

Unit Performance Guide

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STARTING AND SUSTAINING
HIGH-PERFORMING
QUALITY UNITS

Membership Impact Department

Volume 3, First Edition



BOY SCOUTS OF AMERICA®

Unit Performance Guide

Starting and Sustaining
High-Performing Quality Units

Membership Impact Department

BSA Mission Statement

The mission of the Boy Scouts of America is to prepare young people to make ethical and moral choices over their lifetimes by instilling in them the values of the Scout Oath and Law.

Aims of Scouting

The aims of the Scouting movement are to build youth into quality citizens by building character, fostering citizenship, and promoting fitness.

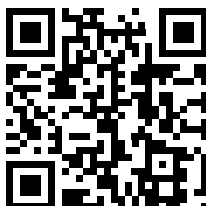
Methods of Scouting

- Patrols
- Ideals
- Outdoors
- Advancement
- Association with adults
- Personal growth
- Leadership
- Uniform

Provide suggested changes to this document at the following link:

<http://tinyurl.com/8770j7c>

Updates to this publication can be found at www.scouting.org/Membership/New_Units.aspx
or by scanning this QR code into your smartphone:



Download a free QR reader for your smartphone at <http://reader.kaywa.com> to read this code and all other QR codes in this publication.

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Introduction

The business model for the Boy Scouts of America for many years was to create more units, which would provide for more youth in Scouting. Over time, that model resulted in the creation of units without a solid foundation for sustainment and an undesirable unit dissolution rate, necessitating a new approach to the challenges of unit creation and retention.

The *Unit Performance Guide* was developed in 2011 as a LEAN initiative to consolidate many separate pieces of literature into one resource designed to build sustainable new units and to strengthen existing units. Originally titled the *New-Unit Retention Guide*, this publication included a longstanding 12-step process for creating new units based on the structured sales call process from professional sales training, commissioner lessons, and enhancements of best practices.

This edition of the *Unit Performance Guide* has evolved to include results from a 2012 application of novel retention processes in 30 pilot councils. The process of building sustainable units requires purposeful thought, study, and investment in time and people for success. In four chapters, the *Unit Performance Guide* presents unit development and growth as four pillars of high-performing units. Patterned after the stages of team development taught in National Youth Leadership Training (NYLT) and Wood Badge courses, each pillar has a purpose and all are required collectively for success.

CHAPTER 1. KNOW THE MARKET

Team	Membership Team
Purpose	Research potential areas of growth for new units and grow existing units.
Measure of Success	14 percent market density

CHAPTER 2. MAKE THE CALL

Team	Relationships Team
Purpose	Nurture strong partner relationships to “make the call” to serve more youth.
Measure of Success	1-to-3 ratio of commissioners to units

CHAPTER 3. BUILD THE TEAM

Team	Organizing Team
Purpose	Assemble an effective team with a dedicated new-unit commissioner.
Measure of Success	54 percent trained leaders

CHAPTER 4. GROW THE UNIT

Team	Unit Support Team
Purpose	Employ an active unit Key 3 and three years of new-unit commissioner service.
Measure of Success	2 percent growth, 76 percent retention, six unit visits

The pilot study in membership trends for councils that employed the practices outlined in this publication clearly indicated that a new baseline standard for creating new units has been established. With 70 percent of existing units chartered to religious organizations, these are the presupposed minimum startup criteria for building sustainable new units:

10 Youth

5 Adults

Unit Key 3

New-Unit Commissioner

Engaged Chartered Organization

Chartered Organization Sales Model

The processes described in the *Unit Performance Guide* are also based upon the following six-step chartered organization sales model, which promotes Scouting and supports the development of sustainable units. This model systematically builds capacity within a district to identify prospective chartered organizations, to approach prospects with an organization-compatible youth program, and to support new units through training and personal attention. (See Appendix 19.)

1. Prospect

Network, gain referrals, generate leads, research, and develop prospect lists.

2. Build connections

Making contact with the prospect is the first part of building a connection. Spend time building the connection before presenting opportunities to new prospects.

3. Identify needs

Identifying needs of the organization increases the likelihood that the prospect will respond positively to your proposal. Listening helps identify the prospect's needs, allowing you to match the opportunities with the prospect.

4. Present opportunities

Scouting can meet the needs of many individuals and organizations. Meeting the prospect's needs and appealing to their values create a lasting relationship. Anticipate concerns and be prepared to develop a "win-win" for the prospect and Scouting.

5. Define commitment

To secure a commitment from the individual or organization, you must ask! Additional questions or concerns may be identified. Once a commitment is made by the prospect, action items for moving forward are identified.

6. Promote continuous cultivation

Delivering on the promises you make during the sales conversations is crucial. Provide training, coaching, and support to the prospect to assist them in achieving the commitment they have made. Strong follow-up builds credibility, solid connections and relationships, and trust, which become a foundation for additional sales and future referrals.

Membership Team—Identify potential chartered organizations for a new unit, make the call on that organization, organize new units, and recruit new members in a systematic way.

Relationships Team—Establish and maintain mutually beneficial relationships with major community organizations and institutions, both those that have Scouting units and those that do not.

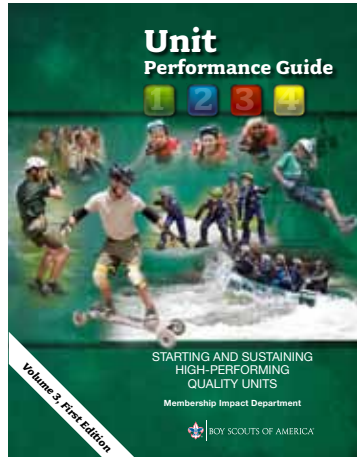
Organizing Team—Organization formally adopts the Scouting program, confirms the appointment of a chartered organization representative, and appoints an organizing team. The organizing team selects and recruits key leaders.

Unit Support Team—The unit support team helps grow the unit. The new-unit commissioner meets monthly with the unit Key 3 and helps the unit get through its first and second charter renewal cycles. The new-unit commissioner supports the unit in becoming a high-performing unit by working with Journey to Excellence and Voice of the Scout.

Unit Performance Guide Methodology

The BSA-approved strategy for starting and sustaining high-performing quality units

Four Pillars (Steps) of New-Unit Organization and Retention:



1. Know the Market
2. Make the Call
3. Build the Team
4. Grow the Unit

1. Volunteer-driven, professionally guided.

The district executive, new-unit commissioner, and new-unit organizer all work together in the new-unit organization process. Professionals and volunteers partnering together help ensure the proper development of high-performing quality units.

2. A new-unit commissioner is assigned at the very start of the new-unit organization process.

Once the unit is organized, the commissioner serves the unit for three years to help it become a high-performing unit. There should be a 1:1 ratio—one new-unit commissioner for one new unit.

3. Organize every new (non-LDS) unit with at least 10 youth.

Starting with two dens or patrols or a crew of 10 helps ensure the unit has a good foundation to grow.

4. Recruit at least five adult unit volunteers.

Properly selected quality volunteers are important to the successful operation and sustainability of the new unit. Note: The chartered organization representative position should be a separate position and not a multiple position.

5. Develop the unit Key 3 concept.

The unit leader, committee chair, and chartered organization representative meet monthly. The assigned new-unit commissioner serves as the advisor to the meeting.

6. Focus on organizing the whole Scouting family.

The whole Scouting family normally includes a pack, a troop, and a crew chartered to the same organization. It can also include a Varsity Scout team or a Sea Scout ship.

Resources:

To access the *Unit Performance Guide*, visit www.scouting.org/membership and click on “New Unit Development.” It also is available in PDF format (English, No. 522-025; English/Spanish, No. 522-026); in EPUB file for iPhone, iPad, Nook, and Android devices; and in MOBI file for Kindle.

The Four Pillars of High-Performing Units

High-Performing Teams

Performance Process

Measures of Success

Membership Team

District Commissioner
District Membership Chair
District Executive

1. Know the Market

- ☐ Council Market Analysis Report
- ☐ Membership Reports
- ☐ Identify Chartered Organizations
- ☐ Scouting Family
- ☐ New-Unit Commissioners
- ☐ Know Our Chartered Organizations
- ☐ Vision Statements

Gold Standard

Market Share
14%

Relationships Team

Institution Head
Chartered Organization Representative
District Executive
Unit Commissioner
Influential Scouter

2. Make the Call

- ☐ Preparation
- ☐ Structured Sales Calls
- ☐ Building Blocks of Scouting
- ☐ Program Benefits
- ☐ Chartered Organization Relationships
- ☐ Chartered Organization Representatives
- ☐ Chartered Organization Checklist

Gold Standard

Commissioner Ratio
1:3

Organizing Team

New-Unit Commissioner
New-Unit Organizer
District Training Team
District Executive
JTE Committee Members

3. Build the Team

- ☐ Organizing Team
- ☐ Selecting Quality Leaders
- ☐ Training Unit Leadership
- ☐ Unit Program Planning
- ☐ Recognitions
- ☐ Tools of the Trade:
 - Online: Forms, Training, and Events
 - Unit Development and Youth Recruitment
 - Program: Ready to Use
 - Religious Emblems and Cultural Markets
 - Webelos to Scout

Gold Standard

Trained Leaders
54%

Unit Support Team

Unit Key 3:

- Unit Committee Chair
- Unit Leader
- Chartered Organization Representative

 New-Unit Commissioner
Unit Committee Members

- Journey to Excellence
- Voice of the Scout

4. Grow the Unit

- ☐ Unit Key 3
- ☐ Unit Reporting Tools
- ☐ Recruiting Youth Members
- ☐ Successful Unit Meetings
- ☐ Unit Performance
- ☐ Commissioner Service
 - Unit Self-Assessments
 - Annual Service Plan
 - Unit Visit Tracking System (UVTS)
 - Charter Presentations
 - First Charter Renewal
 - Second Charter Renewal

Gold Standard

Membership Growth
2%

Retention Rate
76%

Unit Visits Per Year
6

Know the Market

1

2

3

4



Know the Market

High-Performing Teams

Performance Process

Measures of Success

Membership Team

District Commissioner
District Membership Chair
District Executive

1. Know the Market

- ☐ Council Market Analysis Report
- ☐ Membership Reports
- ☐ Identify Chartered Organizations
- ☐ Scouting Family
- ☐ New-Unit Commissioners
- ☐ Know Our Chartered Organizations
- ☐ Vision Statements

Gold Standard

Market Share
14%

Relationships Team

Institution Head
Chartered Organization Representative
District Executive
Unit Commissioner
Influential Scouter

2. Make the Call

- ☐ Preparation
- ☐ Structured Sales Calls
- ☐ Building Blocks of Scouting
- ☐ Program Benefits
- ☐ Chartered Organization Relationships
- ☐ Chartered Organization Representatives
- ☐ Chartered Organization Checklist

Gold Standard

Commissioner Ratio
1:3

Organizing Team

New-Unit Commissioner
New-Unit Organizer
District Training Team
District Executive
JTE Committee Members

3. Build the Team

- ☐ Organizing Team
- ☐ Selecting Quality Leaders
- ☐ Training Unit Leadership
- ☐ Unit Program Planning
- ☐ Recognitions
- ☐ Tools of the Trade:
 - Online: Forms, Training, and Events
 - Unit Development and Youth Recruitment
 - Program: Ready to Use
 - Religious Emblems and Cultural Markets
 - Webelos to Scout

Gold Standard

Trained Leaders
54%

Unit Support Team

Unit Key 3:

- Unit Committee Chair
- Unit Leader
- Chartered Organization Representative

 New-Unit Commissioner
Unit Committee Members

- Journey to Excellence
- Voice of the Scout

4. Grow the Unit

- ☐ Unit Key 3
- ☐ Unit Reporting Tools
- ☐ Recruiting Youth Members
- ☐ Successful Unit Meetings
- ☐ Unit Performance
- ☐ Commissioner Service
 - Unit Self-Assessments
 - Annual Service Plan
 - Unit Visit Tracking System (UVTS)
 - Charter Presentations
 - First Charter Renewal
 - Second Charter Renewal

Gold Standard

Membership Growth
2%

Retention Rate
76%

Unit Visits Per Year
6

Chapter 1.

Know the Market

Measure of Success: 14% Market Density

When you begin a journey, you must first plan the trip. It is the same when you're planning to start a new unit. First, you must decide where you are going, and then you do research to determine the best way to get to your final destination. The new-unit process takes systemic planning and teamwork. Organizing sustainable new units is a journey.

Experienced volunteers and professionals in the Boy Scouts of America have learned that one person alone cannot effectively organize a new unit. **Building and sustaining high-performing units takes a team of dedicated people—both volunteer and professional—working together throughout the entire process.** It takes a district to support a unit. You will find in this resource guide that every performance process listed has a specific team assigned with specific responsibilities, which is the key to proper new-unit development.

The five major components that will lead to traditional membership growth are found in Scouting's Journey to Excellence:

- Membership measures
- Leadership and governance measures
- Finance measures
- Program measures, volunteer engagement
- Unit-service measures

Membership Team. The key people responsible for knowing your market research include the district membership chair, district commissioner, and district executive.

Unit Performance Guide. The *Unit Performance Guide* was first published in 2011 as a one-stop reference for starting and sustaining high-performing units. The *Unit Performance Guide* was further developed and field-tested during a 2012 pilot program in order to reverse the national trend of dropping units faster than adding new ones. This publication establishes the best practice criteria for starting a new unit:

10 Youth

5 Adults

Unit Key 3

New-Unit Commissioner

Engaged Chartered Organization

Amazing Results. The councils that participated in the pilot program had an average 33 percent higher success rate compared to other councils. Here are some important findings:

- 85 percent responded that the consolidated Tools of the Trade sections were very helpful.
- 92.8 percent found the new-unit Key 3 concept effective.
- 78 percent found the *Unit Performance Guide* process effective.
- On average, councils implementing even part of the *Unit Performance Guide* concepts realized seven or more new units and less than one (0.36) dropped unit during the pilot program.
- On average, pilot councils had 18.8 percent fewer dropped units, while nonpilot councils had 14.5 percent more dropped units for a 33.3 percent higher success rate when implementing *Unit Performance Guide* practices.

Plan for success. Start no unit before its time.

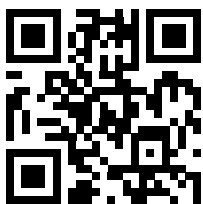
District Nominating Committee

Establishing a new unit begins with the district nominating committee. As committee members do their work each year, it is critical that they nominate people whose skills and attributes lend themselves to the functions of the committees upon which they will serve. The functions of the membership team and the relationships team are listed later in this chapter. A wide variety of skills will be needed to fulfill these functions: analytical skills, salesmanship skills, organizational skills, training skills, and personal relationship skills. While it is the district chair that will be assigning members of the district committee to various committees, it is important that the nominating committee be aware of the needs of the district. Obviously it will take more than one individual to accomplish these tasks.

Council Market Analysis Report

The Council Market Analysis Report (CMAR) provides demographic and lifestyle information specific to each council. The analysis provides information about the cultures, values, and attitudes of your council's members and about youth who live in your council area who are not being served. Maps and tables in the report include numbers, percentages, indexes, and lifestyle information. By analyzing this information, you will be able to:

- Meet the needs of your current members
- Recruit more members who are similar to the ones you currently serve
- Attract more youth in underserved communities
- Find community partners and sponsors
- Target and appeal to new chartered organizations



The Council Market Analysis Report is available as a PDF to all Scouting professionals by logging on to their MyBSA account at www.mybsa.org or scanning this QR code into their smartphone. Click on “Resources” and then click on “Council Market Analysis Reports” in the BSA Resources list.

The CMAR should be distributed to all volunteer membership teams.

To view your council’s information, select by region, area, and headquarters city. Download a PDF of the report, and view data tables in Excel format. Councils that organize districts by zip codes will have total youth available (TAY) research already completed and will easily put JTE market share and membership/youth growth goals into the hands of their membership committees.

COUNCIL MOSAIC PROFILES

One particularly useful feature of the Council Market Analysis Report is the presentation of Experian’s Mosaic segments to provide summary demographic and lifestyle information for households within your council. These segments identify population groups according to common features, including, among others:

- Ethnicity, culture, and languages
- Values, attitudes, and religious and political preferences
- Consumer and entertainment preferences

The CMAR presents Cub Scout membership census data by Mosaic segment, providing data useful to membership committees. It is possible to identify segments that your council serves well, such as in the following chart:

Cluster-Description	Cub Scout Members	% of Total Cub Scout Membership	Total Households in Council Area	% of All Households in Council Area	% of Cub Scouts in Segment	Index
B07– Generational Soup	103	3.97%	3,515	1.86%	2.93%	2.1
C14– Boomers and Boomerangs	338	13.02%	15,458	8.19%	2.19%	1.6
K37– Wired for Success	10	0.39%	1,028	0.54%	0.97%	0.7

The sample above shows that:

- 13.02 percent (338 boys) of the council's Cub Scouts are identified as belonging to the Boomers and Boomerangs segment.
- 15,458 (8.19 percent) of the households in the council area are identified as Boomers and Boomerangs.

The index is calculated to show that a youth in the Boomers and Boomerangs segment is 1.6 times more likely to join Cub Scouts compared to the average Cub Scout in the council. The recruitment strategies that the council currently uses appeal to youth in these households.

The CMAR may also be used to look for new Cub Scouts in the Mosaic segments that your council does not satisfactorily reach, as shown in the following chart:

Cluster-Description	Cub Scout Members	% of Total Cub Scout Membership	Total Households in Council Area	% of All Households in Council Area	% of Cub Scouts in Segment	Index
N48–Gospel and Grits	121	0.55%	11,326	0.73%	1.07%	0.7
D18–Soulful Spenders	690	3.14%	66,318	4.30%	1.04%	0.7
J36–Settled and Sensible	63	0.29%	6,147	0.40%	1.02%	0.7

The sample above shows that:

- 3.14 percent (690 boys) of the council's Cub Scouts are identified as Soulful Spenders.
- 66,318 (4.30 percent) of the households in the council area are identified as Soulful Spenders.

The index shows that a youth in the Soulful Spenders segment is less likely (0.7 times) to join Cub Scouts compared to the average Cub Scout the council serves. However, we can see that there are many households in this council area that are considered targets for recruitment. The council should research the Soulful Spenders segment and determine what needs to be done differently to reach this population.

HOW TO USE THIS ANALYSIS

These excerpts from a CMAR illustrate how to find membership opportunities in districts.

Know the Market

Study the Mosaic descriptions of the zip codes in your council area. You can do this by using the Mosaic USA Interactive Guide, available at <http://guides.business-strategies.co.uk/mosaicusa2011/html/visualisation.htm>. Then enter a zip code in your council area.

The screenshot shows the Experian Mosaic USA Interactive Guide interface. The top navigation bar includes links for Segments, System Profiles, Resources, Settings, ZIP Code Lookup, and Enter ZIP Code. The main content area is titled 'Group A: Power Elite' and describes the wealthiest households in the US. It features a 'Key Traits' list, an 'Imagery' section with photos of a large house and a family, and a 'Profile' section at the bottom. A black arrow points to the 'ZIP Code Lookup' button in the top navigation bar.

Experian Mosaic

Mosaic USA Interactive Guide

Segments System Profiles Resources Settings ZIP Code Lookup Enter ZIP Code About Exit Help

Group A: Power Elite
The wealthiest households in the US, living in the most exclusive neighborhoods, and enjoying all that life has to offer

Richard & Mary
6.13% 7.64%

ALL Key Traits Top 10s Rankings Data Imagery Description Streetscapes Regional Distribution Mapping Family Tree Pen Portrait Data Insights

Key Traits

- Wealthiest households
- Prosperous
- Family-focused
- Global travelers
- Socially active
- Financial investments
- Influential
- Brand-conscious
- Sports activities
- Digitally-savvy

Imagery

Profile: How we live our lives | Sports and fitness participation
Power boating

Group A ranked 1 out of 19
with an Index of 187

Profile Rank
Group Order

Browse through the description pages and charts to learn about the people and cultures in your council area.

Study the Cub Scout tables of zip codes in your council area.

High market share and high gap: this is where your current members live.

Examine best practices here.

Low market share and high negative gap: this is where boys like the ones you currently serve live.

Start new units here.

High TAY and low market share: this is your underserved population.

Grow units here.

C	D	E	F	G
Total Cub Scout TAY	Total Cub Scout Members	Total Cub Scout Market Share	Cub Scouts Expected	Gap
1,287	247	19.19%	167	80
57	20	35.09%	0	20
3,019	68	2.25%	242	-174
1,574	122	7.75%	291	-169
3,682	56	1.52%	251	-195
3,335	260	7.80%	574	-314
362	68	18.78%	46	22

Before recruiting new youth, learn more about the youth you currently serve.

- Identify units in these areas that have consistent retention and recruitment and look to these for “best practices.”
- Plan day camps and district events at geographically convenient locations.
- Identify the number of Cub Scouts in each Mosaic segment by ethnicity and use these numbers:
 - On United Way applications
 - To find sponsors for project sales

Recruit other youth like those you are already serving.

- Look at the zip codes with a negative gap.
 - If the negative gap is greater than -50, look for new chartered organizations.
 - If the negative gap is less than -50, look for units already established in these areas and encourage them to reach out to youth in their area.
- Make Scouts more visible in these zip codes.
 - Encourage units to perform service projects—identifiable as BSA projects—in these areas.
 - Hold district events nearby.

- Put up fliers in the businesses that serve the Mosaic segments of council members.
 - For joining opportunities
 - To advertise events

Recruit youth in all markets.

- Study the Mosaic profiles to learn about the cultures, attitudes, and preferences of the families in the underserved areas of your council.
- Refer to the data tables in the report to learn the racial/ethnic breakdown in each zip code.
- Study available resources to learn how to approach multicultural markets and the Millennial generation. (See the list of available resources on page 7 of the CMAR.)
- Prepare to convey the values and benefits of Scouting to both Millennial parents and emerging cultures that may not have had a Scouting tradition.
- Make Scouting more visible in your target areas.
 - Run PSAs on the radio stations preferred by your targeted segments.
 - Place billboards in these neighborhoods.
 - Send direct mail to selected zip codes or selected Mosaic segments.
 - Encourage units to perform service projects—identifiable as BSA projects—in targeted neighborhoods.
 - Hold district events nearby.
- Look for new chartered organizations that currently serve the segments you are trying to reach and collaborate with them to reach these youth.

Membership Reports

There are two district reports in MyBSA with which professionals must be familiar: the Objectives Progress Report and the District Totals Report. These reports are listed by unit number and give a monthly snapshot of the number of youth served in each program and in their chartered organization. These reports should be shared with council and district committee members.

Objectives Progress Report. This report (see Appendix 2) is a goal-oriented report that gives a summary of member and unit statistics by program and shows last year-end, last-year, and this-month totals. The report also shows current-month goals and year-end goals that have been entered by the local council. In addition, the report shows totals for Journey to Excellence Units, Total Unit Commissioners, Total District Committee Members, Top Leaders Trained, Rechartered Units Year to Date, Total Youth Population, and Total Youth Density by program. This information is very helpful in establishing and assessing progress toward several Journey to Excellence goals, including membership.

District Totals Report. This report (see Appendix 3) gives membership statistics by program for last year, last month, and this month enumerated by youth, adults, units, and *Boys' Life* subscriptions. In addition, the report shows current On-Time Charter Renewal, Quality Unit, Top Leader Trained, 100% *Boys' Life*, Chartered Organization name, and Expire Date by unit sorted by district and then program. This information is used to determine the status of youth, adult, and chartered organizations. It can help determine Scouting family opportunities and motivate inventory and progress urgency.

Identify Chartered Organizations

Youth markets are identified through the use of total available youth, or TAY—the number of youth in an area who meet BSA membership requirements. When surveying communities of youth in an area, it is critical to identify appropriate chartered organizations.

Local organizations are granted a charter by the Boy Scouts of America to operate one or more Scouting units (see “The Scouting Family”). The chartered organization agrees to:

- Conduct Scouting in accordance with its own policies and guidelines as well as those of the BSA.
- Include Scouting as part of its overall program for youth and families.
- Appoint a chartered organization representative who is a member of the organization and is an important member of the unit Key 3. He or she will represent their chartered organization as a member at large in the district and council, serving as a voting member.
- Select a unit committee of parents and members of the organization who will screen and then select the best unit leaders who will meet the leadership standards of both the organization and the BSA.
- Provide adequate and secure facilities for Scouting units to meet on a regular schedule with a time and place reserved.
- Encourage the units to participate in outdoor experiences.

Nearly 109,000 Scouting units are owned and operated by chartered organizations. Of these, a total of 70.3 percent of all units are chartered to faith-based organizations.

Largest Faith-Based Chartered Organizations	Total Units	Total Youth
The Church of Jesus Christ of Latter-day Saints	37,856	430,557
United Methodist Church	10,868	363,876
Catholic Church	8,397	273,648
Presbyterian Church	3,597	125,523
Lutheran Church	3,827	116,417
Baptist Church	3,981	108,353

Some 22.0 percent of all units are chartered to civic organizations.

Largest Community Chartered Organizations	Total Units	Total Youth
Groups of citizens	3,115	100,751
American Legion and Auxiliary	2,553	68,154
Business/industry	2,807	66,454
Lions International	2,271	64,563

And 7.6 percent of all units are chartered to educational organizations.

Largest Educational Chartered Organizations	Total Units	Total Youth
Parent-teacher groups other than PTAs	3,443	144,219
Private schools	2,802	103,254
Parent Teacher Association/Parent Teacher Organizations	1,561	65,567

DETERMINING THE YOUTH MARKET

The organizing team surveys the youth market. It is important to get to know the potential unit leaders and chartered organizations, and to study the research data to ensure there is an available opportunity before making the call on a chartered organization. Rigorous preparation, organization, and planning produce greater success. Determining the youth available in a zip code may include use of total available youth (TAY), or the number of youth in an area who meet BSA membership requirements. It may also include the Council Market Analysis Report, Objectives Progress Report, District Totals Report, boy-fact survey, high school survey, and BeAScout (see Appendix 13) to pinpoint the location of existing units on a map. Knowing your market should help determine the following:

- The location of underserved areas
- The location of public schools, charter schools, home-schooling associations, school expansions, police departments, fire departments, municipal housing authorities, or other after-school programs that could benefit from the organization of new units
(**Note:** Public schools and government organizations usually do not serve as chartered organizations.)
- New religious institutions being organized that may want to use Scouting with their youth members
- Other community organizations in the district that serve youth, such as service clubs, veterans groups, educational hobby clubs, community centers, public housing, religious organizations, and others
- Current chartered organizations without the whole Scouting family

RESEARCHING POTENTIAL CHARTERED ORGANIZATIONS

After potential chartered organizations have been identified, find out everything possible about their purpose, structure, leadership, and history of youth and community involvement. Find out the following:

- What potential adult unit leaders does the organization have?
- How adequate are the organization's program resources?
- How compatible are the organization's values and goals with those of the BSA?
- What facilities can the organization provide for an adequate meeting space?
- What are the costs associated with using the organization's facilities?
- What Scouts are already members of the organization?
- Do they currently have a youth program in their organization? If so, what ages do they serve?
- What other similar organizations already use the Scouting program?

Prospect sources:

- Existing chartered organizations
- www.USACHurch.com
- www.city-data.com
- www.manta.com
- Chamber of Commerce list
- Service club directory
- School parent-teacher organizations
- Home-school organizations
- Driving through neighborhoods and communities
- Worship pages of your local newspaper

Research tools:

- Organization website
- Social media
- Local newspapers and magazines; use searchable archives
- Information from new-unit volunteers
- Information from key volunteers
- Fact sheets; www.scouting.org/membership

PRIORITIZE THE ORGANIZATIONS

After potential organizations have been researched, list them in order from the most promising to the least promising for potentially working with Scouting. Track the information you gather on one shared master list. Research prospects weekly, spending time to research facts about the organization's mission, contacts, current youth programs, and structure. Establish goals on leading indicators, such as number of new contacts made and number of face-to-face visits conducted.

The Scouting Family

The whole Scouting family comprises a traditional Cub Scout pack, Boy Scout troop, and Venturing crew. Optionally, a Varsity team or Sea Scout ship may also be chartered. One of the best sources of unit and membership growth is to help an existing chartered organization in starting all three unit types in the whole Scouting family.

Many chartered organizations may operate only a pack or a troop. However, there is a likely market for the whole Scouting family within the organization. By combining the Council Market Analysis Report and interest surveys with a map of chartered organizations within the whole Scouting family, a district membership committee can highlight opportunities for unit expansion.

It is important that the chartered organization's existing units are strong and that the chartered organization representative is engaged in the Scouting program. Commissioner services should be provided at the very beginning of the new-unit organization process to help strengthen the unit and establish the important relationship prior to approaching the chartered organization regarding expansion.

Look on the www.scouting.org/membership Web page and select one of the categories below Chartered Organizations to determine whether the chartered organization (community, education, outdoor, religious) has a Memorandum of Understanding (see Appendix 22) as a national affiliate with the BSA.

In forming new units with an established chartered organization, it is easier to move up the ladder in the Scouting family. A strong Cub Scout pack with involved family members, both siblings and adults, form the backbone of a healthy organization. As the youth move through Cub Scouting into Boy Scouting, the family members tend to stay involved, forming strong, healthy committees to support a new troop. Families that have girls as well as boys approaching Venturing age create the beginnings of a new Venturing crew. Moving up the ladder from Cub Scout packs to Venturing crews is easier than moving from crew to pack, but the ladder can be navigated in either direction with strong chartered organizations and interested youth and leaders.

