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Important Dates	
Submit Member Applications for Council to complete data entry	Monday, October 1, 2018
Unit Charter Renewal System (UCRS) opens	
Council-entered member data available in UCRS	Monday, October 15, 2018
Renewal application due (including all forms, signatures, payment, etc)	Friday , November 30, 2018
Youth Protection Training valid through at least	April 1, 2019
PA Child Protective Services Law clearances valid through at least	January 1, 2020

PREPARE

<u>Phase</u>	Responsibility	Task / Requirement	<u>Notes</u>	
Prepare	Unit Leadership	Identify RENEWAL PROCESSOR - the person responsible for charter renewal	If the person handling this year's charter renewal is different from last year, PLEASE COMMUNICATE THE CHANGE TO DISTRICT COMMISSIONER ASAP	
Prepare	Unit Leadership	Chartered Organization Rep, Committee Chair, or Unit Leader delegates access	Use instructions linked here to give additional access to Renewal Processor: http://www.scouting.org/filestore/idg/Security_Manager.pdf	
Prepare	UNIT RENEWAL PROCESSOR	Get RECHARTER MATERIALS	Access Codes to the COLBSA Online Rechartering System will be distributed at the September District Roundtable If you cannot attend, contact your District Executive to make arrangements to get them.	
Prepare	UNIT RENEWAL PROCESSOR	Choose a cut-off date for the Unit to enter new members into UCRS to be included with electronic submission.	After Unit's electronic submission, Council Registrar can update UCRS based on applications received, but NOT UNTIL after electronic renewal is completed.	
Prepare	UNIT RENEWAL PROCESSOR	Identify required members	- Youth members: minimum 5 (fewer than five requires Council Scout Executive approval) - Adult members:minimum 5 (6 for Packs)	
Prepare	District Executive	Distribute Roster and Access Code to Units	October District RoundTable	

ORGANIZE

Phase	Responsibility	Task / Requirement	Notes
Organize	RENEWAL PROCESSOR with COMMITTEE CHAIR and UNIT LEADERS	Determine who is staying and who is leaving. For those Adults registering for the upcoming year, determine if any are changing their registered positions as different positions have different training requirements.	- Age 21 (Assistant positions: Age 18) - Have Youth Protection Training valid until at least April 1, 2019 - Have PA Clearances valid until at least January 1, 2020 - Every registered adult must complete position-specific training before charter submission https://my.scouting.org/Documents/PositionTrainedCourses.pdf - A change in registered position will likely require different / new training.
Organize	RENEWAL PROCESSOR	Identify INSTITUTION HEAD	Determine if there will be a change of the person in charge of the Unit's sponsoring organization - The sponsor is called the Chartered Organization. - The person in charge is the Institution Head. - If the Institution Head will change before January 1, 2019, then complete this form: http://www.scouting.org/filestore/pdf/5 24-402_WB.pdf
Organize	RENEWAL PROCESSOR	Identify CHARTERED ORGANIZATION REP	Registered Adult who can sign for Chartered Organization. COR may also register as CC or MC
Organize	RENEWAL PROCESSOR	Identify COMMITTEE CHAIR (Key 3 member)	
Organize	RENEWAL PROCESSOR	Identify COMMITTEE MEMBERs (2)	
Organize	RENEWAL PROCESSOR	Identify UNIT LEADER (Key 3 member)	
Organize	RENEWAL PROCESSOR	Identify DEN LEADER	Required for Packs only

