

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.











Guide to Safe Scouting

Membership & Unit Renewal Process

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



COMMUNICATION PLAN RESOURCES

COUNCIL/DISTRICT READY FOR MEMBER & UNIT RENEWALS?

IS YOUR UNIT READY FOR MEMBERS & UNIT RENEWALS?

EOR MINNERS & UNIT BENIEWAYS?

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!



[Scouting America Letterhead]

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 of 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 have members pay their annual fees directly, or the unit may coordinate payments for its members. Two variations exist:

- 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.
- 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.

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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 <u>Unit and Membership Renewal web page</u>.





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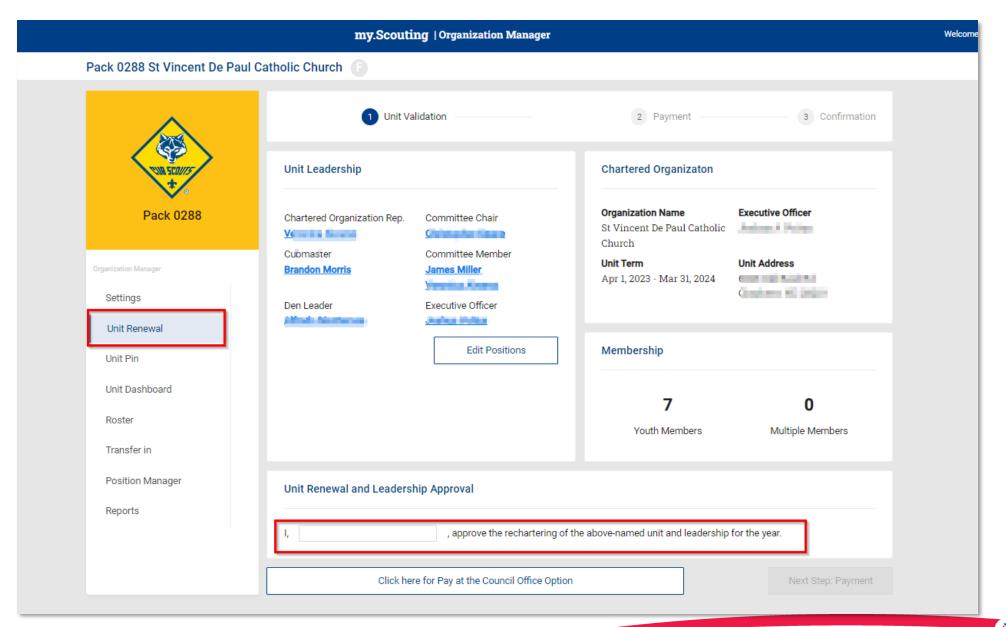
Your Commissioners and Council are here to assist you! For more details, visit the <u>Unit and Membership Renewal web page</u>.



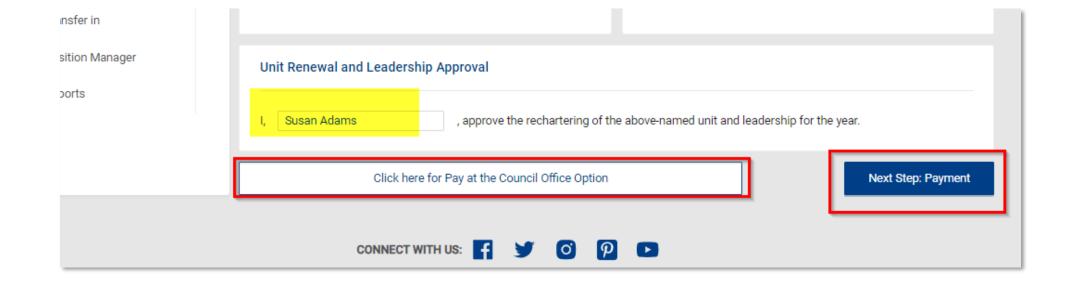
Unit Renewal Process

Changes made in the spring of 2024













Mecklenburg County Council 415 Apache 04 Pack 0288 (F)

Create PDI

Service Territory

Council

District

Organization Name

Date Document Generated

Participating Organization

Executive Officer Special Interest

Expire Data

Service Territory 15

Mecklenburg County Council 415

Apache 04

Pack 0288 (F)

04/11/2024

St Vincent De Paul Catholic Church

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

us

Cubmaster

State State

Den Leader

Alberta Mariana

Committee Chair

Christian In Mane

Chartered Organization Rep.

Visit in the Z

Committee Member

Venezia Instalia Instalia

James Inc.

Unit Renewal and Leader Approval

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

Sign here



my.Scouting | Organization Manager

Pack 0288 St Vincent De Paul Catholic Church Renewal Order Status Status: Initiated **New Charter** Is paid: No Effective Date: 04/01/2024 Created By: Expiry Date: 03/31/2025 Pack 0288 Unit Validation -2 Payment 3 Confirmation Organization Manager Unit Renewal Fees Settings \$100.00 Recharter Fee: Unit Renewal Subtotal: \$100.00 Admin Fee (Credit Card - 3%): Unit Pin \$3.00 Unit Dashboard Total: \$103.00 Roster Transfer in **Billing Information** Position Manager ACH Payment Credit Card Reports CARD INFORMATION * First Name: Susan * Last Name: Adams 34 4113 * Card Number: 12/27

411

* Expiration Date:

* CVV:

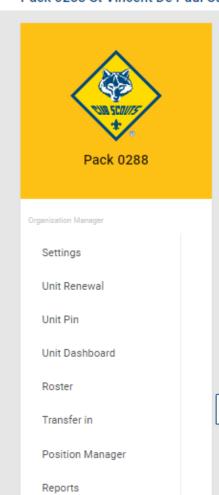


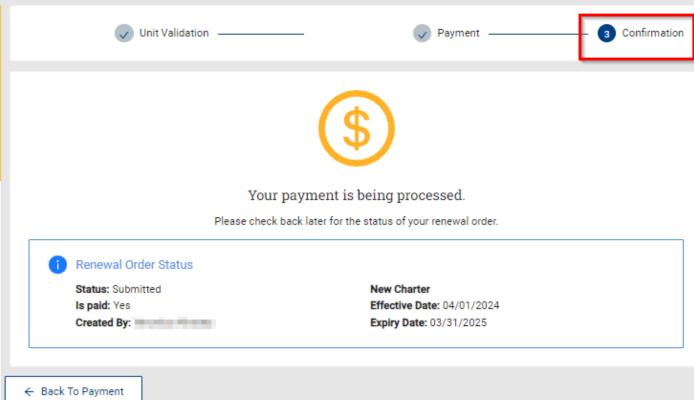
12/27 * Expiration Date: Organization Manager 411 Settings * CVV: Unit Renewal mcreagh@scouting.org * Email Address: Unit Pin Unit Dashboard BILLING ADDRESS USA * Country: Roster Transfer in 1325 W Walnut Hill Ln * Address Line 1: Position Manager Address Line 2 Address Line 2: Reports Irving * City: TX * State/Region: 75038-3008 * ZIP Code: \sim Save this card for future payments: Submit Payment