Varsity Scout teams are generally chartered to the Church of Jesus Christ of Latter-day Saints churches in the community. A ward is an organizational component of the LDS church. Through its youth ministry, it may already have an existing Cub Scout pack and Boy Scout troop, and should be encouraged to start a Varsity team as well. Varsity teams are specifically tailored to the LDS church's program for serving older boys, and LDS Venturing crews serve the 17- to 18-year-old pre-missionary boys. These programs may help LDS wards retain their older boys in Scouting.

A Sea Scout ship is a special type of Venturing crew, with its own organization and advancement system oriented toward seamanship. A ship rather than a Venturing crew may be chartered to an organization if its members prefer the focus of the Sea Scouting program, or a chartered organization with a Venturing crew may also have a Sea Scout ship if there is sufficient interest.

New-Unit Commissioners

NEW-UNIT COMMISSIONER

The new-unit commissioner holds a special place in the formation of a new unit. The new-unit commissioner's role begins with the very conception of the new-unit organization process (step 1) by working closely with the district executive, supporting the new-unit organizer, and becoming a familiar and consistent liaison between the chartered organization representative and the district. The new-unit commissioner will need to put in place at the beginning of the organizational process a functional succession plan of leadership while providing support to the newly recruited key leaders. In many cases, the new-unit commissioner will be the go-to person serving as a coach, mentor, and consultant by laying a strong foundation around which the new unit can form and, it is hoped, continue for a long time.

As described in the Journey to Excellence recognition program, being a new-unit commissioner is a worthwhile long-term volunteer commitment that will generally last at least three years. The new-unit commissioner will need to serve longer than the generally accepted two-year tenure of other district volunteer leaders because new units need careful watching, support, guidance, mentoring, and assistance through several charter renewal cycles to ensure unit sustainability.

While it is typical and acceptable for most unit commissioners to be assigned several units and have a longer tenure, the length and intensity of service given by the new-unit commissioner adds to the importance of this position. **They are also asked to be assigned to only one unit.** With this in mind, what motivates a volunteer to become a new-unit commissioner and serve only one unit for three full years? Because they truly believe that when a new unit is organized, the BSA made a promise to those families that their sons (or daughters in Venturing) would have a real Scouting experience. It is a promise that really needs to be kept.

Experienced unit commissioners often say it would be much more exciting to “raise a unit in the way it should go” than to monitor an existing unit.

New-unit commissioners may derive even greater satisfaction from their new role than other unit commissioners simply because they can take pride in the creation process and watch the unit grow and be sustained over many years.

So, who would make a good new-unit commissioner?

A new-unit commissioner can be an experienced commissioner who specializes in new-unit service and has had some specialized training. Ideally, this commissioner will have a reduced unit workload and is committed to serving this one unit for the full three years the unit will be considered “new.” The role the new-unit commissioner plays is much like that of troop guide—not a member of the unit but a mentor who helps the unit leadership become a high-performing team. Once the unit becomes independent, the new-unit commissioner should be replaced with a traditional unit commissioner, freeing the new-unit commissioner to begin again with another unit.

The new-unit commissioner will need to give this unit extra service in addition to the annual service plan. That service is described in the section “Commissioner Service Plan.” While an experienced commissioner is preferred, the new-unit commissioner could also be a volunteer who is at least 21 years old, such as an Arrowman, former camp staff member, or Eagle Scout who serves under the mentorship and guidance of an experienced commissioner such as an assistant district commissioner or district commissioner. Such an individual can be an excellent

candidate to start with one new unit. Any Scouter who fits this description and is willing to make this commitment would make a good new-unit commissioner. It is important to have a dedicated new-unit commissioner when building sustainable new units.

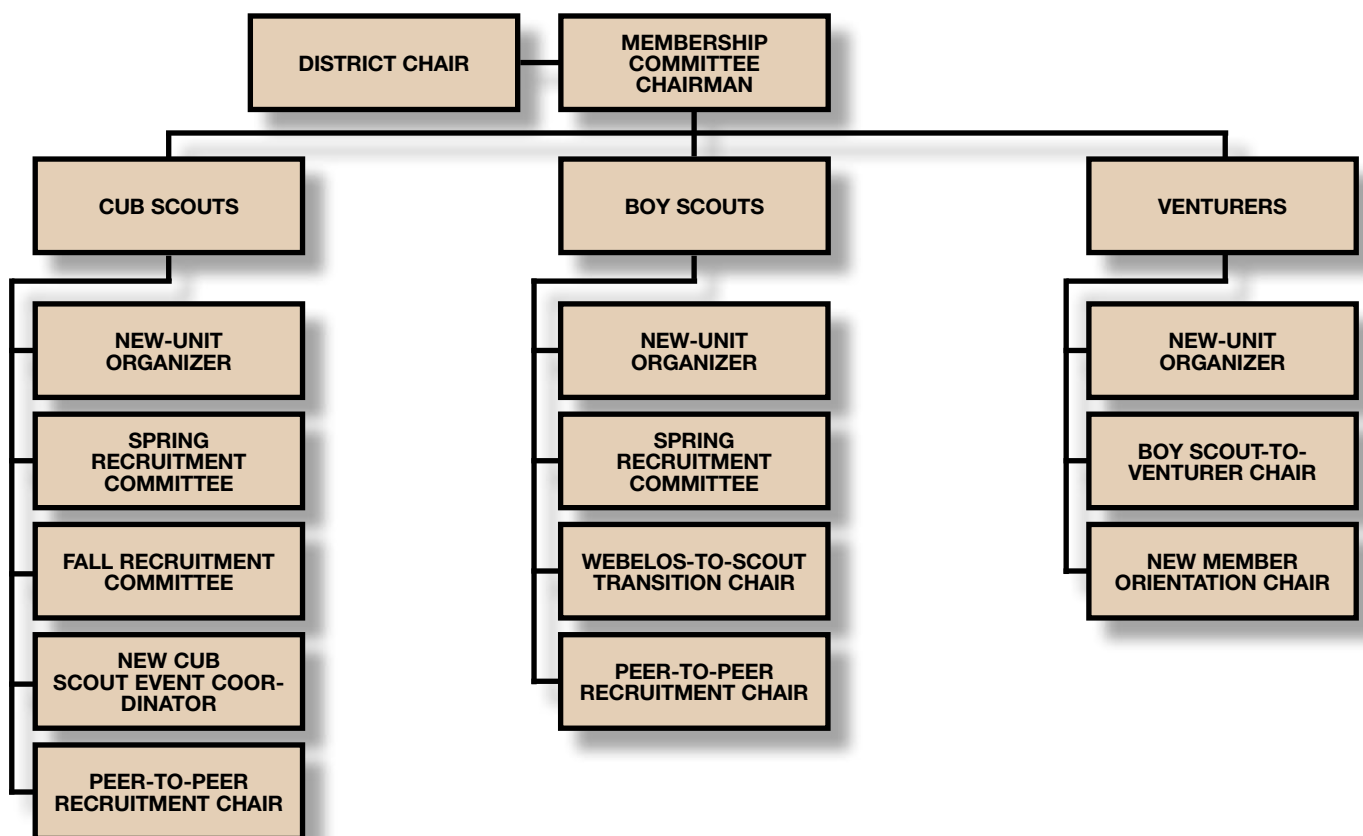
NEW-UNIT ORGANIZER

During unit formation, the new-unit organizer and the new-unit commissioner work closely together.

Market research and determining who to approach to become a chartered organization are membership decisions. The district executive and district commissioner will work with the membership team as they go through this process. Once a decision is made to start a new unit, a new-unit commissioner is immediately assigned to that potential unit and begins to work closely with the new-unit organizer. The district commissioner then signs off on the New-Unit Application.

When calling on the prospective chartered organization, the new-unit commissioner may go along on this call, but it is the new-unit organizer's meeting. The new-unit organizer could be an influential Scouter, an individual experienced in sales, a key volunteer, or an individual who knows the prospective organization and community.

The District Membership Committee



The district membership committee is primarily responsible for fostering productive relationships with community organizations, the organization of new units in order to provide opportunities for youth membership growth, and district-wide youth recruitment.

Cultivation of present chartered organizations is extremely important. This is done through continuous expressions of appreciation, invitations to organizational heads to visit Scouting events, and recognitions for tenure and exemplary support from organizations. The relationship function at the district level is not as formalized as at the council level. It is mainly a “door opening” function that follows up efforts made by the council membership/relationship committee. A committee member for each of the three major categories of organization—religious, educational, and community—can be added on a district level if there is a need.

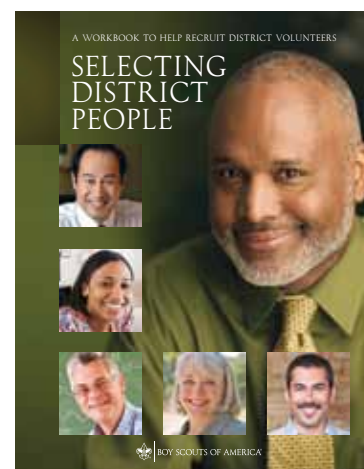
New-unit organization and unit reorganization are major responsibilities of the membership committee. All new-unit organization originates with this committee, and unit reorganization is generally done in cooperation with the commissioner staff, which has the ongoing responsibility of renewing unit charters. Commissioners are accountable for keeping units alive and healthy, but they often need the support of the membership committee to help get units organized, and sometimes reorganized so they work with new-unit organizers.

Instead of a planning body, the district membership committee is an action group. It conducts the events and activities that will reach out to serve more youth.

DISTRICT MEMBERSHIP CHAIR

The district membership chair is responsible to the district chair and serves on the council membership/relationships committee. The person who fills this role must have leadership ability and the capacity to manage a team working on a variety of activities. The chair needs to be able to motivate committee members and to inspire them to meet district membership objectives. The chair must be a good adult recruiter.

Use *Selecting District People*, No. 34512, to determine the number of people needed on this committee for your district.



RECRUITING VOLUNTEERS

- Every district Key 3 should be held accountable to have a volunteer recruitment action plan in place to fill their key vacancies with qualified volunteers to serve as commissioners and membership chairs, as well as other district committee members. This is one of the most important roles of the district Key 3: to select quality volunteers and then recruit, train, motivate, and recognize them. The district Key 3 recruitment plan is an ongoing, year-round process. It should be scheduled in the Key 3's weekly action plan.
- Once recruited, the district Key 3 should ensure their new volunteers receive proper training as soon as possible.
- New volunteers should have a position description, an organization chart, and a clear understanding of their position and assigned duties.
- These volunteers need to take ownership and be held accountable while simultaneously being given the proper guidance for their position.
- Most importantly, motivate and recognize them for their service and tenure.

Know Our Chartered Organizations

PLANNING THE SALES CALL

This approach works well for the initial contact with a prospective organization: Ask if you may come and discuss something you feel is very important to the community and a way to help their organization's membership grow. If possible, don't go into more detail on the phone. If asked what this is about, simply state that it is related to the youth of the community and you would like to elicit their input and ideas and share some of your own. Don't be evasive, but save the "sale" for the personal visit. Allow 30 minutes for the initial visit.

This is a two-step process: fact, need, and information gathering, then making the presentation.

FACT, NEED, AND INFORMATION GATHERING (MEETING THE NEEDS OF THE PROSPECTS)

You should visit with the head of the prospective organization to gather facts and information and to determine the organization's needs before you make the sales presentation mentioned in Chapter 3. This visit involves active listening. Listen carefully. Find out about the organization's goals and dreams. What are the challenges? Then you will be able to determine how Scouting can help the organization meet its needs.

A typical conversation may lead to questions such as:

- What is your organization doing in our community?
- What should you be doing?
- What roadblocks keep your organization from achieving those objectives?
- Who else from your organization should I talk to?

COMPLETING THE PROFILE

Following that initial visit and prior to the sales presentation, complete the background information about the organization and the community. Address details such as:

- Total available youth (TAY) in the organization's membership
- Total available youth in the surrounding community
- Members of the organization who are already Scouters
- Similar organizations that use the Scouting program
- The organization's community service efforts
- The organization's past affiliation with Scouting, if any

See the New-Unit Prospect Profile Worksheet online at www.scouting.org/filestore/pdf/nupp.pdf.

Vision Statements

To ensure the future of Scouting, organizations, units, and leaders must understand what commitments and planning will be required to support their youth in both the short and long terms. They will need to properly communicate their vision of Scouting with others so more volunteers, parents, and youth will join the program. Understanding a shared vision is a critical leadership skill, and is a fundamental key to high-performing units. After reviewing market analysis data, the new-unit organizing team can support a chartered organization and unit leadership as they develop a vision statement.

Every organization should have a well-defined goal or vision of what a new Scouting unit will do for their organization. They might not realize how to measure its success—or lack of success—without a proper vision statement. Some examples are:

SAMPLE VISION STATEMENT FOR A NEW CHARTERED ORGANIZATION

In establishing Troop 308, FUMC hopes to provide enrichment opportunities for strengthening families with lifelong experiences that capture fun and excitement for youth with the support of their parents or caregivers, and will encourage their spiritual development based on the ideals and values of the Scouting program.

UNIT VISION STATEMENTS

1. Using the values of Scouting and the methods of Cub Scouting, Pack 308 hopes to establish a Cub Scout program that will support each individual Cub Scout's personal development and provide a vehicle for parents that helps them in raising their son as well as strengthening family relationships and preparing the Cub Scout for Boy Scouting.
2. Troop 308 seeks to provide a Scout program based on the values of Scouting that will encourage a youth to develop his leadership and personal relationship skills, provide opportunities for the Scout to participate in the adventures Scouting offers, and allow him to advance at his own pace and reach his full potential.
3. Venturing Crew 308 will provide an exciting and relevant Scouting-based program that will attract and hold older teens—both young men and women—offering travel, leadership and personal development, skills development, and fun.

A vision has the following characteristics.

1. It presents a clear picture of success.
2. It inspires action.
3. It is realistic (achievable).
4. It creates and maintains momentum.
5. It is positive.
6. It is dynamic rather than static.

Organizing teams and unit support teams might brainstorm different types of visions that could be used during meetings with chartered organizations and potential unit leaders to help align the mission of both organizations.

A well-defined vision statement could be the motivational common bond that attracts new and young families to your organization. It can be added into the BeAScout.org description of the chartered organization.

How to Start a New Unit

NEW-UNIT APPLICATION



Cub Scouting



Boy Scouting

Purpose of the Boy Scouts of America
Its purpose is to promote, through cooperation with other agencies, the ability of youth to do things for themselves and others, and to teach them patriotism, courage, self-reliance, and kindred virtues. In achieving this purpose, emphasis is placed upon its educational program and the oaths, promises, and codes for character development, citizenship training, and mental and physical fitness.

Pack
Cub Scouting is for parents, leaders, and organizations to use with boys who are in the first through fifth grade or are 7 through 10 years old.

Troop
Boy Scouting is an educational program filled with fun and adventure that appeals to boys.

Boys must be under the age of 18 and at least 11, or have completed the fifth grade and be at least 10 years old, or have earned the Arrow of Light Award in Cub Scouting and be at least 10 years old.

Team
Varsity Scouting is a program designed to assist your organization in meeting the needs and interests of older boys. Boys must be at least age 14 and not yet age 18.

Venturing Crew/Ship
Venturing will help your organization meet the needs, desires, and concerns of young adults. Young men and women must be ages 14 through 20, or 13 with the completion of the eighth grade.



Varsity Scouting



VENTURING · BSA®
Venturer/Sea Scout



BOY SCOUTS OF AMERICA®

BOY SCOUTS OF AMERICA ADULT APPLICATION

This application is also available in Spanish. Esta solicitud también está disponible en español.

The mission of the Boy Scouts of America is to prepare young people to make ethical and moral choices over their lifetimes by instilling in them the values of the Scout Oath and Scout Law.

In a Cub Scout pack, Boy Scout troop, Varsity Scout team, Venturing crew, or Sea Scout ship—or in any position in a district or council—your participation is a service to your community and helps youth become better citizens.

As members of the Boy Scouts of America, high-quality adult leaders are important role models for youth. This application helps the chartered organization to select qualified leaders to serve as volunteers. Thank you for completing this application in full. See instructions on the inside cover.

BY SUBMITTING THIS APPLICATION YOU ARE AUTHORIZING A CRIMINAL BACKGROUND CHECK OF YOURSELF. THIS CHECK WILL BE MADE FROM PUBLIC RECORD SOURCES. YOU WILL HAVE AN OPPORTUNITY TO REVIEW AND CHALLENGE ANY ADVERSE INFORMATION DISCLOSED BY THE CHECK.

IF YOU WOULD LIKE A COPY OF YOUR CRIMINAL BACKGROUND REPORT, PLEASE CONTACT YOUR LOCAL COUNCIL OFFICE.

Youth Protection Training

All applicants for membership are required to take this training within 30 days of registering. To take it online, go to www.MyScouting.org and establish an account using the member number you receive when you register. If you take the training online before you obtain a member number, be sure to return to MyScouting and enter your number for training record credit. Your BSA local council also provides training on a regular basis if you cannot take it online.

For more information, refer to the back of this application.



BOY SCOUTS OF AMERICA®

BOY SCOUTS OF AMERICA YOUTH APPLICATION

This application is also available in Spanish. Esta solicitud también está disponible en español.



Cub Scouting

Tiger Cub

Cub Scout
Webelos Scout



Boy Scouting



Varsity Scouting



Venturing/Sea Scouting

Scout Oath or Promise

On my honor I will do my best to do my duty to God and my country and to obey the Scout Law; to help other people at all times; to keep myself physically strong, mentally awake, and morally straight.

Scout Law

A Scout is trustworthy, loyal, helpful, friendly, courteous, kind, obedient, cheerful, thrifty, brave, clean, and reverent.



BOY SCOUTS OF AMERICA®

Make the Call

1

2

3

4



Make the Call

High-Performing Teams

Performance Process

Measures of Success

Membership Team

District Commissioner
District Membership Chair
District Executive

1. Know the Market

- ☐ Council Market Analysis Report
- ☐ Membership Reports
- ☐ Identify Chartered Organizations
- ☐ Scouting Family
- ☐ New-Unit Commissioners
- ☐ Know Our Chartered Organizations
- ☐ Vision Statements

Gold Standard

Market Share
14%

Relationships Team

Institution Head
Chartered Organization Representative
District Executive
Unit Commissioner
Influential Scouter

2. Make the Call

- ☐ Preparation
- ☐ Structured Sales Calls
- ☐ Building Blocks of Scouting
- ☐ Program Benefits
- ☐ Chartered Organization Relationships
- ☐ Chartered Organization Representatives
- ☐ Chartered Organization Checklist

Gold Standard

Commissioner Ratio
1:3

Organizing Team

New-Unit Commissioner
New-Unit Organizer
District Training Team
District Executive
JTE Committee Members

3. Build the Team

- ☐ Organizing Team
- ☐ Selecting Quality Leaders
- ☐ Training Unit Leadership
- ☐ Unit Program Planning
- ☐ Recognitions
- ☐ Tools of the Trade:
 - Online: Forms, Training, and Events
 - Unit Development and Youth Recruitment
 - Program: Ready to Use
 - Religious Emblems and Cultural Markets
 - Webelos to Scout

Gold Standard

Trained Leaders
54%

Unit Support Team

Unit Key 3:

- Unit Committee Chair
- Unit Leader
- Chartered Organization Representative

 New-Unit Commissioner
Unit Committee Members

- Journey to Excellence
- Voice of the Scout

4. Grow the Unit

- ☐ Unit Key 3
- ☐ Unit Reporting Tools
- ☐ Recruiting Youth Members
- ☐ Successful Unit Meetings
- ☐ Unit Performance
- ☐ Commissioner Service
 - Unit Self-Assessments
 - Annual Service Plan
 - Unit Visit Tracking System (UVTS)
 - Charter Presentations
 - First Charter Renewal
 - Second Charter Renewal

Gold Standard

Membership Growth
2%

Retention Rate
76%

Unit Visits Per Year
6

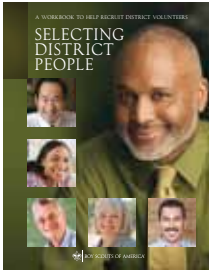
Chapter 2.

Make the Call

Measure of Success: 1-to-3 ratio of commissioners to units

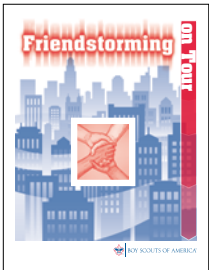
Preparation

Now that the organizing team has completed its research and developed a strategic and realistic list of new-unit prospects, it is time to start implementing the new-unit plan.



In this chapter you will learn about the second phase of new-unit organization, including the key components you need before, during, and after approaching a prospective chartered organization. This is when important first impressions are made and the potential chartered organization is introduced to the programs of the Boy Scouts of America.

The key volunteers needed to form your unit support team are the new-unit organizer, the new-unit commissioner, the district training team, and an influential Scouter. A helpful publication to guide the prospecting and identification of qualified volunteers is *Selecting District People*, located among commissioners' resources at: http://www.scouting.org/filestore/commissioner/pdf/34512_WB.pdf.



An additional source for developing potential volunteers is *Friendstorming on Tour*, No. 510-003, available on MyBSA and through your council office.

Structured Sales Calls

MAKE THE CALL

When approaching a prospective chartered organization, first select two or three people to make the sales call. One is not enough, and more than three may be intimidating. Choose the presentation team from the following:

- New-unit organizer
- New-unit commissioner
- District executive
- Scouter who is a member of the prospective chartered organization. Remember, people do business with those they *know*, *like*, and *trust*.
- Influential community leader who is a Scouter

Before the sales call, determine who will take the lead role and who will fill supporting roles. Enter the conversation with a mindset of providing service to the prospect. Use escalating questions to increase your credibility.

The sales call should not last longer than 45 minutes. The vast majority of the volunteer's and professional's time should be asking questions and listening to the head of the prospective organization, not talking. Try to stay on track, unless the person you are calling on decides to tell stories about their Scouting experiences.

Desired Outcomes for This Visit

- Option 1: Pique curiosity and request another appointment with the decision maker(s):
“Thank you for sharing this information with me about your organization. I believe there are some ways we could work together to achieve your goals. I would like to take some time to prepare some ideas for you. Could we schedule a time next week to continue our conversation? Today is _____. Would next (match the day) work well for you, or would (one day earlier) work better?”
- Option 2: Present an opportunity for the prospect to determine interest. Prepare a customized executive summary to identify benefits and features of Scouting to meet the organization's needs. Increase your success by addressing as many needs as possible.

Define Commitment

1. Identify the decision maker. Be sure you are talking with the person who can make the final decision.
2. Review the chartered organization concept. Do not undersell the chartered organization role.
3. Ask for the commitment. The most influential person makes the ask. “Do you see how our organizations can work together to address (prospect's need or desire)?”
“Would your organization be willing to work with the Boy Scouts of America to bring (prospect's need or desire) to youth and families?” Remember not to speak after you have asked for the commitment.

Action Steps

- Get the chartered organization agreement signed by the organization and the appropriate Scouting representative.
- The executive officer appoints a qualified individual from the organization to serve as the chartered organization representative.
- Schedule an organizing team meeting where members of the chartered organization will be oriented to the timeline of the new-unit organization process.
- Before you leave, secure dates for the next meeting to keep the process moving forward.
- Congratulate the new chartered organization! Have key volunteers send personalized welcome notes.

Questions for a leader of a faith community:

- What are your current youth programs? Tell me which one you are most proud of.
- How are your current youth programs meeting your expectations?
- What are your top three concerns regarding youth today?
- Why did you pick those? Can you tell me more about that?
- Tell us about your outreach ministries or services to the community.
- What is the average age of your congregation?
- What do you feel are the most important issues facing families today?
- What do you think your faith community can do to help?
- Do you use camps or outdoor programs with your youth?
- Have you ever considered Scouting to address your concerns?
- Where do you see your faith-based organization five or 10 years from now?

Questions for a president of a service club:

- What is your club's focus for the next two years?
- What are your concerns about youth in our community?
- How is your club addressing these needs?
- Why is that important?
- What types of service projects does your club do?
- How does that work for you?
- How does your club serve children and families?
- What would you like to see made more available to children?
- Why is this important?
- Have you ever considered Scouting to address your concerns?

Questions for a parent-teacher group:

- What are your top concerns? Why?
- What collaborative efforts already exist?
- What collaborative efforts could exist to match community resources with schools?
- What is important to the children and families in your school?
- What issues do you face trying to serve children and families?
- What issues would you like to help families address?
- What type of additional volunteer support do you need?
- Have you ever considered Scouting to address your concerns?

Promote common opportunities:

- Community outreach
- Building strong families
- Character development
- Gaining more parent and volunteer involvement
- Providing positive role models and mentors to youth
- Presenting parents with opportunities to set and achieve goals
- Teaching life skills to youth
- Your organization gets introduced to others.

Be prepared to answer questions and common concerns, such as the following:

- We don't have very many youth in our organization.
- We do not have any extra volunteers in our organization to take on this project.
- We are concerned about liability issues.
- We don't have it in our budget.
- I don't know anything about running a Scouting unit.
- Our congregation is much older.
- We tried this before, and it did not work.
- We already have a youth program.
- I will have to run this by our board.

Building Blocks of Scouting

Scouting is a values-based program with its own code of conduct. The Scout Oath and Scout Law help instill the values of good conduct, respect for others, and honesty. Scouts learn skills that will last a lifetime, including basic outdoor skills, first aid, citizenship skills, leadership skills, and how to get along with others. For a full century now, Scouting has instilled in youth the values and knowledge they will need to become leaders in their communities and country.

AIMS

The aims of the Scouting movement are to build youth into quality citizens by building character, fostering citizenship, and promoting fitness.

Scout-age youth experience dramatic physical and emotional growth. Scouting offers them a wide range of opportunities to channel much of that change into productive endeavors and to find the answers to many of their questions. Through service projects and Good Turns, Scouts can give back directly to their community. Many Scouting activities allow youth to associate with others from different backgrounds. The religious emblems program offers pathways for Scouts to more deeply understand their duty to God. The unit provides each Scout with an arena in which to explore, to try out new ideas, and to embark on adventures that sometimes have no design other than to have a good time with good people.

FOUNDATION: COMMUNITY ORGANIZATIONS AND SCOUT COUNCILS

Scouting teaches skills that can help youth develop into our future community leaders. Organizations that are interested in nurturing youth for the betterment of the community will find Scouting to be a positive form of community outreach.

The Boy Scouts of America grants charters to organizations such as churches, service clubs, and other community groups to operate Scouting groups. Chartered organizations work with local Scout councils to provide the support necessary for unit operations. When an organization adopts Scouting as part of its youth and/or community outreach program, a committee is formed and leadership is selected to organize and operate the unit in conjunction with the organization's special needs and desires. Councils provide access to program materials and literature, outdoor camping facilities, leadership training and field support, assistance in recruiting members, liability insurance, record keeping, and supplies such as uniforms, insignia, and awards.

More than ever, young people need the guidance and mentoring that Scouting provides. Scouting's constructive educational program is a healthy alternative to the negative influences youth face in society across the country and worldwide.

LEADERSHIP

Boy Scouting and Venturing are youth-led, youth-run organizations, but the youth must be trained to serve as leaders. One of the unit leader's most important responsibilities is to provide the direction, coaching, and training that empowers youth with the skills they need to lead their unit.

Scouting's value to young people is clear, but the advantages of Scouting are not limited to youth. Adults also develop leadership and physical skills with every training experience. Adult training begins with the Orientation Training program, followed by Introduction to Outdoor Leader Skills and Leader Specific Training. Further training can include Wood Badge, which has evolved into the BSA's core leadership skills training course. Wood Badge focuses on a person's ability to work with and lead groups of youth and adults.

METHODS

The Methods of Scouting

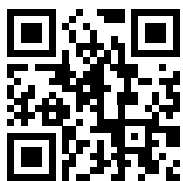
- Patrols
- Ideals
- Outdoors
- Advancement
- Association with adults
- Personal growth
- Leadership
- Uniform

The Den/Patrol Method

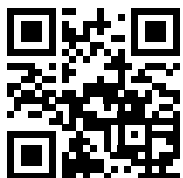
Dens and/or patrols are the building blocks of a Scout unit. A den/patrol is a small group of youth who are similar in age, development, and interests. Working together as a team, den/patrol members equally share the responsibility for the den/patrol's success. Youth gain confidence by serving in positions of den/patrol leadership. All den/patrol members enjoy the friendship, sense of belonging, and achievements of the den/patrol and of each of its members.

The Outdoors

Scouting provides many opportunities for youth to help plan and participate in rugged outdoor adventures. The unit plans activities that match the interests and abilities of the Scouts such as day hikes, aquatics activities, and weeklong summer camp. Older Scouts may participate in high-adventure programs such as rock climbing, rappelling, and whitewater rafting. Younger Scouts may attend summer camp and learn teamwork within their patrol and troop. Summer camp blends fun programs with advancement requirements to reinforce skills learned throughout the year. In Scouting, fitness is fun with a purpose.



To see Cub Scouts in action, go to www.scouting.org/video/new_unit_cub or scan this QR code with your smartphone.



To see Boy Scouts in action, go to www.scouting.org/video/new_unit_jambopromo.aspx or scan this QR code with your smartphone.

Advancement

The Boy Scouts of America provides recognition for Scout achievements. The advancement program allows Scouts and Venturers not only to progress from rank to rank but also to gain self-confidence from his or her participation in a unit. The youth acquire lifelong skills reflected in the Venturing crew's interests.

Requirements serve as the basis for a Scout's rank advancement. The four steps to advancement are learning, testing, reviewing, and recognition.

