BSA Annual Membership and Unit Renewal Process Webinar
June 18, 2024
1:00PM - 2:00PM Central Time
Welcome and Introductions

- Objective Today
  - 3rd Webinar

- Presenters
  - Michael Creagh, National - Manager, Member Applications
  - Tracie Turner, National Environmental Safety Specialist
  - Lonnah Curry, National Registrar
  - Chris Crowley, Deputy Scout Executive – Central Florida Council
  - Otto Goedhart, Manager, Membership Growth

- A Few Reminders...
  - FAQ’s update
  - Submit questions in Q&A
  - Is this recorded? Yes.
Membership & Unit Renewal Process

https://www.scouting.org/resources/unit-and-membership-renewal/
June 1, 2024
To: All Unit Key 3, District Key 3, Council Key 3, CST Key 3
Re: Update on unit and membership renewal

On August 1, 2023, unit renewal and membership renewal were separated. The process we called "recharter" no longer exists. Renewal of membership is distinct from unit renewal of its charter.

Membership Renewal
- The membership period for all Scouting America members is now 12 months - a cycle that begins and ends on each member’s anniversary date.
  - For members who joined on or after August 1, 2023, their anniversary date will be 12 months from the month they joined.
  - For members who joined prior to August 1, 2023, their renewal date will be on the anniversary of their current primary registration. All multiple-position registrations will renew along with the primary registration.

For units, the Key 3 will determine how membership renewal fees are paid using Organization Manager. Units need to determine whether they will allow auto-approval (if the council permits it). When a renewal is auto-approved, it means that adults may renew without requiring the Chartered Organization Representative (COR) to approve that renewal. The renewal process is streamlined.

A unit can pay its annual fees directly, or the unit may coordinate payments for its members. Two variations exist:
1. In Family/Self Pay, members or their parents/guardians will receive an email with a link 60 days prior to expiration reminding them to renew. Payment is made by the member (or a parent/guardian) without going through the unit.
2. Unit Pay is an option for units that prefer to coordinate or make payments for its members. Units will need to renew members throughout the year when their renewals are due.

Unit Renewal
- Units will renew their charter on or before their unit anniversary date. These are the steps:
  - A Key 3 member or designee will validate information within Organization Manager.
  - Changes to leadership (if needed) are made within Position Manager.
  - Leaders take YPT if needed.
  - E-sign the page, then pay and submit.
IS YOUR COUNCIL/DISTRICT READY FOR MEMBER & UNIT RENEWALS?

Nearly every council will have members renewing their memberships starting in August or September. Those members will receive email notifications in June or July. For most councils, these will be their first experiences with the new Member Renewal and Unit Renewal processes. Is your council ready?

- **Support Unit Preparations**
  - Are your units ready?
  - Use the [flyer for units or other communication tools](#).
  - Address missing email addresses and association of parents/guardians early.
  - Support units with reports on Members Due to Renew and Opted Out.

- **Auto-renewal Decision for Councils**
  - Document the council’s decision about auto-renewal promptly.
  - Communicate that decision to units as necessary.

- **Communication Plan**
  - Determine whether and how the council will complement the National Council’s communication plan. Consider postcards, texts, etc.

- **Saving Opt-Outs**
  - Be prepared to contact members who opt out.
  - Ask why. We can learn.
  - Invite them to re-join, if appropriate.
  - Offer information about other units, if appropriate.

*Please submit tickets as issues arise* Remember timely action is crucial!
Member Renewal and Unit Renewal are now separate processes. They are more straightforward, but units must make some decisions. Is your unit ready?

- **Separate Processes**
  - Member Renewal and Unit Renewal are now separate processes.
  - Members now renew annually based on when they join.

- **Key Decisions and Actions to Make Early**
  - Verify correct emails for all members.
  - Ensure every Scout under 18 has an associated parent’s/guardian’s email.
  - Decide payment method:
    - *Unit Pay*: The unit pays for members’ registrations in the month due
    - *Self Pay or Family Pay*: Let members/parents manage renewals.
  - Choose auto-renewal or manual approval.

- **Communication – early and as often as necessary**
  - Inform parents/members of decisions.
  - Clarify steps for renewal.

- **Be prepared for:**
  - 3% credit/debit card fee.
  - Adult registrations may be delayed for background checks.

*Your Commissioners and Council are here to assist you!*

*For more details, visit the [Unit and Membership Renewal web page](#).*
Unit Renewal Process

Changes made in the spring of 2024
I, [Your Name], approve the rechartering of the above-named unit and leadership for the year.
Unit Renewal and Leadership Approval

[Name: Susan Adams]

Approve the rechartering of the above-named unit and leadership for the year.