Phase	Responsibility	Task / Requirement	Notes
Organize	RENEWAL PROCESSOR	Identify ADULT MEMBERS	Focus on the required leadership positions first.
			Minimum number of Adult members required to renew a Unit Charter: - Packs: 6 - All other unit Types: 5 - One person MAY register as both COR and Committee Chair / Committee Member. Dual registration is not permitted for any other Unit position. - Must be 21 (those registered in "Assistant" positions must be at least 18). - Must have Youth Protection Training valid until at least April 1, 2019. - Must submit background clearances under PA CPSL valid until at least January 1, 2020: http://colbsa.org/palaw/ - Must complete position-specific training: https://my.scouting.org/Documents/PositionTrainedCourses.pdf
			If a new Adult Membership application is received AFTER the Unit completes its electronic submission: Renewal Processor can no longer edit. Submit to COLBSA as a new adult membership application Include with the Charter Application materials, identifying as additional member registration not in electronic submission Appropriate fees will be added
			All other Adult requirements above apply in either case – Age, Training, Youth Protection, PA Background Checks

<u>Phase</u>	Responsibility	Task / Requirement	<u>Notes</u>
Phase Organize	Responsibility RENEWAL PROCESSOR - with Key 3, Membership Chairperson, Treasurer, Youth leaders, and other adults involved in the unit	Identify YOUTH MEMBERS	Minimum number of Youth members required to renew a Unit Charter is five (fewer requires Council Scout Executive approval). Determine each youth who will stay and who is leaving. - For Troops: 18th birthday before January 1, 2019 (or charter posting date) If leaving, make note of why (this information is required in the Charter renewal) Review new Youth Member applications for completeness: If received before the Unit submits its electronic renewal: - Enter the new Youth member information into the Unit Charter Renewal System (UCRS) - Include with the Unit's Charter Application materials If received AFTER the Unit submits its electronic renewal: - UCRS will not allow electronic submission to be updated - Include with the Charter Application materials and identify that the new member is not listed in the electronic submission

LEAD / EXECUTE

<u>Phase</u>	Responsibility	Task / Requirement	<u>Notes</u>
Lead /	RENEWAL	Confirm access to UCRS.	Access opened October 1, 2018
Execute	PROCESSOR		
Lead /	RENEWAL	Enter all changes into UCRS	From October 1 to November 30, 2018
Execute	PROCESSOR	- New members	- Check for multiple entries of the same
		- Deleted members	member
		- Personal info changes / corrections	
Lead /	RENEWAL	Review Charter Details and Summary	- Verify all active members for 2019
Execute	PROCESSOR	online	- Verify all deleted members for 2019
			- Verify all Adult Leader positions filled
			- Verify Adult YPT expiration dates
			- Verify Adult PA clearances
1 1 /	DENEWAL	D. i. Ol. I. O	- Verify adult training
Lead /	RENEWAL	Review Charter Summary online	- Verify all active members for 2019
Execute	PROCESSOR		- Verify all deleted members for 2019
			Verify Adult YPT expiration datesVerify Adult PA clearances
			- Verify adult FA clearances - Verify adult training
			- Verify addit training
			o Individual:
			■ Individual membership
			Boys Life (Youths)
			 COLBSA Personal
			Insurance (all members)
			o Unit:
			 Unit Recharter Fee
Lead /	RENEWAL	Print Draft Charter reports / Review with	Remind everyone of confidentiality
Execute	PROCESSOR	Unit Key 3 and Treasurer	requirement of all personal information
			contained in the UCRS system and reports
Lead /	RENEWAL	Submit Charter – Electronic	- Review Instructions:
Execute	PROCESSOR		https://filestore.scouting.org/filestor
			e/commissioner/pdf/2017_Internet_
			<u>Charter Renewal Tutorial.pdf</u>
			- Electronic submission must be
			completed before printing Renewal
			Application Renewal Application, membership
			applications, signatures, fees, etc.
			must be submitted by Thursday,
			November 30, 2018.
			- Renewal may be completed
			completely online
Lead /	RENEWAL	Print paper copy of PAPER	If not submitting renewal completely online,
Execute	PROCESSOR	SUBMISSION (MUST COMPLETE	then read the instructions on the last page of
		ELECTRONIC SUBMISSION FIRST)	the Report Package and provide unit contact
			information
Lead /	Unit Leader	For paper submission, sign all pages of	
Execute		the printed report package including the	
	Sponsoring	application	
	Organization		
	Executive	Sign new member applications	
Lead /	Unit Treasurer	Review all recharter fees / determine net	Review COLBSA unit account balance to
Execute		amount due to COLBSA	determine net amount due

