

Youth-Serving Executive's Guide to Registration



BOY SCOUTS OF AMERICA®

BASIC RULES OF REGISTRATION

1. The National Executive Council sets the fees and registration requirements.
2. All membership is voluntary.
3. All leaders and youth members must meet membership standards.
4. All members register with the Boy Scouts of America National Council and not with their local councils (**"Youth registration fee," the Rules and Regulations of the Boy Scouts of America (No. 57-492), Article XI, Section 3, Clause 6**).
5. There are separate and distinct Scouting programs that each have their own membership qualifications.
6. All Scouting happens through local community groups called chartered organizations. Chartered organizations have the responsibility for the selection and approval of all leaders and youth members registered under their charter. The Boy Scouts of America reserves the right of final approval in all membership applications.
7. Local councils serve a specific geographic territory, and only chartered organizations located within that boundary can be served by the corresponding council.
 - a. Districts: **Standard Local Council Articles of Incorporation, Article VIII, Section 1, page 16**.
 - b. Units: **Standard Local Council Articles of Incorporation, Article IX, Section 1, page 18**.
8. Local councils operate under an executive board of elected members from the community. The board employs a Scout executive, who has responsibility for all other paid personnel.
9. Local councils exist to serve the communities in their territory through chartered organizations that organize and conduct the Scouting program.
10. Districts are geographic subdivisions of the council and are organized for the administrative convenience of the local council.
11. Full-time professional Scouters, called district executives and district directors, serve districts and divisions. These Scouters organize and administer the Scouting program within their geographic districts.
12. The local council maintains confidentiality of all membership records, which may not be released except on the direct authorization of the Scout executive (**Rules and Regulations (No. 57-492), Article XI, Section 3, Clause 21**).

REGISTRATION POLICIES AND PROCEDURES

1. All youth members in BSA units must be registered with a national BSA-approved registration form signed by a parent (or guardian) and the unit leader (or designee).
2. Councils may not register individuals in BSA units from rosters or lists without obtaining completed and signed BSA registration forms.
3. Councils may not register youth members using permission slips or recruiting fliers, unless a completed BSA registration form is also received.
4. Councils may not register any individual upon verbal or written directions without obtaining a completed and signed registration form.
5. Faxes, emails, and scans are acceptable for the original signature if the council is not reasonably able to obtain a signature on an application.
6. Unit volunteers should be the only ones allowed to determine if an individual will be registered at rechartering.
7. Councils must not reregister any individual dropped by the unit because the registration fee has been prepaid.
8. If units turn in excess registration fees to the council office, the funds must be maintained in unit custodial accounts.
9. Registration funds may not be used for council expenditures.
10. Council employees are not allowed to access unit custodial accounts for registration fees without the specific, verifiable permission of a unit leader.
11. Unused membership fees should be refunded to either the unit or the individual.
12. The registrar and field staff should be advised that individuals dropped by the unit leadership cannot be reregistered without the unit's approval.
13. Councils should not engage in any activity that may allow individuals to be registered for any period without their knowledge.
14. Youth registered in traditional Scouting units should participate on an ongoing basis and not for a onetime event or activity.
15. Youth registered in traditional Scouting units should receive a program that offers at least a few, if not all, of the standard methods of Scouting.
16. Councils may not require, as a condition of registering, any payment in addition to the prorated amount due for the balance of the unit charter.
17. All BSA members and Exploring participants should be registered immediately after their applications are received by the council.
18. All unit charters should be posted by the council as soon as it is administratively possible.
19. Unit charters may not be held and remain unposted by a council for the purpose of not disclosing dropped membership or delaying payment.
20. Councils may not change unit rechartering dates for the purpose of using transfer fees to extend membership significantly beyond the original expiration date.

THE CHARTERED ORGANIZATION

LOCATION:

- The physical location of the chartered organization, not the mailing address, must reside within your council's geographic area. In addition, the physical location of the chartered organization, not the mailing address, must reside within your district's geographic area.

CHARTERS:

- A \$40 Unit Liability Insurance Fee is required for units registering with the Boy Scouts of America. All units are required to pay this fee when registering or reregistering. The unit charter fee helps defray expenses for general liability insurance and raises a portion of the funds required to maintain insurance coverage for the chartered organization and leaders.
- Charters are granted to organizations that have goals compatible with those of the Boy Scouts of America, including religious, educational, civic, fraternal, business, labor, and corporate organizations; professional associations; and groups of citizens. The chartered organization must be clearly identified and **may not use** initials or abbreviations.
- The specific denomination of a religious organization should be indicated.
- The chartered organization's executive officer must be listed, along with a complete mailing address that includes the city, state, and ZIP code and a phone number.
- The Church of Jesus Christ of Latter-day Saints has indicated that all their charters should be shown with the indication "LDS," followed by the stake and ward designations.

CHARTERED ORGANIZATION TYPES:

- The correct organization code should be on all units.
- For chartered organization code lists, see "Forms Location" on page 67.

DUAL CHARTERED ORGANIZATIONS:

- A unit can be sponsored by more than one chartered organization.
- Duplicate charters can be issued, if requested, so that each chartered organization has one for its own use (must be produced locally).
- Only **one** institutional head (IH) and **one** chartered organization representative can be listed on the unit.