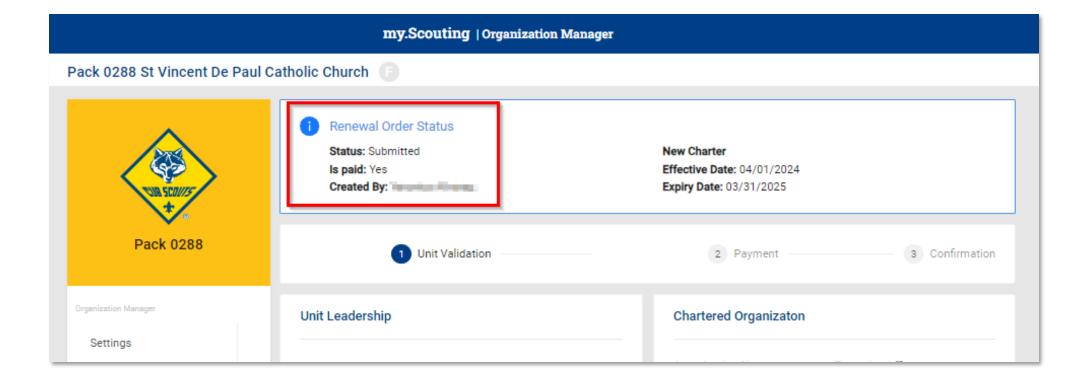
my.Scouting | Organization Manager

Pack 0288 St Vincent De Paul Catholic Church











Payment confirmation



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

to #100 confirmation

Retention Policy 3 Year Delete (3 years)

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

Expires 4/11/2027



Receipt

Billed to:

Visa xxxxxx4113 Susan Adams

Total:

USD \$103.00

Purchased from:

Boy Scout of America 1325 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

For all youth and adult members of the BSA

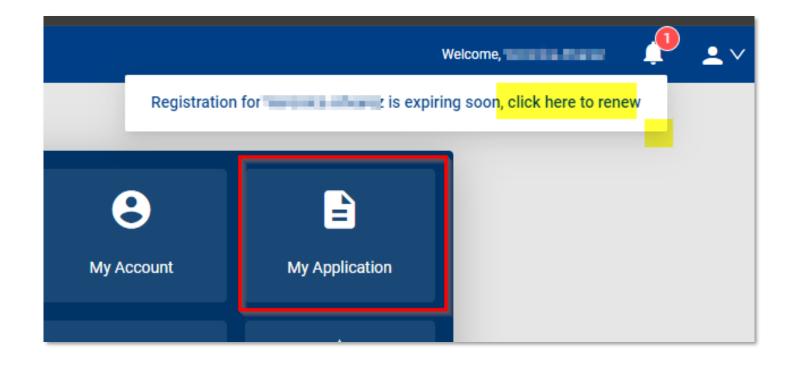
Note: All registrations are for 12 months. For example, if your current registration expires on 12/31/2023, your renewed membership will start on 1/1/2024 and run through the entire calendar year until 12/31/2024. Membership renewal can be completed by either the individual, the family or the unit.

Auto Renewal Membership Family/Self Pay

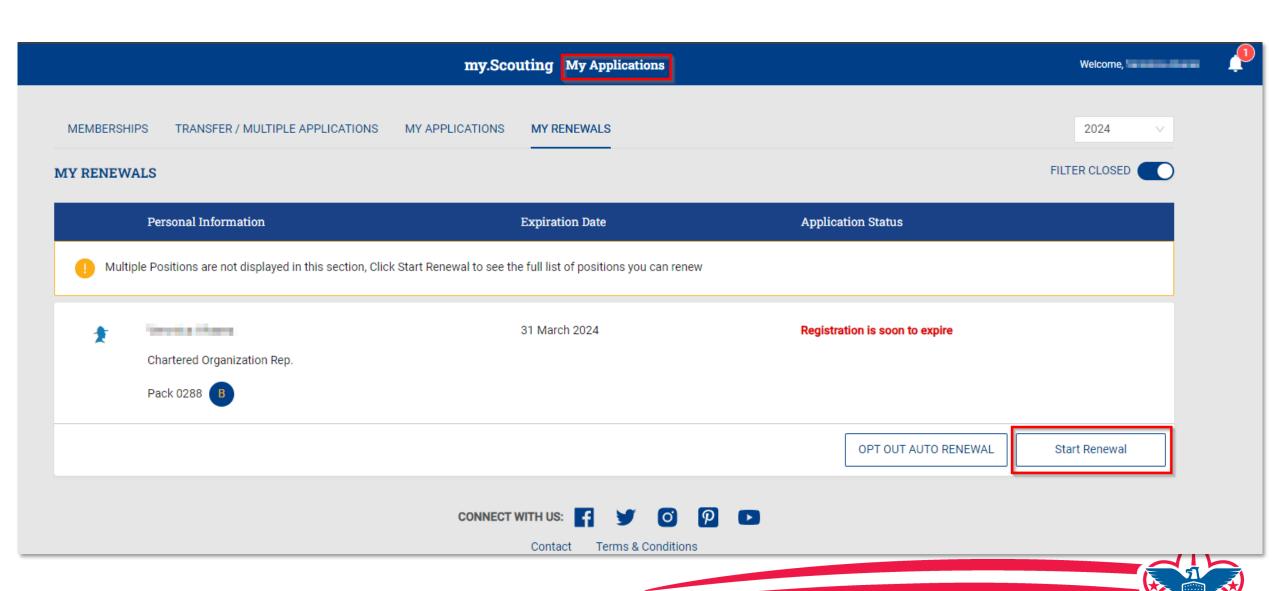
- An email notification and a renewal link will be sent 60 days before membership expires.
- The link provided in the email will direct individuals to a renewal form on My.Scouting
- If registered in multiple positions, select the primary position. Renewing the primary position will automatically renew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

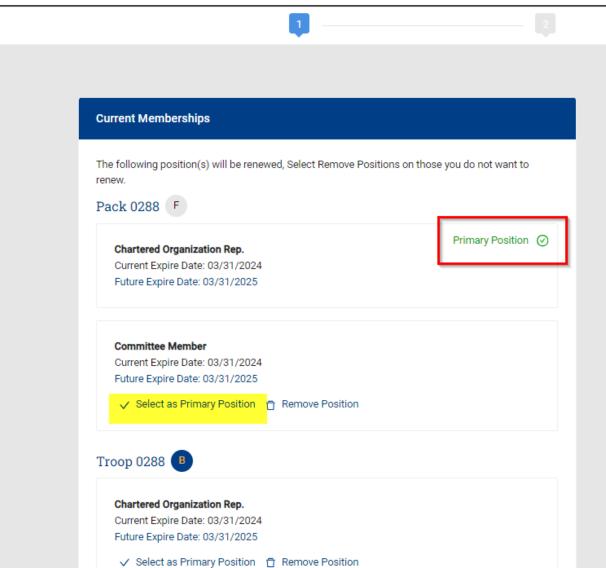
Auto Renewal Membership Unit Pay

- 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.