Many Scouts have been introduced to a lifelong hobby or rewarding career through the merit badge program. Merit badges help Scouts develop physical skills, social skills, and self-reliance. There are more than 100 different merit badges that teach important life skills to Scouts. The merit badge system is systematically reviewed and enhanced in order to reflect the changing interests and technology that youth encounter in today.

Program Benefits

FOR THE ORGANIZATION

- Scouting is a proven program with a reputable worldwide brand and has been in existence for more than 100 years.
- Wearing the uniform supports diversity and equality.
- You become a part of a large, friendly family.
- Scouting is an opportunity to prepare our next generation of leaders.
- Scouting promotes team-building within the organization.
- Scouting is an exciting opportunity to give back to the community and nation through service projects.
- Local, regional, and national events are options to supplement your program.
- Extensive literature, training materials, and other resources in various formats are available.
- The BSA offers outstanding adult and youth leader training courses, including leadership development.
- Youth Protection training materials and videos are available for both adults and youth.
- Professional and volunteer assistance is readily available in all Scouting programs.

FOR ADULT VOLUNTEERS

- It's fun!
- Complete program resources help adults work effectively with youth.
- Scouting is an opportunity to work safely with young people.
- Adults get to participate in a values-based program.
- It offers the satisfaction of seeing young people grow through mentoring and teaching others.
- Adults are recognized for their commitment and involvement in serving youth.
- Parents can serve as volunteer leaders and share common experiences alongside their sons in Scouting and alongside their sons and daughters in Venturing.

FOR YOUTH

- Scouting is an exciting, challenging program young people can enjoy with their friends.
- The setting lets youth participate in making choices.
- Boy Scouts and Venturers can experience the adventure of adult-like activities in a supervised environment.
- Scouting develops interpersonal skills that will equip its members for a lifetime.
- There are real opportunities to try leadership roles and develop leadership skills.
- It is a positive environment for the transition of youth from dependence to independence.

Chartered Organization Relationships

Begin with the end in mind, by getting to know the mission, goals, and vision of the chartered organizations, and the tools that are available to build successful relationships that serve BSA units. The www.scouting.org/membership web page has membership resources for chartered organization relationships, including:

- Memorandums of Understanding for community/civic, religious, and educational organizations
- Effective chartered organization relationships:
 - Training the chartered organization representative
 - Annual Charter Agreement
 - Chartered Organizations and the Boy Scouts of America (Fact Sheet)
- Religious:
 - Scout Sabbath Services
 - Scout Sunday Observances
 - Handbook for Chaplain and Chaplain Aides in Boy Scout Troops and Venturing Crews
 - Religious Emblems Coordinator

ORGANIZATION ADOPTS THE PROGRAM

After meeting with the head of the organization and reviewing the organization's goals and how Scouting can help meet those goals, secure a commitment from the organization to sponsor a whole Scouting family: pack, troop, and crew. This would be the best possible scenario.

Chartered Organization Representative

APPOINTING THE ORGANIZING TEAM

The organization head appoints a chartered organization representative. This person will serve as a member of the unit Key 3 and will serve as a member of the organization's Scouting program. In addition, the organization will appoint a committee of three to five people who will plan the next few steps. The committee should include some parents of potential Scouts. The new-unit organizer and unit commissioner should schedule a meeting with the organizing team as soon as possible. This organizing team will work out details and plan the recruitment of unit leadership.

It is important that the head of the organization appoint the members of the organizing team so committee members will know they have the chartered organization's support. Members of the organizing team may become unit committee members.

ORGANIZING TEAM MEETS

The new-unit organizer plays a key role in the success of the unit organization plan. The new-unit organizer helps guide the organizing team throughout the process. A unit commissioner should already have been assigned at the beginning of the organizational process, so asking the new-unit commissioner to assist the new-unit organizer is appropriate.

Explain what is expected of the chartered organization and what is expected of the local council.

The chartered organization agrees to:

- Conduct the Scouting program according to its own policies and guidelines, as well as those of the Boy Scouts of America.
- Include Scouting as part of its overall program for youth and families.
- Appoint a chartered organization representative. This person will serve as a member of the unit Key 3, will be a member of the organization, and will coordinate all Scout unit operations within it. He or she will serve as a representative on the district committee, and serve as a voting member of the local council.
- The chartered organization head or chartered organization representative must approve all leader applications to ensure the individuals meet the organization's standards as well as the standards of leadership of the Boy Scouts of America.
- Select an organizing team (minimum of three) of parents and members of the chartered organization who will assist in the selection of leaders.
- Provide adequate facilities for the unit(s) to meet on a regular schedule with time and place reserved.
- Encourage the unit(s) to participate in outdoor activities and all programs of the council.

The council agrees to:

- Respect the aims and objectives of the organization and offer the resources of Scouting to help meet those objectives.
- Provide year-round training, service, and program resources to the organization and its unit(s).
- Assist the unit in conducting an annual program planning conference. Provide program planning support materials and tools.
- Provide training and support for the chartered organization representative as the primary communication link between the organization and the BSA.
- Provide techniques and methods for selecting quality unit leaders and then share in the approval process of those leaders.
- Provide primary general liability insurance to cover the chartered organization, its board, officers, chartered organization representative, and employees against all personal liability judgments. This insurance includes attorneys' fees and court costs, as well as any judgment brought against the individual or organization. Unit leaders are covered in excess of any personal coverage they might have, or, if there is no personal coverage, the BSA insurance immediately picks them up on a primary basis. Vehicles owned by the chartered organization and loaned to the unit will be covered on an excess basis for the chartered organization's benefit.
- Provide camping facilities, a service center, and a full-time professional staff to assist the organization in every way possible.

Distribute copies of "Chartered Organization and Council Responsibilities." Walk everyone through this agreement.

Chartered Organization Checklist

INSTITUTIONAL HEAD CHECKLIST

- ☐ Meet with representatives of the Boy Scouts of America.
- ☐ Charter a new Scout program by signing a new-unit application.
- ☐ Identify a representative from the institution who will be the liaison with the Boy Scouts.
- ☐ The liaison will work with a Boy Scout representative to identify leaders.
- ☐ All leaders are approved by the head of the institution.
- ☐ Training on Scouting and Youth Protection is conducted with new leaders.
- ☐ A Boy Scout representative gives guidance and support to the new unit on planning at least three months of program.
- ☐ A Boy Scout representative will promote a Scouting program sign-up date to the community.
- ☐ The sign-up date arrives for parents who will be additional leaders and for new youth.
- ☐ Applications for youth are approved by the leader, and adult applications are approved by the chartered organization representative.
- ☐ First unit meeting: The new Scouting unit conducts the first program meeting of its members.
- ☐ A district representative will present the official charter to the chartered organization.

COST

The cost of starting up a Cub Scout pack, Boy Scout troop, or Venturing crew is minimal to the chartered organization. The fee is \$40, which covers liability insurance for the chartered organization.

How to Start a New Unit

NEW-UNIT APPLICATION



Cub Scouting

Purpose of the Boy Scouts of America
Its purpose is to promote, through cooperation with other agencies, the ability of youth to do things for themselves and others, and to teach them patriotism, courage, self-reliance, and kindred virtues, in achieving this purpose, emphasis is placed upon its educational program and the oaths, promises, and codes for character development, citizenship training, and mental and physical fitness.

Pack
Cub Scouting is for parents, leaders, and organizations to use with boys who are in the first through fifth grade or are 7 through 10 years old.

Troop
Boy Scouting is an educational program filled with fun and adventure that appeals to boys.



Varsity Scouting



Boy Scouting



BOY SCOUTS OF AMERICA®



VENTURING-BSA®
Venturer/Sea Scout

Boys must be under the age of 18 and at least 11, or have completed the fifth grade and be at least 10 years old, or have earned the Arrow of Light Award in Cub Scouting and be at least 10 years old.

Team
Varsity Scouting is a program designed to assist your organization in meeting the needs and interests of older boys. Boys must be at least age 14 and not yet age 18.

Venturing Crew/Ship
Venturing will help your organization meet the needs, desires, and concerns of young adults. Young men and women must be ages 14 through 20, or 13 with the completion of the eighth grade.

BOY SCOUTS OF AMERICA ADULT APPLICATION

This application is also available in Spanish. Esta solicitud también está disponible en español.

The mission of the Boy Scouts of America is to prepare young people to make ethical and moral choices over their lifetimes by instilling in them the values of the Scout Oath and Scout Law.

In a Cub Scout pack, Boy Scout troop, Varsity Scout team, Venturing crew, or Sea Scout ship—or in any position in a district or council—your participation is a service to your community and helps youth become better citizens.


As members of the Boy Scouts of America, high-quality adult leaders are important role models for youth. This application helps the chartered organization to select qualified leaders to serve as volunteers. Thank you for completing this application in full. See instructions on the inside cover.

BY SUBMITTING THIS APPLICATION YOU ARE AUTHORIZING A CRIMINAL BACKGROUND CHECK OF YOURSELF. THIS CHECK WILL BE MADE FROM PUBLIC RECORD SOURCES. YOU WILL HAVE AN OPPORTUNITY TO REVIEW AND CHALLENGE ANY ADVERSE INFORMATION DISCLOSED BY THE CHECK.

IF YOU WOULD LIKE A COPY OF YOUR CRIMINAL BACKGROUND REPORT, PLEASE CONTACT YOUR LOCAL COUNCIL OFFICE.

Youth Protection Training


All applicants for membership are required to take this training within 30 days of registering. To take it online, go to www.MyScouting.org and establish an account using the member number you receive when you register. If you take the training online before you obtain a member number, be sure to return to MyScouting and enter your number for training record credit. Your BSA local council also provides training on a regular basis if you cannot take it online. For more information, refer to the back of this application.



BOY SCOUTS OF AMERICA®

BOY SCOUTS OF AMERICA YOUTH APPLICATION

This application is also available in Spanish. Esta solicitud también está disponible en español.




Cub Scouting


Tiger Cub Cub Scout
Webelos Scout



Boy Scouting



Venturing/Sea Scouting



Varsity Scouting

Scout Oath or Promise

On my honor I will do my best to do my duty to God and my country and to obey the Scout Law; to help other people at all times; to keep myself physically strong, mentally awake, and morally straight.

Scout Law

A Scout is trustworthy, loyal, helpful, friendly, courteous, kind, obedient, cheerful, thrifty, brave, clean, and reverent.



BOY SCOUTS OF AMERICA®

Membership Resources



Build the Team

1

2

3

4



Build the Team

High-Performing Teams

Performance Process

Measures of Success

Membership Team

District Commissioner
District Membership Chair
District Executive

1. Know the Market

- ☐ Council Market Analysis Report
- ☐ Membership Reports
- ☐ Identify Chartered Organizations
- ☐ Scouting Family
- ☐ New-Unit Commissioners
- ☐ Know Our Chartered Organizations
- ☐ Vision Statements

Gold Standard

Market Share
14%

Relationships Team

Institution Head
Chartered Organization Representative
District Executive
Unit Commissioner
Influential Scouter

2. Make the Call

- ☐ Preparation
- ☐ Structured Sales Calls
- ☐ Building Blocks of Scouting
- ☐ Program Benefits
- ☐ Chartered Organization Relationships
- ☐ Chartered Organization Representatives
- ☐ Chartered Organization Checklist

Gold Standard

Commissioner Ratio
1:3

Organizing Team

New-Unit Commissioner
New-Unit Organizer
District Training Team
District Executive
JTE Committee Members

3. Build the Team

- ☐ Organizing Team
- ☐ Selecting Quality Leaders
- ☐ Training Unit Leadership
- ☐ Unit Program Planning
- ☐ Recognitions
- ☐ Tools of the Trade:
 - Online: Forms, Training, and Events
 - Unit Development and Youth Recruitment
 - Program: Ready to Use
 - Religious Emblems and Cultural Markets
 - Webelos to Scout

Gold Standard

Trained Leaders
54%

Unit Support Team

Unit Key 3:

- Unit Committee Chair
- Unit Leader
- Chartered Organization Representative

 New-Unit Commissioner
Unit Committee Members

- Journey to Excellence
- Voice of the Scout

4. Grow the Unit

- ☐ Unit Key 3
- ☐ Unit Reporting Tools
- ☐ Recruiting Youth Members
- ☐ Successful Unit Meetings
- ☐ Unit Performance
- ☐ Commissioner Service
 - Unit Self-Assessments
 - Annual Service Plan
 - Unit Visit Tracking System (UVTS)
 - Charter Presentations
 - First Charter Renewal
 - Second Charter Renewal

Gold Standard

Membership Growth
2%

Retention Rate
76%

Unit Visits Per Year
6

Chapter 3.

Build the Team

Measure of Success: 54% Trained Leaders

The Organizing Team

PREPARING FOR UNIT ORGANIZATION

The most important task of the organizing team is selecting unit leaders. Before the selection process begins, it is important that the team learn about the Scouting organization and how the program functions in a unit.

Team members should:

- Understand the aims and methods of Scouting.
- Know the steps to unit organization.
- Be familiar with program planning and program planning tools and resources.
- Understand the process for selecting unit leaders.
- Develop a short- and long-term leader succession plan.
- Be aware of training opportunities.
- Be familiar with literature and support materials available for leaders.
- Be familiar with the Journey to Excellence and Voice of the Scout programs.

New-Unit Organizer and New-Unit Commissioner

The new-unit organizer works closely with the institutional head or executive officer of the chartered organization to put together an organizing team.

The new-unit commissioner supports that effort and strives to become a familiar face to that group, taking the lead in helping the team complete some aspects of its responsibilities.

The responsibilities of the new-unit organizer and the new-unit commissioner are as follows:

- While organizing and running the recruitment effort is the membership team's responsibility, the new-unit commissioner will support the idea that at least 10 youth and five adults are recruited for membership in the unit.
- The new-unit commissioner encourages the unit to participate in training both during this organization phase and into the future. The new-unit organizer will coordinate with the district training chair to provide initial training and Youth Protection training on an agreed-upon date. The new-unit leadership takes Youth Protection training, This Is Scouting, and position-specific training.
- The new-unit commissioner supports a leadership succession plan to be in place prior to the first charter.
- The new-unit commissioner introduces the organizing team to the Journey to Excellence and helps them write a vision statement and set goals for the unit. The new-unit commissioner will also introduce the organizing team to Voice of the Scout.

- The new-unit organizer helps them plan the details for their first meeting and introduces the team to the national first month meeting plan.
- The new-unit commissioner familiarizes the unit with the district/council calendar and encourages roundtable attendance.
- The new-unit commissioner schedules an annual program planning meeting led by an experienced district representative.
- Together, the new-unit organizer and new-unit commissioner will present the charter at a full meeting of the chartered organization.
- The new-unit organizer and the new-unit commissioner attend the first meeting. From this point on, the new-unit commissioner takes the leading role in mentoring the unit for the next 36 months.
- The new-unit organizer and the new-unit commissioner ensure that unit leaders and parents are added to council and district email lists so that they receive current event and training information.

Selecting Quality Leaders

MESSAGE TO CHARTERED ORGANIZATIONS

Your organization has joined with the Boy Scouts of America to deliver a program of citizenship training, character development, and personal fitness to the young men and women of your community. Critical to the success of your Scouting program is the selection of quality leaders who represent the values of the Boy Scouts of America and your organization. The chartered organization has the responsibility for the selection of these individuals.

THE PROCESS

Cubmasters, den leaders, Scoutmasters, Varsity Scout coaches, crew Advisors, ship Skippers, and their assistants must be identified and recruited by the chartered organization when a new unit is organized or when there is a leadership change in an existing unit. The chartered organization will need to have a succession plan in place to maintain proper key leadership. The organization may wish to seek advice from the BSA local council about the process.

SELECT AND RECRUIT KEY LEADERS

The first priority of the organizing team is selecting quality unit leaders. Give everyone a copy of *Selecting Quality Leaders for Cub Scouts*, No. 523-500, available online at www.scouting.org/filestore/membership/pdf/522-500_web.pdf; *Selecting Quality Leaders for Boy Scouts*, No. 523-981, available online at www.scouting.org/filestore/membership/pdf/522-981.pdf; or *Venturing Fast Start*, No. 25-878, available online at www.scouting.org/filestore/pdf/25-878.pdf.

CHOOSING PROSPECTIVE UNIT LEADERS

Make a prospect list of qualified people who would make good leaders and match the profile of the position to be filled. Don't choose just anyone to fill a slot; be selective. Choose prospects who exemplify the values of the Boy Scouts of America. Don't make assumptions about whether a prospect will accept the position; it is important to give prospects a chance to make their own decision. You may be surprised how many times busy people will commit to volunteering for organizations that serve youth.

Present the list of candidates to the head of the organization for approval and ask for additional suggestions. Also, have the organization appoint someone—perhaps a member of the organizing team—to be the chartered organization representative. Explain the basic responsibilities of this position. (See an explanation of the tasks on pages 4 through 9 of *The Chartered Organization Representative*, No. 33118, available online at www.scouting.org/filestore/commissioner/pdf/33118_WB.pdf.) The chartered organization representative represents the organization at the district and council levels as a voting member.

APPOINTING OTHER VOLUNTEERS

The organizing team must also recruit and appoint people to serve as the committee chair and committee members. These people may be members of the organizing team.

With these people in place, and with members of the organizing team also acting as members of the unit committee, you are ready to complete the process of selecting and recruiting leaders and youth.

The newest volunteer unit position approved by the BSA is the unit membership chair. This important position reports to the unit committee chair and serves as a member of the unit committee. This role consists of the following responsibilities:

- Meet with the unit leaders and committee monthly to discuss membership goals and retention.
- Conduct at least two recruitment/Scouting promotion events per year to ensure unit growth using the peer-to-peer recruitment method.
- Distribute membership fliers to schools and churches in the unit's area.
- Conduct Scouting rallies and boy talks in schools, leveraging council support when needed.
- Attend the district's membership chair training sessions, which will focus on best practices.
- Have your unit be involved in the required number of Adopt-a-School service and community service projects needed for Scouting's Journey to Excellence score.
- Ensure that new youth and adult applications along with funds are completed and turned in to the council service center within a week after receipt of the applications.
- Work with the unit committee to ensure the unit reaches Scouting's Journey to Excellence gold status in membership.
- Update the unit's BeAScout pin and follow up with leads.
- Have your unit participate in a fall and spring recruitment plan.
- Work with the district transition chair to encourage youth to transition to the age-appropriate program as they grow older.
- Have an annual customer satisfaction survey done with current Scout families.

POSITION DESCRIPTION

The Scoutmaster is responsible for training and guiding youth leaders in the operation of the troop, and for managing, training, and supporting his or her assistant Scoutmasters in their role.

The Cubmaster is responsible for coordinating the efforts of the den leaders to make sure the pack has a cohesive program, and for managing, training, and supporting them in their role.

The crew Advisor is responsible for training and guiding youth leaders in the operation of the crew, and for managing, training, and supporting his or her associate Advisors in their role.

CHARACTERISTICS OF SUCCESSFUL UNIT LEADERS

- Commitment to the ideals of Scouting
- High moral standards
- Ability to relate to youth
- Ability to remain calm under pressure
- Good organizational skills
- Ability to relate to and interact with adults
- Flexibility and the ability to compromise
- Good planning ability
- High energy level
- Good attention to detail

Training Unit Leadership

YOUTH PROTECTION TRAINING

Child abuse is a serious problem in our society, and unfortunately, it can occur anywhere, even in Scouting. Youth safety is of paramount importance to Scouting. For that reason, the BSA continues to create barriers to abuse through training and leadership protocols.

The Boy Scouts of America places the greatest importance on providing the most secure environment possible for our youth members. To maintain such an environment, the BSA has developed numerous procedural and leadership selection policies, and provides parents and leaders with numerous online and print resources for the Cub Scout, Boy Scout, and Venturing programs.

The BSA requires Youth Protection training for all registered leaders.

New leaders are required to complete Youth Protection training prior to registration or reregistration following a membership lapse. To take the training online, go to www.MyScouting.org and establish an account using the member number you received when you registered for BSA membership. If you take the training online before you obtain a member number, be sure to return to MyScouting and enter your number for training record credit. Your BSA local council also provides training on a regular basis if you cannot take it online. For more information, refer to the back of the BSA adult membership application, No. 524-501.

Youth Protection training must be retaken every two years—regardless of position. If a volunteer does not meet the BSA's Youth Protection training requirement at the time of charter renewal, the volunteer will not be reregistered.

All nonregistered adults, including all parents, are encouraged to take the BSA's Youth Protection training.

To find out more about the Youth Protection policies of the Boy Scouts of America and how to help Scouting keep your family safe, see the *Parent's Guide* in any of the Cub Scouting or Boy Scouting handbooks, or go to <http://www.scouting.org/Training/YouthProtection.aspx>.

You may also go to the Youth Protection web page by scanning this code into your smartphone.

ORIENTATION TRAINING

As soon as possible after a person has agreed to be a leader, he or she should view the appropriate Fast Start Orientation Training either on DVD or by logging on to MyScouting.org. After viewing this material, the new leader will have a better perspective of his or her role and responsibilities.

THIS IS SCOUTING AND POSITION-SPECIFIC TRAINING

This Is Scouting is the initial online interactive learning experience for new adult leaders. This Is Scouting picks up where Orientation Training left off. The course can be taken by logging on to MyScouting.org. It takes approximately one hour to complete.

Leaders should be encouraged to attend basic leader training as soon as possible. The new-unit organizer may be able to get district trainers to conduct training especially for the new unit. If a special training session is not possible, be sure to inform the new volunteers when and where the next district or council basic leader training session will be held. Encourage unit support arrangements for carpools and child care so every leader who needs to can attend. By going together, they will have an opportunity to provide support for each other in this new situation.

ROUNDTABLE

A roundtable is a monthly presentation of unit program ideas, inspiration, networking, and additional training for leaders in all Scouting units. The new-unit organizer or the unit commissioner should provide a district calendar of events to leaders so they know when and where the roundtable is held. They should also give them an idea of what happens at a roundtable and the resources available. They should convey the many practical ideas for leaders to use.

SUPPLEMENTAL TRAINING

The Boy Scouts of America offers many supplemental training opportunities on a district, council, and national basis. (See Appendix 17.)

Unit Program Planning

FUNDING THE UNIT PROGRAM

No organization can exist without funds, and a new pack, troop, or crew is no different. The practices established early on in the organization process will serve the Scouting program for years to come and provide participants, families, and the chartered organization with the knowledge that the program is secure.

Just like in families, even the best relationships can be soured by money. With that in mind, the unit committee needs to have an understanding of some basic principles and procedures to avoid potentially problematic situations.

UNIT BUDGET

The unit budget should anticipate the needs of the unit for the coming year. The Unit Budget Plan, No. 524-426, is available at www.scouting.org in downloadable form and in an online worksheet and in Appendix 23 of this book.

Build the budget from the expense side first. Typical expenses include:

- Registration fees. The annual membership fee to be a member of the Boy Scouts of America
- *Boys' Life*. An annual subscription to *Boys' Life* magazine for every household
- Unit accident insurance provides medical care coverage to members and guests injured as a result of participation in a Scouting activity (may be provided at the council level)
- Program materials. Flags, camping equipment, program supplies, and other material necessary to conduct regular program
- Activities. Those program activities that will be paid for by the unit budget as determined by the unit committee. Some activities will be financed by the Scout and his family over and above the budget.
- Basic expenses. Advancement recognition, books and literature, leader training, community goodwill projects, etc.
- Reserve fund. A fund established to meet unexpected expenses that may occur

Sources of funding for units include:

- Membership dues. Collecting and paying dues from individual members establishes a level of responsibility and character development. Dues assessed annually are too often contributed by parents and are sometimes an impediment to joining. Dues are not meant to completely pay for a member's Scouting experience or support the entire unit budget, but might cover registration, *Boys' Life*, insurance, and basic expenses.
- Money-earning projects. Individual units can conduct money-earning activities such as sales and community projects. Since individual units are not charitable organizations in and of themselves, they cannot solicit contributions from the community or provide the promise of tax deductibility to anyone who makes a contribution. Most councils provide opportunities for units to participate in council fundraising activities that provide funding back to the unit. Advantages to the unit in participating in these activities include:
 - Established sale with public promotion and marketing
 - Authorized to wear the uniform when conducting the sale
 - The council deals with the vendor and is financially responsible for payment.
 - The council deals with delivery and warehousing of the product.

Units may conduct their own money-earning activities that are subject to the BSA's money-earning guidelines. The guidelines are included on the Unit Money-Earning Application, No. 34427, which can be found at www.scouting.org or in Appendix 25 of this book. This application should be completed by the unit whenever a non-council-sponsored money-earning activity is conducted.

FISCAL PROCEDURES FOR UNITS

The *Committee Record Book* is available at your Scout shop and comes in specific editions for packs, troops/teams, and crews. It contains useful formats for keeping financial records for units as well as helpful information for unit committees, particularly treasurers.

UNIT FISCAL POLICY FAQs

Should our unit have a checking or savings account?

Yes. Unit funds should be deposited in a checking or savings account that requires two signatures on every check or withdrawal. The unit leader could be one of the signees, but a committee member is recommended. It could be that the unit leaders have a petty cash fund (the limit set by the committee), which is accounted for with receipts each month.

Who is responsible for the finances of the unit?

The unit committee is responsible for the unit's finances. A treasurer is assigned and the committee chair should receive the bank statement to reconcile monthly. All unit funds should pass through the bank account; this includes but is not limited to dues, money from unit fundraisers, product sales, and gifts. An exception might be registration fees, which are collected as part of an organized School Night program. In this case, fees are collected by district and council representatives and are transmitted to the Scout service center.

Should our unit consider insuring our unit equipment?

Yes, it is suggested that your unit insure its equipment. Remember, the chartered organization owns the unit including the number associated with the unit, and all funds used by the unit remain the responsibility of the chartered organization as long as the charter issued by the BSA remains in place. It is recommended that an equipment inventory be provided annually to the chartered organization.

Can our unit deposit funds with the local council?

Yes, most councils allow units to deposit funds to their credit in the council service center, thus making it convenient for units to make purchases without sending cash. A "unit account" is established for each unit that deposits funds with the council. At a minimum, the council should provide a detailed—at least annual—statement of activities of your unit account for your committee to review.

What happens to the unit funds and equipment should the unit dissolve?

In the event of the dissolution of a unit, or the revocation or lapse of its charter, the unit committee shall apply unit funds and property to the payment of unit obligations and shall turn over the surplus, if any, to the local council. In the case of a chartered organization, any funds or equipment that may have been secured as property of the unit shall be held in trust by the chartered organization or the council, as may be agreed upon, pending reorganization of the unit or for the promotion of the program of the Boy Scouts of America.

When should our unit submit a BSA Unit Money-Earning Application?

For all unit fundraising, all unit money-earning projects must be approved in advance by using the BSA's Unit Money-Earning Application. Approval must be made by the chartered organization and the local council.

Does a pack or troop need its own tax identification number? If so, where do we get it?

All units need a tax ID number (also referred to as an "EIN," employer identification number). Units should NOT use the Social Security number of an adult leader. If they do, the IRS will attribute all banking transactions, unit purchases, etc., to that leader as an individual. Units may use the tax ID number of their chartered organization, if given permission. This may be especially useful for the unit if that organization is tax-exempt. Most units obtain their own tax ID number by completing IRS Form SS-4. There is no cost involved. The current form and instructions are available on the IRS website at www.irs.gov. Also, the IRS now allows you to provide the information over the phone and immediately receive a unit EIN. The IRS phone number is 800-829-4933.

Is our pack or troop considered tax-exempt by the IRS?

That depends on who sponsors your pack, troop, or unit. The only time a unit can be considered tax-exempt is if its chartered organization is also tax-exempt. The BSA National Council grants a *charter* to religious organizations, service clubs, businesses, and others who want to operate a Scout unit. A unit is actually "owned" by its chartered organization. Chartered organizations vary widely in tax status, but the tax status of your unit is the same as that of your chartered organization.

What is IRS Form 990-N, and does our unit need to file annually with the IRS the electronic postcard 990-N?

The IRS requires small tax-exempt organizations with annual gross receipts of \$50,000 or less to file Form 990-N. The BSA national office consulted with the IRS and outside counsel on whether this filing requirement applies to Cub Scout packs, Boy Scout troops, Venturing crews, and other units. In their opinion, most Scout units do not have to file Form 990-N. For most units, no filing is required. The only exception is for the very small number of units that have filed for separate, federal tax-exempt status under Section 501(c)(3) of the Internal Revenue Code. Those units must file either Form 990-N (if their annual gross receipts were \$50,000 or less) or the more detailed Form 990 or 990EZ (if annual gross receipts were more than \$50,000).

Can our pack or troop be covered under the BSA's group exemption?

No. The IRS only allows local councils (and council trust funds) to be included under the BSA group exemption. Packs, troops, and other Scout units cannot be included under the BSA group exemption because they “belong” to their chartered organization. (**Note:** Tax issues for Girl Scout troops are handled differently by the IRS because of how their cookie sales are structured.)

Form SS-4 asks us for a “GEN.” What is that, and do we have one?

The “GEN” is the group exemption number for the BSA. As discussed, only councils are covered under the BSA group exemption. Units cannot use this number. However, once your unit receives an EIN, the unit may still qualify for a number of state and sales tax exemptions as a nonprofit organization under your state laws. Check with your own state, as this varies widely across the country.

A volunteer suggested that our unit apply for its own tax-exempt status. Can we?

Units should not incorporate or apply for their own tax-exempt status. Units are not legal entities. Even if they were, this is an expensive and time-consuming process. Units are only permitted to raise funds through approved unit money-earning projects. Units could lose their charter if they tried to get their own tax-exempt status and solicit tax-deductible gifts.