UNIT NUMBERS:

- Unit numbers are assigned to a chartered organization by the council.
- If a unit does not recharter, the number is reserved for a minimum of one year.
- Prior to reaching the one-year deadline, a letter is needed from the current chartered organization to release the unit number.
- A unit may not change from one program to another. If a unit's members want to participate in a different program, members may transfer to another unit or organize a new unit in that program.

RENEWAL DATES:

- Renewal dates may be assigned in any month of the year, and units can register for charters lasting between six and 18 months.
- Some councils may have designated months for units to recharter.
- Renewal dates can only be set or changed at renewal time.
- New units must pay for the month they are entered into the computer and the month they are to recharter (**i.e., if a unit is entered in May and wants to recharter the following May, it must pay a 13-month registration fee**).

UNIT REQUIREMENTS:

Troop, Varsity, Venturing, and Sea Scout units are required to have an institution head, a chartered organization representative, a committee chairman, two committee members, and a unit leader. Packs are required to have a chartered organization representative, a chair, two committee members (or one committee member and one pack trainer), a unit leader, and at least one den leader who may be a Tiger Cub den leader, a Cub Scout den leader, or a Webelos den leader.

The chartered organization representative (CR) and the Parent coordinator (PC) are the **ONLY** adults allowed to hold two positions in the **SAME UNIT**. Only the CR may hold multiple positions as committee chairman (CC), a committee member (MC), or a Parent coordinator (PC).

Chartered organizations that operate more than one unit (e.g., pack, troop, team, and crew) **must register the same individual as the chartered organization representative (CR)** for all units chartered to that organization, because the CR serves as a voting member of the district committee and the council. The executive officer (IH) **must** also be the same person for all units chartered to that organization.

There must be at least **FIVE** paid youth members in a pack, troop, team, crew, or ship. If special circumstances exist, the Scout executive may give permission to allow a unit to register with as few as two paid youth members. No unit can register with fewer than **TWO** paid youth members. Units with more than 100 or fewer than five at registration must be approved by the Scout executive. This approval should be in writing and kept in the unit's historical file.

A transferred membership is considered a paid registration.

TENURE:

A unit retains its tenure provided it has done the following things.

- 1) Reregister on time.
- 2) Separated reregistered (SR) within the 10 months following the drop date and registering with the original recharter date for a full 12 months.
- 3) Dropped and ceased all activity but reorganized during the 10-month period.
 - a. **Accumulated tenure is retained; however, there will be a space between tenures for the months during which no fee was paid.**
- 4) If a unit does not reregister within 12 months of the expiration date, all tenure will be lost on the first day of the 13th month. If the unit then reregisters, it must return as **NEW**.

PROGRAM POSITION REQUIREMENTS

All traditional programs require the following positions, **which MUST** be filled by individuals who are at least 21 years old:

IH Institutional head

CR Chartered organization representative

CC Committee chair

MC Two committee members**

In addition to these positions, each program has its own leadership positions.

Cub Scouts	
CM—Cubmaster (REQUIRED)	TL—Tiger Cub leader*
DL—Den leader*	PC—Parent coordinator
DA—Asst. den leader	PT—Pack trainer**
WL—Webelos leader*	91U—Unit Scouter Reserve
WA—Asst. Webelos leader	92U—Unit College Scouter Reserve

A Tiger Cub partner (AP) is required for each Tiger Cub that is registered.

Boy Scouts	Varsity Scouts
SM—Scoutmaster (REQUIRED)	VC—Varsity Scout coach (REQUIRED)
SA—Assistant Scoutmaster	VA—Assistant Varsity coach
10—Blazer Scout leader	PC—Parent coordinator
PC—Parent coordinator	91U—Unit Scouter Reserve
91U—Unit Scouter Reserve	92U—Unit College Scouter Reserve

Venturing/Crews	Venturing/Ships
NL—Crew Advisor (REQUIRED)	SK—Skipper (REQUIRED)
NA—Assistant crew Advisor	MT—Mate
PC—Parent coordinator	PC—Parent coordinator
91U—Unit Scouter Reserve	91U—Unit Scouter Reserve
	92V—Venturing College Scouter Reserve

**A pack must have at least one den leader (DL) who may be a Tiger Cub den leader (TL), a Cub Scout den leader (DL), or Webelos den leader (WL) (one of these is required).*

***One (1) pack trainer (PT) may be substituted for one (1) committee member (MC). A pack may have one MC and one PT.*

PROGRAM POSITION REQUIREMENTS

All adults holding leadership positions must be 21 years of age, except for the following, who must be at least 18 years old:

All leadership positions are open to both males and females.

Adults pay a \$24 annual registration fee. The registration fee can be prorated at \$2.00 per month. No other fees should be included.

AP—Tiger Cub adult partner

92U—Unit College Scouter Reserve (male only)

CA—Assistant Cubmaster

92V—Venturing College Scouter Reserve

DA—Assistant den leader

SA—Assistant Scoutmaster

VA—Assistant Varsity coach

WA—Assistant Webelos leader

➤ The National Executive Board sets registration fees. Dues, insurance, and other expenses cannot be added to the registration fee. See *Rules and Regulations of the Boy Scouts of America*, Article XI, Section 3, Clause 6.

