to verify that if leaders change positions in the recharter system, their trainings must be complete for the new position. Leaders have 30 days after the charter is submitted online to complete trainings in order for the charter to be processed by council.

UNIT KEY 3
The Unit Key 3 consists of the unit leader (CM, SM, NL, SK), the chartered organization representative (CR), and the committee chairman (CC). The Unit Key 3 is a critical component to the success of Scouting. The Unit Key 3 meets once a month to discuss the unit issues, volunteer vacancies, coming events, and progress towards completing their action plan and Journey to Excellence goals. It is a time for the Unit Key 3 to spot early warning signs and work together toward continued unit success.
When rechartering the unit, please align your leadership to implement the Unit Key 3. This means spreading out the positions if one person is serving as committee chairman and chartered organization representative. This three-person structure 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 Arrow of Light parents. This allows for a better succession planning as parents transition into the next program.
POSITION CODES and TITLES

All positions can be held by male or female and the minimum age requirements for each position is in parentheses next to the position. These are all fee-paying positions – except AP, LP and IH.

CR  Chartered Organizational Rep (21)  SM  Scoutmaster (21)
CC  Committee Chairman (21)  SA  Assistant Scoutmaster (18)
MC  Committee Member (21)  UP  Unit Participant (youth 18-21, Adult app)
NM  New Member Coordinator (21)  NL  Crew Advisor (21)
IH  Institutional Head (21)  NA  Crew Associate Advisor (21)
      (Non-Paying Position)  VP  Venturing Participant (youth 18-21, Adult app)
CM  Cubmaster (21)  SK  Sea Scout Ship Skipper (21)
CA  Assistant Cubmaster (18)  MT  Sea Scout Ship Mate (21)
DL  Den Leader (21)  91U  Unit Scouter Reserve (21)
DA  Assistant Den Leader (18)  92U  Unit College Scouter Reserve (18)
LL  Lion Guide (21)  92V  Venturing College Scouter Reserve (21)
PT  Pack Trainer (21)  AP  Tiger Cub Adult (18) – Non-Paying Position
TL  Tiger Cub Den Leader (21)  LP  Lion Partner (18) – Non-Paying Position
WL  Webelos Den Leader (21)  AP  Tiger Cub Adult (18) – Non-Paying Position
WA  Assistant Webelos Den Leader (18)

Note: The online system will flag your recharter if required positions are missing. The NM can serve as one of the members of committee positions.

SCOUTER RESERVE POSITIONS

These positions are for adults that wish to remain on their unit rosters, without registering as an assistant leader or committee member. These positions use the same application, fees and registration process, as any other adult volunteer but the only training requirement is Youth Protection. Scouter Reservists do not need to complete Position Specific Leader training or any other adult leader training after completing YPT.

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  For Packs and Troops
(Position code 92U)  Minimum age requirement of 18

VENTURING COLLEGE SCOUTER RESERVE  For Crews and Ships
(Position code 92V)  Minimum age requirement of 21
  o If a young person is away at college, on a mission, or in the service and wants to stay registered with the unit,
    the Unit College Scouter Reserve or Venturing College Scouter Reserve would be the appropriate method of
    maintaining their registration with the unit.

UNIT SCOUTER RESERVE  For Packs, Troops, Crews and Ships
(Position code 91U)  Minimum age requirement of 21
  o If an adult supports the unit but is not an ongoing participant in meetings, activities and outings the Unit
    Scouter Reserve would be the appropriate method of maintaining their registration with the unit.
UPDATE ROSTER BUTTON – USE THIS OFTEN

The “Update” Button can be selected anytime during the recharter process prior to Stage 5. This button allows units to upload the roster from the BSA system which may have additional youth and adult applications that were recently posted to the unit roster. The update does not overwrite any changes already made to the system. You will be able to go through stages 2-4 to view these new additions to the roster.

Example: Unit approves online applications after Nov. 1st or after the date when the unit initially started the renewal process. Use the update button to upload the new people and continue the recharter process.