ADULT TRAINING

Category	Responsibility	Task / Requirement	<u>Notes</u>
Training – Position- specific	RENEWAL PROCESSOR	Download and review the Training Manager report for each Adult to determine any training deficiencies.	https://My.scouting.org http://colbsa.org/recharter
Training – Position- specific	Current Adult members who will stay in their same currently registered position		Position-specific training does not expire
Training – Position- specific	New Adult members and Current Adult members changing to a new leadership position	Complete training requirements for the new leadership position	https://my.scouting.org/Documents/PositionTrainedCourses.pdf
Youth Protection Training	RENEWAL PROCESSOR	Download and review the Training Manager report for YPT to determine the expiration date of each currently registered Adult's Youth Protection Training.	YPT must be completed before any new Adult can register YPT must be valid until at least April 1, 2019 http://My.scouting.org

DATES AND FEES

Commissioners, District Executive, and other volunteers will help. ASK!

Key Dates

Responsibility	Task / Requirement	<u>Notes</u>
RENEWAL PROCESSOR	Cutoff date for including new applications in UCRS renewal process	Unit chooses a date four or more weeks before November 30, 2018 submission deadline. New registrations not recorded in UCRS will be processed manually when charter application is processed. Appropriate fees will be added.
	Recharter Day	Detailed review of your charter renewal application - mid-to late October with Unit Commissioner or other
	Final electronic and paper submissions due (early submission encouraged!)	Due on/before November 30, 2018 charter renewal application, new member applications, signatures, fees, etc.

Reminder of Important Dates

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Toutill Totection Training Valid tillough at least	Aprii 1, 2013
PA Child Protective Services Law clearances valid through at least	January 1, 2020

Fees Calculation

Responsibility	<u>Fee</u>	<u>Notes</u>
	National annual membership registration	\$33 per person (not Tiger/Lion Adult partners)
	Boys' Life subscription (optional but encouraged)	\$12 per subscription 1 per youth address required Multiple youths / siblings at the same address only require 1 subscription (but each youth may want to receive their own copy)
	National Unit Liability Insurance Fee	\$40 per unit
	Council Accident and Illness	\$2 per person
	Insurance Liability Fee	Does not show up in National's fee calculation Tiger/Lion Adult Partners ARE charged

Fees example

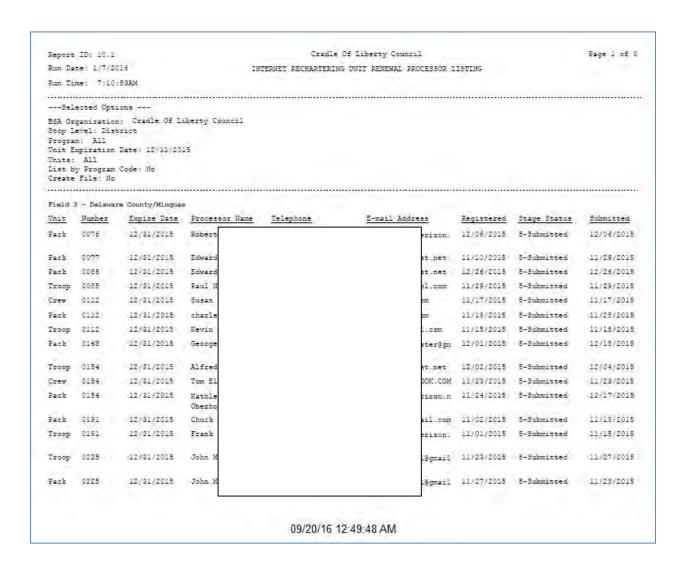
rees example				
Quantity	Fee Type	Individual fee	Calculation	Subtotals
38: - 30 Cubs, including 5 Tigers / Lions - 8 Adult leaders - Note: no National Registration fee for Tiger / Lion Adult Partners	National Registration fee	\$ 33.00	\$ 990.00 \$ 264.00 \$ 0.00	\$ 1,254.00
30 Cubs, including 5 Tigers / Lions	Boys Life fee	\$ 12.00	\$ 360.00	\$ 360.00
1 Unit	Unit Registration fee	\$ 40.00	\$ 40.00	\$ 40.00
43: - 30 Cubs, including 5 Tigers / Lions - 8 Adult leaders - 5 Tiger / Lion Adult partners	Council Accident and Illness Insurance Liability Fee	\$ 2.00	\$ 86.00	\$ 86.00
•		TOTAL	\$ 1,740.00	\$ 1,740.00