Click here for Pay at the Council Office Option

Next Step: Payment
Boy Scouts of America

Unit Renewal Paper

Mecklenburg County Council 415
Apache 04
Pack 0288 (F)

Service Territory
Council
District
Organization Name
Date Document Generated
04/11/2024

Participating Organization
Executive Officer
Special Interest
Date
03/31/2024

Instructions:
Review your unit leadership and submit this form to your council office with the Unit Charter Fee before the 15th of the month.

Unit Leadership

Executive Officer
 UNIT CHAIR
Cubmaster

Den Leader

Committee Chair
Christopher James Moore
Chartered Organization Rep.
Veteran's Family Member

Veteran's Family Member
Veteran's Family Member

I, ____________________, approve the rechartering of the above-named unit and leadership for the year.

Sign here
Renewal Order Status
Status: Initiated
Is paid: No
Created By: [redacted]
New Charter
Effective Date: 04/01/2024
Expiry Date: 03/31/2025

Unit Validation
Payment
Confirmation

Unit Renewal Fees
Recharter Fee: $100.00
Subtotal: $100.00
Admin Fee (Credit Card - 3%): $3.00
Total: $103.00

Billing Information
Credit Card
Card Information
First Name: Susan
Last Name: Adams
Card Number: [redacted]
Expiration Date: 12/27
CVV: 411

ACH Payment
Expiration Date: 12/27

CVV: 411

Email Address: mcneagh@scouting.org

BILLING ADDRESS
Country: USA
Address Line 1: 1325 W Walnut Hill Ln
Address Line 2:  
City: Irving
State/Region: TX
ZIP Code: 75038-3000

Save this card for future payments: 

Submit Payment
Your payment is being processed.

Please check back later for the status of your renewal order.

Renewal Order Status

- Status: Submitted
- Is paid: Yes
- New Charter: 04/01/2024
- Effective Date: 04/01/2024
- Expiry Date: 03/31/2025

Back To Payment
Renewal Order Status

Status: Submitted
Is paid: Yes
Created By: [Redacted]

New Charter
Effective Date: 04/01/2024
Expiry Date: 03/31/2025
Payment confirmation

Chase Integrated Payments <chase-support@wepay.com>

If there are problems with how this message is displayed, click here to view it in a web browser.

CHASE
Integrated Payments

Receipt

Billed to:
Visa xxxxxx4113
Susan Adams

Total:
USD $103.00

Purchased from:
Boy Scout of America
1320 W. Walnut Hill Lane,
Irving, TX, 75038, US
Wepay_admin@scouting.org

Type:
Sale

Date:
04/11/2024

If you have any questions about your receipt, contact chase-support@wepay.com.
Member Renewal Process

Personal Renewal
Auto Renewal Membership

Family/Self Pay

- An email notification and a renewal link will be sent 60 days before membership expires.
- The link provided in the email will direct individuals to a renewal form on My.Scouting.
- If registered in multiple positions, select the primary position. Renewing the primary position will automatically renew multiple positions.
- The individual pays with a credit card and submits the renewal.
- The unit will approve the membership renewal.

Unit Pay

- In Organization Manager, the unit selects the Unit Pay option.
- Unit Key 3s are notified each month about which members are due to renew that month.
- Using the Roster tab, the unit selects which members they are renewing.
- The unit can choose not to renew a member (opt-out). The unit can also change the Scout’s Life subscription settings for each person.
- The unit pays with a credit card or establishes a securely stored electronic fund transfer payment (ACH) and submits the renewal.

Note: All registrations are for 12 months. For example, if your current registration expires on 12/31/2023, your renewed membership will start on 1/1/2024 and run through the entire calendar year until 12/31/2024. Membership renewal can be completed by either the individual, the family or the unit.
Registration for [Your Name]'s enrollment is expiring soon. **Click here to renew.**

- **My Account**
- **My Application**
### MY RENEWALS

<table>
<thead>
<tr>
<th>Personal Information</th>
<th>Expiration Date</th>
<th>Application Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Multiple Positions are not displayed in this section, Click Start Renewal to see the full list of positions you can renew</td>
<td>31 March 2024</td>
<td>Registration is soon to expire</td>
</tr>
</tbody>
</table>

Chartered Organization Rep:
Pack 0268

[Start Renewal]
Current Memberships

The following position(s) will be renewed, Select Remove Positions on those you do not want to renew.

