Membership & Unit Renewal Process

https://www.scouting.org/resources/unit-and-membership-renewal/
Beginning in August of 2023, registrations in the Boy Scouts of America were all changed to a 12-month membership cycle. As a result of this, membership renewal going forward needed to be looked at and determined the best way for all members to renew each year.

As part of the changes being made, a more simplified and streamlined process for unit and membership renewal was taken into consideration. Today, we now have a self-serve process for our members that also allows the unit to have the option to renew their members if they choose.

Beginning two months before a person’s registration expires, emails will be sent as a reminder with a link that takes the person directly to the renewal process. Those emails will continue on a 15-day cycle until the registration is completed. In addition, each month an e-mail is sent to unit key three listing all members that renew in the next two months.
Unit Renewal Process

Let us first look at how units renew, as mentioned before, the recharter process has been replaced and the units will renew on an annual basis through the My.Scouting tool in the Organization manager.
Located in Organization Manager, in My.Scouting, and if you are a unit key 3 member, there’s a tool called Unit Renewal, within that 2-month period prior to renew your unit this will become active.

When the unit opens this, it will run a validation process just like rechartering always did to look at whether the unit leadership is correct, the adults have current youth protection training dates and other unit related validations.
If there is a validation issue, it will show and stop the unit from continuing to renew.

The most common validation issue is the youth protection training dates for adult leadership, in this example you can see that there are two adults that have youth protection training that either has expired or will expire before the unit renews so at that point the unit would stop the renewal process and work with those adult leaders to make sure they get their youth protection updated.
Validation Requirements

- Unit does not have required number of leadership positions
- Leaders do not have current Youth Protection Training
- Leaders are less than 18 years old
- Leaders do not have completed CBC Authorizations
- Adults do not have SSN

Let’s review the unit renewal validations:

- The unit has to have the required number of leadership in the right positions
- The leadership has to have the youth protection training current
- No leaders can be under the age of 18
- The system is also validating whether leaders have a completed criminal background check authorization form and it’s on file
- We also validate if the unit has any adults that do not have a Social Security number.
When the validation is completed any corrections or changes that needed to be made can be made by the unit, then when the unit logs back into this app, the person filling this out with put their name in as approving the renewal of the above named unit leaders for the year and then they can either click next step and make payment and complete the process right online or click and print this out to take it to the council office and pay over the counter at the council.
This is a sample of what the printed version of the unit renewal looks like. It provides the information for the unit to take to the council office and provides a wet copy of the signature so that can be accomplished if needed. We're asking this be done before the 15th of the month.
If a unit chooses to pay online, this recap at the top of the screen will show them the fees that they are about to pay: the $100 unit renewal fee along with the 3% administration fee.
The unit will have the option to save the payment method for next year. Next, they'll click on “Submit Payment”.
Once payment is made, confirmation is shown on the screen and that remains there until the next year when it is time for the unit to renew.
The payment confirmation also shows at the top of the renewal page once the unit has made the payment.
The payer will also receive an e-mail receipt in case they need to turn it into the unit to get reimbursed for making the payment.
Now let us look at how membership is renewed. There are two different processes that can be used to complete a members renewal.
As you see on the slide there are two methods for members to renew, one is for the family or the person to do their own renewal, and the other is to allow the unit to pay for renewals.

We know strong units include in their budget planning some form of member renewal whether it’s for adults or youth or both so we want to make sure that both the parent option and the unit option exist.
As mentioned, either the parent, or if you're an adult leader you have the ability to do a renewal through the My.Scouting app that allows you to see your registration, see if you have any multiple registrations, and then select your primary registration.
An e-mail will be sent out two months before your registration expires as a reminder, there is also a reminder notice found in My.Scouting, as shown on the screen and there is also a reminder notice in “Scoutbook plus” showing you that you have a renewal with a link to take you to My.Scouting where you can connect with your application and make your renewal.

Within My.Scouting there's a tab called “my applications” if you've never been here before this is where all your registrations and your child's registration plus any multiples you might have, are listed and this would be where you go to make your renewal.
In this example the adult has one registration as the chartered org Rep so all they need to do is click on the start renewal button and that will bring up any other registration details that need to be reviewed.
We are now looking at the current membership that this person has, we can see the primary registration as the chartered Org Rep, but they all are also multiplied as a committee member in the pack and also a chartered org Rep for the troop.

We only want to pay in one position so a primary position must be selected, and it will default to the previous year's primary position. If a change needs to be made, for example this person is no longer going to be active in the pack and only the troop that selection can be made at this time.

The person can also remove any positions that they will not be renewing for the next year then the next step is to go to payment.
You will be asked to review the terms and conditions and type in your name, then click on “Go to checkout summary”. 
You are now presented the summary of the expenses, in this example, they are renewing as an adult, their council has a council program fee that represents 18 dollars, there's the 3% administration charge and this person has selected Scouts Life magazine to renew so the total is $95.79 and at this point you're Scroll down to enter your payment method.
The billing address is auto populated for the primary address you have on file, but you can change it too. You have the ability to restart the process completely if needed, but if everything is correct then you click "Place Order" and the payment is made, an e-mail will be sent acknowledging the payment and you have renewed your registration in the Boy Scouts of America for another 12 months.
Unit Paid Member Renewal

When the Unit Chooses to Renew their Members

Next, we will look at how the unit can pay and renew membership using My.Scouting and the “Roster” tool. The unit can renew adults or youth members, that's entirely up to the unit.
If a unit chooses to make membership renewal payments, one of the unit “Key-3” will need to go to Organization Manager, and in the “settings” tab, there's an option to select the “Renewal Payment”, this will allow the unit to process renewals. This needs to be checked if the unit chooses to make membership renewal payments. Then they need to click “Save”.
In Organization Manager there is a new roster feature, it will be live within that 60-day window to renew registration and the process is very simple, the unit checks the boxes on the far-left hand side of those people they want to renew and then click the renew button up in that Gray header at the top of the roster bar. In our sample we've selected 3 youth.
Once the “renew” tab is clicked, the bottom of the page opens to show the “Membership Renewal Order” details and the “Unit Paid Membership Renewal Batch” details. In our example you’ll see the three youth are selected, looking at the “Batch” section on the bottom, they would click the “Go to Payment” tab to continue.
This brings us to a view of the membership selected and the option to make any edits such as Scout Life magazine subscription or whether this is a primary position. When all those edits are corrected Click “Create Renewal Order”.
The “Payment Summary” is now displayed, and we see we have our three youth, two with “Scout Life Magazine”, we have the council program fee and the administration charge of 3%.