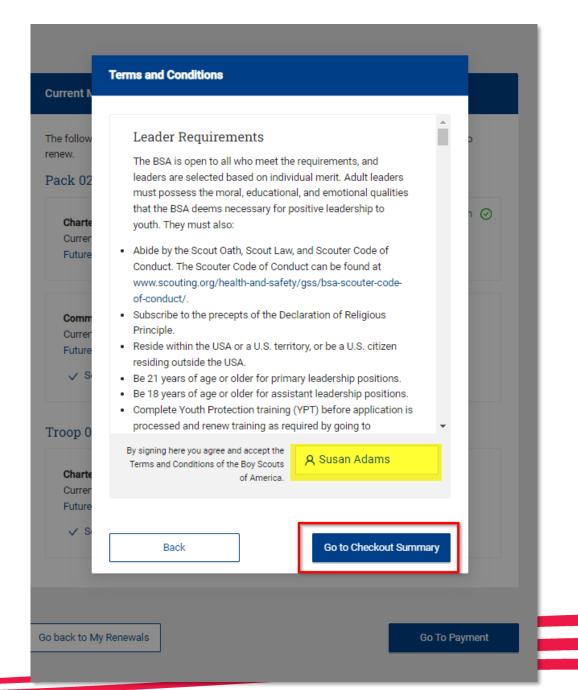




Go back to My Renewals

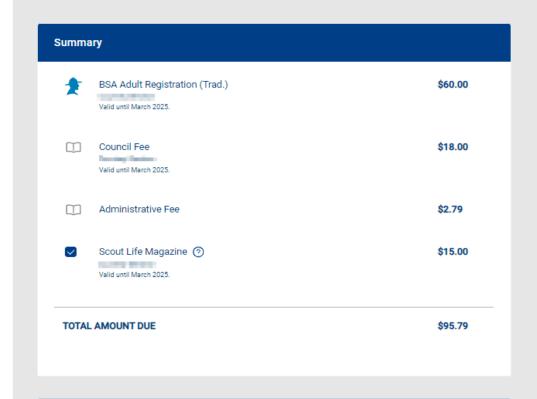
Go To Payment











Payment Details

CARD INFORMATION

* Cardholder Name:

Cardholder Name



BILLING ADDRESS	Same as saved address
* Country:	USA
* Address Line 1:	Constitute the State Cons
Address Line 2:	
* City:	Outline
* State/Region:	
* ZIP Code:	3676