Pack 0288

Chartered Organization Rep.
Current Expire Date: 03/31/2024
Future Expire Date: 03/31/2025
Select as Primary Position

Committee Member
Current Expire Date: 08/31/2024
Future Expire Date: 08/31/2025
Select as Primary Position

Troop 0288

Chartered Organization Rep.
Current Expire Date: 03/31/2024
Future Expire Date: 03/31/2025
Select as Primary Position

Go back to My Renewals
Go To Payment
Leader Requirements

The BSA is open to all who meet the requirements, and leaders are selected based on individual merit. Adult leaders must possess the moral, educational, and emotional qualities that the BSA deems necessary for positive leadership to youth. They must also:

- Subscribe to the precepts of the Declaration of Religious Principle.
- Reside within the USA or a U.S. territory, or be a U.S. citizen residing outside the USA.
- Be 21 years of age or older for primary leadership positions.
- Be 18 years of age or older for assistant leadership positions.
- Complete Youth Protection training (YPT) before application is processed and renew training as required by going to

By signing here you agree and accept the Terms and Conditions of the Boy Scouts of America.
Summary

- BSA Adult Registration (Trad.) $60.00
- Council Fee $18.00
- Administrative Fee $2.79
- Scout Life Magazine $15.00

TOTAL AMOUNT DUE $95.79

Payment Details

CARD INFORMATION
Cardholder Name:
Annual Membership Registration

I understand the BSA is an annual registration and has tokenized my credit card for renewal. I will renew this membership application automatically and every 12 months for an additional term unless I notify the BSA via the opt-out option located in the My Application tool in MyScouting.org. You will be reminded of your renewal beginning 30 days prior to the expiration of your current membership and given an opportunity to opt-out of your renewal at that time.

BILLING ADDRESS

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<th>Value</th>
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<td>Address Line 1:</td>
<td></td>
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<tr>
<td>Address Line 2:</td>
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</tr>
<tr>
<td>City:</td>
<td></td>
</tr>
<tr>
<td>State/Region:</td>
<td></td>
</tr>
<tr>
<td>ZIP Code:</td>
<td></td>
</tr>
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</table>

Same as saved address: [ ]

[ ] Restart Renewal

[ ] Place Order
Unit Paid Member Renewal

When the Unit Chooses to Renew their Members
<table>
<thead>
<tr>
<th>Name</th>
<th>Member ID</th>
<th>Role</th>
<th>Gender</th>
<th>Renewal Status</th>
<th>Opt Out</th>
<th>Expiration Date</th>
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<tbody>
<tr>
<td>Carmen González</td>
<td></td>
<td>Chartered Organization</td>
<td>F</td>
<td>Expired</td>
<td></td>
<td>03/31/2024</td>
</tr>
<tr>
<td>Kai</td>
<td></td>
<td>Youth Member</td>
<td>M</td>
<td>Expired</td>
<td></td>
<td>03/31/2024</td>
</tr>
<tr>
<td>Janeth</td>
<td></td>
<td>Youth Member</td>
<td>M</td>
<td>Expired</td>
<td></td>
<td>03/31/2024</td>
</tr>
<tr>
<td>Seth</td>
<td></td>
<td>Youth Member</td>
<td>M</td>
<td>Expired</td>
<td></td>
<td>03/31/2024</td>
</tr>
<tr>
<td>Chris J Keane</td>
<td></td>
<td>Committee Chair</td>
<td>M</td>
<td>Expired</td>
<td></td>
<td>03/31/2024</td>
</tr>
<tr>
<td>John</td>
<td></td>
<td>Committee Member</td>
<td>M</td>
<td>Expired</td>
<td></td>
<td>03/31/2024</td>
</tr>
<tr>
<td>Jane</td>
<td></td>
<td>Committee Member</td>
<td>M</td>
<td>Expired</td>
<td></td>
<td>03/31/2024</td>
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<tr>
<td>Jim</td>
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<td>Youth Member</td>
<td>M</td>
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<td>03/31/2024</td>
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<td>James</td>
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<td>M</td>
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<td>03/31/2024</td>
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### Membership Renewal Orders

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<th>Position</th>
<th>YPT Expiration</th>
<th>Paid</th>
<th>Approved</th>
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<td>Youth Member</td>
<td>N/A</td>
<td>No</td>
<td>Yes</td>
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<tr>
<td>Jamie</td>
<td>Initiated</td>
<td>Youth Member</td>
<td>N/A</td>
<td>No</td>
<td>Yes</td>
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<tr>
<td>Seth</td>
<td>Initiated</td>
<td>Youth Member</td>
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### Unit Paid Membership Renewal Batches

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<th>Created On</th>
<th>Number of Orders</th>
<th>Paid</th>
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<td>Vertex</td>
<td>04/11/2024, 2:17:39 pm</td>
<td>3</td>
<td>No</td>
<td>GO TO PAYMENT</td>
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Councils Processing