The IH (institutional head) and the AP (Tiger Cub partners) pay no fee and are shown as multiple.

➤ If the IH or AP want to serve in a membership position, an adult application and fees are required.

Transfers are allowed for every position, except the IH and AP. Those requesting a transfer must be currently registered and complete an adult application.

The chartered organization MUST have the same IH and CR for every unit that it sponsors.

The chartered organization representative (CR) of a unit may multiple as the committee chair (CC), a committee member (MC), or a Parent coordinator (PC) but not all four. In addition, adults can register in other traditional units, but they must be sure they have a paid registration.

MULTIPLE REGISTRATIONS:

When registering as multiple, an individual **MUST** have a paid registration. Without a paid registration, the individual **will not**:

1. Receive a membership card
2. Receive *Scouting* magazine
3. Receive important mailings from the council office

YOUTH PROGRAM REQUIREMENTS

TIGER CUBS

- Must be under the age of eight and have completed kindergarten
- Or be in the first grade
- Or be age seven
- Male only

CUB SCOUTS

- Must have completed the first grade but not the third grade
- Or be age eight or nine
- Male only

WEBELOS SCOUTS

- Must have completed the third grade but not the fifth grade
- Or be age 10, but not yet 11½
- Male only

BOY SCOUTS

- Must have completed the fifth grade and be at least age 10
- Or be age 11
- Or have earned the **Arrow of Light Award** and be at least age 10, but not yet age 18
- Male only

VARSITY SCOUTS

- Must be at least age 14 but not yet age 18
- Male only

VENTURERS/SEA SCOUTS

- Must be at least age 13 and have completed the eighth grade, or age 14 but not yet 21
- Youth registered in a crew or ship prior to age 21 may continue as members after their 21st birthday until the unit recharter or until their 22nd birthday, whichever comes first.
- Male and female (must have parent/guardian approval if under age 18)

Youth pay a \$24 yearly registration fee. The registration fee can be prorated at \$2.00 a month. No other fees should be included.

⇒ The National Executive Board sets registration fees. Dues, insurance, and other expenses cannot be added to the registration fee. See *Rules and Regulations of the Boy Scouts of America*, Article XI, section 3, clause 6.

Transfers are allowed if they have a current registration and complete a youth application.

Cub Scouts, Boy Scouts, Varsity Scouts, and Venturers and Sea Scouts may multiple register.

- Cub Scouts—with pack
- Boy Scouts—with crew, ship, team, pack or another troop
- Varsity Scouts—with crew, ship, troop, or team
- Venturers—with crew, ship, *troop, or *team (*male only)
- Sea Scouts—with crew, ship, *troop, or *team (*male only)

Multiple-registered youth are not counted in membership totals.

YOUTH APPLICATION REQUIREMENTS

The official youth application is **always required** for registering new youth in traditional Scout packs, troops, teams, crews, and ships. The application should be filled out with complete legal names and addresses.

1. Date of birth

- The date of birth is **ALWAYS** required. Do not guess the age of the person.

2. Grade

- The grade is calculated by the birthday that is entered. If the calculated grade is not correct, change it so that accurate information can be entered into PAS.

3. The parent/guardian **MUST** sign if the youth is under the age of 18.

- There is a parental signature exception (see page 19).
- Faxes, emails, and scans are acceptable for the original signature if the council is not able to reasonably obtain a signature on an application.

4. Signature of the unit leader (or designee)

- The designee can only be the executive officer/institutional head, chartered organization representative, or the committee chairman if the unit leader is not available.

5. Tiger Cub adult partner (AP)

- If APs are not living at the same address, they **MUST** complete an adult application and attach it to the youth application.

ADULT APPLICATION REQUIREMENTS

The official adult application is **always required** for registering new adults in traditional Scouting packs, troops, teams, crews, and ships. Any change of position, transfer from one unit to another, or multiple registering during the year also requires a completed adult application.

1. Date of birth
 - The date of birth is ALWAYS required. Do not guess the age of the person.
2. Social Security numbers
 - The Social Security number is ALWAYS required on the application. This is an identifier. If individuals do not have or want to give their Social Security numbers, contact your supervisor.
3. Signature of applicant
 - Applicants MUST sign their applications and the Disclosure/Authorization Forms. By signing the Disclosure/Authorization Form, they grant permission for the BSA to conduct criminal background checks.
 - No one is permitted to sign the adult application for the applicant.
4. Faxes, emails, and scans are acceptable for the original signature if a council is not able to reasonably obtain a signature on an application.
5. Signature of the unit committee chair
6. Signature of the chartered organization head or representative
7. Accepted (signature of Scout executive or designee)
8. Questions answered for application item No. 6
 - If any of the questions were answered yes, the application should be given to the Scout executive.
9. Completed adult application
 - Sign the Disclosure/Authorization Form for permission to perform criminal background checks and file it with the original application.
 - The application process will not be complete until this form is signed and filed with the application.