Unit Paid Member Renewal

When the Unit Chooses to Renew their Members





Troop 0001

Organization Manager

Settings

Unit Pin

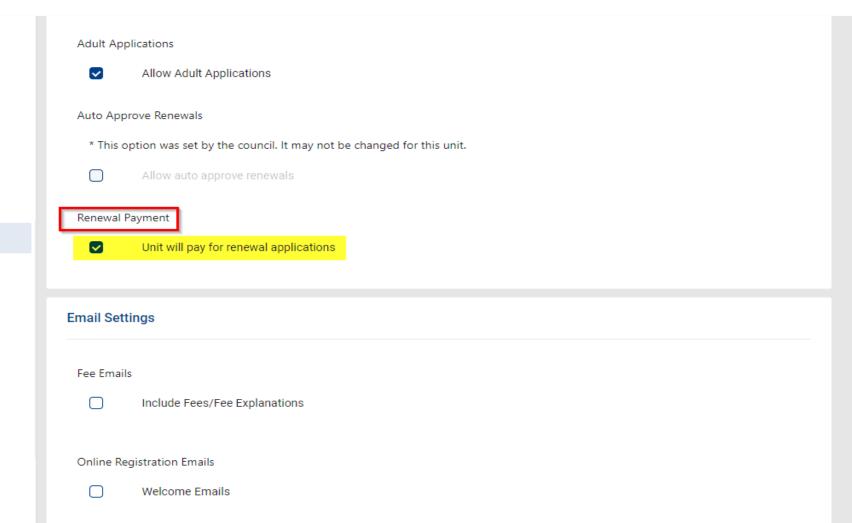
Unit Dashboard

Roster

Transfer in

Position Manager

Reports



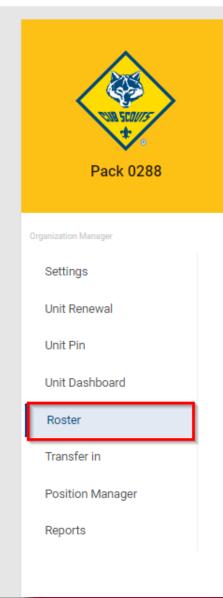
SAVE

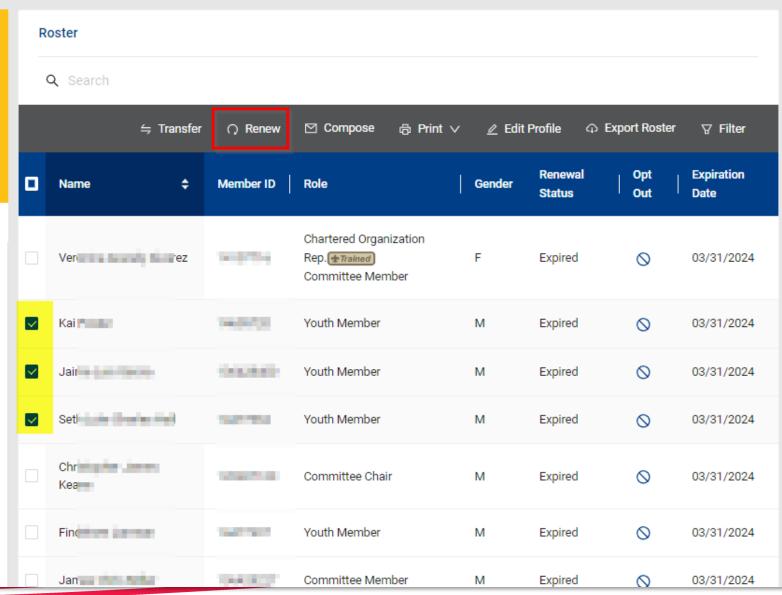


my.Scouting | Organization Manager

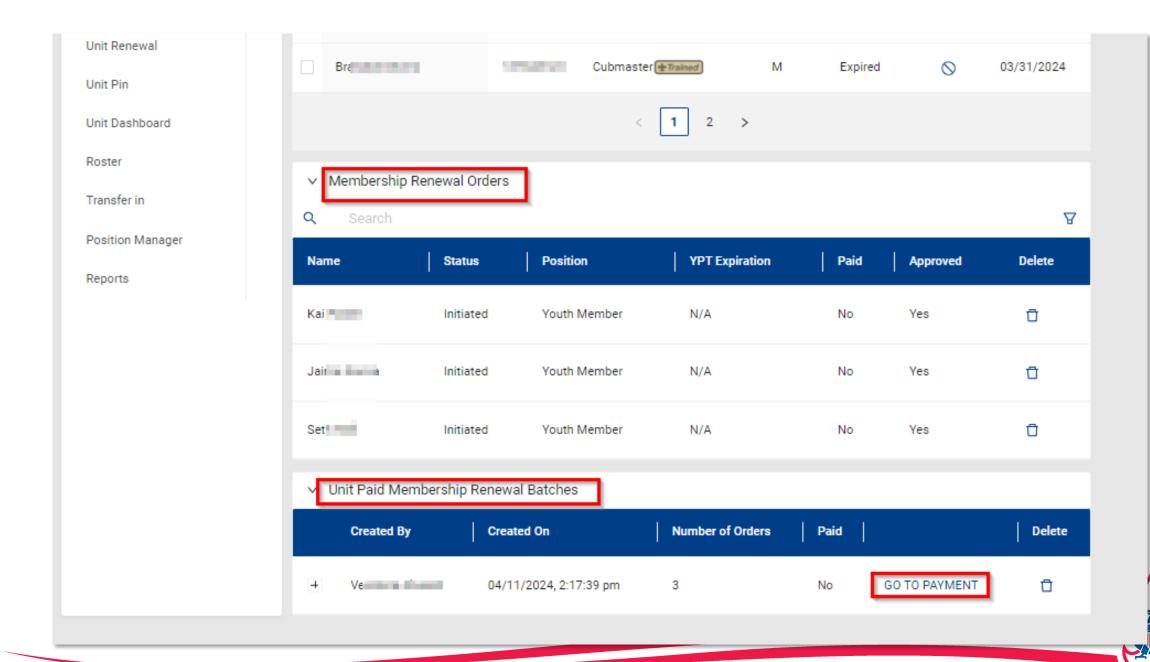
Pack 0288 St Vincent De Paul Catholic Church