Can we solicit gifts for our unit?

No. Simply put, units are not permitted to solicit any gifts. Both the Charter and Bylaws and the Rules and Regulations of the BSA make this very clear; only local councils may solicit individuals, corporations, United Ways, or foundations for gifts in support of Scouting. Units, unit leaders, and youth members may not solicit gifts in the name of Scouting or in support of unit needs and activities (except in unusual circumstances where the unit has received permission to do so from the local council). Units are also prohibited from soliciting gifts on their websites.

Does that mean people can't make gifts to our troop?

Units are not supposed to solicit gifts, but they can receive gifts. Anyone can contribute to a Scout pack, troop, or unit—and many donors don't need or care about charitable deductions. Obviously, defining a “solicited gift” is not always easy. Unit leaders are relied upon to set good examples and honor the intent and spirit of these important guidelines, even though it is hard to stop people from being generous, especially toward Scouting.

Can gifts go to the local council to benefit our unit, then “pass through” the council to us?

No, your unit “belongs” to your chartered organization, not to your local council. IRS guidelines prohibit any charity from accepting gifts that are “passed through” to a person or unrelated entity. A council could accept a gift in the name of your unit and hold it in a unit account. The unit could then “draw down” on the account for camp fees, uniform and supply needs, etc. (this is how colleges handle student scholarships). But be sure to first ask your local council if they have the staff and time to do this. This is entirely their decision.

My local company has employee volunteerism grants and they will contribute to charities where I volunteer my time. Can these gifts go to our unit?

Employee incentive awards and volunteerism grants usually *cannot* go to a pack, troop, or unit, due to the company's giving restrictions. Corporate donations often can go only to charities that are 501(c)(3) charities, and many units are not chartered by tax-exempt charities. Also, many companies won't make gifts to religious organizations. If a unit is tax-exempt, it's often because it's chartered to a place of worship, so they can't receive corporate funds either. Of course, corporate awards and grants may go to any local council.

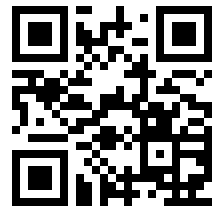
RESOURCES

These resources will assist you in planning and organizing your unit program. See also Appendixes 23, 24, and 25.

- *Troop Committee Guidebook*, No. 34505
- Unit Money-Earning Application, No. 34427
- Unit Budget Plan, No. 524-426
- Who Pays for Scouting? (Appendix 24)

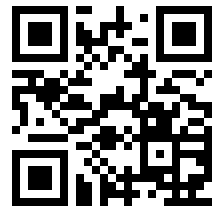
CUB SCOUTING

- *Cub Scout Leader Book*, No. 33221, pages 85–93 “Program Planning”
- Pack Annual Program Planning Conference Guide, online at <http://www.scouting.org/licensing/sitecore/content/Home/CubScouts/Leaders/ProgramPlanning.aspx>, or scan this QR code into your smartphone:
- *Webelos Leader Guide*, No. 33853



BOY SCOUTING

- *Scoutmaster Handbook*, No. 33009, pages 80–84, “Troop Program Planning”
- *Troop Committee Guidebook*, No. 34505, page 12, “Annual Program Planning Conference”
- *Troop Program Features*, Volume I, No. 33110; II, No. 33111; and III, No. 33112
- *Troop Program Features*, Spanish, Volume I, No. 30132; II, No. 30133; and III, No. 30134
- Troop Annual Program Planning Conference Guide, online at <http://www.scouting.org/licensing/sitecore/content/Home/BoyScouts/ProgramPlanning.aspx>, or scan this QR code into your smartphone:



VENTURING

- *Venturing Fast Start*, No. 25-878
- Venturing Crew Officers Orientation, www.scouting.org/training/youth/venturingorientation.aspx
- *Venturing Leader Manual*, No. 34655

PROGRAM PLANS



Recognitions

FOUNDER'S BAR



The Founder's Bar (see Appendix 9) may be worn below the unit numerals as soon as the completed charter and funds are officially received by the Scout office. The bar may be worn for as long as the unit numbers are worn. It may not be worn with any other unit numerals or by anyone whose name was not affiliated with the first unit charter.

This recognition emphasizes both the importance and the pride of forming and nurturing a new Scout unit. While it does not guarantee the unit will become a bronze, silver, or gold Journey to Excellence unit, it does encourage multiple-year charter renewal so one may continue wearing the bar. The bar will stimulate conversation and emulation by others. For more information, visit www.scouting.org/filestore/pdf/522-011.pdf.

WILLIAM D. BOYCE NEW-UNIT ORGANIZER AWARD



The William D. Boyce New-Unit Organizer Award (see Appendix 10) is presented to recognize volunteers who organize one or more traditional Scouting units. The award may be worn on the adult uniform. The award is a square knot placed over the three colors representing the three phases of our program—Cub Scouting, Boy Scouting, and Venturing.

The William D. Boyce pamphlet, No. 04-515, is one of the most complete references available to membership teams. The pamphlet is available at www.scouting.org/filestore/pdf/04-515.pdf.

COMMISSIONER AWARD OF EXCELLENCE IN UNIT SERVICE



In addition to the William D. Boyce New-Unit Organizer Award for volunteers organizing new units, there is an award for volunteer unit commissioners focuses on both unit and youth retention. Any registered commissioner who is providing direct unit service is eligible to earn the Commissioner Award of Excellence in Unit Service through unit service and a project that together result in improved retention of members and on-time unit charter renewal over the course of two consecutive years. Criteria for earning the knot are on the progress record in Appendix 12.

The award is based upon the requirements for commissioners listed in the Journey to Excellence performance program, which includes Adding Unit Visits in the online Unit Visit Tracking System. More information is available at www.scouting.org/membership.

Tools of the Trade

ONLINE—FORMS, TRAINING, AND EVENTS

- Starting a new unit? Fill out three forms:
 - New-Unit Application
 - Adult Application
 - Youth Application
- Online Training
- Online Tour and Activity Plan
- Online Annual Charter
- Online Advancements
- Journey to Excellence
- Voice of the Scout
- Event Registration

UNIT DEVELOPMENT AND YOUTH RECRUITMENT

Visit our website at www.scouting.org/membership.

PROGRAM—READY TO USE

- One-year programs
- Meeting one programs
- Program concepts:
 - Cub Scout Delivery System
- Webelos-to-Scout Transition

RELIGIOUS EMBLEMS AND CULTURAL MARKETS

Visit our website at www.scouting.org/membership and click on the Recognitions link.

- Duty to God pamphlet, No. 512-879



How to Start a New Unit

NEW-UNIT APPLICATION



Cub Scouting

Purpose of the Boy Scouts of America
 Its purpose is to promote, through cooperation with other agencies, the ability of youth to do things for themselves and others, and to teach them patriotism, courage, self-reliance, and kindred virtues. In achieving this purpose, emphasis is placed upon its educational program and the oaths, promises, and codes for character development, citizenship training, and mental and physical fitness.

Pack
 Cub Scouting is for parents, leaders, and organizations to use with boys who are in the first through fifth grade or are 7 through 10 years old.

Troop
 Boy Scouting is an educational program filled with fun and adventure that appeals to boys.



Varsity Scouting



Boy Scouting



BOY SCOUTS OF AMERICA®



VENTURING · BSA®
Venturer/Sea Scout

Boys must be under the age of 18 and at least 11, or have completed the fifth grade and be at least 10 years old, or have earned the Arrow of Light Award in Cub Scouting and be at least 10 years old.

Team
 Varsity Scouting is a program designed to assist your organization in meeting the needs and interests of older boys. Boys must be at least age 14 and not yet age 18.

Venturing Crew/Ship
 Venturing will help your organization meet the needs, desires, and concerns of young adults. Young men and women must be ages 14 through 20, or 13 with the completion of the eighth grade.

BOY SCOUTS OF AMERICA ADULT APPLICATION

This application is also available in Spanish. Esta solicitud también está disponible en español.

The mission of the Boy Scouts of America is to prepare young people to make ethical and moral choices over their lifetimes by instilling in them the values of the Scout Oath and Scout Law.

In a Cub Scout pack, Boy Scout troop, Varsity Scout team, Venturing crew, or Sea Scout ship—or in any position in a district or council—your participation is a service to your community and helps youth become better citizens.

As members of the Boy Scouts of America, high-quality adult leaders are important role models for youth. This application helps the chartered organization to select qualified leaders to serve as volunteers. Thank you for completing this application in full. See instructions on the inside cover.


BY SUBMITTING THIS APPLICATION YOU ARE AUTHORIZING A CRIMINAL BACKGROUND CHECK OF YOURSELF. THIS CHECK WILL BE MADE FROM PUBLIC RECORD SOURCES. YOU WILL HAVE AN OPPORTUNITY TO REVIEW AND CHALLENGE ANY ADVERSE INFORMATION DISCLOSED BY THE CHECK.

IF YOU WOULD LIKE A COPY OF YOUR CRIMINAL BACKGROUND REPORT, PLEASE CONTACT YOUR LOCAL COUNCIL OFFICE.

Youth Protection Training

All applicants for membership are required to take this training within 30 days of registering. To take it online, go to www.MyScouting.org and establish an account using the member number you receive when you register. If you take the training online before you obtain a member number, be sure to return to MyScouting and enter your number for training record credit. Your BSA local council also provides training on a regular basis if you cannot take it online.

For more information, refer to the back of this application.



BOY SCOUTS OF AMERICA®


BOY SCOUTS OF AMERICA YOUTH APPLICATION

This application is also available in Spanish. Esta solicitud también está disponible en español.



Cub Scouting

Tiger Cub Cub Scout
Webelos Scout



Boy Scouting



Venturing/Sea Scouting



Varsity Scouting

Scout Oath or Promise

On my honor I will do my best to do my duty to God and my country and to obey the Scout Law; to help other people at all times; to keep myself physically strong, mentally awake, and morally straight.

Scout Law

A Scout is trustworthy, loyal, helpful, friendly, courteous, kind, obedient, cheerful, thrifty, brave, clean, and reverent.



BOY SCOUTS OF AMERICA®

Grow the Unit

1

2

3

4



High-Performing Units

High-Performing Teams

Performance Process

Measures of Success

Membership Team

District Commissioner
District Membership Chair
District Executive

1. Know the Market

- ☐ Council Market Analysis Report
- ☐ Membership Reports
- ☐ Identify Chartered Organizations
- ☐ Scouting Family
- ☐ New-Unit Commissioners
- ☐ Know Our Chartered Organizations
- ☐ Vision Statements

Gold Standard

Market Share
14%

Relationships Team

Institution Head
Chartered Organization
Representative
District Executive
Unit Commissioner
Influential Scouter

2. Make the Call

- ☐ Preparation
- ☐ Structured Sales Calls
- ☐ Building Blocks of Scouting
- ☐ Program Benefits
- ☐ Chartered Organization Relationships
- ☐ Chartered Organization Representatives
- ☐ Chartered Organization Checklist

Gold Standard

Commissioner Ratio
1:3

Organizing Team

New-Unit Commissioner
New-Unit Organizer
District Training Team
District Executive
JTE Committee Members

3. Build the Team

- ☐ Organizing Team
- ☐ Selecting Quality Leaders
- ☐ Training Unit Leadership
- ☐ Unit Program Planning
- ☐ Recognitions
- ☐ Tools of the Trade:
 - Online: Forms, Training, and Events
 - Unit Development and Youth Recruitment
 - Program: Ready to Use
 - Religious Emblems and Cultural Markets
 - Webelos to Scout

Gold Standard

Trained Leaders
54%

Unit Support Team

Unit Key 3:
— Unit Committee Chair
— Unit Leader
— Chartered Organization
Representative
New-Unit Commissioner
Unit Committee Members
— Journey to Excellence
— Voice of the Scout

4. Grow the Unit

- ☐ Unit Key 3
- ☐ Unit Reporting Tools
- ☐ Recruiting Youth Members
- ☐ Successful Unit Meetings
- ☐ Unit Performance
- ☐ Commissioner Service
 - Unit Self-Assessments
 - Annual Service Plan
 - Unit Visit Tracking System (UVTS)
 - Charter Presentations
 - First Charter Renewal
 - Second Charter Renewal

Gold Standard

Membership Growth
2%

Retention Rate
76%

Unit Visits Per Year
6

Chapter 4.

Grow the Unit

Measures of Success: 2% Growth, 76% Retention, 6 Unit Visits

When a new unit is started, a commitment is made to family members, parents, and their sons (and daughters in Venturing) that they will receive a yearlong Scouting program. To fulfill that commitment, it becomes equally important for the new unit to be sustained for a long time. This involves focusing on important elements the unit must possess in order to stay in operation. Elements like a unit leader succession plan with capable adult volunteers and an Orientation Training for new leaders are important for a great start. Other elements like monthly advancement and outdoor programs like day camp and summer camp will add to the sustainability of the new unit.

The previous chapters focused on the processes of new-unit development. When new units follow the elements mentioned above with proper unit programming, youth tend to stay in the program longer, which ultimately results in stronger units. How do new units become high-performing units?

This chapter explains how to recruit youth members, procedures for completing paperwork, conducting the first unit meeting, and the charter presentation process. It also focuses on the commissioner's annual service plan, unit assessments, Voice of the Scout, and Journey to Excellence.

Assign a new-unit commissioner to the potential new unit. The concept of a new-unit commissioner is introduced in the very first steps of organizing a new unit. A new-unit commissioner can be an experienced commissioner who specializes in new-unit service and has had some specialized training. The new-unit commissioner can also be a volunteer who is at least 21 years old, such as an Arrowman, former camp staff member, or Eagle Scout who serves under the mentorship and guidance of an experienced commissioner such as an assistant district commissioner or district commissioner. This could be an excellent candidate to start with one new unit. Any Scouter who fits this description and is willing to make the commitment will make a good new-unit commissioner.

Ideally, this commissioner will have a reduced unit workload and will be committed to serving this one unit for the full three years the unit will be considered “new.” The role the new-unit commissioner plays is much like that of troop guide—not a member of the unit but a mentor who helps the unit leadership become a high-performing team. Once the unit becomes independent, the new-unit commissioner should be replaced with a traditional unit commissioner, freeing the new-unit commissioner to begin again with another unit. The new-unit commissioner will need to give this unit extra service in addition to the annual service plan. That service is described in the section “Commissioner Service Plan.”

The key volunteers guiding the unit are the unit Key 3—the unit chair, unit leader, and chartered organization representative—with assistance from the unit committee and the new-unit commissioner.

To ensure the success of a newly organized unit, many capable volunteers need to be selected and recruited who will work closely with their professional Scouter. The district executive cannot do it alone.

Unit Key 3

The unit Key 3 is a new concept to the BSA and is a critical component to the success of the unit. The unit Key 3 consists of the unit committee chair, the unit leader, and the chartered organization representative. The new-unit commissioner serves as an advisor to the unit Key 3. This group meets once a month to discuss the unit, its challenges, coming events, and progress toward completing their action plan and Journey to Excellence goals, just like any other Scouting Key 3. It is a time for the unit Key 3 to learn how to spot early warning signs and work together toward continued unit success. The new-unit commissioner meets with them to support their efforts, to help with problem solving, and to keep the unit moving in sync with the district and council calendars.

The following are some items the new-unit commissioner should urge the unit Key 3 to review on a regular basis:

Ensure that a monthly program and unit budget plan are in place and on track. These items are critical for unit success. Encourage long-range planning for a positive experience for all. This may need to involve the district finance committee.

Support systems that will ensure a well-organized unit. These include monthly unit Key 3 meetings, monthly committee and leader's meetings, regular parent meetings, and a communication plan.

Encourage a unitwide communication system. Communication takes many forms: newsletter, phone tree, email blast, website, Facebook group. Whatever fits the unit.

Encourage unit Key 3 training. Encourage them to take This Is Scouting and Leader Specific Training for their position prior to their first meeting. Be sure the unit Key 3 is aware of training opportunities. Through the district commissioner, enlist the help of the training team to bring training to the unit as necessary.

Unit Reporting Tools

COMPLETE THE PAPERWORK

NEW-UNIT CHARTER SEQUENCE

1. New-Unit Application (see Appendix 8) signed by the executive officer and district commissioner
2. Adult applications and Youth Protection training signed by the chartered organization representative
3. Youth applications
4. Registration fees

Although by this point much of the paperwork may already be done, the organizer or commissioner for the new unit may be involved now to ensure that all the paperwork has been correctly completed. The unit commissioner may also take the paperwork to the local council service center for processing.

NEW-UNIT APPLICATION

Purpose of the Boy Scouts of America
Its purpose is to promote, through cooperation with other agencies, the ability of youth to do things for themselves and others, and to teach them patriotism, courage, self-reliance, and kindred virtues. In achieving this purpose, emphasis is placed upon its educational program and the oaths, promises, and codes for character development, citizenship training, and mental and physical fitness.

Cub Scouting
Cub Scouting is for parents, leaders, and organizations to use with boys who are in the first through fifth grade or are 7 through 10 years old.

Boy Scouting
Boy Scouting is an educational program filled with fun and adventure that appeals to boys.

Boys must be under the age of 18 and at least 11, or have completed the fifth grade and be at least 10 years old, or have earned the Arrow of Light Award in Cub Scouting and be at least 10 years old.

Varsity Scouting
Varsity Scouting is a program designed to assist your organization in meeting the needs and interests of older boys. Boys must be at least age 14 and not yet age 18.

Venturing Crew/Ship
Venturing will help your organization meet the needs, desires, and concerns of young adults. Young men and women must be ages 14 through 20, or 13 with the completion of the eighth grade.

BOY SCOUTS OF AMERICA

Venturer/Sea Scout

Remember that:

- The New-Unit Application requires the signature of the executive officer who is the head of the chartered organization. **We are also encouraging a district commissioner to sign their name on the new-unit application so they can ensure a new-unit commissioner is assigned to the unit. (See Appendix 8.)**
- Every youth and adult leader must complete an application, and all adult leaders must have completed Youth Protection training.
- The registration fees must be collected and kept with the applications and then submitted to the local council service center in a timely manner.
- BSA health forms should be collected from all youth and adult leaders.

Youth Applications

When accepting youth applications, it is important to:

- Verify that all applications are completed in full, including the health history information on the reverse.
- Collect the appropriate fees, including registration fees, charter fee, and *Boys' Life* subscription fees.
- Check applications for signatures of a parent and youth for Venturing and of the unit leader.

Adult Leader Applications

When accepting adult leader applications, it is important to:

- Verify that all applications are completed in full, including the names of references.
- Collect the appropriate fees.
- Verify that all adult applications are approved and signed by the committee chair and the chartered organization representative. The unit committee chair approves all applications except that of the chartered organization representative, which is approved by the head of the chartered organization.
- Include a copy of the Youth Protection Training Certificate.

Recruiting Youth Members

RECRUIT YOUTH MEMBERS AND ORIENT PARENTS

It is finally time to invite prospective youth members and their parents to join Scouting. The first group of youth to be invited should include those who are members of the chartered organization. Youth from the community can sometimes be reached by announcements through area schools. Your local council and district executive can provide recruitment fliers and posters, and usually have contacts with school administrators. Be sure that you have put information about the unit into the national “Be A Scout” website to enable families to identify Scout units online: <https://beascout.scouting.org>. (See Appendix 13.)

Number of New Youth to Organize a New Unit: At Least 10

At least two dens or two patrols of five youth each or a Venturing crew of 10 youth should be recruited to encourage unit sustainability. Recruit qualified parents who will become additional leaders. A good ratio is one parent for every two boys. Orient all parents. The unit committee and new-unit organizer do this with the assistance of the new-unit commissioner.

Rationale: There must be a critical mass so the youth feel this is the place to be. For competitions and youth interaction, there must be at least two small groups within the unit. There must be sufficient adults willing to help so no one is overwhelmed.

Number of New Adults to Organize a New Unit: At Least Five

It is highly recommended that more than the minimum of five adults are recruited as leaders in the new unit to ensure a proper leader succession plan and shared responsibilities. New parents can start in the Unit Scouter Reserve position (91U) and work into a leadership position. This role is for supportive adults who have no immediate, specific leadership role. Like all registered BSA adult positions, this role requires a criminal background check and the completion of Youth Protection training.

Scheduling the Recruitment Date and Location

The most important key to recruitment success is to select a date and location that will appeal to your audience. Parental attendance and engagement are essential, as the purpose of the event will be to recruit both adult leaders and youth members. Location is particularly critical. If you will be drawing members from multiple communities (schools, for example), plan to conduct a sign-up rally night at each location, or conduct a sign-up where the unit meets. Prospective members are unlikely to travel outside their comfort zone unless they are already looking for the Scouting program. Selecting the right date is also important. Studies have shown that families are most receptive to starting Scouting at the beginning of a new school year. It is frequently a time when families reevaluate the activities in which their children are engaged and try new things. The other time that works well to recruit new members is during camp promotion season. Parents register their children for summer programs in January and February. Consider participating in camp fairs in your community.

Given potential members' age, troops and crews will frequently need an activity "hook" to bring youth and their parents to the meeting. Conduct the recruitment event in a nearby park with athletic fields and a picnic shelter or at an indoor rock climbing venue or across from a nearby school. Plan an engaging unit activity that will appeal to members of your target audience.

Preparing and Promoting the Sign-Up

Attendance at the sign-up meeting is very important. Youth and their parents will most likely register for Scouting when they attend this meeting. Prime the pump by having your established unit leaders or committed youth reach out to families in the community that have youth in the target audience. The personal connection and "ask" can do more to promote enrollment than a hundred fliers.

Some other ideas for promoting attendance include:

- Youth talks in the school on the day of the meeting
- Informational fliers
- Radio and TV PSAs
- Personal visits to prospects
- Bring a friend. A Scout stays in longer if his buddy is there.

- Personal visits to prospects
- Promotion at area churches, playgrounds, and parks
- School open houses
- Posters in schools
- Personalized invitations from the organizational head

Ask your membership team to brainstorm other ideas.

Conducting the Sign-Up

Hold the sign-up where the unit will meet. Make it a brief, upbeat, and well-planned rally.

Be sure to:

- Have an information sheet on the unit: leader's name, contact information, website, training, next meeting, planned activities, etc.
- Have a sign-in sheet to collect names, ages, addresses, and email addresses of prospective members.
- Introduce the unit leadership.
- Present the unit program.
- Register new youth members.
- Select and recruit additional adults.
- Create an air of excitement of things to come.
- Provide information.
- Answer questions.
- Provide an information meeting with parents.
- Discuss health forms.
- Provide parent orientation on Youth Protection training.
- Provide light refreshments.
- Announce the unit's next meeting date.
- In the case of Venturing-age youth:
 - Have each youth complete the Venturing Activity Interest Survey.
 - Brainstorm with youth their ideas that might not be on the survey.
 - Review the potential for crew program based on the Program Capability Inventory and the chartered organization.

Following Up With Unregistered Youth and Adults

Inevitably, some youth and adults will not register at the recruitment meeting. Be sure to follow up with a phone call and/or a postcard reminding them of upcoming events and opportunities to join. A commissioner staff and district executive can together set up a district membership inventory calling night to follow up on all youth dropped off of unit charter renewals (see Appendix 16). Also, encourage newly recruited youth to reach out to other friends and conduct mini-recruitment meetings to build upon your initial recruitment success. In particular, target dens or patrols with smaller than desired numbers. A healthy unit has a balanced enrollment at all levels of the program.

Successful Unit Meetings

HOLD THE FIRST UNIT MEETING

The unit committee, with the new-unit commissioner serving as a mentor, helps plan and support the meeting. The presence of the new-unit commissioner will provide support to the new leadership. The second most frequently stated reason boys leave Cub Scouting and Boy Scouting is unorganized leadership. New-unit commissioner assistance with this meeting will help the unit committee make a good first impression. (See “Unit Program Planning” in Chapter 3.)

BEFORE THE FIRST UNIT MEETING

The new-unit organizer should assist the new leaders in planning the first month of meetings using the age-appropriate unit meeting planning materials. The plan should make clear the responsibilities of each member of the team. The plan should include setup of the meeting room, necessary supplies or equipment, and starting times of each activity.

Assign someone responsibility for meeting with those who did not attend the recruitment meeting to distribute the necessary applications, forms, calendars, and other documents.

Ideally, have a run-through of the meeting so the unit leaders can become comfortable and tweak the plan as necessary.

FIRST UNIT MEETING

The new unit conducts its first meeting as developed in the organization process.

The new-unit organizer and the new-unit commissioner should attend the first meeting to make sure the unit gets off to a good start.

Be sure the new leader is congratulated on the meeting and the next meeting is scheduled and planned. Conduct a debriefing session with the unit leaders at the conclusion of the first meeting to review what they have learned and celebrate their success.

Assign a member of the organizing team or district committee who is trained and has expertise in the annual program planning process. This person should set a date and time to hold the unit’s annual program planning conference. Have the assigned person facilitate the unit’s first annual program planning conference. Use online or DVD-based pack, troop, or crew program planning conference guides. When complete, ensure the unit committee prints and shares the annual plan with all of the unit’s families. The plan should include a budget and calendar of events. Having an annual program plan and budget is a common element of high-performing units.

Unit Performance

JOURNEY TO EXCELLENCE

Journey to Excellence, the current performance recognition program, changes the basic way success is measured and recognized in the Boy Scouts of America by moving away from measuring process and moving to measuring performance. Below is specific information to help you understand the criteria and exactly what data will be used to determine the three levels of performance. In planning your strategy, once the new unit has renewed its charter for one year, use those numbers to guide your performance-improvement goal planning. In each area, the pack/troop/crew may qualify by meeting a specific standard or by showing measured improvement.

The Journey to Excellence looks at different areas—depending on the type of unit—to measure the success of the unit.

Same for All Units	Unique to Packs	Unique to Troops	Unique to Crews
Advancement	Day camp	Day camp	Superactivities
Retention	Resident camp	Long-term camping	Youth leadership
Membership	Pack meetings	Patrol method	Building Venturing
Trained leadership	Den meetings	Youth leadership	Activities
Leadership planning	Webelos-to-Scout transition	Courts of honor	
Outdoor activities	Building Cub Scouting	Webelos-to-Scout transition	
Parent meetings		Building Scouting	
Service projects			
Budget			
Re-register on time			
Annual assessment			

Pack	Troop	Team	Crew	Ship
<p>PACK of _____ District</p> <p>2014 Scouting's Journey to Excellence</p> <p>Unit Name: _____</p> <p>Unit Number: _____</p> <p>Unit Type: _____</p> <p>Unit Leader: _____</p> <p>Unit Address: _____</p> <p>Unit Phone: _____</p> <p>Unit Email: _____</p> <p>Unit Website: _____</p> <p>Unit Description: _____</p> <p>Unit Goals: _____</p> <p>Unit Objectives: _____</p> <p>Unit Activities: _____</p> <p>Unit Awards: _____</p> <p>Unit Recognition: _____</p> <p>Unit Summary: _____</p>	<p>TROOP of _____ District</p> <p>2014 Scouting's Journey to Excellence</p> <p>Unit Name: _____</p> <p>Unit Number: _____</p> <p>Unit Type: _____</p> <p>Unit Leader: _____</p> <p>Unit Address: _____</p> <p>Unit Phone: _____</p> <p>Unit Email: _____</p> <p>Unit Website: _____</p> <p>Unit Description: _____</p> <p>Unit Goals: _____</p> <p>Unit Objectives: _____</p> <p>Unit Activities: _____</p> <p>Unit Awards: _____</p> <p>Unit Recognition: _____</p> <p>Unit Summary: _____</p>	<p>TEAM of _____ District</p> <p>2014 Scouting's Journey to Excellence</p> <p>Unit Name: _____</p> <p>Unit Number: _____</p> <p>Unit Type: _____</p> <p>Unit Leader: _____</p> <p>Unit Address: _____</p> <p>Unit Phone: _____</p> <p>Unit Email: _____</p> <p>Unit Website: _____</p> <p>Unit Description: _____</p> <p>Unit Goals: _____</p> <p>Unit Objectives: _____</p> <p>Unit Activities: _____</p> <p>Unit Awards: _____</p> <p>Unit Recognition: _____</p> <p>Unit Summary: _____</p>	<p>CREW of _____ District</p> <p>2014 Scouting's Journey to Excellence</p> <p>Unit Name: _____</p> <p>Unit Number: _____</p> <p>Unit Type: _____</p> <p>Unit Leader: _____</p> <p>Unit Address: _____</p> <p>Unit Phone: _____</p> <p>Unit Email: _____</p> <p>Unit Website: _____</p> <p>Unit Description: _____</p> <p>Unit Goals: _____</p> <p>Unit Objectives: _____</p> <p>Unit Activities: _____</p> <p>Unit Awards: _____</p> <p>Unit Recognition: _____</p> <p>Unit Summary: _____</p>	<p>SHIP of _____ District</p> <p>2014 Scouting's Journey to Excellence</p> <p>Unit Name: _____</p> <p>Unit Number: _____</p> <p>Unit Type: _____</p> <p>Unit Leader: _____</p> <p>Unit Address: _____</p> <p>Unit Phone: _____</p> <p>Unit Email: _____</p> <p>Unit Website: _____</p> <p>Unit Description: _____</p> <p>Unit Goals: _____</p> <p>Unit Objectives: _____</p> <p>Unit Activities: _____</p> <p>Unit Awards: _____</p> <p>Unit Recognition: _____</p> <p>Unit Summary: _____</p>

VOICE OF THE SCOUT

The national Voice of the Scout program captures the experiences of our Scouts and Scouters during a 10-week survey period in both the spring and fall. Surveys are distributed to leaders, chartered organization representatives, parents of Scouts, and (for Scouts over age 14) to the Scouts themselves. To receive a survey, someone in the Scouting household must have email information on file in the BSA ScoutNET system. Once information collection has begun, it is aggregated and displayed at the unit, district, council, area, and region levels on a VOS dashboard available to council employees and board-level volunteers. Council employees share feedback results with commissioner staff and district committee members for appropriate, actionable coaching of unit leadership at the summer and fall unit health reviews. This feedback helps units and the BSA be continuously aware of what members and volunteers want so that at every level ways can be found to meet and exceed their expectations. The end goal is to discover what needs to be done—operationally and strategically—to make sure every unit is a great unit while maintaining the values of Scouting.