QUICK TIPS FOR UNIT CHARTER RENEWAL

1. Follow the 90-day plan for charter renewal.
- *2. Draw a line through the complete information for any youth or adult who is no longer active in the unit.
- **3. Cross out any incorrect information and enter the correct information in the blank space directly below each item.
4. The number of youth and adult members should be checked to determine if they are paying the total fee. If not, check for transfers or multiple registrations.
5. Each unit must have at least five paid youth members.
6. All units are required to pay an annual Unit Liability Insurance Fee of \$40.
7. Make sure there is an application for all new members and leaders, including transfers.
8. All adult applications should be checked for Social Security numbers.
9. All individuals should have complete addresses.
10. Adults should be checked for meeting the age requirements.
11. Adult committees and leadership requirements are met by position and program.
12. Check for *Boys' Life* subscriptions and fees and mark appropriately.
13. Make sure all signatures of certification are on the Unit Renewal Application.
14. Following Internet rechartering, secure a hard copy of paperwork with signatures.
15. A unit can recharter for a period of six to 18 months.
16. Complete the annual Chartered Partner Agreement and file with charter papers. It is suggested that the Chartered Partner Agreement be completed 90 days prior to the unit charter expiration date.
17. At no time should applications be left unsecured.

FOR INTERNET RECHARTER RENEWALS:

- *2. Deselect adult and youth not renewing their memberships. They may be added back in if needed.
- **3. Go to "update member data," click "update" and update member information as needed.

REGISTRATION POLICY FOR SIGNATURES ON BSA FORMS

We have received numerous inquiries about the BSA's policy on accepting faxes, emails, and other electronic methods to obtain signatures on registration forms. Councils should make every effort to comply with standard membership policies. This includes obtaining documents with original signatures. However, if reasonable attempts to obtain an original signature are not successful, the BSA will accept signatures on BSA applications via electronic methods (faxes, emails, or scanned email attachments). **This practice should be the exception—not the rule.**

If your council is not reasonably able to obtain a signature on a BSA or an Exploring application or a charter:

- Your staff may electronically scan or fax the form with the missing signature to the person who needs to sign it.
- This person may sign where needed and return it to your office electronically or by fax.

In addition, emails from the appropriate person will be accepted in lieu of a signature, as long as a copy of the email is attached to the BSA form and kept in the appropriate unit file. These attached documents will follow the same retention policy as applications (current year plus the past two years).

There are rare situations (e.g., camp, remote locations, or institutional programs) where it is absolutely not possible or practical to receive a parental signature. Upon approval by the unit leader, an email, scan, or fax from the parent authorizing his or her child to be registered with the BSA is acceptable. A copy of the email, scan, or fax should be attached to the application.

An authorization by telephone should only be accepted as an absolute last resort and should include a note indicating the date of the call and the names of both parties to the call. It must also be signed by the council representative who made or received the call.

LDS Registration Procedures When Using Membership Information System Lists

The Church of Jesus Christ of Latter-day Saints Membership Information System (MIS) registration alternative:

Units should make every effort to comply with standard membership policies. *If all attempts to secure a parental signature on a BSA application are not successful, then only those units with membership fees paid by the LDS Church for members of the LDS Church may use the following procedures:*

- The unit may submit an MIS list signed by the unit leader and an appropriate ecclesiastical leader (stake president, stake Young Men's president, bishop, or a counselor of the bishopric) in lieu of applications. By conveying the names of Church youth to BSA for registration, the Church represents that the parent or guardian of each youth is aware of and agrees to their child's membership in the BSA, subscribes to the oath or promise of the program the child is joining, agrees to support the child's participation, understands that the chartered organization is to provide a safe and adequate meeting place and capable adult leadership, and that all those involved must adhere to the policies of BSA.
- Youth application forms will be required for registrants who are not members of the Church.
- Adult applications will be required, due to laws related to granting permission for conduct criminal background checks.

2015
Annual Local Council
Membership Validation Procedures
Required tasks and checklist

Below is a recommended timeline and checklist to help you complete the procedures correctly and on time for submission **to your area director by February 13, 2015**. The area director will then sign it and send it to the regional director by February 27, 2015.

- _____ 1. The Scout executive reads the Annual Local Council Membership Validation Procedures (No. 524-325) to be sure it is clearly understood.
- _____ 2. Make _____ copies of the procedures and distribute them to every professional and office staff member, and to all of the district chairs, district commissioners, the council president, the council commissioner, and the council membership chair.
- _____ 3. Schedule time at a January staff meeting to review the procedures, point by point, with all staff members, and discuss any questions they may have. Optionally, invite key volunteers, including the council membership chair. Ask them to keep their copies for future reference.
 - _____ Distribute the individual Employee Certification sheet to each staff member. Have them sign it. Prepare a roster of all those who have turned in their signed sheet to ensure 100 percent compliance.
 - _____ Give district executives copies of the procedures for their Key 2, plus the signature page for the district Key 3 to complete and return.
- _____ 4. Scout executive gives copies of the procedures to the council Key 2, reviews it with them, and obtains signatures.
- _____ 5. Scout executive mails the originals of the signed roster form, and the completed signed council Key 3 certification, to the area director by February 13, 2015.
- _____ 6. All individual employee certification forms—district Key 3 signed forms, and copies of the council Key 3 form and staff roster—are kept on file in the Scout executive’s administrative office. This file, along with these forms, should be available for review and will be requested at membership audits, administrative and governance reviews.