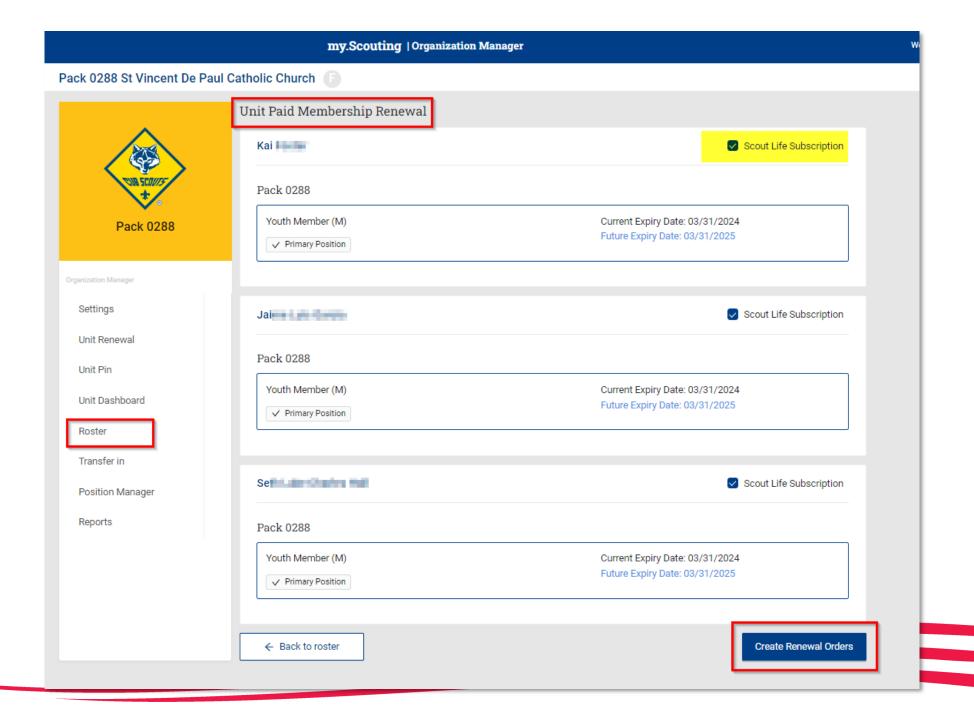


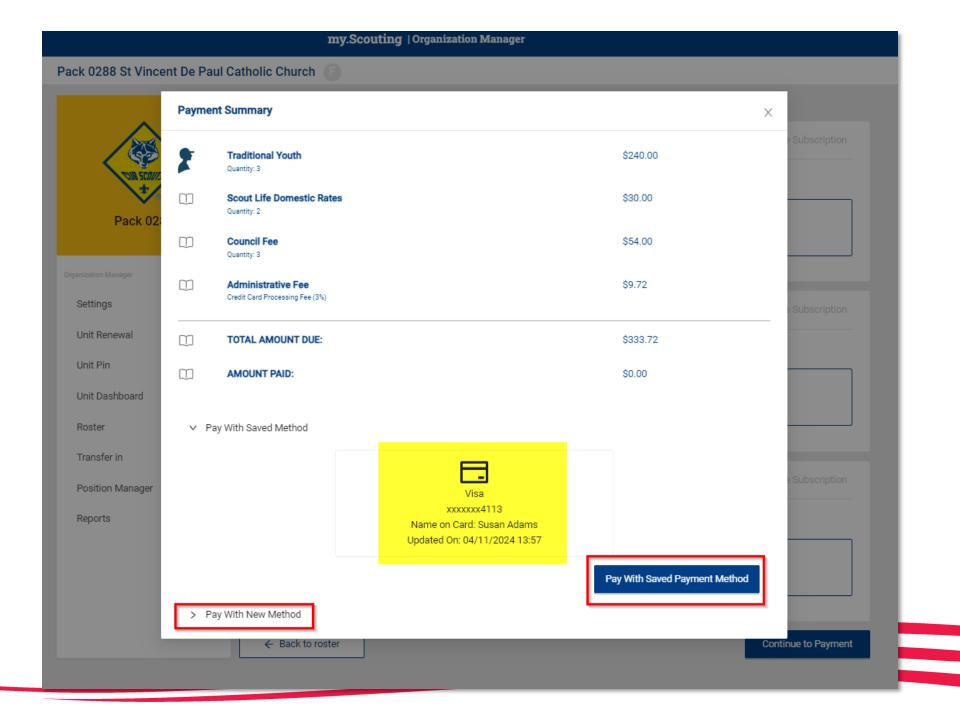














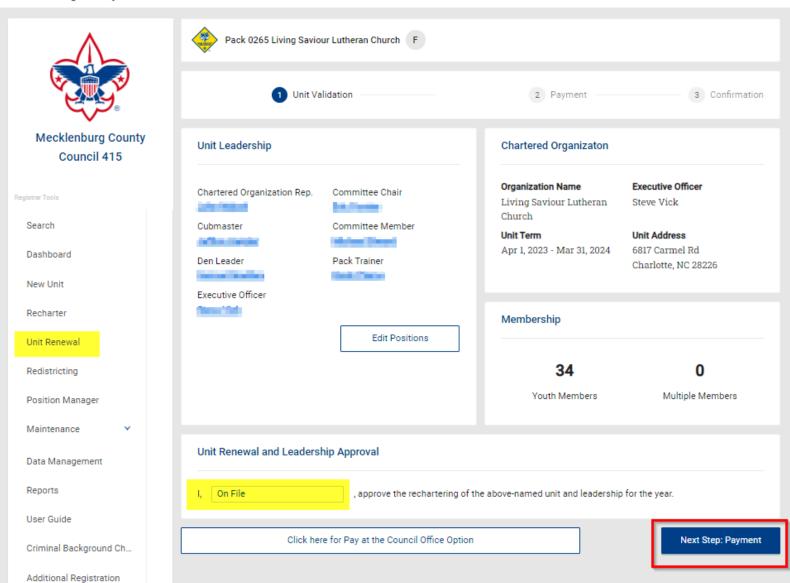
Councils Processing

Manual Options exist for Unit and Membership Renewal



my.Scouting | Registrar Tools

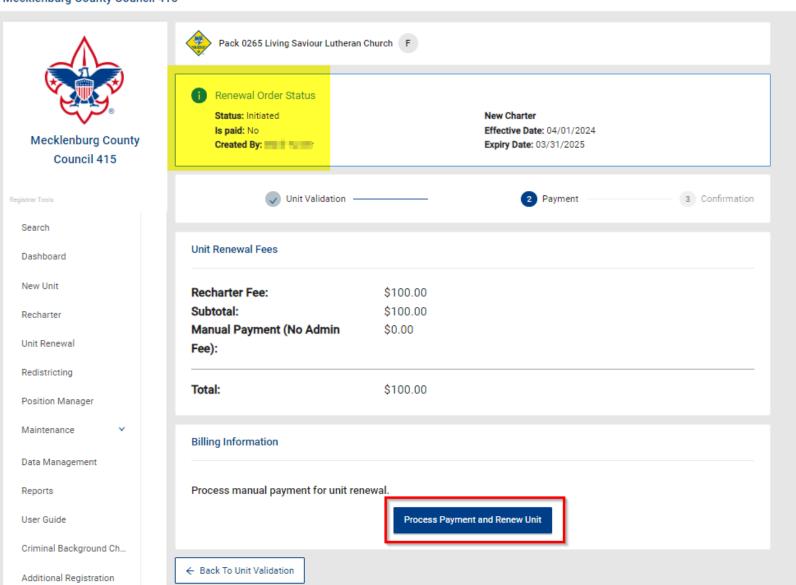
Mecklenburg County Council 415



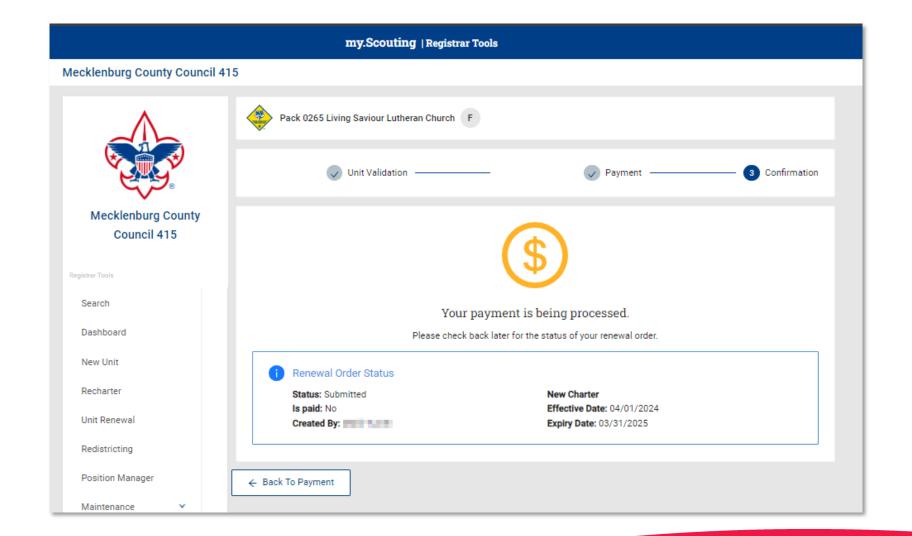


my.Scouting | Registrar Tools

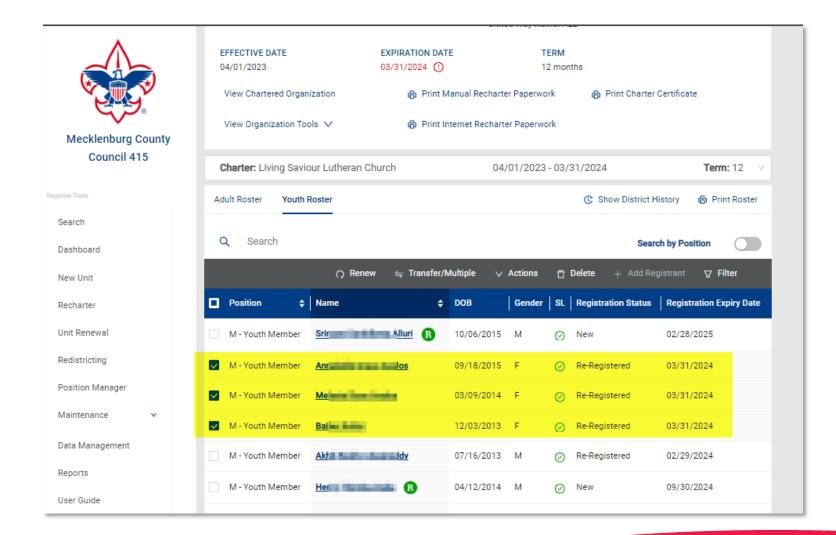
Mecklenburg County Council 415



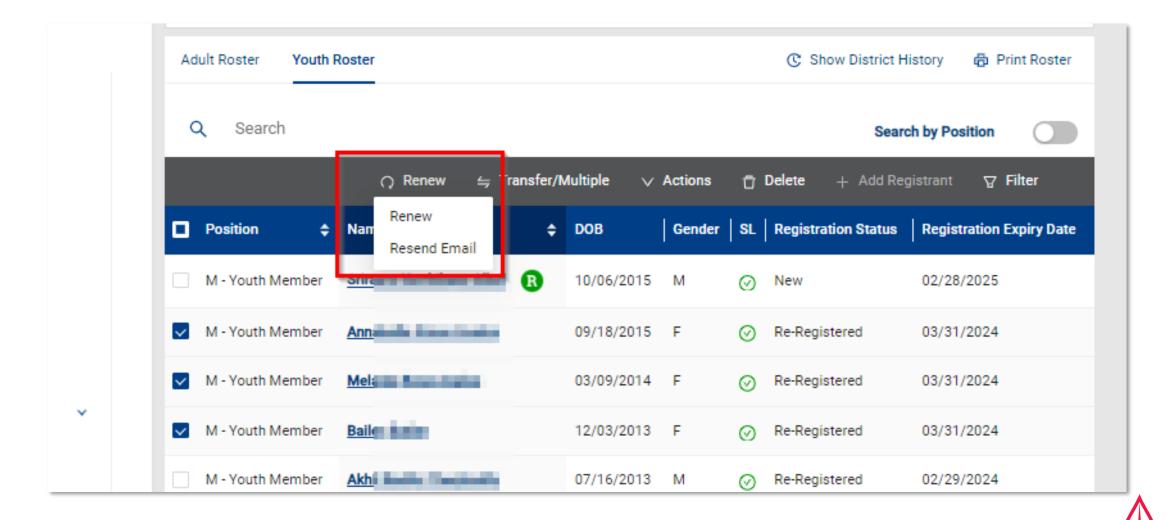


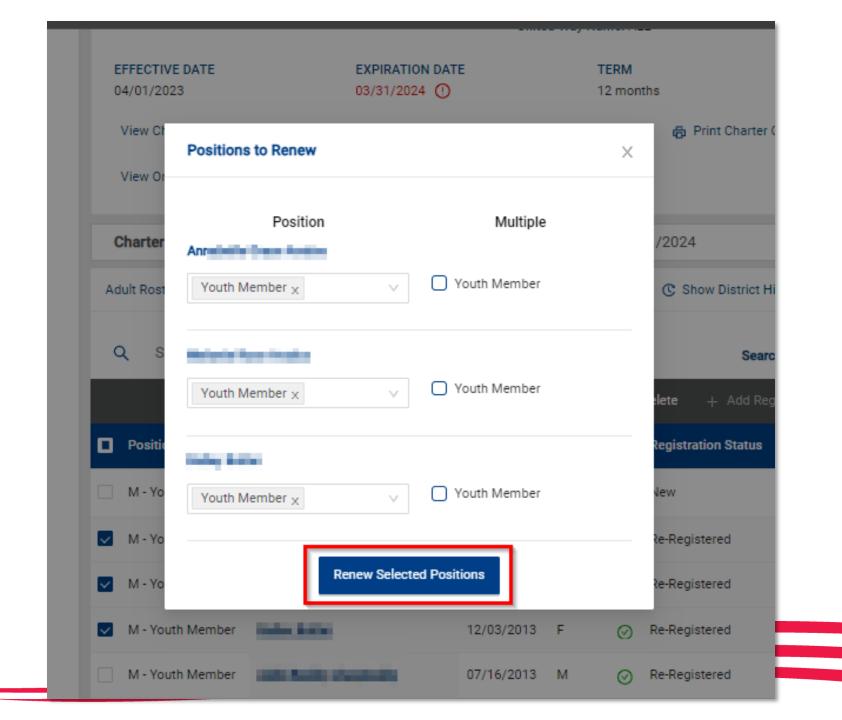


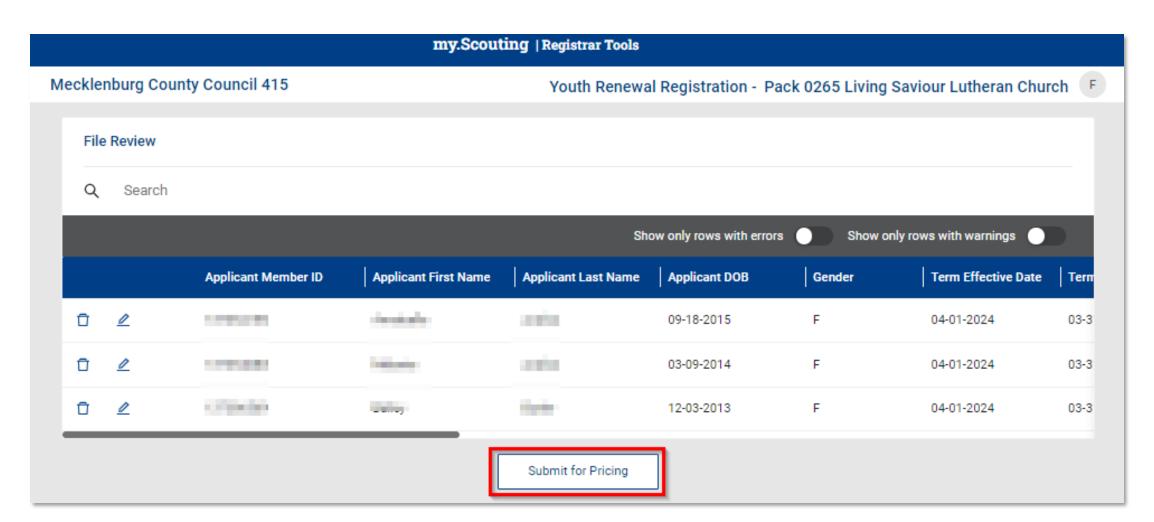














my.Scouting | Registrar Tools

Mecklenburg County Council 415

Youth Renewal Registration - Pack 0265 Living Saviour Lutheran Church

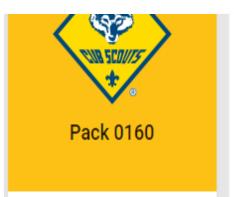
File	Review										
Q	Seard	ch									
										Show only pri	ces
Delete	Edit	Applicant First Name	Applicant Last Name	Youth Registration Fee	Future Year Fee	Joining Fee	SL Youth Subscription Fee	SL Foreign Youth Subscription Fee	SL Future Year Youth Subscription Fee	SL Foreign Future Year Youth Subscription Fee	Total Amount
Û	0	in a later of the	Andre	\$80.00	\$0.00	\$0.00	\$15.00	\$0.00	\$0.00	\$0.00	\$95.00
ū	0	10000		\$80.00	\$0.00	\$0.00	\$15.00	\$0.00	\$0.00	\$0.00	\$95.00
ū	0	(Marine)	Series .	\$80.00	\$0.00	\$0.00	\$15.00	\$0.00	\$0.00	\$0.00	\$95.00
				\$240.00	\$0.00	\$0.00	\$45.00	\$0.00	\$0.00	\$0.00	\$285.00

Submit Registrations

Reporting

Found in Organization Manager





Organization Manager

Settings

Unit Pin

Unit Dashboard

Roster

Position 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.

