



2021 CHARTER RENEWAL GUIDEBOOK



**All units will expire
12/31/2020.**

**Charters should be
completed and turned in
to your commissioner
staff by Friday, Nov. 13.**

Table of Contents

Key dates & things to do before you start	1
Top detours	2
How to get started	3
Fee review & adult positions required	4
Charter checklist	5

Cascade Pacific Council
2145 SW Naito Parkway
Portland, OR 97201
503.226.3423

Key dates for the charter renewal process:

Oct 5: All units **log in and start** the online process

- ◆ First check that all members are registered, then use the online charter renewal system to renew for 2021.
- ◆ **Oct. 5-Nov 7th:** All units **submit charter renewal online.**
- ◆ **Please DO NOT PAY National.** Once a unit pays national via e-check or credit card, CPC is unable make any adjustments the unit later realizes it needs to make. Prepare a check payable to "BSA". Leave the amount due blank until totals are validated at turn in.

Nov 14: Turn in completed charter with payment to your District Commissioner or District Executive.

- ◆ Bring a paper copy of your completed charter renewal packet. Obtain necessary signatures on the Annual Charter Partner Agreement & Journey to Excellence forms.
- ◆ Bring paper applications for unregistered youth & adults.
- ◆ Bring Additional Disclosures & Background Check Authorization Form for all new & returning adults, plus Unit/Venturer/Sea Scout/Exploring Participants (youth 18-20 yrs) listed on the charter.

THINGS TO DO BEFORE YOU START

1. Select an adult to be the renewal processor for Internet Rechartering.
2. Obtain a printout of your current unit roster from My.Scouting.org or your District Executive. ScoutBook & Internet Advancement allows the unit to add names before they have been registered, not the best choice.
3. Review your roster so you know what changes and additions need to be made and which applications to collect and submit to the Council Service Center.
4. Go to my.scouting.org and print your unit's training record (unit Key 3 has access). Your unit Key 3 are Committee Chair, Chartered Organization Representative, and Unit Leader.
5. Verify all adult leaders and Unit/Venturer/Sea Scout/Exploring Participants have Youth Protection Training completed Jan 1, 2019 or after.
6. If you are adding new youth or adults BEFORE charter renewal, make sure you acquire the appropriate signatures and turn in the completed applications and forms to the Council office with fees. Do not submit with the charter.

DO NOT HOLD ON TO APPLICATIONS; THE YOUTH AND ADULTS ARE CURRENTLY ACTIVE IN YOUR UNIT AND MUST BE REGISTERED NOW FOR THE REMAINDER OF 2020.

Adults & Unit/Venturer/Sea Scout/Exploring Participants CANNOT be renewed or registered without Youth Protection Training completed 1.1.2019 or after, and the Additional Disclosures & Background Check Authorization Form.

TOP Reasons my charter cannot be processed by CPC

- ◆ Unable to get Charter Organization Head (EO/IH) or Representative signature. We forgot to **make an appointment** when we began the charter renewal process to review the charter and get the required signatures.
 - *If changing the Charter Organization Head, a New Unit application is required, note “Change of Organization Head only” at the top.
- ◆ Applications are not attached for youth or adult members listed as new on page one of the Unit Charter Renewal Report Package, or youth who turn 18 during 2020 & will be a Unit/Venturer/Sea Scout/Exploring Participant for 2021.
 - *warning these youth may not show on page 1 as needing an adult application.*
- ◆ Applications are required for any adult previously listed as a Lion Adult Partner or Tiger Adult Partner only and is now registering in an adult position.
- ◆ Signatures are missing from the applications that have been attached. Unit leaders and parents must sign the youth applications. The Chartered Organization Representative or Head must sign the adult applications.
- ◆ Incomplete adult application provided; frequently missed items include:
 - ◆ Youth Protection training validation not provided, must be completed 1.1.2019 or after.
 - ◆ The Additional Disclosures & Background Check Authorization Form is not attached.
 - Requested information must be provided; the form signed & dated to be complete.*
 - ◆ The right-hand column of information is not filled in on the adult application.
 - ◆ The two statements beside the applicants signature are not initialed.
 - ◆ “wet ink” signatures, electronic signatures cannot be accepted.
- ◆ Page one is missing. Attach **ALL** pages of the printed Unit Charter Renewal Report Package, even if blank.
- ◆ More than one position within the unit has been assigned to an adult member, such as Den Leader and Committee Member. The Chartered Org Rep (CR) is the only registered position that can multiple either as a Committee Member (MC) or as the Committee Chair (CC). The Charter Organization Head (EO/IH) can be registered in any other position with a completed adult application.
- ◆ A check needs to be submitted with the charter, **DO NOT PAY NATIONAL**. Once you pay national, CPC is unable to make adjustments to add-remove-change what has been submitted.
 - It is recommended to leave the amount blank to allow verification at turn-in.*
- ◆ *Missing Journey to Excellence & Annual Charter Partner Agreement forms.*
- ◆ **Remember—no one is a transfer on a charter. Everyone pays the renewal fee.**
- ◆ **Youth Participants must pay as primary, when multiple registration is as an adult.**
 - ◇ **i.e. pay as a Unit/Venturer Participant, mult as an Assistant Den Leader.**