Special Note: As new employees join your staff during the year, review this document with them as part of their orientation process. Do not wait until the following January or February.

2015 Annual Local Council Membership Validation Procedures

The following procedures must be reviewed and certified by all professionals, paraprofessionals, council registration staff, council service center employees, program aides or project workers, and designated volunteers.

Staff members and
volunteers responsible
(with Scout executive)

Steps

Scout executive

1. **All membership fees paid by the council are to be approved** by the Scout executive following written guidelines established by the executive board. Council-paid fees must be a budgeted expense item approved annually by board resolution. The council's Learning for Life licensing fees are to be approved by the executive board. The annual Learning for Life licensing agreement is filed with the national Learning for Life office by October 31 of each year.
2. **Make copies of the Annual Local Council Membership Validation Procedures available for review and obtain signatures** from all professionals, executives, paraprofessionals, registration staff, support staff, all employees, and designated volunteers. The Annual Local Council Membership Validation Procedures must be shared with all new professionals and support staff members hired during the year.
 - A. During a meeting with affected employees, and with key volunteers optional, review these procedures, answer questions, and have each employee sign an employee certification form.
 - B. Review and obtain appropriate volunteer signatures on the district Key 3 certification and council Key 3 certification forms.
3. **Send the original signed roster form and the council Key 3 certification, signed by the appropriate individuals, to your area director by February 13, 2015.** The roster form should list all employees and volunteers who have signed forms on file at the council office.

Maintain a file in the Scout executive's office with the signed originals of the employee certification forms and the district Key 3 certification, along with copies of the roster form and the council Key 3 certification. The council retains forms (original and copies as indicated above) for at least five years.
4. **Secure personal information and ensure that correct procedures are being followed for the criminal background check process.** Monitor procedures for safeguarding confidential information provided to the council. This includes locked storage of registration documents. Ensure that there is no unauthorized use of the background check program, data, and information that is received. Any misuse by an employee may be cause for termination. Carefully review policies on criminal background checks and retention of registration files found in the latest Registrar Procedures *Manual*, No. 524-901 (online at MyBSA>Resources>Membership Resources).

Registrar

5. **Mail all registration cards directly to the unit leader** of record with a cover letter from the Scout executive requesting that the Scout executive be contacted personally if there are any discrepancies or errors on the cards. This is done at unit charter renewal and for additional enrollments. In the case of Explorer posts, participant cards and certificates are mailed to Explorer Advisers with the letter coming from the council's Learning for Life chair. For Learning for Life school-based programs, the certificate is mailed to the organization with the letter coming from the council's Learning for Life chair. Note that this system must also ensure that no one has access to registration cards other than the individuals involved with mailing cards. The unit leader should not be marked in PAS as "no mail."

Assistant Scout executive, director of support services (not line staff), support executive in councils with support staff, or Scout executive in a small council

6. **Make a personal "welcoming" telephone call to the new unit leader** of record when a new unit is processed. This call should be made within two weeks of the arrival of the charter application in the council service center. This call will help verify the interest of the council and encourage the leader to take advantage of council and district training and services.

This step should be on the registrar's checklist of steps in processing new units. It will be helpful if the registrar sends a note to the designated caller with basic information for making the call. A written log should be maintained for documenting the calls and kept on file with the registrar.

Field director with commissioner or service team chair and related field staff

7. **Conduct semiannual "unit health" reviews** (in January and July).

- A. The youth-serving executive meets with the commissioner team (service team for LFL) to evaluate the units in the district. (This should be a part of the goal-setting process in January.) Unit progress toward achieving the various levels of the Journey to Excellence award should be noted. Use the Exploring Excellence Award for posts and the appropriate Learning for Life Accreditation Award for school-based LFL programs.
- B. For every unit, a plan is developed by the unit-serving executive and his commissioner team based on how this unit can achieve the highest level of the Journey to Excellence award (or the appropriate LFL award) based on their current status. This plan is shared with the council commissioner (or service team) and the staff leader of the executive. These plans should be kept on file by the registrar. Specific actions should be identified monthly, and progress should be reported. Priority should be placed on units with "life-threatening" problems.
- C. Twice a year, unit status should be compared to the last report. Units categorized as "fair" or "poor" that aren't changing in status should be given immediate attention by the youth-serving executive's staff leader with help from the appropriate assistant district commissioner, district commissioner, or service team.

8. **Obtain the Annual Charter Agreement form (No. 524-182).**

- A. A yearly visit is made to the chartering organizations by a commissioned professional and/or key district volunteer.
- B. After following the discussion guide, the top copy is completed and signed by the chartered organization.
- C. The council's copy of the form is filed in the unit file at the council office.