Unit commissioners have two roles to play in Voice of the Scout. The first is similar to their role in JTE: to communicate and promote use of Voice of the Scout to the unit leadership (unit Key 3: chartered organization representative, unit leader, and committee chair). The unit Key 3 should encourage and inform parents about the importance of the Voice of the Scout survey and encourage them to complete it.

The second role is to help the unit Key 3 interpret and utilize the feedback. That takes place at two meetings each year: the action planning meeting around charter renewal time and the midyear charter review meeting, which occurs six months before the next charter renewal. Consider the impact it has: The unit leader will have the opportunity to make changes in the program before it's too late. Small adjustments now can avoid major overhauls later. Beginning in 2013, Voice of the Scout became a mandatory part of JTE.

The unit Key 3 should encourage and inform parents about the importance of the Voice of the Scout survey and encourage them to complete it.

THE ROLE OF THE UNIT COMMISSIONER WITH THE UNIT KEY 3

The role of the unit commissioner with the unit Key 3 is to serve as an adviser. He/she is not a member of the unit and has no voting authority. He/she serves as a representative of the district to the unit, linking district resources to the unit as needed. It is appropriate for the new-unit commissioner to begin meeting monthly with the unit Key 3. As the unit becomes more of a high-performing unit, the unit commissioner will attend as needed.

NEW-UNIT SELF-ASSESSMENT—AN IMPORTANT PROCESS FOR SUSTAINABLE UNITS

As the unit nears 36 months of tenure, the unit will be maturing and able to be more independent. When the last unit self-assessment (see Appendixes 5, 6, and 7) is completed, it will be clear to both the unit and the NUC that the unit is ready for a unit commissioner who has experience with veteran units—those independent units with more than 36 months of tenure. That being the case, the NUC is free to accept another assignment with another new unit. The unit will be assigned a unit commissioner from the district commissioner's staff. This commissioner will have experience with several units and bring new insights to the unit:

- Supplemental training opportunities
- University of Scouting
- Pow wow
- Supplemental training on the BSA website
- Cub Scout podcasts
- *Scouting* magazine

Note: A unit self-assessment is required to be conducted twice a year by the unit commissioner (and/or district executive if no commissioner staff).

Commissioner Service

NEW-UNIT COMMISSIONERS

New-unit commissioners are unit commissioners who specialize in new units. His or her relationship to the unit is much like that of troop guide to a patrol. While not a member of the unit, the new-unit commissioner will serve as a mentor and guide the unit leadership to becoming a high-performing unit. A commissioner who wants to take on this role will need some additional training as listed below. This is a long-term commitment (two to three years) and begins with the formation process of a new unit. Because of the extra attention a new unit requires, the new-unit commissioner has a reduced workload. He or she uses the annual service plan as described in the section "Commissioner Service Plan."

During formation of a new unit, the new-unit commissioner's role is to support the new-unit organizer, become a familiar and consistent link between the chartered organization and the district, and provide support to the new key leaders. He or she can harness the resources of the entire district by being in communication with the subject-matter experts on the district committee (for example, calling on the advancement, training, camping, or finance chair when needed to support the unit). It really does take a district to serve a unit, not just a commissioner. In many cases, the new-unit commissioner will be the face of consistency and the strong foundation around which the new unit can form. New-unit commissioners likely derive even greater satisfaction from their role than other unit commissioners because they can take pride in the creation process. Who makes a good new-unit commissioner? Anyone with a desire to see a unit well-established and who is committed to the extra time and effort that will require.

New-Unit Commissioner Training

Skills/characteristics:

- Commissioned as a unit commissioner
- Already has the Arrowhead Honor
- Should be given a reduced workload (preferably one unit)
- Time and energy for this long-term commitment
- Should work toward earning the Commissioner Award of Excellence for Unit Service

Additional training:

- New-Unit Commissioner Basic Training
- Required training for new-unit commissioners
- New-unit focus orientation and training session
- Review the visioning section from the *Council Commissioner Manual*.
- Review the annual service plan and determine how to provide optimal service to the new unit.
- Review the progress card for earning the Commissioner Award of Excellence for Unit Service.

Encouraged training:

- Participate in Wood Badge or, if already completed Wood Badge, review sessions: Stages of Team Development, Leading EDGE/Teaching EDGE, Coaching and Mentoring.
- A New-Unit Commissioner Basic Training class is available on the national Commissioners website (select Commissioner Training at the left and then Basic Training at the bottom of the page). This training will provide the essential information necessary for a new-unit commissioner to work with new units. This training was developed in conjunction with the Unit Performance Guide.

PRECHARTER UNIT ORGANIZATION

Assist the new-unit organizer in the unit organization process. Focus on things that will ensure long-term success for the unit, which include recruiting enough youth (at least 10) and adults (at least five), Youth Protection training and appropriate leader training, a leadership succession plan, familiarity with Journey to Excellence and Voice of the Scout, and an annual program plan. Help unit leaders set a vision for unit success, goal planning, and program planning consistent with the Journey to Excellence requirements. Encourage the key leadership to visit a well-run unit to capture the vision of success. With the new-unit organizer, present the charter at a meeting of the chartered organization.

THE ROLE OF THE UNIT COMMISSIONER WITH THE UNIT KEY 3

The role of the unit commissioner with the unit Key 3 is to serve as an advisor. He or she is not a member of the unit and has no voting authority. He or she serves as a representative of the district to the unit, linking district resources to the unit as needed. It is appropriate for the new-unit commissioner to begin meeting monthly with the unit Key 3. As the unit becomes more of a high-performing unit, the unit commissioner will attend as needed.

Commissioner Service Plan

The new unit needs extra attention in these first critical months. The new-unit commissioner will use the annual service plan in the same manner he or she would with any other unit. The only difference will be that the visits are more frequent. It is expected that the new-unit commissioner will attend the monthly unit Key 3 meeting and at least one other type of meeting or activity each month in the early stages of the unit's tenure. In addition, his or her leadership will be more directive in the beginning with that leadership style changing as the unit Key 3 moves to a more independent, high-performing stage.

The annual service plan can be found in *Administration of Commissioner Service*, *Commissioner Fieldbook for Unit Service*, and the *Council Commissioner Manual*.

The functions of all unit commissioners should be as simple as possible. This is particularly true for new-unit commissioners. While they specialize in developing and strengthening new units, their four primary areas of responsibility are the same as for all unit commissioners:

- Supporting unit growth in the Journey to Excellence criteria
- Linking district committee resources to the unit
- Visiting units and logging the visits into the Unit Visit Tracking System (UVTS)
- Supporting on-time charter renewal

The new-unit commissioner should follow the annual service plan in the *Commissioner Fieldbook for Unit Service* and the guidelines established earlier in this chapter for supporting the unit Key 3:

Precharter unit organization. Help unit leaders set a vision for unit success, goal planning, and program planning consistent with the Journey to Excellence requirements. Encourage the key leadership to visit a well-run unit to capture the vision of success.

With the new-unit organizer, present the charter at a meeting of the chartered organization.

Visit the unit more than once a month. A unit Key 3 meeting counts as one of the visits.

Attend unit Key 3 meeting. The unit Key 3 (chartered organization representative, unit leader, and committee chair, plus the new-unit commissioner as an advisor) will meet on a monthly basis to ensure successful unit operation. The new-unit commissioner meets to advise and guide the Key 3 on its way to becoming a high-performing unit. Review of the monthly program, budget, advancement, unit activities, training, leadership, Journey to Excellence progress, Voice of the Scout feedback, and charter renewal are all possible topics for the meeting. It is a time for the unit Key 3 to learn how to spot early warning signs and work together toward continued unit success.

Help unit leaders get additional training as needed. Through the district commissioner, request progressive specialty training as needed. Topics might include recruiting youth members, information on Friends of Scouting, advancement, etc. While it is the responsibility of the district committee, it may be necessary to conduct sessions of this training yourself at a unit committee meeting.

Encourage participation in district activities. Encourage attendance at district activities and camping opportunities. Keep the district and council calendars in mind when helping the unit Key 3 schedule unit meetings and events.

Encourage attendance at roundtable. Another venue for regular leader training is district roundtable meetings. The purpose of the roundtable program is:

- To provide the skill to do—skills, techniques, information, program ideas—the know-how that makes for successful unit operation.
- To provide unit leadership with the will to do—morale, enthusiasm, inspiration, and vision that periodically renew the desire to serve youth.

Unit Self-Assessment

NEW-UNIT SELF-ASSESSMENT—AN IMPORTANT PROCESS FOR SUSTAINABLE UNITS

As the unit nears 36 months of tenure, the unit will be maturing and should be moving from dependence to independence. When the last unit self-assessment (see Appendixes 5, 6, and 7) is completed, it will be clear to both the unit and the new-unit commissioner that the unit is ready for a unit commissioner who has experience with veteran units—those independent units with more than 36 months of tenure. That being the case, the new-unit commissioner is free to accept another assignment with another new unit. The unit will be assigned a unit commissioner from the district commissioner's staff. This commissioner will have experience with several units and bring new insights to the unit:

- Supplemental training opportunities
- University of Scouting
- Pow-wow
- Supplemental training on the BSA website
- Cub Scout podcasts
- Scouting magazine
- District roundtable

Note: A unit self-assessment is required to be conducted twice a year by the unit commissioner (and/or district executive if there is no commissioner staff).

Annual Service Plan

The annual service plan in Appendix 26 is under revision.

Action Planning Meeting

GUIDELINES FOR UNIT SELF-ASSESSMENT AND ACTION PLANNING MEETING

The action planning meeting is held around charter renewal time. The midyear charter review meeting is held six months before charter renewal.

Guidelines and Procedures for Conducting the Action Planning Meeting

Process: The action planning meeting should take place around charter renewal time. Traditionally it has been recommended that it be done two weeks prior to the charter renewal deadline. Occasionally this is a very busy time for a unit and the meeting is delayed until just after charter renewal. It is important that the meeting be held within a month either way of the charter renewal due date.

The unit Key 3 should, prior to the meeting, fill out page 1 of the JTE spreadsheet located online at www.scouting.org/JTE. In addition, they should complete the appropriate unit self-assessment form and review the Voice of the Scout feedback. The unit Key 3 will each receive a copy of the unit feedback from the district committee. The unit commissioner should also get the JTE information and complete a unit self-assessment form from his or her perspective. The unit commissioner will receive the unit Voice of the Scout feedback from the district commissioner.

The agenda should begin with the consideration of the Voice of the Scout feedback using the JTE and self-assessments as verification. Discussion of goals and specific plans to improve Scout and parent satisfaction with their Scout experience should follow. These plans should then go to the unit committee for discussion and adoption. Usually an improvement in both the JTE and Scout satisfaction occur as those plans are put into practice.

The unit commissioner plays a vital role in this meeting. It can be an emotionally charged meeting, and the unit commissioner should be prepared for that. His or her role is to help the unit Key 3 put the information into the proper perspective and to help the unit Key 3 understand what the feedback indicates. Often the unit commissioner can assist the unit Key 3 in developing plans for change and link district resources with unit needs to implement those changes. There is training available for the unit commissioner both online at www.scouting.org and from the district commissioner.

The midyear charter review meeting is held six months prior to the charter renewal date. This meeting is held just like the action planning meeting except the JTE results will not be available to units at that time. There will be new Voice of the Scout feedback and the unit Key 3 should complete a new unit self-assessment form, using those tools together to get an accurate picture of their unit. Again, the unit commissioner plays the same key role. In addition to evaluating the Voice of the Scout feedback and making plans for change to the program, the unit will evaluate its progress toward JTE goals, making adjustments as needed.

The unit commissioner should endeavor to leave the unit Key 3 with the sense that this is an opportunity for change and with hope and enthusiasm for what the unit can become.

In Attendance: Unit Key 3 (unit leader, unit committee chair, and chartered organization representative), unit commissioner, and district executive (whenever a commissioner is unavailable)

What is the purpose of the action planning meeting and the midyear charter review?

- To set a unit goal action plan to enable the unit to reach JTE at the next charter renewal
- To evaluate the unit's progress toward achieving the Journey to Excellence standards
- To evaluate and make plans to improve the Scouts' and their parents' satisfaction with their Scouting experience
- To review the unit's goals, successes, and vision for the coming year
- To identify any areas of improvement—leadership, program, and membership

- To determine any specific actions needing to be taken to assist with unit improvements and identify who will follow up on those actions
- To schedule any necessary and immediate follow-up to monitor progress
- To provide unit retention

When to conduct the meetings (at least semiannually):

- The action planning meeting occurs around charter renewal. The midyear charter review takes place six months prior to the next charter renewal.
- Other times to use the unit self-assessment tool:
 - When there is a change in unit leadership (unit leader, committee chair, chartered organization representative) or a new unit commissioner
 - As needed when a problem arises

How should the arrangements for this meeting be made?

- If the unit commissioner is new to the unit, he or she speaks to the unit leader during the first unit visit to schedule the meeting date, time, and location. If the unit commissioner has been serving this unit, he or she asks for a meeting around charter renewal and again six months later.
- The dialogue should include:
 - Approaching the unit leader at an appropriate time and requesting that a meeting be set up with the unit Key 3
 - Setting the meeting, preferably at the leader's, the chair's, or the chartered organization representative's home
 - Asking them to complete the unit self-assessment form prior to the meeting
 - Letting them know they will be receiving the feedback from Voice of the Scout from the district committee shortly
 - Letting them know the visit will include a discussion of the unit self-assessment, JTE and Voice of the Scout feedback, and how the goals and vision of their unit's program can be supported

Why should only the unit leader, chartered organization representative, unit chair, and unit commissioner (and district executive when available) attend the meeting?

- Because the unit Key 3 helps provide leadership and guidance to the unit. Since it is a smaller representative group, they can be more open to analyzing their program, their unit's needs, and steps to be taken to help resolve any issues.
- It also helps open a dialogue between the unit and the district. Once they meet and determine what needs to be done, others can be involved in helping determine in which direction to go and any potential support or resources needed.

What preparation should be made prior to the action planning meeting?

- Review the statistics of the unit available from the local council and the district team, especially looking at:
 - Journey to Excellence status: Bronze, Silver, or Gold
 - Voice of the Scout feedback
 - Unit self-assessment form (Appendixes 5, 6, and 7)

- Outdoor program participation
- Advancement reports
- Trained leadership status
- Unit succession plan
- Youth Protection training
- Participation in district and council events
- Roundtable attendance
- If the JTE unit health self-assessment form was not completed prior to the visit, do so at this time. Analyze and make observations, and review the statistics gathered from the council/district prior to the action planning meeting.
- Set another time and meeting for a follow-up prior to the unit's charter renewal.
- The national BSA membership audit validation procedures require that unit health assessments be conducted two times a year, and that the completed form be added to the unit file at the council office.
- Document the health assessment meetings and visits in UVTS.
- Provide positive encouragement to the unit, and most important, recognize the unit with its JTE recognition at one of its gatherings.

Present at meeting: Unit Key 3 and unit commissioner (and district executive when the unit commissioner is not available).

Unit Visit Tracking System

What is UVTS? It's an online method for commissioners to track information about contacts with units.

Unit Visit Tracking System has been enhanced so that administrative commissioners may now also add unit visits.

UNIT VISIT TRACKING SYSTEM SUPPORT AVAILABLE

Commissioners are encouraged to call the UVTS hotline if they experience any computer access issues, problems, or difficulties using UVTS. This useful support service can resolve problems much faster if they talk directly to the user/source with the UVTS issues.

The Unit Visit Tracking System support service provides personal assistance from an operator, along with helpful details about UVTS and informative links to each section of UVTS content.

The UVTS hotline number is for commissioners only: **972-672-4389**.

The operator is on call to answer questions from 8 a.m. to 10 p.m. Central time Monday through Saturday.

If the operator is handling another UVTS call, callers should leave a voice mail message and the operator will call back, usually within 48 hours.

Commissioners who prefer may send a direct email with their full name, volunteer Scouting position, council name, contact phone number, email address, and UVTS issues clearly defined to MyScouting@scouting.org.

UVTS QUESTIONS AND ANSWERS

How does UVTS become available to commissioners? Anyone registered in PAS by the council in any commissioner position may use UVTS from MyScouting. Commissioners must enter their member ID in My Profile for access to UVTS.

Does the council assign unit commissioners to units in ScoutNET? Councils no longer assign unit commissioners to units in ScoutNET to provide UVTS unit access. All that is required of the council is the registration of commissioners in approved positions.

What do commissioners have access to in UVTS? Each commissioner is able to view unit visit reports entered for any unit in the organizational level of the commissioner's registration. For example, unit- and district-level commissioners may view the reports for units in their district. Council-level commissioners may view the reports for all units in every district.

Which commissioners will be able to enter unit visit reports? Anyone in each council who holds a commissioner position will be able to enter a unit visit report for any unit within the organization level associated with the commissioner position. For example, unit- and district-level commissioners may enter reports for units in their district. Council-level commissioners may enter reports for all units in every district.

How do council staff members see the unit visit reports entered by commissioners?

Access to UVTS is available through MyScouting for council professionals and authorized staff members. For instructions, read Unit Visit Tracking: Assigning Read-Only Access to Council Staff on the ScoutNET Support site Internet Unit Services page or on the MyTraining page in the MyBSA Knowledge Base.

Does UVTS have other features? Yes. The Export Visits Summary lists each active traditional unit in the council or district and reports the number of unit visit reports entered for each unit. The filter function enables sorting of visit reports. Those who serve as administrative commissioners may enter Administrative Comments for any existing unit visit report in the council or district. Online help is provided. The video available on the home page describes how to enter a unit visit report.

How can district operating committees benefit from information in UVTS? District commissioners can arrange for unit visit reports and health assessments for new units entered in UVTS to be exported to Excel for review by the appropriate district operating committee members. Providing that information will facilitate the engagement of district operating committee resources needed to strengthen new units.

Charter Presentations

PRESENTING THE CHARTER

The new-unit organizer and new-unit commissioner should present the first charter at a full gathering of the chartered organization. For instance, in a church they should present the charter before the full congregation; a service club should present it at a meeting of all of its members. This way, everyone will know that Scouting is a part of the organization's youth program and can share in the pride of ownership.

Youth members and unit leaders should participate in the ceremony as the charter is presented to the head of the chartered organization. Unit leaders and the unit committee may also be installed during this ceremony.

The charter certificate should be framed and appropriately displayed after the ceremony.

ADDITIONAL FOLLOW-UP

Once the unit has been organized, it will need ongoing service from the entire district, both the commissioner staff and district committee. At this point, the new-unit commissioner should step in to give the unit the support it needs to deliver a quality program to a growing membership. The new-unit organizer must be sure the new unit is solidly under the care of a new-unit commissioner before the organizer leaves the unit.

New-unit organizers may want to attend youth meetings or committee meetings periodically just to see how things are going and to enjoy seeing youth and leaders grow in Scouting because of their efforts.

The trainer who helped in the orientation meeting and/or basic leader training should follow up to ensure leaders have an opportunity to attend other supplemental training provided by the district.

Charter Renewal

FIRST CHARTER RENEWAL

The unit Key 3 and the new-unit commissioner will work together through the charter renewal process. This is the time of year in which the action planning meeting is held. The unit Key 3, with the new-unit commissioner as their advisor, should use the JTE scores, the Voice of the Scout feedback, and the unit self-assessment to set new goals for the coming year. The new-unit commissioner will present the charter at a meeting of the chartered organization. (See Appendixes 5, 6, 7, 8, 9, 10, 11, and 12.)

SECOND CHARTER RENEWAL

Midyear charter review. This meeting takes place about six months before the next charter renewal. The unit Key 3, with the new-unit commissioner as an advisor, should use the Voice of the Scout feedback and the unit self-assessment to review their progress toward JTE goals and improved customer satisfaction. At the second charter renewal, the new-unit commissioner will guide the unit Key 3 through the charter renewal process, assisting where needed. By the third charter renewal, the new-unit commissioner will likely just be on call to help.

During the second and third years (12 to 36 months of tenure), the new-unit commissioner will continue serving as an advisor to the unit Key 3, repeating many of the same tasks that took place during the first year. It is the repetition that will help the new unit gain confidence in their ability to do these things for themselves. As unit confidence grows, the new-unit commissioner will play a smaller role in the daily operations of the unit.

At the time of the third charter renewal, during the action planning meeting, the unit Key 3 and the new-unit commissioner can determine whether the unit is ready for a different commissioner who is more familiar with high-performing unit service. A unit commissioner specializing in tenured units will meet less often with the newly tenured unit and, because he or she is assigned to more than one unit at a time, will bring different perspectives to the unit.

When that change is made, the new-unit commissioner is free and ready to take on another new unit.

Host a celebration. At this time, the unit is no longer considered “new.” There should be recognition of this accomplishment. Included in the celebration should be the new-unit organizer, the new-unit commissioner, and all members of the unit.

How to Start a New Unit

NEW-UNIT APPLICATION




Cub Scouting

Purpose of the Boy Scouts of America
 Its purpose is to promote, through cooperation with other agencies, the ability of youth to do things for themselves and others, and to teach them patriotism, courage, self-reliance, and kindred virtues. In achieving this purpose, emphasis is placed upon its educational program and the oaths, promises, and codes for character development, citizenship training, and mental and physical fitness.

Pack
 Cub Scouting is for parents, leaders, and organizations to use with boys who are in the first through fifth grade or are 7 through 10 years old.


Troop
 Boy Scouting is an educational program filled with fun and adventure that appeals to boys.



Varsity Scouting



Boy Scouting



BOY SCOUTS OF AMERICA®



VENTURING · BSA®
Venturer/Sea Scout

BOY SCOUTS OF AMERICA ADULT APPLICATION

This application is also available in Spanish. Esta solicitud también está disponible en español.

The mission of the Boy Scouts of America is to prepare young people to make ethical and moral choices over their lifetimes by instilling in them the values of the Scout Oath and Scout Law.

In a Cub Scout pack, Boy Scout troop, Varsity Scout team, Venturing crew, or Sea Scout ship—or in any position in a district or council—your participation is a service to your community and helps youth become better citizens.


As members of the Boy Scouts of America, high-quality adult leaders are important role models for youth. This application helps the chartered organization to select qualified leaders to serve as volunteers. Thank you for completing this application in full. See instructions on the inside cover.

BY SUBMITTING THIS APPLICATION YOU ARE AUTHORIZING A CRIMINAL BACKGROUND CHECK OF YOURSELF. THIS CHECK WILL BE MADE FROM PUBLIC RECORD SOURCES. YOU WILL HAVE AN OPPORTUNITY TO REVIEW AND CHALLENGE ANY ADVERSE INFORMATION DISCLOSED BY THE CHECK.

IF YOU WOULD LIKE A COPY OF YOUR CRIMINAL BACKGROUND REPORT, PLEASE CONTACT YOUR LOCAL COUNCIL OFFICE.

Youth Protection Training


All applicants for membership are required to take this training within 30 days of registering. To take it online, go to www.MyScouting.org and establish an account using the member number you receive when you register. If you take the training online before you obtain a member number, be sure to return to MyScouting and enter your number for training record credit. Your BSA local council also provides training on a regular basis if you cannot take it online. For more information, refer to the back of this application.



BOY SCOUTS OF AMERICA®


BOY SCOUTS OF AMERICA YOUTH APPLICATION

This application is also available in Spanish. Esta solicitud también está disponible en español.




Cub Scouting

Tiger Cub Cub Scout
Webelos Scout



Boy Scouting



Venturing/Sea Scouting




Varsity Scouting

Scout Oath or Promise

On my honor I will do my best to do my duty to God and my country and to obey the Scout Law; to help other people at all times; to keep myself physically strong, mentally awake, and morally straight.

Scout Law

A Scout is trustworthy, loyal, helpful, friendly, courteous, kind, obedient, cheerful, thrifty, brave, clean, and reverent.



BOY SCOUTS OF AMERICA®

Appendixes

1. Council Market Analysis Report–Data Sort Example
2. Objectives Progress Report
3. District Totals Report
4. Annual Charter Agreement
5. Pack Self-Assessment
6. Troop/Team Self-Assessment
7. Crew/Ship Self-Assessment
8. New-Unit Application
9. Founder's Bar
10. William D. Boyce New-Unit Organizer Award
11. Scouting Family Organization Award
12. Commissioner Progress Record
13. BeAScout
14. Other Prospective Chartered Organizations Unique to My District
15. Unregistered Unit Report
16. Membership Inventory
17. What Makes a Trained Leader?
18. Charter Renewal Overflow Page
19. Boy Scouts of America Sales Model
20. Transfer Forms for Youth and Adult Members
21. National Chartered Organizations Using the Traditional Scouting Program
22. Memorandum of Understanding
23. Unit Budget Plan
24. Who Pays for Scouting?
25. Unit Money-Earning Application
26. Annual Service Plan
27. Chartered Organization Discussion

2013 COUNCIL MARKET ANALYSIS REPORT

**Nevada Area
329**

Research
&
Program Innovation
Boy Scouts of America

The mission of the Boy Scouts of America is to prepare young people to make ethical and moral choices over their lifetimes by instilling in them the values of the Scout Oath and Scout Law.



Appendix 2

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Objectives Progress Report October 30, 2013 (10/30/2013)

--- Selected Options ---

Organizations: All

Stop Level Subdistrict

	Youth					Units/Groups			Quality Units		
	Last Yr. End	Last Yr	Actual	Goal	Yr End Goal	Last Yr	Actual	Goal	Last Yr	YTD	Goal
Boy Scouts of Amer.											
Tiger Cubs	3034	2665	2315	3128	3409						
Cub Scouts	8754	8377	7799	9752	9978	344	337	373	0	0	110
Webelos	7890	7733	7502	7507	7723						
Lone Cubs	0	0	0	0	0	0	0	0	0	0	0
Total Cub Scouting	19678	18775	17616	20387	21110	344	337	373	0	0	110
Boy Scouts	9548	9261	9420	9176	9510	292	289	311	0	0	103
Lone Scouts	0	0	0	25	25	0	0	0	0	0	0
Varsity Scouts	138	119	114	109	113	16	16	14	0	0	4
Total Boy Scouting	9686	9380	9534	9310	9648	308	305	325	0	0	107
Venturers	778	727	671	852	920	81	70	85	0	0	22
Sea Scouts	53	51	39	45	53	5	4	4	0	0	1
Total Venturing	831	778	710	897	973	86	74	89	0	0	23
Total Traditional	30195	28933	27860	30594	31731	738	716	787	0	0	240
Learning For Life											
LFL Elementary	2480	1357	1072	3160	3160	4	2	8	0	0	0
LFL Junior High	0	0	0	0	0	0	0	0	0	0	0
LFL High School	0	0	0	0	0	0	0	0	0	0	0
LFL Explorers	1336	1146	1080	1461	1540	53	48	57	40	26	18
LFL Special Needs	401	33	1000	401	401	2	2	5	0	0	0
Total LFL	4217	2536	3152	5022	5101	59	52	70	40	26	18
TOTAL	34412	31469	31012	35616	36832	797	768	857	40	26	258
Rechartered Units YTD		700	672	622		Total Unit Commissioners			265	276	336
Groups/Posts Renewed YTD		51	48	62		Top Leaders Trained			307	358	409
Total Youth Population		364685	371972			Youth Boys' Life Subs			20619	19541	19304
Total Youth Density		8.63	8.34			Quality Units % of Total			0.00	0.00	
Tot Dist Committee Mbrs		476	545	647		On-time Units/Groups YTD			700	638	518
Total BSA Density		TYP 371972	Density 7.49						TYP	Density	
Tiger Cub Density		27591	8.39			Cub Scout Program Density			135935	12.96	
Cub Scout Density		54466	14.32			Boy Scout Density			81820	11.65	
Webelos Scout Density		53878	13.92			Venturing Density			154217	0.46	

Appendix 3

Report: 0119 v6.00
Date: 10/31/2013
Time: 12:18:05

District Totals Report October 31, 2013 (10/31/2013)

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	Youth			Adults			Boys' Life			On-Time		Qual Unit		100% BL		Ldr Trn		Units	
	Last Year	Last Mo.	This Mo.	Last Year	Last Mo.	This Mo.	Last Year	Last Mo.	This Mo.	Last Year	This Year	Last Year	This Year	Last Year	This Year	Last Year	This Year	Last Year	This Year
Boy Scouts of Amer.																			
Tiger Cubs	2665	1884	2328	362	286	304	2357	1633	1986										
Cub Scouts	8377	7398	7813	3447	2962	3106	6842	5949	6192	303	276	0	0	178	166	167	183	344	337
Webelos	7733	7295	7505	458	396	401	5908	5580	5693										
Lone Cubs	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Cub Scouting	18775	16577	17646	4267	3644	3811	15107	13162	13871	303	276	0	0	178	166	167	183	344	337
Boy Scouts	9261	9328	9426	5370	5070	5125	5762	5855	5875	268	250	0	0	142	138	114	145	292	289
Lone Scouts	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Varsity Scouts	119	113	114	49	50	53	3	0	0	14	13	0	0	0	0	0	1	16	16
Total Boy Scouting	9380	9441	9540	5419	5120	5178	5765	5855	5875	282	263	0	0	142	138	114	146	308	305
Venturers	727	647	676	383	341	349	26	28	28	68	60	0	0	1	0	25	27	81	70
Sea Scouts	51	38	39	36	22	22	1	0	0	4	3	0	0	0	0	1	1	5	4
Total Venturing	778	685	715	419	363	371	27	28	28	72	63	0	0	1	0	26	28	86	74
Non-Units	0	0	0	248	190	192	4	4	4	0	0	0	0	0	0	0	0	0	0
Total Traditional	28933	26703	27901	10353	9317	9552	20903	19049	19778	657	602	0	0	321	304	307	357	738	716
Learning For Life																			
LFL Elementary	1357	2480	1072	6	8	4	0	0	0	0	0	0	0	0	0	0	0	4	2
LFL Junior High	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
LFL High School	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
LFL Explorers	1146	946	1080	276	241	245	0	0	0	43	36	40	26	0	0	0	0	53	48
LFL Special Needs	33	401	1000	6	16	3	0	0	0	0	0	0	0	0	0	0	0	2	2
Total LFL	2536	3827	3152	288	265	252	0	0	0	43	36	40	26	0	0	0	0	59	52
TOTAL	31469	30530	31053	10641	9582	9804	20903	19049	19778	700	638	40	26	321	304	307	357	797	768

THE ANNUAL CHARTER AGREEMENT BETWEEN:

_____ and the _____ Council, BSA
Chartered Organization Local Council

Pack No. _____ Troop No. _____ Team No. _____ Crew No. _____ Ship No. _____

(Please identify those units chartered by the Chartered Organization.)