ADDITIONAL RESOURCES

Description	Link / URL
Recharter Help	https://filestore.scouting.org/filestore/commissioner/pdf/2017_Inter
	net_Charter_Renewal_Tutorial.pdf
New Unit Application (also used for	http://www.coouting.org/filostoro/pdf/EQ4_402_M/D.pdf
New Unit Application (also used for change of Institution Head)	http://www.scouting.org/filestore/pdf/524-402_WB.pdf
Organization Security Manager	http://www.scouting.org/filestore/idg/Security_Manager.pdf
Member Manager reports	Instructions provided by email, COL website
Youth Application	www.scouting.org/filestore/pdf/524-406.pdf
Todai 7 approadori	WWW.socatiling.org/moctors/pai/oz 1 100.pai
Adult Application	www.scouting.org/filestore/pdf/524-501.pdf
Training Manager reports (YPT,	Instructions provided by email, COL website
position-specific) Pennsylvania Child Protective Services	http://colbsa.org/palaw
Law	nttp://oolosa.org/palaw
PA CPSL log (all clearances submitted,	Provided by email
results acceptable for Adult registration)	·
Position-specific training requirements	https://my.scouting.org/Documents/PositionTrainedCourses.pdf

SAMPLE RESOURCES

The report below is used by District Commissioners and affected Council staff to determine each Unit's progress toward completing the electronic renewal submission.



The form shown and linked below is the BSA form used when registering a new Unit as well as when there is a change in the Institution Head of an existing Chartered Organization.

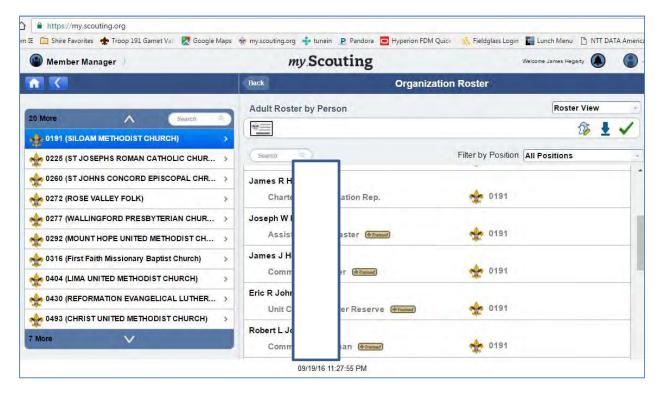


http://www.scouting.org/filestore/pdf/524-402_WB.pdf

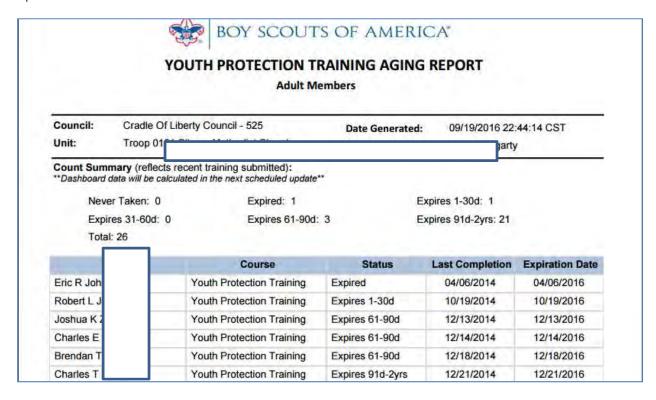
The web page shown and linked below is an example of a Member Manager report. The content of the report can be downloaded for an entire Unit roster or can segregate Youth from Adult members. Commissioners can provide direction on how the retrieve these reports. There are also process documents on the Council's recharter page that illustrate how to run these reports.