Run

Run

Run

Run

Run



	Girls	Boys	Total This Year	Total Last Ye	ar 🔻	Difference	% Gain				
	122	275	397	138		259	187.681	A			
al	359	1,873	2,232	1,970		262	13.299	A			
s N	MORE	Invita	ations/Leads	MORE	Re	enewal Status	REPO	RT			
			New		151 Total Units ?						
			Opened Pending Reassignme	ent	Unit Renewal						
		7	nvitation Sent		35 Units Available for Renewal ?						
		19	Closed		3	29 Renewals N	ot Started 💮				
_		6	Completed			7 In Process F	Renewals 💮				
nent						3 Initiated	?				
nse						4 Paymen	t Submitted 💮				
nt											
_						n Dra Doctad I	Inite 🗇				

AMERICA® Unit Charter Renewal Status Report (BSA Order)

n behalf of the Boy Scouts of America. Disclosing, copying, or making any inappropriate use of this roster information is strictly prohibited.

Export to CSV

Export to PDF

t ↑ ↓	SubDistrict ∴ ∨ ↑ ↓	Unit ∴ ∨ ↑ ↓	Unit Number ∴ ∨ ↑ ↓	Gender Accepted ∴ ∨ ↑ ↓	Current Chartered Org	Current Effective Date ∴ ∵ ↑ ↓	Current Expiry Date ∴ ∨ ↑ ↓	Next Chartered Org ∴ ∨ ↑ ↓	Next Effective Date ∴ ∵ ↑ ↓		ReCharter Status ∴ ∨ ↑ ↓	Renewal Status ∴ ∨ ↑ ↓	Last Modified N ∴ ∨ ↑ ↓
Rivers 02		Pack	0556	F	Calvary Baptist Church	04/01/2023	03/31/2024	Calvary Baptist Church	04/01/2024	03/31/2025		Payment Submitted	04/11/2024 1
Rivers 02		Pack	0299	F	First Baptist Church of Sparta	04/01/2023	03/31/2024	First Baptist Church of Sparta	04/01/2024	03/31/2025		Initiated	04/11/2024 2
via 14		Troop	0914	В	Old Hickory Council	04/01/2023	03/31/2024	Old Hickory Council	04/01/2024	03/31/2025		Payment Submitted	04/11/2024 8
via 14		Troop	0944	В	Kernersville Moravian Church	04/01/2023	03/31/2024	Kernersville Moravian Church	04/01/2024	03/31/2025		Payment Submitted	04/11/2024 2
via 14		Troop	0719	В	American Legion Post 55	04/01/2023	03/31/2024	American Legion Post 55	04/01/2024	03/31/2025		Initiated	04/11/2024 1
via 14		Troop	0779	В	Old Hickory Council	04/01/2024	03/31/2025	Old Hickory Council	04/01/2024	03/31/2025		Initiated	04/11/2024 3
03		Troop	0301	В	John R. Bentley Youth Fund INC	04/01/2023	03/31/2024	John R. Bentley Youth Fund INC	04/01/2024	03/31/2025		Payment Submitted	04/11/2024 6
dge 01		Pack	0109	F	VFW Post 7031	04/01/2023	03/31/2024	VFW Post 7031	04/01/2024	03/31/2025		Closed	04/11/2024 2
dae 01		Dack	N100	Ę	Mountaineers	11/01/2022	03/31/202/	Mountaineers				Renewal Not	



This information is to be used only for authorized purposes on behalf of the Boy Scouts of America. Disclosing, copying, or making any inappropriate use of this roster information is strictly prohibited.

Council Circle Ten Council 571

District

Organization Name Circle Ten Council 571 Report Generated By Samuel Thompson

Date Report Generated 12/04/2023

Export to CSV Export to PDF

RELOAD



Records: 6

Member ID ∴ ∨ ↑ ↓	Position ∴ ∨ ↑ ↓	First Name	Last Name	Email ∴ ∨ ↑ ↓	Phone ∴ ∨ ↑ ↓	Address ∴ ∨ ↑ ↓	Registration Effective DT ∴ ∨ ↑ ↓	Registration Expiry DT ∴ ∨ ↑ ↓	Charter Expiry DT ∴ ♥ ↑ ↓	Community Organization ∴	Unit ∴ ∨ ↑ ↓	District ∴ ∨ ↑ ↓	Council ∴ ∨ ↑ ↓
140322643	Youth Member	Apollo	Test				10/01/2023 00:00:00	09/30/2024 00:00:00	07/31/2023 00:00:00	Caddo Mills Historical Society	Pack 0410	Eastern Lakes 44	Circle Ten Council 571
140322642	Committee Member	Henry	Test				10/01/2023 00:00:00	09/30/2024 00:00:00	07/31/2023 00:00:00	Caddo Mills Historical Society	Pack 0410	Eastern Lakes 44	Circle Ten Council 571
140322644	Unit Participant	Kevin	Smith				10/01/2023 00:00:00	09/30/2024 00:00:00	07/31/2023 00:00:00	Price Family Orthodontics	Troop 0603	Iron Horse 58	Circle Ten Council 571
140322645	Committee Member	Isaac	Test				10/01/2023 00:00:00	09/30/2024 00:00:00	07/31/2023 00:00:00	Circle Ten Council	Crew 0216	Iron Horse 58	Circle Ten Council 571
140377646	Venturing Participant	Echo	Smith				10/01/2023 00:00:00	09/30/2024 00:00:00	07/31/2023 00:00:00	Church of the Apostles	Ship 0046	Western Horizon 33	Circle Ten Council 571
140322647	Youth Member	Marcus	Test				10/01/2023 00:00:00	09/30/2024 00:00:00	07/31/2023 00:00:00	Church of the Apostles	Ship 0046	Western Horizon 33	Circle Ten Council 571