The purpose of the Boy Scouts of America ("BSA") program is to prepare young people to make ethical and moral choices over their lifetimes by instilling in them the values and principles taught in the Scout Oath and Scout Law.

The Chartered Organization, as a duly constituted organization that serves youth, desires to use the program(s) of the BSA to further its mission respecting the youth it supports. The Local Council provides the support and service necessary to help the Chartered Organization succeed in its use of Scouting.

The Chartered Organization agrees to:

- Use Scouting to further the Chartered Organization's aims and values for youth.
- Conduct the Scouting program according to its own policies and guidelines as well as those of the BSA.
- Be represented in the Local Council and the local Scouting district by a Chartered Organization Representative ("COR"), who will be appointed by the Chartered Organization. The COR will be the point of contact between the Chartered Organization and the Local Council; will serve as a voting member of district and council committees on which the COR serves; and will, with the Chartered Organization, select and approve volunteer leaders for submission to the Local Council for its consideration. The COR will work with the unit committees sponsored by the Chartered Organization.
- Select and support unit committee(s) made up of at least three persons for each unit. Such persons may be selected from those who are parents of youth in the Scouting unit or others who are approved by the Chartered Organization.
- Select a committee chairman for each unit committee. Working with the COR, the unit committee will select potential unit adult members. Both the unit committee chair and either the COR or the head of the Chartered Organization will sign their leadership applications.
- Ensure appropriate facilities for the unit for its regular meetings to facilitate the aims of the Chartered Organization and Scouting.
- Facilitate outdoor experiences and apply the principles set forth in the Guide to Safe Scouting.
- Require that all of the adult members have received and maintain timely BSA Youth Protection Training and encourage all adult leaders to receive additional applicable training made available by the council.

The Local Council agrees to:

- Respect the aims and objectives of the Chartered Organization and assist the Chartered Organization by making available Scouting resources.
- Make available to the Chartered Organization and its units and members program training, program resources, and other Scouting support services to help the Chartered Organization and its units and members accomplish their goals for their youth.
- Make available training and support for the Chartered Organization and for the COR as the primary link between the Chartered Organization, the Local Council, and the BSA.
- Review applications for adult members, including conducting a criminal background check, in accepting adult members selected by the Chartered Organization.
- Work with the Chartered Organization to make reasonable accommodations for policies of the Chartered Organization that may conflict with the implementation of Scouting programs.
- Provide camping opportunities, administrative support, and professional staff to assist the Chartered Organization in developing a successful Scouting program.
- Provide primary general liability insurance to cover the Chartered Organization, its board, officers, CORs, employees, and Scouting members and authorized volunteers. Coverage will be provided with respect to claims arising out of an authorized Scouting meeting or activity. For more information, please refer to the relevant insurance policies and descriptions of coverage provided in separate materials by the Boy Scouts of America.

Signed _____ Title _____ Date _____
For the chartered organization

Signed _____ Title _____ Date _____
For the BSA local council

Signed _____ Title _____ Date _____
Chartered Organization Representative



BOY SCOUTS OF AMERICA®

524-182
2013 Printing

Pack Self-Assessment

Pack Number: _____ District: _____ Date Completed: _____

Completed by: _____ Date Review Meeting Held: _____

(Quality Criteria)

Doing a Great Job _____

Would Like Improvement _____

Needs Help _____

Comments and Needs _____

I. Pack Leadership

A. An active committee meets monthly. _____

B. Assistant leaders are in place for pack and dens. _____

C. Adult leaders are registered and Fast Start and Basic Training are completed.

D. All dens have active den chiefs. _____

E. An active pack trainer is on the pack committee. _____

F. At least one adult is trained in BALOO (Basic Adult Leader Outdoor Orientation).

G. All adults are trained in Youth Protection. _____

H. Webelos leaders have been trained in Outdoor Leader Skills for Webelos leaders.

II. Program

A. We develop an annual program calendar and share it with our families.

B. We operate under the annual budget plan. _____

C. We conduct monthly pack leader meetings to plan den and pack meetings.

D. Den and pack leaders attend roundtables. _____

E. We review our program routinely with our chartered organization representative.

F. We develop an active outdoor program to involve our families.

G. A good percentage of our youth earn advancement awards regularly.

H. We conduct a monthly summertime program.

I. Our unit is 100% *Boys' Life* with all families.

J. We conduct at least one service project annually.

III. **Membership/Attendance**

A. We have dens of all ages involved.

B. Our weekly den meetings are strongly attended by our members.

C. We have good participation from youth and parents at pack meetings.

D. Our youth and leaders wear their uniforms to den and pack meetings and on outings.

E. We have an annual plan to recruit new youth members.

IV. **Journey to Excellence Performance Recognition Standards**

A. We annually recharter on time.

B. We earned the Journey to Excellence last year.

C. We are on track to earn the Journey to Excellence award this year.

PACK _____ of _____ District
2014 Scouting's Journey to Excellence

Item Number	Objective	Bronze Level	Silver Level	Gold Level	Bronze Points	Silver Points	Gold Points
1	Advancement: Increase the percentage of Cub Scouts earning rank advancements.	Have 40% of Cub Scouts advance one rank or have a 2 percentage point increase.	Have 55% of Cub Scouts advance, or have 40% advance and a 2 percentage point increase.	Have 75% of Cub Scouts advance, or have 55% advance and a 2 percentage point increase.	100	200	400
2	Retention: Improve retention rate.	Retain and reregister 60% of eligible members or have a 2 percentage point increase.	Retain and reregister 65% of members, or retain and reregister 60% and have a 2 percentage point increase.	Retain and reregister 75% of members, or retain and reregister 65% and have a 2 percentage point increase.	100	200	400
3	Building Cub Scouting: Have an increase in membership or be larger than the average size pack at charter renewal time.	Have a membership growth plan and either a net gain of one member over last year or at least 27 members.	Have a membership growth plan and either increase youth members by 5% or have at least 40 members.	Have a membership growth plan and either increase youth members by 10% or have at least 60 members with an increase over last year.	75	150	300
4	Outdoor activities: The pack has activities in the outdoors.	Have three outdoor activities during the year.	Have four outdoor activities during the year.	Have five outdoor activities during the year.	75	150	300
5	Trained leadership: Have a trained and engaged pack committee.	Have a Cubmaster and a committee with at least three members. All dens have registered leaders.	Achieve Bronze, plus the Cubmaster and den leaders have completed basic leader training or, if new, will complete within three months of joining.	Achieve Silver, plus two-thirds of active committee members must have completed basic leader training.	50	100	200
6	Day/resident/family camp: Increase the percentage of Cub Scouts attending Cub Scout day camp, family camp, and/or Cub Scout resident camp.	33% or 2 percentage point increase.	50%, or 33% and 2 percentage point increase.	75%, or 50% and 2 percentage point increase.	50	100	200
7	Service projects: The pack participates in service projects, with one benefitting your chartered organization.	Participate in two service projects and enter the hours on the JTE website.	Participate in three service projects and enter the hours on the JTE website.	Participate in four service projects and enter the hours on the JTE website.	50	100	200
8	Leadership planning: Next year's leaders are identified early.	By May 31, the pack committee recruits/confirms pack and den leadership for the next year.	Achieve Bronze, plus the pack holds its fall recruitment by September 30.	Achieve Silver, plus every leadership position is filled by October 15.	50	100	200
9	Webelos-to-Scout transition: Have a Webelos-to-Scout transition plan with a troop or troops.	With a troop, hold two joint activities, one of which is a parent orientation and camp promotion meeting.	60% of eligible Webelos register with a troop.	80% of eligible Webelos register with a troop and the pack has at least one active den chief.	50	100	200
10	Budget: The pack has a budget that is continually reviewed by the committee and follows BSA policies relating to fundraising and fiscal management.	Have a written budget reviewed at committee meetings and that follows BSA policies.	Achieve Bronze, plus Cub Scouts' ideas are used in the budget planning process.	Achieve Silver, plus budget is completed before the next program year.	25	50	100
11	Pack and den meetings: Packs and dens have regular meetings.	Hold nine pack meetings a year, have an active program plan, and ask for parental involvement. Den or pack meetings have started by October 31.	Achieve Bronze, plus pack committee meets at least six times a year. Dens meet at least twice a month during the school year.	Achieve Silver, plus earn the Summertime Pack Award.	25	50	100
12	Fitness: Pack and den meetings have activities that include a physical fitness component.	Introduce the SCOUTStrong program in the pack.	Achieve Bronze, plus the pack promotes and coordinates group fitness activities.	Achieve Silver, plus the pack holds an ongoing fitness competition where members can track their performance.	25	50	100
13	Annual Charter Renewal Process	Complete charter reregistration, obtain all signatures, and submit paperwork to the council office or your commissioner prior to the expiration of your charter.	Achieve Bronze, plus email addresses are provided for all parents of youth members and registered adults who have one.	Achieve Silver, plus promote the MyScouting Tools accessed through your MyScouting account and invite a commissioner and your chartered organization representative to at least one meeting.	25	50	100

Bronze: Earn at least 700 points by earning points in at least 10 objectives.

Silver: Earn at least 1,000 points by earning points in at least 10 objectives.

Gold: Earn at least 1,600 points by earning points in at least 10 objectives.

Points _____

Total points _____

We certify on our honor as Scout leaders that these requirements have been completed.

Cubmaster _____ Committee chair _____

Commissioner _____ Chartered Org. Rep. _____

Level achieved _____ Did not achieve _____ Date _____

This form should be turned in to the Scout service center or your unit commissioner with your charter renewal paperwork.



Troop/Team Self-Assessment

(Journey to Excellence Worksheet)

Troop/Team Number: _____ District: _____ Date Completed: _____

Completed by: _____ Date Review Meeting Held: _____

(Quality Criteria)

Doing a Great Job _____

Would Like Improvement _____

Needs Help _____

Comments and Needs _____

I. Troop/Team Leadership

A. An active adult committee meets monthly. _____

B. Assistant adult leaders are involved in the troop/team.

C. Adult leaders are registered and Fast Start and Basic Training are completed.

D. The unit provides a pack with active den chiefs. _____

E. An adult leader coordinates training for all adults. _____

F. An adult leader is trained in Safe Swim Defense and Safety Afloat.

G. An adult leader coordinates Youth Protection training. Everyone is trained.

H. Youth leaders are elected by youth twice per year and are provided training.

II. Program

A. We develop an annual program calendar and share it with our families.

B. We operate under the annual budget plan. _____

C. We conduct monthly troop/team youth leader meetings to plan unit meetings and outings. _____

D. We have adult leaders attend roundtables. _____

E. We review program routinely with our chartered organization representative.

- F. We have a strong outdoor program and go on at least one outdoor trip monthly/regularly. _____
- G. A good percentage of our youth earn advancement/recognition awards regularly. _____
- H. Our troop attends summer camp. _____ or
- I. Our troop/team plans a major activity annually. _____
- J. Our unit is 100% *Boys' Life* with all families. _____
- K. We conduct at least one service project annually. _____

III. **Membership/Attendance**

- A. We have youth of all ages involved. _____
- B. Our weekly unit meetings are strongly attended by our members. _____
- C. We have good participation from youth and parents at quarterly courts of honor/recognition meetings. _____
- D. Our youth and leaders wear their uniforms to unit meetings and on outings. _____
- E. We have an annual plan to recruit new youth members, including graduating Webelos Scouts. _____

IV. **Journey to Excellence Performance Recognition Standards**

- A. We annually recharter on time. _____
- B. We earned the Journey to Excellence last year. _____
- C. We are on track to earn the Journey to Excellence award this year. _____

TROOP _____ of _____ District
2014 Scouting's Journey to Excellence

Item Number	Objective	Bronze Level	Silver Level	Gold Level	Bronze Points	Silver Points	Gold Points
1	Advancement: Increase the percentage of Boy Scouts earning rank advancements.	Have 40% of Boy Scouts advance one rank or have a 2 percentage point increase.	Have 45% of Boy Scouts advance, or 40% advance and a 2 percentage point increase.	Have 50% of Boy Scouts advance, or 45% and have a 2 percentage point increase.	75	150	300
2	Retention: Improve retention rate.	Retain and reregister 75% of eligible members, or have a 2 percentage point increase.	Retain and reregister 80% of members, or retain and reregister 75% and have a 2 percentage point increase.	Retain and reregister 85% of members, or retain and reregister 80% and have a 2 percentage point increase.	75	150	300
3	Building Boy Scouting: Have an increase in membership or be larger than the average size troop.	Have a membership growth plan that includes a recruitment night and either a net gain of one member over last year or at least 15 members.	Have a membership growth plan that includes a recruitment night and either increase youth members by 5% or have at least 25 members.	Have a membership growth plan that includes a recruitment night and either increase youth members by 10% or have at least 35 members with an increase over last year.	75	150	300
4	Trained leadership: Have a trained and engaged troop committee.	Have a Scoutmaster, an assistant Scoutmaster, and a committee with at least three members.	Achieve Bronze, plus the Scoutmaster and 60% of assistants have completed basic leader training or, if new, will complete within three months of joining.	Achieve Silver, plus two-thirds of active committee members must have completed Troop Committee Challenge and at least one person has attended Wood Badge.	75	150	300
5	Short-term camping: The troop conducts short-term or weekend campouts throughout the year.	Conduct four short-term overnight campouts.	Conduct seven short-term overnight campouts.	Conduct nine short-term overnight campouts.	50	100	200
6	Long-term camping: The troop participates in a long-term camp.	The troop participates in a long-term camp.	60% of Scouts attend a long-term camp.	70% of Scouts attend a long-term camp.	50	100	200
7	Patrol method: The troop uses the patrol method.	The troop has patrols, and each has a patrol leader. There is an SPL if more than one patrol. The PLC meets at least four times a year. The troop holds patrol leader training.	PLC meets at least six times a year, including an annual planning meeting.	PLC meets at least 10 times a year, including an annual planning meeting, and one Scout attends NYLT.	50	100	200
8	Service projects: The troop participates in service projects, with one benefiting your chartered organization.	Participate in four service projects and enter the hours on the JTE website.	Participate in five service projects and enter the hours on the JTE website.	Participate in six service projects and enter the hours on the JTE website.	50	100	200
9	Webelos-to-Scout transition: Have a Webelos-to-Scout transition plan.	With a pack or Webelos den, hold two joint activities, one of which is a Webelos parent orientation and camp promotion meeting.	Achieve Bronze, plus recruit two Webelos Scouts.	Achieve Bronze, plus provide at least one den chief to a pack and recruit five Webelos Scouts.	50	100	200
10	Budget: The troop has a budget that is continually reviewed by the committee and follows BSA policies relating to fundraising and fiscal management.	Have a written budget reviewed at committee meetings and that follows BSA policies.	Achieve Bronze, plus Scouts participate in the budget planning process.	Achieve Silver, plus budget is completed before the next program year.	25	50	100
11	Courts of honor/parents meetings: Scouts are recognized for their badges at courts of honor.	Scouts are recognized for badges or cards at least twice a year at courts of honor, where troop plans are reviewed with parents.	Three courts of honor are held with families attending.	Four courts of honor are held with families attending.	25	50	100
12	Fitness: Troop meetings and activities include physical fitness components.	Introduce the SCOUTStrong program in the troop.	Achieve Bronze, plus the troop promotes and coordinates group fitness activities.	Achieve Silver, plus the troop holds an ongoing fitness competition where members can track their performance.	50	100	200
13	Annual Charter Renewal Process	Complete charter reregistration, obtain all signatures, and submit paperwork to the council office or your commissioner prior to the expiration of your charter.	Achieve Bronze, plus email addresses are provided for all parents of youth members and registered adults who have one.	Achieve Silver, plus promote the MyScouting Tools accessed through your MyScouting account and invite a commissioner and your chartered organization representative to at least one meeting.	25	50	100

Bronze: Earn at least 700 points by earning points in at least 11 objectives.

Silver: Earn at least 1,000 points by earning points in at least 11 objectives.

Gold: Earn at least 1,600 points by earning points in at least 11 objectives.

Points _____

Total points _____

We certify on our honor as Scout leaders that these requirements have been completed.

Scoutmaster _____ Committee chair _____

Commissioner _____ Chartered Org. Rep. _____

Level achieved _____ Did not achieve _____

Date _____

This form should be turned in to the Scout service center or your unit commissioner with your charter renewal paperwork.



TEAM _____ of _____ District
2014 Scouting's Journey to Excellence

Item Number	Objective	Bronze Level	Silver Level	Gold Level	Bronze Points	Silver Points	Gold Points
1	Advancement: Increase the percentage of Varsity Scouts earning rank advancements and Varsity awards.	Have 40% of Varsity Scouts advance one rank or earn the Varsity Letter or Varsity Denali award, or have a 2 percentage point increase.	Have 45% of Varsity Scouts advance one rank or earn the Varsity Letter or Varsity Denali award, or have 40% advance and a 2 percentage point increase.	Have 50% of Varsity Scouts advance one rank or earn the Varsity Letter or Varsity Denali award, or have 45% advance and a 2 percentage point increase.	75	150	300
2	Retention: Improve retention rate.	Retain and re-register 75% of eligible members, or have a 2 percentage point increase.	Retain and re-register 80% of members, or retain and re-register 75% and have a 2 percentage point increase.	Retain and re-register 85% of members, or retain and re-register 80% and have a 2 percentage point increase.	75	150	300
3	Building Varsity Scouting: Have an increase in membership or be larger than the average size team.	Have a membership growth plan that includes a recruitment night and a net gain of one member over last year.	Have a membership growth plan that includes a recruitment night and a net gain of two members over last year.	Have a membership growth plan that includes a recruitment night and a net gain of three members over last year.	75	150	300
4	Trained leadership: Have a trained and engaged team committee and advisors.	Have a Coach, an assistant Coach, and a committee with at least three members.	The Coach and 60% of active assistants have completed basic leader training, or, if new, will complete within three months of joining.	Achieve Silver, plus two-thirds of active committee must have completed Troop Committee Challenge and at least one person has attended Wood Badge.	75	150	300
5	Five fields of emphasis: The team conducts regular activities in the five fields of emphasis.	Conduct activities from three of the five fields of emphasis.	Conduct activities from four of the five fields of emphasis.	Conduct activities from all five fields of emphasis.	50	100	200
6	Long-term high-adventure: The team participates in at least one high-adventure activity.	The team participates in high-adventure activities.	60% of Scouts attend a high-adventure activity.	70% of Scouts attend a high-adventure activity.	50	100	200
7	Team/squad method: The team uses the team/squad method.	The team has squad and program managers, and each squad has a squad leader. There is a captain. The TLC meets four times a year. The team holds team leadership training.	TLC meets six times a year, including an annual planning meeting.	TLC meets 10 times a year, including an annual planning meeting, and one Scout attends NYLT.	50	100	200
8	Service projects: The team participates in service activities, with one benefiting your chartered organization.	Participate in four service activities and enter the hours on the JTE website.	Participate in five service activities and enter the hours on the JTE website.	Participate in six service activities and enter the hours on the JTE website.	50	100	200
9	Budget: The team has a budget that is continually reviewed by the committee and follows BSA policies relating to fundraising and fiscal management.	Have a written budget reviewed at committee meetings and that follows BSA policies.	Achieve Bronze, plus Scouts participate in the budget planning process.	Achieve Silver, plus have the budget completed before the next program year.	25	50	100
10	Courts of honor: Varsity Scouts are recognized for their Varsity awards.	Scouts are recognized for awards at least twice a year at courts of honor.	Three courts of honor are held.	Four courts of honor are held.	25	50	100
11	Fitness: Team meetings and activities include physical fitness components.	Introduce the SCOUTStrong program in the team.	Achieve Bronze, plus the team promotes and coordinates group fitness activities.	Achieve Silver, plus the team holds an ongoing fitness competition where members can track their performance.	50	100	200
12	Annual Charter Renewal Process	Complete charter reregistration, obtain all signatures, and submit paperwork to the council office or your commissioner prior to the expiration of your charter.	Achieve Bronze, plus email addresses are provided for all parents of youth members and registered adults who have one.	Achieve Silver, plus promote the MyScouting Tools accessed through your MyScouting account, and invite a commissioner and your chartered organization representative to at least one meeting.	25	50	100

Bronze: Earn at least 700 points by earning points in at least 10 objectives.
Silver: Earn at least 1,000 points by earning points in at least 10 objectives.
Gold: Earn at least 1,600 points by earning points in at least 10 objectives.

We certify on our honor as Varsity Scout leaders that these requirements have been completed.

Team Coach _____ Committee chair _____
Commissioner _____ Chartered Org. Rep. _____

This form should be turned in to the Scout service center or your unit commissioner with your charter renewal paperwork.

Points _____

Total points _____

Level achieved _____

Did not achieve _____

Date _____



Crew/Ship Self-Assessment

(Journey to Excellence Worksheet)

Crew/Ship Number: _____ District: _____ Date Completed: _____

Completed by: _____ Date Review Meeting Held: _____

(Quality Criteria)

Doing a Great Job _____

Would Like Improvement _____

Needs Help _____

Comments and Needs _____

I. Crew/Ship Leadership

A. An active committee with at least three members meets at least four times a year.

B. Assistant adult leaders are involved in the unit. The unit has coed leadership (if the crew is coed). _____

C. Adult leaders are registered and Fast Start and Basic Training are completed.

D. An adult leader coordinates training for all adults. _____

E. An adult leader is trained in Safe Swim Defense and Safety Afloat (if aquatic activities are planned). _____

F. An adult leader coordinates Youth Protection training. Everyone is trained.

G. Youth leaders are elected by youth annually and are trained at a crew officers' seminar

H. Meetings and activities involve youth chairs and youth officers with adult guidance.

II. Program

A. We develop an annual program calendar and share it with our families.

B. We operate under the annual budget plan. _____

C. We conduct monthly unit officer/leader meetings to plan unit meetings and activities.

D. We have adult leaders attend roundtables and Teen Leaders' Council meetings (if held). _____

E. We review our program routinely with our chartered organization representative.

F. We have a strong program and go on at least one activity per month.

G. We use the advancement/recognition awards programs to encourage personal development.

H. We attend special council/district events.

I. We plan a major activity annually.

J. We conduct at least one service project annually.

K. We support a pack or troop annually.

L. We participate in a Venturing Leadership Skills Course annually.

M. We conduct a minimum of two meetings or activities each month.

III. Membership/Attendance

A. Our unit meetings are attended by at least 50 percent of our members regularly.

B. Our youth and leaders wear their uniforms to unit meetings and on outings (if applicable).

C. Our unit has an annual plan to recruit new youth members.

IV. Journey to Excellence Performance Recognition Standards

A. We annually recharter on time.

B. We earned the Journey to Excellence last year.

C. We are on track to earn the Journey to Excellence award this year.

CREW _____ of _____ District
2014 Scouting's Journey to Excellence

Item Number	Objective	Bronze Level	Silver Level	Gold Level	Bronze Points	Silver Points	Gold Points
1	Activities: The crew has regular activities throughout the year reflecting the interests of the youth members.	Have carried out at least four activities.	Have carried out at least five activities.	Have carried out at least six activities.	100	200	400
2	Building Venturing: Have an increase in membership or be larger than the average size crew.	Have a membership growth plan that includes a recruitment night and either a net gain of one member over last year or at least seven members.	Have a membership growth plan that includes a recruitment night and either increase youth members by 5% or have at least 10 members.	Have a membership growth plan that includes a recruitment night and either increase youth members by 10% or have at least 15 members with an increase over last year.	75	150	300
3	Retention: Improve retention rate.	Retain and re-register 45% of eligible members or have a 2 percentage point increase.	Retain and re-register 60% of members, or retain and re-register 45% and have a 2 percentage point increase.	Retain and re-register 80% of members, or retain and re-register 60% and have a 2 percentage point increase.	75	150	300
4	Youth leadership: The crew has elected youth leaders who are leading the crew activities.	Have an elected president, vice president, secretary, and treasurer, and they are leading the activities of the crew.	Achieve Bronze, plus officers prepare annual program plan.	Achieve Silver, plus officers meet at least four times and/or attend council VOA meetings.	75	150	300
5	Service projects: The crew participates in service projects, with one benefitting your chartered organization.	Participate in two service projects and enter the hours on the JTE website.	Participate in three service projects and enter the hours on the JTE website.	Participate in four service projects and enter the hours on the JTE website.	75	150	300
6	Trained leadership: Have a trained and engaged crew committee.	Have an Advisor and a committee with at least three members.	Achieve Bronze, plus Advisor and two-thirds of other registered adults have completed basic leader training or, if new, will complete within three months of joining.	Achieve Silver, plus 50% of youth participate in Introduction to Leadership Skills for Crews.	75	150	300
7	Super activity: The crew participates in a super activity.	Participates in a super activity.	55% of youth attend a super activity.	75% of youth attend a super activity.	75	150	300
8	Budget: The crew has a budget and follows BSA policies relating to fundraising and fiscal management.	Have a written budget reviewed at committee meetings and that follows BSA policies.	Achieve Bronze, plus youth members participate in the budget planning process.	Achieve Silver, plus have the budget completed before the next program year.	25	50	100
9	Fitness: Crew meetings and activities include physical fitness components.	Introduce the SCOUTStrong program in the crew.	Achieve Bronze, plus the crew promotes and coordinates group fitness activities.	Achieve Silver, plus the crew holds an ongoing fitness competition where members can track their performance.	50	100	200
10	Annual Charter Renewal Process	Complete charter reregistration, obtain all signatures, and submit paperwork to the council office or your commissioner prior to the expiration of your charter.	Achieve Bronze, plus email addresses are provided for all parents of youth members and registered adults who have one.	Achieve Silver, plus promote the MyScouting Tools accessed through your MyScouting account.	25	50	100

Bronze: Earn at least 700 points by earning points in at least 8 objectives.

Silver: Earn at least 1,000 points by earning points in at least 8 objectives.

Gold: Earn at least 1,600 points by earning points in at least 8 objectives.

Points _____

Total points _____

We certify on our honor as Venturers and Venturing leaders that these requirements have been completed.

Crew president _____ Crew secretary _____ Level achieved _____

Advisor _____ Committee chair _____ Did not achieve _____

Commissioner _____ Chartered Org. Rep. _____ Date _____

This form should be turned in to the Scout service center or your unit commissioner with your charter renewal paperwork.