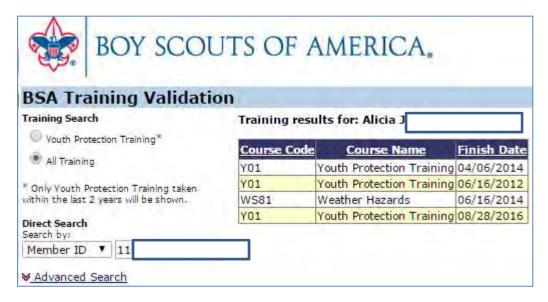
The web page shown and linked below is an example of a Member Manager report. An Adult Members roster is shown in this example.



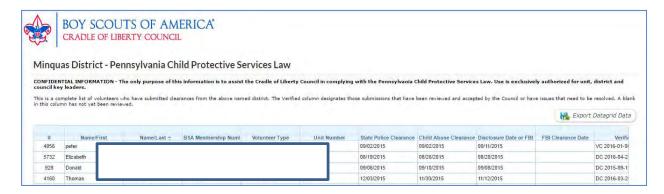
The web page shown and linked below is an example of a Youth Protection Training report. The content of the report can be downloaded to show a chronological list of Adult Members' YPT expirations. Commissioners can provide direction on how the retrieve these reports. There are also process documents on the Council's recharter page that illustrate how to run these reports.



Below is an example of a Legacy Training report – Training Validation for an individual. These legacy tools are being replaced but may be available for some time during the 2019 recharter season.



Below is an example of a District's PA CPSL log. Access is restricted to Commissioners, affected Council staff, Renewal Processors and Unit Key-3. Volunteers listed on this roster have all submitted clearances that fulfill the requirements for Scouting volunteers in Pennsylvania.

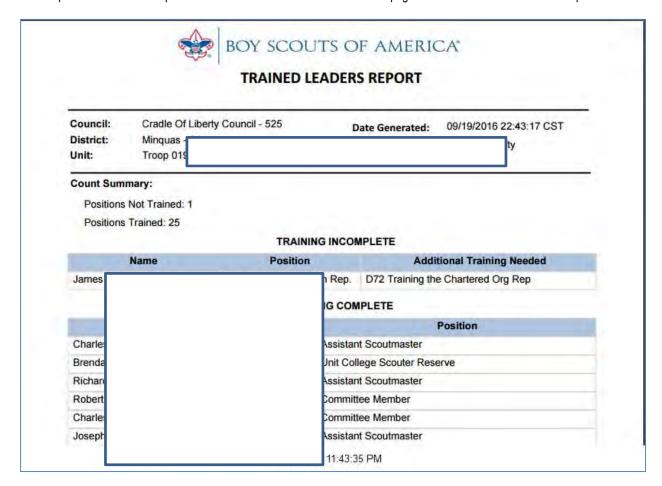


Shown and linked below is the PA CPSL page on the Council web site.



http://colbsa.org/palaw/

The web page shown and linked below is an example of a Trained Leaders report. The content is actually a list of training courses not completed based on each adult's registered position. Commissioners can provide direction on how the retrieve these reports. There are also process documents on the Council's recharter page that illustrate how to run these reports.



The form shown and linked below lists the required training courses by registered position. It shows many of the Legacy Training course codes that satisfy current training requirements.



https://my.scouting.org/Documents/PositionTrainedCourses.pdf