Registrar, Scout executive

9. Watch for unusual or no changes in unit membership. Notify the Scout executive immediately when there is a loss or gain of 50 percent or more of youth members at charter renewal, or when there are no changes in youth and adults reregistering. Monitor an abnormal influx of new members during the year and notify the Scout executive. Charter applications should be screened to reveal any significant numbers of “short-term” or “long-term” registrations. An objective appraisal should be made to ascertain the reasons. Units with more than 100 members or fewer than five at registration time must receive written approval by the Scout executive. These approvals should be kept in the units’ file.

All staff members

10. Maintain standards of membership and leadership by following BSA registration procedures. Any changes to registration records or established procedures must include the written and specific authorization of the Scout executive. Field receipts must be used when accepting and handling funds. No paid employee of the council is to be registered in any volunteer position without the written permission of the Scout executive. The only exception is a unit in which the children of the employee participate.

Learning for Life groups are evaluated annually by the organization and the evaluations are shared with the Scout executive. A memorandum of understanding must be signed each year by the participating organization and the council to ensure a quality program and continuous registration.

Exploring post adult leaders and Learning for Life committee members must complete the correct form with original signatures.

11. All youth members in the council are registered with the Boy Scouts of America or Learning for Life. Learning for Life school-based participants are accounted for in the estimated number of youth served.

12. The Open Door Policy is a means to resolve membership concerns. Staff members are encouraged to discuss any concerns with their immediate staff leader. If the concern is such that it cannot be discussed with or resolved by the immediate staff leader, the employee should be free to approach the next level of management, the Scout executive, or the area director. To make an anonymous report, go to www.ethicspoint.com.

PARENTAL SIGNATURE EXCEPTIONS

1. Registrations subsidized by council funds or external sources

Units should make every effort to comply with standard membership policies. If all attempts to secure a parental signature on a BSA application are not successful, then only those units with membership fees paid or subsidized by council funds or external income may use the following alternative youth registration exemption:

- The unit leader must verify and attest that the youth member attends the unit on a regular basis and that several attempts at obtaining a completed registration form signed by a parent have failed. Attendance rosters and program logs should be kept on file in the unit's history file.
- Volunteer oversight and verification must be made, including a site visit while the unit is in operation.
- The parental approval on the application form must be signed by an official from the charter organization.
- The use of this alternative registration procedure must be approved by the council executive board.

A form to list members' names and secure approvals is attached. A copy of this form must be used each time this exception is used, and the form should be kept in the unit's current file attached to the application form for each member on the list.

2. Additional registrations

Wherever possible youth applications should be filled out, signed by a parent, and signed by a unit leader/official. In those rare situations (i.e., camp, remote locations, or institutional programs) where it is absolutely not possible or practical to receive a parental signature—with the unit leader's approval—an email, or fax from the parent authorizing their child to be registered with the BSA is acceptable. A copy of the email or fax should be attached to the application. A phone call authorization should only be accepted as a last resort. A phone call authorization should include a note indicating the date of the call and the names of both parties to the call and signed by the council representative making or receiving the call.

3. LDS registration procedures

Effective January 1, 2014, the Church of Jesus Christ of Latter-day Saints (LDS) will be making direct payment to the National Council for the registration of the adults and members of their chartered units nationwide. Councils will process registrations normally and will continue to collect fees for any Boys' Life magazine subscriptions from the youth and adults in these units, but no registration fees will be assessed. Lists from the LDS Church database, signed by the unit leader and an appropriate LDS ecclesiastical leader (stake president, stake Young Men's president, bishop, or counselor of the bishopric), can be used to register LDS youth in LDS units. By conveying the names and information of LDS Church youth to the BSA for registration, the Church represents that: the parent or guardian of each youth is aware of and agrees to their child's membership in the BSA; the youth subscribes to the oath or promise of the program they're joining; the parent or guardian agrees to support the child's participation; the parent or guardian understands that the chartered organization is to provide a safe and adequate meeting place and capable adult leadership; and all those involved in the unit's operation must adhere to the policies of the BSA.

Parental Signature Exception Form

This form must be completed, including the required signatures, and kept in the unit file each time the parental signature exception is applied.

Attach the applications for the youth members on the list to this form.

The following youth members are being registered without parental signatures in:

Unit No. _____	Chartered to _____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

As the unit leader, I attest that the above youth members attend this unit on a regular basis and that several attempts at obtaining a parent's signature on the membership application have failed.

Attendance rosters and program logs are on file to verify their participation.

Signed _____ Date _____ Position _____
Unit Leader

Print name

I have made a site visit while this unit is in operation and verify that this is a functioning unit.

Signed _____ Date _____ Position _____
District/Council Volunteer

Print name

On behalf of the chartered organization, I approve the registration of the above youth members.

Signed _____ Date _____ Position _____
Chartered Organization Official

Print name

This alternative to obtaining parental signatures on completed membership applications has been approved by the council executive board, on (date) _____, and I approve the registration of the above youth in this unit.

Signed _____ Date _____ Position _____
Scout executive

REQUIRED CERTIFICATIONS

Employee Certification

I have reviewed the 2015 Annual Local Council Membership Validation Procedures and certify that I understand how they apply to my responsibilities in the council.

Employee's signature

Staff position

Date

Print Name

District Key 3 Certification

We have reviewed the above 2015 Annual Local Council Membership Validation Procedures and certify that we understand how they apply to our responsibilities within the district of this council.