INTERNET CHARTER RENEWAL INSTRUCTIONS

How to get started:

1. Use Internet Explorer Only. (Firefox, Safari and Chrome appear to be compatible but may come up with warnings. Mac is not compatible.)
2. After October 1st, the processor can access the renewal website at www.cpcbsa.org/charter.

Note: you will also find a tutorial and a Power Point presentation on this site.

3. Select **CLICK HERE TO BEGIN**.

4. **Select FIRST TIME USER**

EACH YEAR, and with each unit - if processing more than one, **YOU ARE A FIRST TIME USER**.

5. On the next screen, enter the 2021 unit access code provided by your District Executive or District Commissioner then select unit type and enter your four digit unit number.
6. Create a password as instructed (keep it easy and write it down) and click **REGISTER**.

My new Password is: _____

7. Complete the information requested on each screen. You can stop at any time, log off the system and return to where you left off by re-entering your access code and password as a returning user.
 - A. It is suggested that every time the processor logs back in as a returning user to click the "Update Unit Roster". This ensures that any youth or adult applications submitted at the Council Service Center since your initial login will show on your roster.
 - B. Transfers do not apply at charter renewal. They are considered renewing members. The fee is \$78.00 or \$54. **Do not mark someone as a transfer.**
 - B. **New youth will pay a one time \$25 joining fee. If returning after taking a break, even for a couple of years, they are not new. (details will be required)**

Here's how to wrap it up:

1. After completing all the information to renew the unit, click Roster Review and check for accuracy.
2. If you have not clicked the **SUBMIT** button and are having problems, contact your District Executive or District Commissioner.
3. Once everything is correct, click the **SUBMIT** button. Please note that once you hit **SUBMIT**, the online access cannot be reset. Changes or corrections should be noted on the cover sheet and discussed with your District Executive or District Commissioner.
4. **PLEASE DO NOT PAY ONLINE**. Please plan to pay by check payable to 'BSA'.
5. Print ALL pages of the Unit Charter Renewal Report Package (including page one, even if blank). If you want a copy for your unit, print two copies.
6. Verify one more time that ALL adult members and Unit/Venturer/Sea Scout/Exploring Participants have provided a completed, signed Additional Disclosures & Background Check Authorization Form.
7. Obtain **SIGNATURES** from the Charter Organization Head /Executive Officer (IH/EO) and the Unit Leader on the Charter Renewal Report if Online Approval was not selected.
8. Collect the appropriate fees. A fee schedule is included on page 5.
9. Return all paperwork and payments to your District Executive or District Commissioner.

FEES REVIEW

To make your job easier, please register any new members recruited in the fall with the Council Service Center **BEFORE BEGINNING** the online recharter process.

In the event you have NEW youth or adult members added to the charter, please collect the 2020 prorated fees in addition to the 2021 Charter Renewal fees. This will allow us to register these new youth and adult members before year-end. Please verify that you have attached completed applications for all new youth and adult members being added to the charter.

2020 REGISTRATION, COUNCIL INS & BOYS' LIFE FEES	Compare with page one (cover sheet)
NEW YOUTH joining fee, only paid once:	# _____ x \$ 25.00 = _____
YOUTH registering in October	# _____ x \$19.50 = _____
Boys' Life fee in October	# _____ x \$ 3.00 = _____
ADULTS registering in October	# _____ x \$13.50= _____
YOUTH registering in November	# _____ x \$13.00= _____
Boys' Life fee in November	# _____ x \$ 2.00 = _____
ADULTS registering in November	# _____ x \$ 9.00= _____
YOUTH registering in December	# _____ x \$ 6.50 = _____
ADULTS registering in December	# _____ x \$ 4.50 = _____
2020 TOTAL _____	