SHIP _____ of _____ District
2014 Scouting's Journey to Excellence

Item Number	Objective	Bronze Level	Silver Level	Gold Level	Bronze Points	Silver Points	Gold Points
1	Activities: The ship has regular activities throughout the year reflecting the interests of the youth members.	Have carried out at least four activities.	Have carried out at least five activities.	Have carried out at least six activities.	100	200	400
2	Building Sea Scouts: Have an increase in membership or be larger than the average size ship.	Have a membership growth plan that includes a recruitment night and either a net gain of one member over last year or at least 7 members.	Have a membership growth plan that includes a recruitment night and either increase youth members by 5% or have at least 10 members.	Have a membership growth plan that includes a recruitment night and either increase youth members by 10% or have at least 15 members with an increase over last year.	75	150	300
3	Retention: Improve retention rate.	Retain and re-register 45% of eligible members or have a 2 percentage point increase.	Retain and re-register 60% of members, or retain and re-register 45% and have a 2 percentage point increase.	Retain and re-register 80% of members, or retain and re-register 60% and have a 2 percentage point increase.	75	150	300
4	Youth leadership: The ship has elected youth leaders who are leading the ship activities.	Have an elected boatswain, boatswain's mate, yeoman, and purser, and they are leading the activities of the ship.	Achieve Bronze, plus 50% of the youth participate in Sea Scout quarterdeck training.	Achieve Silver, plus 70% of youth participate in Sea Scout quarterdeck training.	75	150	300
5	Service projects: The ship participates in service projects, with one benefiting your chartered organization.	Participate in two service projects and enter the hours on the JTE website.	Participate in three service projects and enter the hours on the JTE website.	Participate in four service projects and enter the hours on the JTE website.	75	150	300
6	Trained leadership: Have a trained and engaged ship committee.	Have a Skipper, a mate, and a committee with at least three members.	Achieve Bronze, plus Skipper, mates, and two-thirds of other registered adults have completed Sea Scout Adult Leader Basic Training; or, if new, will complete within three months of joining.	Achieve Silver, plus 50% of youth participate in a youth training course.	75	150	300
7	Super activity/Long Cruise: The ship participates in a super activity/long cruise.	Participates in a super activity/long cruise.	55% of youth attend a super activity/long cruise.	75% of youth attend a super activity/long cruise.	75	150	300
8	Budget: The ship has a budget and follows BSA policies relating to fundraising and fiscal management.	Have a written budget reviewed at committee meetings and that follows BSA policies.	Achieve Bronze, plus the youth participate in the budget planning process.	Achieve Silver, plus have the budget completed before the next program year.	25	50	100
9	Fitness: Ship meetings and activities include physical fitness components.	Introduce the SCOUTStrong program in the ship.	Achieve Bronze, plus the ship promotes and coordinates group fitness activities.	Achieve Silver, plus the ship holds an ongoing fitness competition where members can track their performance.	50	100	200
10	Annual Charter Renewal Process	Complete charter reregistration, obtain all signatures, and submit paperwork to the council office or your commissioner prior to the expiration of your charter.	Achieve Bronze, plus email addresses are provided for all parents of youth members and registered adults who have one.	Achieve Silver, plus promote the MyScouting Tools accessed through your MyScouting account and attend at least one district or council event as an outreach activity.	25	50	100

Bronze: Earn at least 700 points by earning points in at least 8 objectives.
Silver: Earn at least 1,000 points by earning points in at least 8 objectives.
Gold: Earn at least 1,600 points by earning points in at least 8 objectives.

Points _____
Total points _____

We certify on our honor as Venturers and Venturing leaders that these requirements have been completed.

Ship boatswain _____ Ship yeoman _____ **Level achieved** _____
Skipper _____ Committee chair _____ **Did not achieve** _____
Commissioner _____ Chartered Org. Rep. _____ Date _____

This form should be turned in to the Scout service center or your unit commissioner with your charter renewal paperwork.



NEW-UNIT APPLICATION



Cub Scouting



Boy Scouting

Purpose of the Boy Scouts of America

Its purpose is to promote, through cooperation with other agencies, the ability of youth to do things for themselves and others, and to teach them patriotism, courage, self-reliance, and kindred virtues. In achieving this purpose, emphasis is placed upon its educational program and the oaths, promises, and codes for character development, citizenship training, and mental and physical fitness.

Pack

Cub Scouting is for parents, leaders, and organizations to use with boys who are in the first through fifth grade or are 7 through 10 years old.

Troop

Boy Scouting is an educational program filled with fun and adventure that appeals to boys.

Boys must be under the age of 18 and at least 11, or have completed the fifth grade and be at least 10 years old, or have earned the Arrow of Light Award in Cub Scouting and be at least 10 years old.

Team

Varsity Scouting is a program designed to assist your organization in meeting the needs and interests of older boys. Boys must be at least age 14 and not yet age 18.

Venturing Crew/Ship

Venturing will help your organization meet the needs, desires, and concerns of young adults. Young men and women must be ages 14 through 20, or 13 with the completion of the eighth grade.



Varsity Scouting

VENTURING • BSA®
Venturer/Sea Scout

BOY SCOUTS OF AMERICA®

A CHARTERED ORGANIZATION

The chartered organization selects one of its members to register as chartered organization representative who may also serve as chair or as unit committee member if needed. All units must have a unit leader and a minimum of five paid youth. There must be at least three committee members, with one named chair. Packs must have a den leader/Webelos den leader/Tiger Cub leader who should be registered as an adult in the pack. The chartered organization also provides meeting facilities for the unit. No one may register in more than one position in the same unit, except the chartered organization representative.

Unit Liability Insurance Fee. Units are required to pay an annual unit liability insurance fee of \$40. This fee must be submitted with the unit's charter application and will help defray the expenses for the general liability insurance program. These fees will raise approximately 25 percent of the funds required to maintain insurance coverage for all chartered organizations, leaders, and ScoutParent unit coordinators.

Chartered Organization Certification. The executive officer of the chartered organization, by signature, certifies that the organization approves the charter application. The executive officer also certifies that the organization has approved all registering unit adults. The responsibility for approval of unit adults can also be given to the chartered organization representative. The chartered organization certifies that all registered adults: agree to abide by the Scout Oath and the Scout Law, the Declaration of Religious Principle, the policy of nondiscrimination, and the *Charter and Bylaws* and the *Rules and Regulations of the Boy Scouts of America*; agree to respect and obey the laws of the United States of America, and to meet age requirements as follows:

- **Packs**—All leaders must be at least 21 years of age except assistants, who must be at least 18 years of age. Tiger Cub adult partners must be at least 18 years of age.
- **Troops**—Assistant Scoutmasters may be 18. All other adults in the troop must be at least 21.
- **Teams**—Varsity Scout Coaches must be at least 21 years old. Assistant Varsity Scout Coaches must be at least 18 years old.
- **Crews/Ships**—All leaders must be at least 21 years old.

YOUR LOCAL COUNCIL THROUGH THE BOY SCOUTS OF AMERICA:

1. Helps you organize your unit.
 - Provides unit committee with proven and accepted methods to recruit leadership.
 - Outlines suggested procedures to recruit youth.
 - Conducts organization meetings.
 - Shares in approval process for unit leaders.
2. Provides training opportunities for your Scouting leaders.
3. Provides year-round help.
 - Leader roundtables
 - Commissioner service
 - Concerned district personnel
 - Special activities and events
4. Maintains a council service center.
 - Program resources
 - Latest editions of literature
 - Professional staff assistance

INSTRUCTIONS

Program. Indicate program by placing an "X" in the appropriate box on the application.

Unit Leader Certification. The unit leader certifies on individual applications that each member meets the age and gender requirements as follows:

- **Packs**—The Cubmaster certifies that each boy is in the first through fifth grade, or is 7 through 10 years old and that each boy has parental consent.
- **Troops**—The Scoutmaster certifies that each boy is under the age of 18 or at least 11, or has completed the fifth grade and is at least 10 years old, or has earned the Arrow of Light Award and is at least 10 years old.
- **Teams**—The Coach certifies that each boy is at least age 14 and not yet age 18.
- **Crews/Ships**—The Advisor/Skipper certifies that each crew or ship youth member has completed the eighth grade and is at least 13 or 14 years of age and not yet 21. The youth in these units may be male or female.

For Units Serving People With Special Needs. Please use one of the following disability codes when registering a unit with a majority of members who have special needs.

Mentally Disabled

Physically Disabled

Special Interest

A special-interest code and description should be entered for units with a special interest. Use the following descriptions and codes: traditional program, code 0413; Soccer and Scouting, code 0414; and Scoutreach, code 0418.

Policy of Nondiscrimination. Membership in the Boy Scouts of America is open to all boys and young adults who meet the joining requirements. Membership in Scouting, advancement, and achievement of leadership in Scouting units are open to all youth without regard to race or ethnic background and are based entirely upon individual merit.

NEW-UNIT APPLICATION

Council No.

Print one letter in each space—leave a space between words.

Chrt. org. code

Full name of chartered organization

District No.—Name

County

Special needs or special-interest type

Address of chartered organization

City

State

Zip code

Executive officer: First name

Middle name

Last name

Suffix

Sex

County

Executive officer email address: ☐ Work ☐ Home

Address

Date of birth (mm/dd/yyyy)

City

State

Zip code

Phone No.

Pack (C) ☐

Team (V) ☐

Ship (P) ☐

Effective date

Term (months)

Expire date (month and year)

Unit No.

Special-interest code—Description

100% Boys' Life unit

First issue

Last issue

Subscription term (months)

No.

Youth registration fees

\$

Leader registration fees

\$

Boys' Life fees

\$

Unit liability insurance fees

\$

Total fees

\$

Signature of executive officer

Signature (for the council)

524-402

LOCAL COUNCIL COPY

Retain on file for three years.

NEW-UNIT APPLICATION

Council No.

Print one letter in each space—leave a space between words.

Chrt. org. code

Full name of chartered organization

District No.—Name

County

Special needs or special-interest type

Address of chartered organization

City

State

Zip code

Executive officer: First name

Middle name

Last name

Suffix

Sex

County

Executive officer email address: ☐ Work ☐ Home

Address

Date of birth (mm/dd/yyyy)

City

State

Zip code

Phone No.

Pack (C) ☐

Team (V) ☐

Ship (P) ☐

Effective date

Term (months)

Expire date (month and year)

Unit No.

Special-interest code—Description

100% Boys' Life unit

First issue

Last issue

Subscription term (months)

No.

Youth registration fees

\$

Leader registration fees

\$

Boys' Life fees

\$

Unit liability insurance fees

\$

Total fees

\$

Signature of executive officer

Signature (for the council)

524-402

UNIT COPY

Retain on file for three years.

FOUNDER Recognition

In celebration of the 100th Anniversary of the Boy Scouts of America, the New-Unit Task Force announces the new Founder's Bar recognition.

The Founder's Bar is worn by all youth and adults whose names are on a new-unit charter or who officially join the new unit before the unit recharter for the first time. Members of veteran units still in operation who were on the original charter may also wear the Founder's Bar with that unit's numerals.

This recognition will emphasize the importance and pride of forming and nurturing a new Scouting unit. While it does not guarantee the unit will become a Quality Unit, it does encourage multiple-year rechartering so members may continue to wear the bar.

Once the unit has completed its charter, members may begin wearing the Founder's Bar. The Founder's Bar is worn on the left shoulder below the unit numerals.

The Founder's Bar, certificate, and pocket certificate are available for distribution. Contact your local Scout shop for more information.



Founder's Bar, No. 610129



Founder's Bar
Pocket Certificate,
No. 34776



Founder's Bar Certificate, No. 34775



COMMUNITY ALLIANCES
BOY SCOUTS OF AMERICA®

The William D. Boyce New-Unit Organizer Award

In a heavy London fog in 1909, American businessman William D. Boyce became lost. He was approached by a youth who took Mr. Boyce to his destination. When offered a tip by Boyce, this unknown Scout refused to accept it, saying that he could not accept money for a good turn. This “Good Turn” gave birth to the Scouting movement in America. William D. Boyce was one of those organizing individuals who could see thousands of American youth exhibiting similar values.

To support efforts to have Scouting in every community in America, the Boy Scouts of America presents the William D. Boyce New-Unit Organizer Award to volunteers who exemplify Boyce’s organizing spirit.

The award is earned by organizing one new traditional unit. The award consists of a square knot against a background of gold, green, and red, the three colors representing the three traditional programs of the Boy Scouts of America. A device for each type of traditional unit organized can be worn with the square knot.

Description

The William D. Boyce New-Unit Organizer Award is presented to recognize volunteers who organize one or more traditional Scouting units. The award may be worn on the adult uniform. The award is a square knot placed over the three colors representing the three phases of our program—Cub Scouting, Boy Scouting, and Venturing. A volunteer can earn the knot by organizing one traditional unit, and a program device can be earned for up to three additional units organized.



The award was developed to recognize volunteers for organizing traditional units anytime after March 1, 2005.

The award is administered by the Community Alliances Team, Membership Impact Department and will be presented by the local council.

Requirements and Eligibility

1. With the approval of the district committee chair or district membership chair, the volunteer serves as the organizer and completes the successful

organization of one new traditional unit (Cub Scout pack, Boy Scout troop, Varsity team, or Venturing crew).

2. The volunteer organizes the unit by following all procedures as published in the Unit Performance Guide (No. 525-025) using the four pillar steps: 1) Know the Market, 2) Make the Call, 3) Build the Team, and 4) Grow the Unit, in particularly ensuring a new-unit commissioner has been recruited and works with the new-unit organizer at the very beginning of the organizational process. Unit Performance Guide standards to be met: 10 new youth, five adults, unit Key 3, engaged chartered organization. Note: The chartered organization representative is not a multiple position.
3. Quite often several individuals help to organize a new unit. We understand that “it takes a district to support a unit.” However, for this award, only one volunteer can be recognized as the organizer for a new unit.
4. To further recognize the volunteer for organizing additional new units, a program device can be earned and worn on the new-unit organizer knot. The program device represents the type of unit organized (a Cub Scout pack, Boy Scout troop, Varsity team, or Venturing crew). The knot and up to three program devices may be worn in recognition for organizing up to four new traditional units. Multiple program devices for organizing units in the same program may be earned and worn.
5. The William D. Boyce New-Unit Organizer Award is not presented to the new-unit organizer until after the unit is organized and then qualifies as a Bronze unit in Journey to Excellence after achieving its first charter renewal status.

Recognition Items

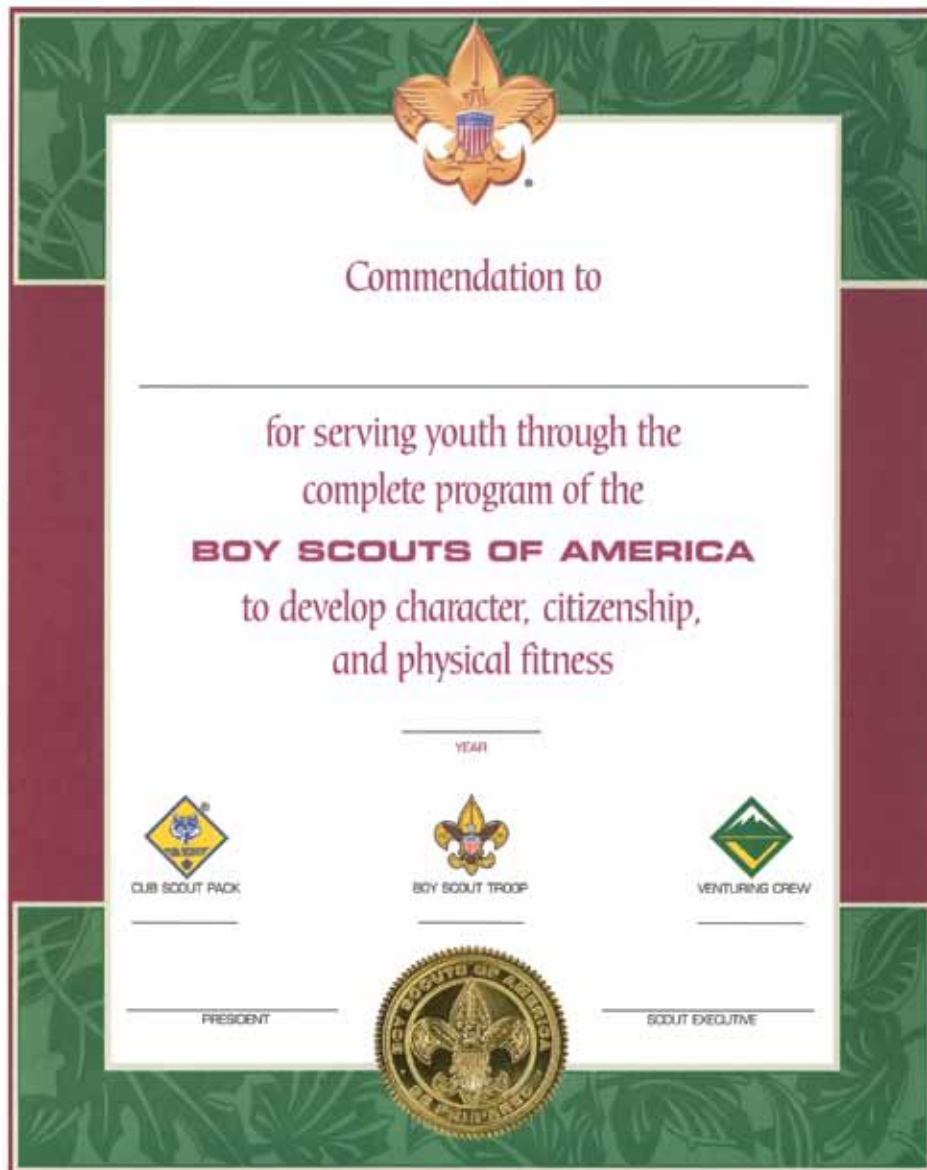
- New-Unit Organizer Award
- New-Unit Organizer Award Uniform Insignia Square Knot
- Program devices to recognize additional new units organized
- “Organizer” lapel pin for civilian wear



Scouting Family Organization Award

Concept: Recognize volunteers who organize a whole Scouting family in their chartered organization or other group:

- A Cub Scout pack, a Scout troop, a Venturing crew
- The ideal would be to organize all three phases of Scouting in the same organization, but this would not be a requirement.

The Award: A specially designed BSA certificate suitable for framing is available through the National Council. Call 972-580-2000 and ask for Community Alliances.



Requirements:	Participation:	Training and Experience:																					
<p>Any registered commissioner who is providing direct unit service is eligible to earn the Commissioner Award of Excellence in Unit Service, through unit service and a project that results in improved retention of members and on-time unit recharter, over the course of two consecutive years. If a commissioner who is not registered as a unit commissioner wishes to earn this award, they must work with the district commissioner where the unit(s) is/are registered.</p> <p>Date started: _____</p> <p>Unit type and number: _____</p> <p>Youth retention at last recharter: _____ (%) (See Journey to Excellence form.)</p> <p>ADC/DC signature: _____</p> <p>Technical Skills:</p> <p>The commissioner shall consistently demonstrate the following:</p> <ol style="list-style-type: none"> 1. The ability to use UVTS 2.0 to log unit visits 2. The ability to provide UVTS 2.0 visit reports to an ADC or DC <p>Signature of ADC/DC _____</p>	<p>Complete each item below:</p> <ol style="list-style-type: none"> 1. Be a participant or staff member in ONE continuing education event for commissioner service.¹ For example: district, council, area, regional, or national College of Commissioner Science, commissioner conference, Philmont, Sea Base, or Summit training. <p>Date: _____</p> <ol style="list-style-type: none"> 2. The commissioner shall make at least six physical visits to each assigned unit per year. All visits must be logged with UVTS 2.0. Examples: unit meetings, unit activities, leader meetings, and summer camp visitations 3. The commissioner shall make at least six significant contacts (in addition to those made in item 2) for each unit served, by telephone, two-way electronic communication, or in person. These contacts must be logged in UVTS 2.0. <p>Signature of ADC/DC _____</p> <p>Footnote 1: Participation or staffing in a continuing education event as noted above prior to the start date of this award shall not be applied. Participation or instructing during training sessions as part of regular staff meetings may not be applied.</p>	<p>Complete each item below:</p> <ol style="list-style-type: none"> 1. Commissioner Basic Training Date: _____ 2. Provide rechartering service by holding membership inventories, training verification, and Journey to Excellence² progress review meetings. Perform charter presentations for the chartered organizations of the units you serve. <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th style="width: 33%;">Unit Type and Number</th> <th style="width: 33%;">Date of Recharter</th> <th style="width: 33%;">Date Charter Presented</th> </tr> </thead> <tbody> <tr><td>P999</td><td></td><td></td></tr> <tr><td>P999</td><td></td><td></td></tr> <tr><td>T999</td><td></td><td></td></tr> <tr><td>T999</td><td></td><td></td></tr> <tr><td>C999</td><td></td><td></td></tr> <tr><td>C999</td><td></td><td></td></tr> </tbody> </table> <p>Footnote 2: Unit-specific requirements and performance criteria are founded on the BSA's Journey to Excellence guidelines. As changes are incorporated, the council commissioner must scope impacts and adjust expectations as required.</p>	Unit Type and Number	Date of Recharter	Date Charter Presented	P999			P999			T999			T999			C999			C999		
Unit Type and Number	Date of Recharter	Date Charter Presented																					
P999																							
P999																							
T999																							
T999																							
C999																							
C999																							
<p>Performance:</p> <p>Complete each item below:</p> <p>A. Performance Goal: Through utilization of the annual unit self-assessment tool, identify a specific goal in a specific unit that would result in higher quality unit performance. The goal should target improvement in at least one of the unit self-assessment target areas.</p> <p>Signature of ADC/DC and the date _____</p> <p>B. Action Plan: Provide a written plan to achieve the goal identified in item A above. Have the plan approved by the unit leader, with the unit leader's signature.</p> <p>Signature of ADC/DC and the date _____</p> <p>C. Results:</p> <ol style="list-style-type: none"> 1. Unit self-assessment conducted twice a year for two years: Dates: Year 1: _____ and _____ Year 2: _____ and _____ 2. Unit retention: On-time rechartering for two consecutive years: Dates: _____ and _____ 3. Youth retention: Youth retention percentages must show improvement: Year 1: _____% Year 2: _____% (See the Journey to Excellence form.) <p>Signature of ADC/DC _____</p>	<p>A commissioner may earn this award up to three times while registered as a commissioner at any level. A square knot is available for uniform wear, with added devices awarded for the second and third achievements.</p> <div style="margin: 20px 0;">  </div> <p>COMMITTEE ACTION</p> <p>Upon completion, a commissioner shall provide a copy of this form to the district commissioner, who will then convey this document to the council for verification and final approval.</p> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div>_____ Council commissioner</div> <div>_____ Date</div> </div> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div>_____ Council Scout executive</div> <div>_____ Date</div> </div>	<p>Commissioner Progress Record</p> <p>FOR THE</p> <div style="margin: 20px 0;">  </div> <p>Commissioner Award of Excellence in Unit Service</p> <p>Name: _____</p> <p>Address: _____</p> <p>City: _____</p> <p>Council: _____</p> <p>District: _____</p> <p>BOY SCOUTS OF AMERICA</p>																					



Put Your Unit on the Map!

Update your pin to connect families with Scouting in your neighborhood.

Update Now!

- ▶ Sign in to MyScouting.
- ▶ On the MyScouting homepage, click “BeAScout” in the Unit Tools section of the left menu.
- ▶ Click “Unit Pin Management” at the top of the BeAScout home page.
- ▶ Update your unit information!

Make it EASY for new Scouting families to find you!

 BOY SCOUTS OF AMERICA®

For details on how to customize a Google pin for your unit, see the “Be A Scout” PowerPoint presentations at www.scouting.org/Membership/youth_recruitment.aspx.

For additional membership and recruiting tools, see www.scouting.org/membership

Prepared. For Life.®

Other Prospective Chartered Organizations Unique to My District

[illegible]

No. 524-403
0613**UNREREGISTERED UNIT REPORT
BOY SCOUTS OF AMERICA**

To:

Date:

The charter for the following unit will expire on the date indicated and soon will drop. If this unit is to renew its charter and keep the same unit number with a record of continuous service for the unit and its members, prompt registration is essential. We want to help you in any way possible. This report, when returned to the local council service center, will help us to do so.

_____	_____
Council	Name
_____	_____
Address	Position

_____	_____	_____
Pack, Troop, Team, or Crew	No.	Address or district
Charter granted to _____		Expire date _____
Name of organization or group		
Unit tenure _____	Number of members _____	
_____	_____	
Leader	Chairman of unit committee	

REPORT OF CHARTERED ORGANIZATION

The above unit, for which we were granted a charter, will not reregister for the following reason.

✓ (Please check)

- ☐ We plan to reregister this unit by _____
- ☐ We believe a reorganization of this unit is necessary before it can be reregistered and request additional help from the district and council to this end.
- ☐ This unit will not reregister. The disposition of its funds and property is described on the reverse side.

Comments:

_____	_____
Date	Chairman of unit committee
_____	_____
	Chartered organization representative

IMPORTANT! Please return this report to your local council service center as soon as completed.

CONDITIONS FOUND

ACTION TAKEN

RECOMMENDATIONS

REPORT OF THE COMMISSIONER

Date _____ Signed _____

REPORT OF THE SCOUT EXECUTIVE OR DISTRICT EXECUTIVE

Date _____ Signed _____
Scout executive District Scout executive

REPORT OF DISPOSITION OF UNIT FUNDS AND PROPERTY

To be completed only if unit is to be permanently dropped.
Refer to Article XI, Section 1, Clauses 1 and 2 of the 2011 edition of the Rules and Regulations of the BSA for governing procedure.

Date _____ Signed _____ Signed _____
Committee chairman Executive officer

LOCAL COUNCIL ACTION

On the basis of this report and the above recommendations, (the executive board) (the district committee), at a formal meeting on

_____, decided:
Date

- ☐ 1. That further efforts should be made to reregister this unit before _____ while the unit is classified
as "lapsed" on the records of the local council and national office. Date
- ☐ 2. That every reasonable effort to reregister this unit has been made and that the unit shall be dropped from the records of the
local council and national office.

District chairman, council commissioner, or council president

Scout executive



VARSITY



V E N T U R I N G • B S A ®

MEMBERSHIP INVENTORY

**(To be conducted sixty days prior to the charter renewal date
as well as during the month of December)**

PURPOSE

1. Provides a roll call in which each unit member is contacted to determine quality of program received, to follow up on absent and inactive members, and to see if everyone is registered.
2. Invites each member to continue the program for another year and thus increases tenure of members.

The membership inventory is a part of the unit's charter renewal and will assist the unit in building strength with a quality program. It should be conducted sixty days prior to the unit's charter review meeting. Membership inventory is also held again in December to be sure all members are registered by year end.

INSTRUCTIONS

1. Select a unit adult to lead the inventory.
2. Invite your commissioner to assist.

3. Using the computer printout for charter renewal, the commissioner and unit adults conduct an inventory of youth and adults who are still active.
4. All inactive members are listed and assigned to various persons who will visit them or contact them to attempt to reactivate them. Be sure to brief the visitors/callers on what to say when they make their calls.
5. Agree on a plan to recruit new youth and adults so the unit can reregister with no loss in membership. One of the criteria for the Journey to Excellence Unit Award is to renew the unit's charter on time.
6. Now make every effort to recruit additional youth and adults.
7. Also be sure to register any youth who are participating but are not yet registered.



BOY SCOUTS OF AMERICA®

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WHAT MAKES A TRAINED LEADER?



Prepared. For Life.™



Adult leaders in units are considered trained, and eligible to wear the official *Trained* emblem, once they have completed Youth Protection Training and the training courses outlined below, or have completed Youth Protection Training and a previous basic training course when it was current.

Youth Protection Training* is a joining requirement for all registered adults and must be retaken every two years!

CUB SCOUTING

Leader-Specific (by position)

BOY SCOUTING

Leader-Specific (by position)**

Introduction to Outdoor Leader Skills***

VARSITY SCOUTING

Varsity Scout Leader-Specific (all Team adults)

Introduction to Outdoor Leader Skills***

VENTURING & SEA SCOUTS

All adults in Crews: Venturing Leader Specific

All adults in Ships: Sea Scout Adult Leader Basic

Need Help?

Contact the National Council – Boy Scouts of America
Program Impact – Volunteer Training Team

Mark Griffin	mark.griffin@scouting.org	972-580-2211
Peter Self	peter.self@scouting.org	972-580-2417
Cindy Polman	cynthia.polman@scouting.org	972-580-2459
Judy Maldonado	judy.maldonado@scouting.org	972-580-2449

* E-Learning page at www.myscouting.org

** Troop Committee Challenge* is the position specifics for troop committee members

*** Not required for committee positions

+ Chartered Organization Representatives take *This Is Scouting**, and *Chartered Organization Representative Training*

2/16/2013

CHARTER RENEWAL OVERFLOW PAGE

Council No.	Program	Unit No.	District Name/Number	Expire Date	Registration Team
-------------	---------	----------	----------------------	-------------	-------------------

Chartered organization _____

Youth roster ☐Adult roster ☐

Use separate pages for youth and adult members.

(Print First Name First)	Phone Number	Date of Birth	Grade	Sex	Boys' Life	Position
Name _____ Address _____ City _____ State _____ Zip _____						
Name _____ Address _____ City _____ State _____ Zip _____						
Name _____ Address _____ City _____ State _____ Zip _____						
Name _____ Address _____ City _____ State _____ Zip _____						
Name _____ Address _____ City _____ State _____ Zip _____						
Name _____ Address _____ City _____ State _____ Zip _____						
Name _____ Address _____ City _____ State _____ Zip _____						
Name _____ Address _____ City _____ State _____ Zip _____						
Name _____ Address _____ City _____ State _____ Zip _____						
Name _____ Address _____ City _____ State _____ Zip _____						



BOY SCOUTS OF AMERICA®

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Boy Scouts of America Sales Model



TRANSFER FORM

(YOUTH MEMBER)

PROCEDURE FOR TRANSFER



1. Unit leader issues transfer form to each member transferring to another unit in the same or another council.
2. Unit leader approves transfer form and includes complete Scouting record.
3. Member presents transfer form to unit leader of unit being joined.
4. Leader of the new unit registers member on proper application.

INFORMATION FROM UNIT THAT MEMBER IS LEAVING

Please transfer _____

from _____ No. _____ of _____
Pack, Troop, Team, Crew, Ship City and State

This member is registered in this unit until _____ *Boys' Life* subscription expires _____
Expire date

Reason for transferring _____

REGISTRATION RECORD

Type of unit	Number	City and State	From	To

SCOUTING HISTORY

Cub Scout Record	Varsity Scout Record	Activity Badges and Merit Badges (Give award and date.)	Offices Held and other Honors Secured, Including Order of the Arrow
Bobcat _____	Letter _____		
Tiger Cub _____			
Wolf _____	Venturing Record		
Bear _____	Bronze _____		
Webelos _____	Gold _____		
Arrow of Light _____	Silver _____		
Boy Scout/Varsity Scout Record	Ranger _____		
	Sea Scout Ranks		
Boy Scout _____	Apprentice _____		
Tenderfoot _____	Ordinary _____		
Second Class _____	Able _____		
First Class _____	Quartermaster _____		
Star _____	Camping History		
Life _____	Number of days _____		
Eagle _____	Long-term _____		
Palms _____	Short-term _____		

I hereby certify to the correctness of the above record. _____
Unit leader Date

SEE OTHER SIDE FOR LEADERSHIP TRANSFER NOTICE



LEADERSHIP TRANSFER NOTICE

Mail this form directly to the individual's new council or if this is not known, mail the form to Registration Service, S218, Boy Scouts of America, 1325 West Walnut Hill Lane, P.O. Box 152079, Irving, TX 75015-2079.