Manual Options exist for Unit and Membership Renewal
<table>
<thead>
<tr>
<th>Position</th>
<th>Name</th>
<th>DOB</th>
<th>Gender</th>
<th>SL</th>
<th>Registration Status</th>
<th>Registration Expiry Date</th>
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</thead>
<tbody>
<tr>
<td>M - Youth Member</td>
<td>Srinivas Narayana Alluri</td>
<td>10/06/2015</td>
<td>M</td>
<td></td>
<td>New</td>
<td>02/28/2025</td>
</tr>
<tr>
<td>M - Youth Member</td>
<td>Aaradhya Aparajita</td>
<td>09/18/2015</td>
<td>F</td>
<td></td>
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<td>03/31/2024</td>
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<tr>
<td>M - Youth Member</td>
<td>Meenakshi Aparajita</td>
<td>03/09/2014</td>
<td>F</td>
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<td>03/31/2024</td>
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<tr>
<td>M - Youth Member</td>
<td>Raajesh Srinivas</td>
<td>12/05/2013</td>
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<tr>
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<td>Akhil Srinivas sridy</td>
<td>07/16/2013</td>
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<td>Hemal Srinivas</td>
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<tr>
<td>M - Youth Member</td>
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<td>03/31/2024</td>
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<tr>
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<td>03/31/2024</td>
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<tr>
<td>M - Youth Member</td>
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<td>Gender</td>
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Submit for Pricing
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<th>Applicant First Name</th>
<th>Applicant Last Name</th>
<th>Youth Registration Fee</th>
<th>Future Year Fee</th>
<th>Joining Fee</th>
<th>SL Youth Subscription Fee</th>
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<th>SL Future Year Youth Subscription Fee</th>
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<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
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Reporting

Found in Organization Manager
EXPLORER POST SPECIAL INTEREST REPORT
A report of all active Explorer Posts, showing Community Organization, membership and their special interest code.

FUNCTIONAL ROLE ASSIGNMENT REPORT
Listing all functional roles assigned by unit. Can be sorted by role.

MEMBER OPTED-OUT REPORT
This Report lists all members who have Opted to not renew.

MEMBERS DUE TO RENEW
This report lists all members due to renew within 2 months or who are lapsed.

MEMBERS WHO HAVE RENEWED
This report will list all members, youth and adult, who have renewed this year. You can adjust the date range as needed.
<table>
<thead>
<tr>
<th>Girls</th>
<th>Boys</th>
<th>Total This Year</th>
<th>Total Last Year</th>
<th>Difference</th>
<th>% Gain</th>
</tr>
</thead>
<tbody>
<tr>
<td>122</td>
<td>275</td>
<td>397</td>
<td>138</td>
<td>259</td>
<td>187.681</td>
</tr>
<tr>
<td>359</td>
<td>1,873</td>
<td>2,232</td>
<td>1,970</td>
<td>262</td>
<td>13.299</td>
</tr>
</tbody>
</table>

**Invitations/Leads**

1. New
2. Opened
3. Pending Reassignment
4. Invitation Sent
5. Closed
6. Completed

**Renewal Status**

- Total Units: 151
- Units Available for Renewal: 35
- Renewals Not Started: 29
- In Process Renewals: 7
  - Initiated: 3
  - Payment Submitted: 4
- Pre-Posted Units: 8

**Unit Renewal**

- 18
- 7
- 19
- 6
<table>
<thead>
<tr>
<th>SubDistrict</th>
<th>Unit</th>
<th>Unit Number</th>
<th>Gender Accepted</th>
<th>Current Chartered Org</th>
<th>Current Effective Date</th>
<th>Current Expiry Date</th>
<th>Next Chartered Org</th>
<th>Next Effective Date</th>
<th>Next Expiry Date</th>
<th>ReCharter Status</th>
<th>Renewal Status</th>
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<tbody>
<tr>
<td>Rivers 02</td>
<td>Pack</td>
<td>0556</td>
<td>F</td>
<td>Calvary Baptist Church</td>
<td>04/01/2023</td>
<td>08/31/2024</td>
<td>Calvary Baptist Church</td>
<td>04/01/2024</td>
<td>08/31/2025</td>
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</tr>
<tr>
<td>Rivers 02</td>
<td>Pack</td>
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<td>F</td>
<td>First Baptist Church of Sparta</td>
<td>04/01/2023</td>
<td>03/31/2024</td>
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<td>03/31/2025</td>
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## Non Renewed Membership Report (RT)

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**Organization Name:** Old Hickory Council 427
**Year-to-Date (YTD):** From 01/01/2024 to 12/31/2024
**Report Generated By:** [Redacted]
**Date Report Generated:** 04/11/2024

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Membership & Unit Renewal Process

https://www.scouting.org/resources/unit-and-membership-renewal/