Council Crossroads of the West 590

Organization Name Crossroads of the West 590

Report Generated By Michael Creagh Date Report Generated 01/29/2024

Export to CSV **Export to PDF**

RELOAD

Records: 8438

Territory	Council	District	Organization	Member ID	Expiry Date	First Name	Last Name	Position	Address	City	State	Zip	Email
Service Territory 02	Crossroads of the West 590	JIM BRIDGER DISTRICT 03	JIM BRIDGER DISTRICT 03	12	12/31/2023	Amelia	v	Lone Boy Scout Counselor	1325 W Walnut Hill Ln.	Woodruff	UT	84086-0131	qa@scouting.org
Service Territory 02	Crossroads of the West 590	JIM BRIDGER DISTRICT 03	JIM BRIDGER DISTRICT 03	12	12/31/2023	Thomas	lancaria.	Lone Boy Scout Counselor	1325 W Walnut Hill Ln.	Evanston	WY	82930-5183	qa@scouting.org
Service Territory 02	Crossroads of the West 590	JIM BRIDGER DISTRICT 03	JIM BRIDGER DISTRICT 03	14	12/31/2023	Jamie	Nation 1	Lone Boy Scout Counselor	1325 W Walnut Hill Ln.	Pinedale	WY	82941-7705	qa@scouting.org
Service Territory 02	Crossroads of the West 590	JIM BRIDGER DISTRICT 03	Pack 0004 (F)	13	12/31/2023	Sarena	Brooks	Den Leader	1325 W Walnut Hill Ln.	Rock Springs	WY	82901-6670	qa@scouting.org
Service Territory 02	Crossroads of the West 590	JIM BRIDGER DISTRICT 03	Pack 0004 (F)	13	12/31/2023	Sawyer	amirez	Youth Member	1325 W Walnut Hill Ln.	Rock Springs	WY	82901-6670	qa@scouting.org
Service Territory 02	Crossroads of the West 590	JIM BRIDGER DISTRICT 03	Pack 0004 (F)	13	12/31/2023	Karson	Selection .	Youth Member	1325 W Walnut Hill Ln.	Rock Springs	WY	82901-6663	qa@scouting.org
Service Territory 02	Crossroads of the West 590	JIM BRIDGER DISTRICT 03	Pack 0004 (F)	13	12/31/2023	Geneva	-	Den Leader	1325 W Walnut Hill Ln.	Rock Springs	WY	82901-4634	qa@scouting.org
Service Territory 02	Crossroads of the West 590	JIM BRIDGER DISTRICT 03	Pack 0004 (F)	13	12/31/2023	Kelli	ucas	Executive Officer	1325 W Walnut Hill Ln.	Rock Springs	WY	82901-7449	qa@scouting.org
Service Territory 02	Crossroads of the West 590	JIM BRIDGER DISTRICT 03	Pack 0004 (F)	13	12/31/2023	Alexandra	No.	Youth Member	1325 W Walnut Hill Ln.	Rock Springs	WY	82901-3440	qa@scouting.org
Service Territory 02	Crossroads of the West 590	JIM BRIDGER DISTRICT 03	Pack 0004 (F)	13	12/31/2023	Elijah	Minches .	Youth Member	1325 W Walnut Hill Ln.	Rock Springs	WY	82901-3440	qa@scouting.org
Service Territory 02	Crossroads of the West 590	JIM BRIDGER DISTRICT 03	Pack 0004 (F)	13	12/31/2023	Lee	MINOR IN	Youth Member	1325 W Walnut Hill Ln.	Rock Springs	WY	82901-4353	qa@scouting.org
Service Territory 02	Crossroads of the West 590	JIM BRIDGER DISTRICT 03	Pack 0004 (F)	12	12/31/2023	Robert		Chartered Organization Rep.	1325 W Walnut Hill Ln.	Rock Springs	WY	82901-4578	qa@scouting.org
Service Territory 02	Crossroads of the West 590	JIM BRIDGER DISTRICT 03	Pack 0004 (F)	12	12/31/2023	Kena	10.00	Cubmaster	1325 W Walnut Hill Ln.	Rock Springs	WY	82901-9701	qa@scouting.org





Council Old Hickory Council 427

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Organization Name Old Hickory Council 427

Year-to-Date (YTD) From 01/01/2024 to 12/31/2024

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Records: 2616

District	Organization			Last Name	Scout's Address	Scout's Phone	Scout's Email	Parent's First Name	Parent's Last Name	Parent's Address	Parent's Phone	Parent's Email	Position Name	Position Type	Date Of Birth	GradeName		Status	YPT Completion Date	YPT Expiration Date
Wilkes 03	Troop 0335 (B)	- All Control	tody	-	TOP transport file, throat one, on abotic GIN			Desch	mode.	peron proces has ethanory no peer- nee	50000 CHO		11	lagraca.		Total Seads	here state	Œ		
Wilkes 03	Troop 0335 (B)	and the same			Till Grandwa Royallana Creek, NC Jacob, Jacob	000 000 000				FB Destroy Destrict Destrict	(00.00)		Kranh Marrian	Engineeric	na sanar 1	ngrit henn	nere sense	iner Terr		
Wilkes 03	Troop 0335 (B)	170000	ji en	il, live	OI Species Supplied Streets C (SHIP Tell	27	triani el Mariane						Established Section	Registered	conne		BOY OLD H	(increase)	BY40ED	2025
Wilkes 03	Troop 0335 (B)	1 de recons		na Atrian	7500	200	larachestoria (harris			75.00	Service of the servic	tara establica estipaca est	(mark)	Engineera o	1160000	Secretario Secretario	Large street	Œ		



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Council Circle Ten Council 571

Organization Name Circle Ten Council 571

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Territory ∴ ∨ ↑ ↓	Council	District ∴ ∨ ↑ ↓	Organization ∴ ∨ ↑ ↓	Member ID ∴ ∨ ↑ ↓	Expiry Date ∴ ∵ ↑ ↓	First Name	Last Name	Street
Service Territory 08	Circle Ten Council 571	Chisholm Trail 50	Chisholm Trail 50	1	12/31/2023	Lisa	The same	1325 W Walnut Hill Ln.
Service Territory 08	Circle Ten Council 571	Chisholm Trail 50	Troop 0025 (B)	1	12/31/2023	Brandon	The state of the s	1325 W Walnut Hill Ln.
Service Territory 08	Circle Ten Council 571	Eastern Lakes 44	Post 0356	100000	12/31/2023	Hunter	juli represe	1325 W Walnut Hill Ln.
Service Territory 08	Circle Ten Council 571	Iron Horse 58	Crew 0033	1	12/31/2023	Cindy	Name of Street	1325 W Walnut Hill Ln.
Service Territory 08	Circle Ten Council 571	Iron Horse 58	Pack 0013 (F)	1	12/31/2023	Thamizhini	d	1325 W Walnut Hill Ln.
Service Territory 08	Circle Ten Council 571	Iron Horse 58	Pack 0013 (F)	1	12/31/2023	Meenal	n n	1325 W Walnut Hill Ln.

Membership & Unit Renewal Process

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