Region

Council No.

CHECK

- ☐ This individual, registered in this council, has rendered valuable service and is now moving to your area. I would recommend a contact by a Scouter in your council to provide the opportunity to continue Scouting.

OR

- ☐ This individual, applying for registration, has indicated previous registration in your council. Please complete this form and return it to the address at the bottom of this page.

Name _____

New address _____

Former address _____

Occupation _____

Present Scouting position _____ Expire date _____

Highest youth rank achieved _____

Circle individual's strength(s).

Boy leadership, supervisory leadership, district commissioner, unit commissioner, administrative positions, training, finance, Cub Scouting, Boy Scouting, Varsity Scouting, Venturing, camping, special events, unit organization, other (specify) _____

ADULT REGISTRATION RECORD

Position	Unit	Local Council	From	To

TRAINING COURSES COMPLETED AND SPECIAL AWARDS RECEIVED

Name of Training Course or Special Award	Date

Date _____ Signed _____
Scout Executive

New Council Name _____

Address _____ Zip Code _____

SEE OTHER SIDE FOR TRANSFER FORM (YOUTH MEMBER)

BOY SCOUTS OF AMERICA

NATIONAL CHARTERED ORGANIZATIONS USING THE TRADITIONAL SCOUTING PROGRAM

Name of Organization	December 2012								December 2011		December 2010	
	Packs	Cub Youth	Troops	Scout Youth	Crews	Venturing Youth	Total Units	Total Youth	Total Units	Total Youth	Total Units	Total Youth
Civic Organization												
American Legion and Auxiliary	1,125	41,831	1,147	23,264	281	3,059	2,553	68,154	2,595	69,171	2,671	69,598
Amvets	22	899	23	381	6	41	51	1,321	46	1,321	48	1,322
Athletic Booster Clubs	165	4,766	97	3,100	127	3,550	389	11,416	429	11,198	514	11,266
Boys' and Girls' Clubs	348	13,053	171	5,083	50	1,041	569	19,177	611	20,046	700	23,322
Business/Industry	1,187	39,045	811	15,723	809	11,686	2,807	66,454	2,979	69,936	3,137	69,685
Chambers of Commerce, Business Assn.	171	5,872	135	3,138	52	1,543	358	10,553	441	12,253	511	13,370
Civil Air Patrol	1	53	4	63	28	594	33	710	32	448	40	566
Civitan International	13	613	24	511	8	76	45	1,200	47	1,182	50	1,278
Community Center, Settlement Houses	484	12,093	328	6,149	113	3,016	925	21,258	1,015	23,096	1,111	23,427
Conservation Clubs/Izaak Walton League	81	2,941	114	2,456	110	1,116	305	6,513	307	6,716	340	8,033
Councils/Districts of BSA	22	1,136	13	409	149	2,113	184	3,658	197	4,272	210	3,959
DAV (Disabled American Veterans)	5	258	10	172	2	39	17	469	18	478	17	412
Elks Lodges, (BPOE)	327	12,747	351	8,447	100	773	778	21,967	790	22,715	817	22,988
Exchange Club, National	25	1,022	18	489	3	32	46	1,543	47	1,596	47	1,634
Farm Bureau, Farm Cooperatives	3	65	5	94	8	272	16	431	23	463	24	400
Fire Departments	529	18,615	509	11,019	138	1,185	1,176	30,819	1,247	32,036	1,300	33,333
Fraternal Order of Eagles (FOE)	30	1,290	18	357	4	26	52	1,673	51	1,704	53	1,682
Grange, National	49	1,563	53	1,284	10	95	112	2,942	114	3,064	127	3,247
Groups of Citizens	1,578	64,319	889	20,512	648	15,920	3,115	100,751	3,409	105,474	3,744	109,868
Homeowners Associations	135	5,927	112	3,216	21	376	268	9,519	312	10,515	320	10,124
Hospitals	30	1,108	25	474	39	927	94	2,509	92	2,645	108	2,823
Indian Tribal Council	21	738	10	139	5	217	36	1,094	44	1,423	53	1,577
Jaycees--Junior Chamber of Commerce	16	703	4	83	0	0	20	786	27	956	32	1,133
Kiwanis International	446	18,424	365	9,324	78	799	889	28,547	940	29,912	989	31,234
Knights of Pythias	7	151	6	64	0	0	13	215	13	233	9	151
Labor Organizations	92	4,876	20	634	3	89	115	5,599	118	5,320	121	5,239
Law Enforcement Agencies	28	1,150	24	448	13	230	65	1,828	71	1,950	71	2,132
Lions International	1,084	40,998	1,033	22,003	154	1,562	2,271	64,563	2,366	67,465	2,451	68,999
Loyal Order of Moose	91	3,948	117	2,477	26	248	234	6,673	256	7,222	297	7,784
Masons--Eastern Star	132	5,341	125	2,257	39	1,066	296	8,664	336	8,577	339	7,748
Men's Clubs	44	1,877	40	991	17	165	101	3,033	103	3,128	106	3,197
Military Order of World Wars	8	179	7	126	4	40	19	345	17	360	15	277
Non-profit Agencies	317	10,782	159	2,790	127	3,090	603	16,662	572	16,224	541	14,288
Odd Fellows (IOOF) Lodge	15	558	10	211	3	26	28	795	30	832	32	858
Optimist International	139	5,968	88	2,595	19	241	246	8,804	253	9,209	272	9,417
Other Community Organizations	668	22,870	492	10,809	496	12,212	1,656	45,891	1,732	47,940	1,917	50,650
Playgrounds, Recreation Centers	169	5,340	107	3,363	168	2,907	444	11,610	458	11,441	478	11,956
Professional and Scientific Societies	33	1,498	20	451	23	634	76	2,583	78	2,694	84	2,678
Rotary International	613	25,692	571	14,837	149	2,393	1,333	42,922	1,366	43,370	1,413	43,336
Ruritan Club	103	3,632	112	2,202	21	127	236	5,961	233	6,167	240	6,400
Sertoma International	20	603	5	166	1	9	26	778	25	760	24	806
United States Power Squadrons	0	0	1	14	4	57	5	71	6	79	6	91
VFW, Auxiliary, Cootie	471	18,966	470	10,382	143	1,851	1,084	31,199	1,105	32,254	1,119	31,565
Women's Clubs	18	542	6	109	2	24	26	675	26	788	29	792
YWCA, YMCA	224	7,297	62	1,203	26	238	312	8,738	366	9,470	399	9,697
Civic Organization Total	11,089	411,349	8,711	194,019	4,227	75,705	24,027	681,073	25,343	708,103	26,926	724,342
Percent to Total	24.74%	26.91%	18.51%	21.32%	24.76%	34.50%	22.05%	25.62%	22.69%	26.00%	23.42%	26.45%

BOY SCOUTS OF AMERICA

NATIONAL CHARTERED ORGANIZATIONS USING THE TRADITIONAL SCOUTING PROGRAM

Name of Organization	December 2012								December 2011		December 2010	
	Packs	Cub Youth	Troops	Scout Youth	Crews	Venturing Youth	Total Units	Total Youth	Total Units	Total Youth	Total Units	Total Youth
Religious Organization												
African Methodist Episcopal	78	1,483	65	792	6	141	149	2,416	158	2,541	163	2,532
African Methodist Episcopal Zion	23	535	21	281	3	66	47	882	49	873	51	974
Armenian Church of America	21	165	26	392	27	319	74	876	79	962	91	1,274
Assemblies of God	48	1,312	36	785	7	96	91	2,193	92	2,126	97	2,499
Baptist Churches	1,925	71,021	1,778	34,964	278	2,368	3,981	108,353	4,121	110,131	4,289	108,722
Buddhist Churches of America	27	845	31	827	10	72	68	1,744	65	1,640	63	1,616
Catholic Church	4,058	166,985	3,576	99,435	763	7,228	8,397	273,648	8,594	284,597	8,800	286,999
Christian Church (Disciples of Christ)	543	21,582	514	11,427	108	932	1,165	33,941	1,199	34,603	1,229	34,361
Christian Methodist Episcopal Church	50	1,219	38	682	7	69	95	1,970	84	1,774	79	1,464
Church of Christ	237	9,631	242	5,198	67	601	546	15,430	554	15,801	564	16,190
Church of God	109	3,372	101	1,700	27	169	237	5,241	237	5,625	260	5,978
Church of the Brethren	50	1,789	42	866	9	104	101	2,759	103	2,782	111	2,781
Church of the Nazarene	73	2,800	70	1,279	13	102	156	4,181	156	3,832	170	4,131
Community Churches	508	19,895	438	11,317	108	1,099	1,054	32,311	1,053	31,122	1,081	30,420
Community of Christ	26	865	26	606	9	428	61	1,899	54	1,681	62	1,743
Episcopal Church	471	21,271	570	18,144	138	1,992	1,179	41,407	1,199	41,801	1,245	41,503
Evangelical/Independent Churches	134	4,457	124	3,122	36	320	294	7,899	302	7,956	298	7,414
Friends, Society of (Quakers)	13	536	17	569	7	56	37	1,161	35	1,156	39	1,319
Islam, Muslim, Masjid	36	1,192	37	956	5	74	78	2,222	76	2,220	79	1,976
Jewish Synagogues and Centers	65	1,969	75	1,652	16	117	156	3,738	163	3,904	168	3,873
Lutheran Church	1,691	66,339	1,760	47,210	376	2,868	3,827	116,417	3,902	119,824	4,037	121,179
Moravian Church in America	17	677	16	361	3	14	36	1,052	37	1,068	40	1,113
Orthodox Churches, (Greek, Russian, etc)	21	522	28	490	7	49	56	1,061	54	965	54	926
Other Churches	391	13,661	397	9,363	91	886	879	23,910	938	24,491	960	24,577
Pentecostal Churches	55	1,199	44	557	8	74	107	1,830	109	1,704	126	1,881
Presbyterian Church	1,441	67,230	1,784	55,288	372	3,005	3,597	125,523	3,673	128,465	3,714	127,109
Reformed Church in America	51	2,153	66	1,861	10	63	127	4,077	132	4,325	133	4,175
The Church of Jesus Christ of Latter-day Saints	10,446	147,163	19,294	218,426	8,116	64,968	37,856	430,557	37,894	421,086	37,925	412,675
The Salvation Army	74	1,451	45	710	11	72	130	2,233	132	2,368	158	2,601
United Church of Christ, Congregational Church	498	21,474	572	15,881	121	870	1,191	38,225	1,221	38,854	1,267	39,247
United Methodist Church	4,967	225,750	4,870	129,972	1,031	8,154	10,868	363,876	11,091	371,629	11,306	372,255
Religious Organization Total	28,147	880,543	36,703	675,113	11,790	97,376	76,640	1,653,032	77,556	1,671,906	78,659	1,665,507
Percent to Total	62.79%	57.61%	77.98%	74.17%	69.05%	44.37%	70.33%	62.19%	69.45%	61.40%	68.40%	60.81%
Educational Organization												
Business-to-School Support Agencies	24	887	9	185	10	507	43	1,579	46	1,430	49	1,347
Correctional Institutions	15	551	36	839	91	2,393	142	3,783	136	3,349	157	3,952
Foreign Schools and Agencies	19	376	12	202	3	94	34	672	66	9,206	123	8,397
Handicapped Resources	68	1,443	93	1,395	118	2,020	279	4,858	295	5,285	310	6,439
Parent - Teacher Groups other than PTA	2,647	118,658	592	17,174	204	8,387	3,443	144,219	3,697	152,686	4,026	158,871
Parent Teacher Associations	1,297	59,423	235	5,485	29	659	1,561	65,567	1,661	69,543	1,761	72,001
Private Schools	1,524	55,191	675	15,751	603	32,312	2,802	103,254	2,868	101,651	2,983	98,170
Educational Organization Total	5,594	236,529	1,652	41,031	1,058	46,372	8,304	323,932	8,769	343,150	9,409	349,177
Percent to Total	12.48%	15.48%	3.51%	4.51%	6.20%	21.13%	7.62%	12.19%	7.85%	12.60%	8.18%	12.75%
Grand Total:	44,830	1,528,421	47,066	910,163	17,075	219,453	108,971	2,658,037	111,668	2,723,159	114,994	2,739,026

Lone Cub Scouts and Lone Boy Scouts are not included in the total youth figures
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(SAMPLE DRAFT)

MEMORANDUM OF UNDERSTANDING

Between

(ORGANIZATION'S LOGO)

(Name of Organization)
And
Boy Scouts of America



WHEREAS *(Name of Organization)* and Boy Scouts of America (BSA) would like to establish a valuable and productive relationship on behalf of boys, young adults and their families for many years to come; we now enter into this Agreement for the purpose of confirming a framework for a cooperative relationship under which *(Name of Organization)* and BSA will assist one another in areas of mutual interest.

WHEREAS, *(Name of Organization)* is a leader in these areas:

_____, and provides needed skills through development of standards and training materials; and

WHEREAS, *(Name of Organization's)* programs and BSA allow interested persons the opportunity to develop leadership skills and responsibility, experience teamwork and gain an awareness of _____; and

WHEREAS, it is the mission of the Boy Scouts of America to prepare young people to make ethical choices over their lifetimes by instilling in them the values of the Scout Oath, Scout Law and Venturing Oath; and

WHEREAS Boy Scouts of America is desirous of lending its aid and support to the citizenship training, character development and personal fitness of boys and young men and women through community based organizations;

BE IT RESOLVED that *(Name of Organization)* and BSA will work cooperatively with each other, within the policies, procedures, safety guidelines and regulations of each organization, to establish and nurture Cub Scout Packs, Boy Scout Troops and Venturing Crews, so that boys and young men and women may grow in character, citizenship responsibility, and with the personal fitness necessary to achieve their greatest potential;

All public communications and/or announcements about this initiative, including websites of (name of organization) and their respective affiliates, licensees, vendors and (name of organization) will be mutually approved by both Boy Scouts of America and (name of organization) before they are issued.

(Name)
(Title)
(Name of Organization)

Date

Wayne Brock
Chief Scout Executive
Boy Scouts of America

UNIT BUDGET PLAN

Take first things first. If your job is to manage funds, your firsts are basics: basic income, basic spending, and basic needs.

If your job is to manage funds for a Cub Scout pack, Boy Scout troop, Varsity Scout team, or Venturing crew, your basics still come first, and they are the same whether the unit is in Hawaii or Maine. They should be planned and budgeted FIRST. Once you develop a sound budgeting plan for basics, you can add other things, such as your individual programming or equipment needs.

The total is a well-managed, well-financed unit. Recognizing this, the Boy Scouts of America recommends a basic unit budget plan, including 10 parts divided into three categories: basic expenses, other expenses, and sources of income.

BASIC EXPENSES

1. Unit Liability Insurance Fee. Units are required to pay a unit liability insurance fee of \$40. This fee shall be submitted with the unit's charter application and will help defray the expenses for the general liability insurance program.

Here are the recommended basic expense items per youth member:

Registration	\$15
Boys' Life	12

Let's look at each basic expense.

2. Registration. When a youth joins, normally the unit asks them to pay the full \$15 national registration fee, regardless of the number of months remaining in the unit's charter year. The unit sends to the council the prorated amount for those remaining months. Note that fees are figured on a monthly basis: 1 month \$1.25; 2 months \$2.50; 3 months \$3.75; 4 months \$5; 5 months \$6.25; 6 months \$7.50; 7 months \$8.75; 8 months \$10; 9 months \$11.25; 10 months \$12.50; 11 months \$13.75; 12 months \$15.

The balance of the youth's fee is kept in the unit treasury to supplement dues in paying the next full year's fee. This procedure ensures prompt registration at charter renewal time.

3. Boys' Life magazine, the official publication of the Boy Scouts of America, is available to all members at \$12 (half the regular rate). Every youth should subscribe to *Boys' Life* because of the quality reading and the articles related to your unit's monthly program. It is part of a youth's growth in Scouting, and research proves Scouts will stay in longer and advance farther if they read *Boys' Life*. If the reserve funds allow, the new Scout, during the charter year, should be signed up for *Boys' Life* on a pro rata basis.

When reserve funds do not pay for the subscription, then the youth or his parents may be asked for the amount. They should understand that the *Boys' Life* subscription cost is not a required part of the national membership fee. On late registrations, it may be necessary to deliver back issues.

4. Unit Accident Insurance. Each unit should be covered by unit accident insurance to help meet the costs of medical care if accidents occur during a Scouting activity. The majority of the councils purchase Council Accident and Sickness insurance, which means you are already covered for accidents and sicknesses. Check with your council to see if they already have the insurance. If not, there is an Accident plan available through Health Special Risk (HSR). Your council can

provide you with a brochure that details the plan. Below are the fees from September 1, 2013, through December 31, 2014, from HSR:

Accident insurance, minimum \$25 per unit or:

*Unit accident insurance for Cub Scouts.....	\$1.50
*Unit accident insurance for Boy Scouts.....	3.35
*Unit accident insurance for Varsity Scouts...	3.35
*Unit accident insurance for Venturers.....	4.75

*The same rates apply for registered Scouters; minimum \$25 insurance premium per unit.

Because LDS units have coverage through Deseret Mutual, it is not necessary to purchase unit accident insurance through HSR.

5. Reserve Fund. The reserve fund might be established by a gift or loan from the chartered organization or by a unit money-earning project. The reserve fund should meet unexpected expenses that occur before dues are collected or other money is earned. A new member's initial expenses may be met from the fund.

A small portion of each youth's basic expenses is budgeted to maintain this fund. If the reserve fund falls below this amount, it should be restored through a money-earning project or other means.

6. Other Basic Expenses. These basic expenses include insignia of membership and rank for each Scout to ensure prompt recognition, and literature required by unit adult and youth leaders. Because service to others is fundamental in Scouting, the budget should include a goodwill project, Good Turn, or a gift to the World Friendship Fund.

OTHER EXPENSES

7. Program Materials. Each unit needs to provide a certain amount of program materials. For example, it should have a United States flag, unit flags, and equipment and supplies for its regular program.

8. Activities. The size of the budgeted amount for activities depends on the unit program. Usually, such activities as Cub Scout pinewood derbies, Boy Scout hikes, camping, or Varsity Scout high-adventure trips are financed by the Scout and his family over and above the dues program.

As a special note, refreshments at parties or parents' meetings can be homemade or met by a cover charge or "kitty" at the event. Regular unit funds should not be used for this purpose.

SOURCES OF INCOME

9. Dues. Most people agree that the habit of regularly meeting financial obligations is desirable. The financial plan of any unit should include participation by a youth in a regular dues plan. An annual unit fee, too often completely contributed by parents, does little to teach responsibility. However, if the youth has to set aside a little each week for a desired item such as dues, they learn how to budget their own income. Paying dues regularly is not easy, but it does help develop character. It teaches individuals responsibility and a wholesome attitude toward earning their own way.



BOY SCOUTS OF AMERICA®

The weekly or monthly dues envelopes for Cub Scout dens and Boy Scout patrols provide a handy means of recording dues for youth who pay on a regular basis, catch up on back dues, or pay in advance. Varsity Scout teams may use the Boy Scout dues envelopes. If a Scout is behind in dues, adult leaders should find out why. Adult leaders may also help provide a solution through individual work projects.

Regardless of your dues collection plan, or how many months or weeks they are collected, individual dues should cover the basic expenses totaling (pack) \$35.00, (troop) \$36.85, (team) \$36.85, and (crew) \$38.25 as shown in the recommended budget. You may also want dues to cover a part of the program and activity budget.

10. Money-Earning Projects. A well-rounded unit program requires supplemental income. It might come from the sale of a product or a project involving the talents, participation, or efforts of the unit members or families. Policies and procedures are in the financial record books for packs, troops, teams, and crews.

Most projects require the submission of the Unit Money-Earning Application, No. 34427, to the local council service center. To ensure conformity with all Scouting standards on money earning, leaders should be familiar with the eight guides listed on the back of the application and in the financial record books.

OTHER RESOURCES

Additional information concerning unit budget plans, the treasurer's job, camp savings, forms, and records is in *Troop/Team Record Book*, No. 34508; *Cub Scout Leader Book*, No. 33221; *Varsity Scout Leader Guidebook*, No. 34827; and *Venturing Leader Manual*, No. 34655.

BUDGET WORK SHEET

To develop your unit budget, complete with the unit leader the work sheet below, and then have it adopted by the unit committee.

In the case of Boy Scout troops, the patrol leaders' council reviews the budget and puts it in final form prior to study and adoption by the troop committee. Be sure to keep parents informed.

Expected Income for Year	
Number of meetings	_____
Amount of dues each meeting	\$ _____
Annual dues per member (dues x number of meetings)	\$ <u>0.00</u>
Average membership in a year	_____
Total dues per year (9) (annual dues x average membership)	\$ <u>0.00</u>
Other income (10)	
	\$ _____
	\$ _____
	\$ _____
Total other income	\$ <u>0.00</u>
Total budgeted income (total dues + total other income)	\$ <u>0.00</u>

Budgeted Expenses for Year	
Registration (2)	\$15.00
Boys' Life (3)	12.00
Unit accident insurance for Cub Scouts (4)	1.50
Unit accident insurance for Boy Scouts (4)	3.35
Unit accident insurance for Varsity Scouts (4)	3.35
Unit accident insurance for Venturers (4)	4.75
Reserve fund (5)	1.00
Other basic expenses (6) (badges, literature, goodwill)	5.50
a. Total per boy (pack)	\$35.00
Total per boy (troop)	36.85
Total per boy (team)	36.85
Total per youth (crew)	38.25
b. Average yearly membership	<u>0</u>
Total basic expenses (items a x b)	\$ <u>0.00</u>
Unit liability insurance fee (1)	\$ <u>40.00</u>
Program materials (7)	\$ _____
Activities (8)	\$ _____
Total budgeted expenses (total basic expenses + program materials + activities + unit liability insurance fee)	\$ <u>40.00</u>

Note: The boldface numbers above match the item to the related section on this form.
If you have questions on any item, refer to the explanatory material.



How Scouting Is Funded

FACT SHEET

Units

How Packs, Troops, Teams, Crews, and Ships Are Funded

Units can use a variety of fund-raising methods as long as they meet the guidelines set by the National Council and their local council and are approved by their unit committee and chartered organization. Most commonly, units are funded through:

- Weekly or monthly dues paid by the member
- Unit product sales such as popcorn
- Chartered organization contributions
- Other money-earning projects approved by the chartered organization

How Packs, Troops, Teams, Crews, and Ships Use Their Funding

Units can use the funds they raise for any activities that are within the national and local council guidelines and that their unit committee and chartered organization approve. Most commonly, units use their funds for:

- Unit activities such as camping and other activities
- Program supplies for unit activities
- Equipment such as tents, camp stoves, and pinewood derby® tracks
- Advancements and awards such as rank emblems and merit badges
- *Boys' Life* magazine subscriptions

Local Councils

How Local Councils Are Funded

Local councils are funded through:

- Friends of Scouting donations
- Special events
- Product sales such as popcorn
- Legacies and bequests
- Foundation grants
- Local United Ways
- Activity fees from summer camp, camporees, etc.
- Investment income and endowments



How Scouting Is Funded

FACT SHEET

How Local Councils Use Their Funding

Local councils provide support for units in their service area; therefore, funds are typically used to:

- Maintain camp properties and the council service center
- Provide insurance
- Maintain membership records
- Pay salaries and benefits to employees
- Purchase program supplies for youth activities sponsored by the council
- Provide volunteer training

National Council

How the National Council Is Funded

The National Council is funded by:

- Scout supply sales
- Membership fees
- Grants from foundations
- Legacies and bequests
- Corporate sponsorships

How the National Council Uses Its Funding

The National Council provides program materials and support for local councils.

The National Council uses its funds for:

- Development of program materials and resources
- Infrastructure support for local councils such as maintaining membership database and reporting functions
- Development of professional and volunteer training materials
- Salaries and benefits for employees

BOY SCOUTS OF AMERICA

DATE _____

Received in council service center _____
(Date)**UNIT MONEY-EARNING APPLICATION**

Applications are not required for council-coordinated money-earning projects such as popcorn sales or Scout show ticket sales.

(Local council stamp)

Please submit this application to your council service center at least two weeks prior to committing to your money-earning project. Read the eight guidelines on the other side of this form. They will assist you in answering the questions below.

☐ Pack☐ Troop

No. _____ Chartered Organization _____

☐ Team☐ Crew

Community _____ District _____

Submits the following plans for its money-earning project and requests permission to carry them out.

What is your unit's money-earning plan? _____

About how much does your unit expect to earn from this project? _____ How will this money be used? _____

Does your chartered organization give full approval for this plan? _____

What are the proposed dates? _____

Are tickets or a product to be sold? Please specify. _____

Will your members be in uniform while carrying out this project? (See items 3–6 on other side.) _____

Have you checked with neighboring units to avoid any overlapping of territory while working? _____

Is your product or service in direct conflict with that offered by local merchants? _____

Are any contracts to be signed? _____ If so, by whom? _____

Give details. _____

Is your unit on the budget plan? _____ How much are the dues? _____

Does your unit participate in the council product sale? ☐ Yes ☐ No Family Friends of Scouting? ☐ Yes ☐ No

How much does your unit have in its treasury? _____

Signed _____ Signed _____
(Chartered Organization Representative) (Unit Leader)

Signed _____
(Chairman, Unit Committee) (Address of Chairman)

FOR USE OF DISTRICT OR COUNCIL FINANCE COMMITTEE: Telephone _____

Approved by _____ Date _____

Approved subject to the following conditions _____



Annual Service Plan

The annual service plan is under revision.

Chartered Organization Discussion

THE ANNUAL CHARTER AGREEMENT BETWEEN:

_____ and the _____ Council, BSA
Chartered Organization Local Council

Pack No. _____ Troop No. _____ Team No. _____ Crew No. _____ Ship No. _____

(Please identify those units chartered by the Chartered Organization.)

The purpose of the Boy Scouts of America ("BSA") program is to prepare young people to make ethical and moral choices over their lifetimes by instilling in them the values and principles taught in the Scout Oath and Scout Law.

The Chartered Organization, as a duly constituted organization that serves youth, desires to use the program(s) of the BSA to further its mission respecting the youth it supports. The Local Council provides the support and service necessary to help the Chartered Organization succeed in its use of Scouting.

The Chartered Organization agrees to:

- Use Scouting to further the Chartered Organization's aims and values for youth.
- Conduct the Scouting program according to its own policies and guidelines as well as those of the BSA.
- Be represented in the Local Council and the local Scouting district by a Chartered Organization Representative ("COR"), who will be appointed by the Chartered Organization. The COR will be the point of contact between the Chartered Organization and the Local Council; will serve as a voting member of district and council committees on which the COR serves; and will, with the Chartered Organization, select and approve volunteer leaders for submission to the Local Council for its consideration. The COR will work with the unit committees sponsored by the Chartered Organization.
- Select and support unit committee(s) made up of at least three persons for each unit. Such persons may be selected from those who are parents of youth in the Scouting unit or others who are approved by the Chartered Organization.
- Select a committee chairman for each unit committee. Working with the COR, the unit committee will select potential unit adult members. Both the unit committee chair and either the COR or the head of the Chartered Organization will sign their leadership applications.
- Ensure appropriate facilities for the unit for its regular meetings to facilitate the aims of the Chartered Organization and Scouting.
- Facilitate outdoor experiences and apply the principles set forth in the Guide to Safe Scouting.
- Require that all of the adult members have received and maintain timely BSA Youth Protection Training and encourage all adult leaders to receive additional applicable training made available by the council.

The Local Council agrees to:

- Respect the aims and objectives of the Chartered Organization and assist the Chartered Organization by making available Scouting resources.
- Make available to the Chartered Organization and its units and members program training, program resources, and other Scouting support services to help the Chartered Organization and its units and members accomplish their goals for their youth.
- Make available training and support for the Chartered Organization and for the COR as the primary link between the Chartered Organization, the Local Council, and the BSA.
- Review applications for adult members, including conducting a criminal background check, in accepting adult members selected by the Chartered Organization.
- Work with the Chartered Organization to make reasonable accommodations for policies of the Chartered Organization that may conflict with the implementation of Scouting programs.
- Provide camping opportunities, administrative support, and professional staff to assist the Chartered Organization in developing a successful Scouting program.
- Provide primary general liability insurance to cover the Chartered Organization, its board, officers, CORs, employees, and Scouting members and authorized volunteers. Coverage will be provided with respect to claims arising out of an authorized Scouting meeting or activity. For more information, please refer to the relevant insurance policies and descriptions of coverage provided in separate materials by the Boy Scouts of America.

Signed _____ Title _____ Date _____
For the chartered organization

Signed _____ Title _____ Date _____
For the BSA local council

Signed _____ Title _____ Date _____
Chartered Organization Representative



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P.O. Box 152079
Irving, TX 75015-2079
<http://www.scouting.org>

522-025
2014 Printing