MULTIPLE REGISTRATIONS

Only the Chartered Organization Rep (CR) can hold more than one position in a unit. The CR may serve in a multiple capacity as a member of the committee (MC) within that unit if there are not enough adults registered for these positions. The CR cannot serve as the unit leader (Cubmaster, Scoutmaster, or Crew Advisor). Den Leaders (DL or WL) cannot multiple register as MC.

Other adults may register in only one position per unit. If a unit feels that better service can be provided by an adult already serving in another unit, that individual may still hold only one position in each unit. There are no restrictions on the number of positions one person may hold as long as the individual serves only one position per unit.

Youth who are registered in Scouts BSA may multiple register as members of a Venturing Crew. Registration fees are paid only for an individual’s primary position; there is no fee for multiple positions. Multiple registrants will only receive a membership certificate for their primary position.

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 the Council Service Center by December 31st.

If a new individual is registering as a multiple, please indicate that on the application by writing MULTIPLE on the application.

Only youth (18 years and older) in a Ship or Crew may multiple register as both an adult and youth.

PROMOTE MEMBERS

The promote members provides the ability to move youth and adults from one unit to another within the same chartered organization. Promote members is integrated seamlessly into the recharter system and is a simple process with step by step instructions. The summary page of the charter will show who an application is needed for.

Youth to Adult Promotion - The promote member process can be used to promote youth in the troop to an adult position in the troop (ex. youth member to Assistant Scoutmaster). An adult application, social security number and YPT are required to complete this process. All adult leaders must meet the adult requirements before joining.

18-Year-Old Youth - Qualified boys and girls over age 18 working towards their Eagle Scout Rank must register with as an adult and use position code UP (Unit Participant). Scouts who are 18 years old and registering with a Crew or Ship as a youth, and who are also an adult assistant Scoutmaster or 92U with a Troop, would pay membership with Crew or Ship for their primary registration and dual role as the adult. All new youth and any youth turning 18 in the new year must complete an Adult Application with position code UP or VP if 18 years or older.
**COMPLETING THE RECHARTER – STAGE 5**

Step 1 – Look at “warning” messages and correct errors.

Step 2 – Give access to the unit Charter Representative to complete the online e-signature to approve charter. The CR will need to use the login and password of the recharter specialist to complete this step. **No other signatures are required and there are no signers needed on printouts.**

Step 3 – Pay registration fees online with a credit card or e-check or submit a check with final paperwork. Payment with credit card will require a 3% service fee.

If the unit wants to pay from their unit account at the council office or submit a check, simply print the Full Recharter summary and give to your Commissioner with payment. Only one check, payable to OCCBSA is accepted. **Credit Cards are not allowed for manual turn ins.**

Please verify unit account balance has appropriate funds for charter payment. Only a member of the unit Key 3 can authorize the use of unit account funds.

Step 4 – Submit charter. If paperwork says **Draft Version**, the recharter has not been submitted online correctly and cannot be accepted.

Step 5 – Print Full Recharter Summary Report. **Not the EZ form.**

If payment is made online, the report will show a zero-balance due.

Look on the cover sheet to see if any names are listed. This would be an error and the recharter will not be accepted. **Please ask the Council Registrar or District Executive for assistance.**

Step 6 – Deliver completed recharter to your Commissioner on or before December 1, 2019. **Do Not deliver or mail to the Council Service Center.**

Due to Commissioner:

- Full Recharter Summary Report.
- Registration payment (if required).
- Signed Disclosure Forms for each member 18 years and older.
- Signed Charter Agreement Form.
- Journey to Excellence scorecard. Must be completed regardless of qualification.

All recharter fees are sent to the National Office. The Council **DOES NOT** receive any part of the BSA registration fee to offset local operating costs.

**PRINTING THE UNIT RECHARTER CERTIFICATE**

After the council processes the recharter package, any Unit Key 3 member may log into their my.scouting.org account to print a charter certificate. No more waiting on Council to return the competed certificate.