2021 REGISTRATION, COUNCIL INS & BOYS' LIFE FEES	Compare with page two of report
NEW YOUTH joining fee, <i>if not included above:</i>	# _____ x \$25.00 = _____
YOUTH & UNIT/VENTURER PARTICIPANT fee:	# _____ x \$78.00 = _____
YOUTH Boys' Life fee:	# _____ x \$12.00 = _____
ADULT Membership & Exploring Participation fee:	# _____ x \$54.00 = _____
ADULT Boy's Life fee	# _____ x \$12.00 = _____
Unit Liability Insurance fee:	\$75.00
Total Charter Renewal fee:	_____
2021 TOTAL _____	

GRAND TOTAL DUE— make checks payable to "BSA"	_____
--	-------

REQUIRED ADULT POSITIONS

- *IH - Charter Organization Head/Executive Officer (non-registering position) - unpaid
 - *CR - Charter Organization Representative (only multiple register as a CC or MC position in this unit)
 - *CC - Committee Chair (cannot multiple register into another position in this unit)
 - *MC - Committee Member (cannot multiple register into another position in this unit)
 - *MC - Committee Member (cannot multiple register into another position in this unit)
 - *UL - Cubmaster, Scoutmaster, Crew Advisor, Skipper (cannot multiple register into another position in this unit)
- For Cub Scouts Only (Pack)
- *LL,TL,DL,WL - Lion, Tiger, Den, Webelos Leaders (cannot multiple register into another position in this pack)

Checklist for Charter Turn In

Unit _____

Charter prepared by _____

Organize the paperwork in the following order: Unit Charter Renewal Report Package (all pages), New Chartered Organization Paperwork, Adult Applications with certificate & form, Youth Applications, Annual Charter Agreement, JTE and other forms. **Be sure to use the "new" Additional Disclosures & Background Check Authorization forms for all new & renewing Adults, plus Unit/Venturer/Sea Scout/Exploring Participants.**

Signatures

- Executive Officer** - Is the Executive Officer signature the same as the Executive Officer listed above the signature line on the Unit Charter Renewal Report Package. When changing the Executive Officer, submit a New Unit Application, write "New EO Only" across the top.
Note - The 2021 Executive Officer or Charter Organizational Representative signs the Unit Charter Renewal Report or if electronically submitted, selects initials & provides an electronic signature.
- Charter Processor** - Is the charter processor contact information complete, correct and readable?

Adults & Unit/Venturer/Sea Scout/Exploring Participants - New & Renewing

- Do all Adult and Unit/Venturer/Sea Scout/Exploring Participants have a **completed, signed Additional Disclosures & Background Check Authorization form** attached?

Applications:

- Are complete applications attached for all adults listed as new (cover page)?
- Are complete applications attached for youth who turn 18 during 2020 & will be a Unit/Venturer/Sea Scout/Exploring Participant for 2021? **warning these youth may not show on page 1 as needing an adult application.*
- Are all applications signed by the registered **Charter Organization Head** or **Representative**?
- Are the applications signed by the **Applicant** and the **two statements initialed** beside the signature?
- Do all adult applications have the Social Security Number **AND** date of birth?

Question 1-6 answered? All should have a response.

#1-4 Information, none or N/A are options.

#5 Must have references and phone numbers.

#6 **a-f** yes or no; if yes, what & when.

Youth Protection

- Have you confirmed **ALL** adults and Unit/Venturer/Sea Scout/Exploring participants listed in the Unit Charter Renewal Report have a completion date of 1.1.2019 or after for youth protection training? (this can be checked via my.scouting.org)

Youth Applications (troops, crews, ships & posts)-Applicants 18 through 20 must submit an adult application with Youth Protection Training completed 1.1.2019 or after)

- Are there applications for all the youth listed as new (cover page)?
- Do all youth applications have grade and date of birth?
Pack only—Tiger & Lion youth must have an **Adult Partner** with **name & date of birth**.
- Are all applications signed by the **parent**?
- Are all applications signed by the **unit leader or designee** (CC or CR)?

Shared Units and Multiple Registrations

- All charters from a shared organization must list the same **Charter Organization Head & Representative**.
- Have all multiple registrations confirmed which unit is their primary unit (the unit paying for them)?
For example the Charter Organizational Representative should only be paid for in one scouting unit, multiplied in all others.

Fees - Does the unit have at least **5 paid** youth? only 2-4 paid youth? Growth Plan & Council Scout Executive approval will be required.

Is there a check? Is the check made out to "BSA"?

Does the check include **2020 prorated fees** and **2021 charter total**?

JTE - Complete 2020 JTE, gather signatures

Annual Charter Agreement

Received by: _____