This totals up and the unit have the ability to use a saved payment method such as the credit card that we just used to renew Susan, or you can add a new payment method. The units have an option to use a credit card or an ACH. The credit card charges the 3% administration fee the ACH charges a $1.00 fee.
Let's now look at how a unit would renew registration manually.

The unit can print out a copy of the renewal order that they create by selecting who they want to renew and then under the “print” option up at the top of the roster page a choice called “Unit Payment of Membership Renewal” this is how the unit could create a paper copy to take to the council office to pay for the members that they need to renew for that month.
On the screen is a sample of what is created, this can be reviewed and if all is correct, then they can export it as a PDF file to send it to the council and make the payment. We want to give the unit as many opportunities to renew their membership as possible.
This is an example of what the PDF file looks like, we ask that the unit turn this into the council by the 15th of the month.

You can now see how much more simplified these processes are compared to the older charter renewal process we’ve done. Individuals can do their own renewal in less than five minutes; the unit can renew a set of members in five to ten minutes and the unit can renew in less than five minutes once all the leaders have current Youth Protection Training.
We have reviewed how the unit could renew registrations or the unit, but we also allow for manual entry. Let's look at the operation on the council side.
We are now looking at “Registrar Tools”, this is the app that councils use to process registration and maintain membership records. There's a new tab in Registrar Tools called “Unit Renewal” and this is where the council can process a unit renewal if requested by the unit.

The unit would print out the paper details as we just talked about and bring it into the council office. Just like for the unit, any validations error will show and need to be fixed before this renewal can be processed.

We recommend a signature code of “On File” be used to show that a paper application had been submitted to renew the unit with a “wet signature”, and then Click the “Next Step Payment” button.
As you see the same processes followed as the unit renewed. The Screen will show the status and reviews the cost, in this case the $100 for the renewal fee. The registrar would click “Process Payment and Renew Unit”.
Upon completion the unit shows “payment processing” all payments are processed overnight from Registrar Tools. The next day this would reflect the payment is completed.
Now let's look at how the council would process registration renewal.

This process is the same for one individual or if the unit has turned in a list of people to be renewed.

In this example, this unit has requested for these three youth members to be renewed, In roster the registrar would go in and select the three members that are to be renewed and then they click on the renewal button that's located up at the top gray bar on the roster.
The registrar has a couple of options here. If they click on the renew button it will proceed to renew the member selected, the Registrar can also resend the reminder emails.
We are going to renew, this is the edit screen that the registrar has to review the position and whether there are multiples, any changes can be made at this point and once this is all correct the registrar will click renew selected positions.
Similar to our “add-reg” tool in Registrar Tools, the renewals are processed in this screen, in this case the renewals display on the screen and the registrar has the ability to edit and review and then submit for pricing.
The pricing displays the registration fees and Scout Life Magazine fees, after reviewing the Registrar submits the registration and it is processed overnight and will be posted the next day.
Now let us look at reports that are available to support the new renewal process some of these reports are found in Organization Manager and available to Units, Districts, and Councils, and some are restricted only to the Registrar and registrar tools due to the personal information included. Let's look at those found in Organization Manager.
We are looking at the report section of Organization Manager for a Cub Scout Pack and you can see there are reports for “Members who have opted out”, “Members Due to Renew”, and “Members who have Renewed”, these reports are all available in Organization Manager at the Unit level, District level, and the Council level.
Now let’s look at the “Renewal Status Dashboard“, this is to monitor just unit renewal and it is found in Commissioner Tools and also found in the Registrar Table dashboard. Unit renewal details are displayed in the different categories: Units Available to Renew. Renewals not Started, Renewals in Process, and then depending on the time whether the unit is “Pre-Posted” or “Posted”. This is a change from the recharter dashboard as there were many more steps in rechartering than we need in renewing a unit.
The “Unit Recharter Report” now shows both rechartering and renewing of units depending on whether the unit rechartered before March of 2024. You can see on the screen that the renewal status is displayed and the recharter is displayed if the unit rechartered.
On Organization Manger at the District and Council Level is a report called “Member Without Unit”. Beginning in August of 2023 all our new membership have a 12-month registration, we know there will be some who joined a unit that did not renew but they are still registered until their 12 months expires. This report allows you to identify who in your district or council need to be contracted and connected with another unit.
The report “Members Due to Renew” is available at the unit, district, and council level in Organization Manager. This supplements the email notification the unit Key-3 get each month of members who will be renewing.
The report Non Renewed Membership Report is also available at the unit, District, and Council level and at allows you to see who has not yet renewed their registration.
The ‘Member Opted Out Report” is also available at the unit, district, and council level in Organization Manager and lists those people who had chosen to not renew. The unit can also Opt-Out someone they know has moved or quit the unit.
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As a reminder there are job aids and details on both the unit renewal and member renewal found at www.scouting.org\resources\unit-and-membership-renewal/ to answer additional resources are created they will be added to this website.