District executive's signature

District chair's signature

District commissioner's signature

Print Name

Print Name

Print Name

Date

District

Council

Copies to be retained in the local council service center.

Council Key 3 Certification

We have reviewed the 2015 Annual Local Council Membership Validation Procedures with our staff leaders, all other professional staff members, the registration staff, and all district Key 3s, and certify that the council enforces the above procedures.

Scout executive's signature

Council president's signature

Council commissioner's signature

Date

Council

Number

I have reviewed this information with the Scout executive. I certify that the proper membership validation procedures are in place and the council is in compliance.

Area director's signature

Date

Area director sends an original copy to Regional Support
at the national office by February 27, 2015.

NEW UNIT WELCOMING CALL CONTACT REPORT

Call made by:
Completed on:
Into unit file:

Unit leader name: _____

Unit leader phone: Work: _____ Home: _____

Email: _____

(Please circle one): pack/troop/team/crew/ship No.: _____

Hello, my name is _____ and I am calling on behalf of the Boy Scouts to follow up on your new _____ (pack, troop, team, crew, ship).

Have you been notified of training? Yes No

Have you started to plan your program for the year? Yes No

Do you feel you are getting enough support? Yes No

What can we do to help?

May I confirm several items?

Chartered organization name: _____

Number of adults: _____ Number of youth: _____

Your district executive's name: _____

Phone number: _____ Email: _____

Anything you would like to tell us? _____

Scout Executive Approval

Pack/troop/team/crew/ship No. _____

I approve this unit to be chartered _____ rechartered _____ with:

Less than five members

More than 100 members

Group/post No. _____

I approve this Learning for Life group/post with:

Less than five members

More than 100 members

Signature of Scout executive

Date

CURRENT UNIT FILE CHECKLIST OF ITEMS

Unit _____

District _____

Date _____

✓	CURRENT UNIT FILE ITEMS TO COMPLY WITH MEMBERSHIP VALIDATION PROCEDURES
	Annual Charter Agreement Form completed with all signatures
	Current unit charter renewal documents or new-unit application completed with all signatures
	Unit Expire Roster
	Special authorizations if necessary (youth with disabilities confirmation, etc.)
	Scout executive approval for units with fewer than five or more than 100 youth
	Parent and leader signatures secured on fully completed youth applications
	Parental Signature Exception Form(s) and attendance rosters and program logs only if necessary
	All six applicant background questions answered on all adult applications
	Charter representative and committee chair approval signatures on all adult applications
	Routing sheet detailing delivery of unit membership cards, roster, and charter
	Registration fees received receipts; additional enrollments with receipts
	Semiannual unit health review summary and progress log on action items
	<i>Unit information to store in separate alphabetical file indefinitely: Applicant-signed Disclosure and Authorization Forms for criminal background check.</i>

Guidelines for Unit Self-Assessment and Action Planning Meeting

(conducted semiannually)

Present at Meeting: Unit Key 3 (Unit Leader, Unit Committee Chair, Chartered Organization Representative), Unit Commissioner, and District Executive

Purpose of meeting (Use as the agenda for the meeting.):

- To evaluate the unit's progress toward achieving the Journey to Excellence Performance Recognition Award
- To review the unit's goals, successes, and vision for the coming year, including a succession plan for future unit leadership
- To identify any areas of improvement—leadership, program, membership, youth and unit retention
- To determine any specific actions needed to be taken to assist with unit improvements and determine who will follow up on those actions
- To schedule any necessary follow-up to monitor progress

When to conduct meeting (semiannually):

- After the unit commissioner has visited the unit for the first time and six months prior to the annual charter renewal
- To review strengths and areas of improvement to help provide direction for needed support
- As needed when a problem arises
- When unit leadership changes

How should the arrangements for this meeting be made?

- The unit commissioner speaks to the unit leader during the first unit visit to schedule the meeting date, time, and location.
- The dialogue should include:
 - Approaching the unit leader after the meeting and requesting that a second meeting be set up with the unit leader, the unit committee chair, and the chartered organization representative
 - Setting the meeting, preferably at the leader's or the chair's home
 - Asking them to complete the unit assessment form sent to them prior to the meeting
 - Letting them know the visit will include a discussion of the assessment form and how the goals and vision of their unit's program can be supported

Why only the unit leader, unit chair, chartered organization representative, unit commissioner, and district executive?

- It provides a small group to openly analyze the program, their unit's needs, and steps to be taken to help resolve any issues.
- It 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 improvements that can be identified.

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:
 - JTE Unit status: Bronze, Silver, Gold
 - Outdoor program participation
 - Advancement reports
 - Trained leadership status
 - Youth Protection training
 - Participation in district and council events
 - Roundtable attendance
- Complete the unit assessment form after the visit to analyze observations and review the statistics gathered from the council/district prior to the action planning meeting.

Pack Assessment

Section: 1 Pack Contact Details

Unit

Date of Contact

Contact Made By

Section: 2 Training and Membership

YPT Current

YPT Expired

YPT Never Taken

Training Data As Of

Leaders Not Trained

Leaders Trained

Leaders Not Trained List

YPT Status List

Youth Registered in Unit

Adults Registered In Unit

Section: 3 Finance

Finance Assessment Score

Finance Assessment (Select score or answer questions below to calculate score).