To print, login to https://my.scouting.org ➢ Choose Unit # ➢ Organizational Manager ➢ Click the Card Icon

A prompt at the bottom of the screen will ask if you wish to open and print or save as an image. Click open to display the certificate and print or you can save as a pdf file.
FREQUENTLY ASKED QUESTIONS

Where can I get a copy of our current BSA Roster?
The first person to ask would be your unit Advancement Coordinator. 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?
Go to https://my.scouting.org and select Legacy Web Tools & Training Validation to look up leaders. Or you can request from a member of the Unit Key 3 (CR, CC, unit leader) a copy of the Training Detail Report or email registration department.

I have not received my membership card?
You can print your own cards from your personal my.scouting.org account profile section. Membership cards are also mailed out to the Unit leaders after the recharter has been processed by the council office. If you are looking for person ID #, the Advancement Coordinator for your unit can print temporary cards or a roster with everyone’s personal ID#. Note: You will only receive a membership card for your primary position (the position which you paid for).

I forgot my log in for Rechartering?
The council only has the unit access code since you created the password. Please make sure it’s something you can remember. You can also use the “forgot password” option or the Council can reset your password if necessary.

Is my Recharter access code the same as last years? NO, the access code changes every year.

How do I change my Charter Executive Officer/IH?
Add the new executive officer as a new person on the roster and choose position IH. Do not type over the existing IH.

How do we change our Chartering Organization?
Contact your District Executive. Attach a new unit application to your Recharter, along with a letter from the previous Organization releasing the number and all property to the new Organization.

Why is my charter not posted? Please contact your District Commissioner, Unit Program District Executive or Council Registrar for details. There can be several reasons for this:
  a. Fees have not been paid
  b. Charter was not submitted correctly online
  c. Required adult leader trainings were not completed

I submitted my Recharter online to the Council 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 plus the new recharter year.

Why do you need my Social Security Number?
All adults must supply their social security for a National background check. It is BSA 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. Yes, if you are a Lion or Tiger partner and wish to register in a paid position. After the annual renewal, every time you change positions or transfer to a different unit during the year, you must fill out a new application. Be sure application is complete and the disclosure page is attached.
Journey to Excellence
“Wrapping Up Your Journey to Excellence Assessment”

Major Features of the Program
- Improve and increase adult leader training.
- Improve youth recruitment and retention.
- Improve parent participation.
- Improve youth advancement.
- Improve outdoor program participation.
- Improve annual program planning.

As the year comes to a close, it is time to complete your unit’s Journey to Excellence Scorecard. The process is fairly simple – you will need the following:

- The unit’s roster as of January 1, 2019.
- The unit’s 2018 Journey to Excellence scorecard to use as comparison.
- The unit’s completed recharter paperwork for 2020.
- The unit’s advancement records for 2019 (all advancement reports submitted throughout the year are available through the Online Advancement System – contact your unit advancement chairman or the Council Service Center.)
- The unit’s activity/service project/meeting calendar and budget.
- The unit’s leadership training records (Unit Key 3 members have access to this through my.scouting.org Training Manager for all registered leaders in the unit).

Scorecards are available online at: www.scouting.org/scoutsource/awards/journeytoexcellence.aspx

Required - Please print and complete three copies – one to turn in with your recharter paperwork, one for your commissioner and one to keep for the unit record.

The unit will receive a recognition ribbon from the Council. The unit may purchase uniform patches at a local Scout Shop.

FINAL RECHARTER CHECKLIST

- Print FULL Recharter Report. Do not send “Draft” copies as it does not have all the information needed to process your charter.
- Payment for Registration, Boys’ Life, Charter renewal and Insurance fees. (If required)
- All new youth and adults online applications submitted prior to clicking Submit to Council.
- Signed Disclosure Forms for each member 18 years and older.
- Signed Charter Agreement Form
- Journey to Excellence scorecard. Must be completed regardless of qualification.
- Returned to Commissioner no later than December 1, 2019.

Recharter System, Booklet and Staffing is funded by Scout Subscriptions and Family FOS donations.