Commissioner Comments

Pack Assessment

The pack has a budget that is continually reviewed by the committee and follows the BSA policies relating to fundraising and fiscal management.

Commissioner Comments

Action Needed

Accountability

Target completion date

--	--	--	--	--	--	--	--

Actual completion date

--	--	--	--	--	--	--	--

Section: 4 Membership

Membership Assessment Score

Membership Assessment (Select score or answer questions below to calculate score).

Commissioner Comments

Improve (youth) retention rate.

Commissioner Comments

Pack Assessment

Have an increase in membership or be larger than the average size pack at recharter time.

Commissioner Comments

Complete charter re-registration, obtain all signatures, and submit paperwork to the council office or your commissioner prior to the expiration of your charter.

Commissioner Comments

Have a Webelos-to-Scout transition plan with a troop or troops.

Commissioner Comments

Action Needed

Accountability

Target completion date

--	--	--	--	--	--	--	--

Actual completion date

--	--	--	--	--	--	--	--

Section: 5

Program

Program Assessment Score

Program Assessment (Select score or answer questions below to calculate score).

Pack Assessment

Commissioner Comments

The unit conducts an Annual Program Planning meeting. Add comments regarding adult led for packs, youth led for all others, and communication of the plan to the units families.

Commissioner Comments

Increase the percentage of Cub Scouts earning rank advancements.

Commissioner Comments

The pack has activities in the outdoors.

Commissioner Comments

Increase the percentage of Cub Scouts attending Cub Scout day camp, family camp, and/or Cub Scout resident camp.

Commissioner Comments

The pack participates in service projects, with one benefiting your chartered organization.

Commissioner Comments

Pack and den meetings and activities that include physical fitness components.

Pack Assessment

Commissioner Comments

Packs and dens have regular meetings.

Commissioner Comments

Action Needed

Accountability

Target completion date

--	--	--	--	--	--	--	--

Actual completion date

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Section: 6 Leadership and Governance

Leadership and Governance Assessment Score

Leadership and Governance Assessment (Select score or answer questions below to calculate score).

Commissioner Comments

Have a trained and engaged pack committee (elements include direct contact leaders).

Commissioner Comments

Pack Assessment

Action Needed

Accountability

Target completion date

Actual completion date

Next years leaders are identified early.

Commissioner Comments

Action Needed

Accountability

Target completion date

Actual completion date

Section: 7 Unit Priorities and Other Details

Unit striving to achieve the following JTE Award:

Key Leader(s) changing within the next 4 months:

Calculated Score

Membership

Pack Assessment

Advancement

Program/Activity/Camping

Training

Finance

Leadership (Youth or Adult)

Need to discuss unit with ADC/DC (optional)

Have a possible UC candidate in this unit (Enter name and contact information)

Youth Attendance: (only for meetings where youth would be in attendance)

Issues with Key 3

Unit not meeting

Unit with no leader

Unit with no committee

Unit with no new members

Unit conflict with the Chartered Organization

New unit leader lacks orientation or training

Pack Assessment

Unit with weak leadership

Troop Assessment

Section: 1 Troop Contact Details

Unit

Date of Contact

Contact Made By

Section: 2 Training and Membership

YPT Current

YPT Expired

YPT Never Taken

Training Data As Of

Leaders Not Trained

Leaders Trained

Leaders Not Trained List

YPT Status List

Youth Registered in Unit

Adults Registered in Unit

Section: 3 Finance

Finance Assessment Score

Finance Assessment (Select score or answer questions below to calculate score).

Commissioner Comments

Troop Assessment

The troop has a budget that is continually reviewed by the committee and follows BSA policies relating to fundraising and fiscal management.

Commissioner Comments

Action Needed

Accountability

Target completion date

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Actual completion date

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Section: 4 **Membership**

Membership Assessment Score

Membership Assessment (Select score or answer questions below to calculate score).

Commissioner Comments

Improve (youth) retention rate.

Commissioner Comments

Troop Assessment

Have an increase in membership or be larger than the average size troop.

Commissioner Comments

Complete charter re-registration, obtain all signatures, and submit paperwork to the council office or your commissioner prior to the expiration of your charter.

Commissioner Comments

Have a Webelos-to-Scout transition plan.

Commissioner Comments

Action Needed

Accountability

Target completion date

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Actual completion date

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Section: 5

Program

Program Assessment Score

Program Assessment (Select score or answer questions below to calculate score).

Troop Assessment

Commissioner Comments

The unit conducts an Annual Program Planning meeting. Add comments regarding adult led for packs, youth led for all others, and communication of the plan to the units families.

Commissioner Comments

Increase the percentage of Boy Scouts earning rank advancements.

Commissioner Comments

The troop conducts short-term or weekend campouts throughout the year.

Commissioner Comments

The troop participates in a long-term camp.

Commissioner Comments

The troop participates in service projects, with one benefiting your chartered organization.

Commissioner Comments

Troop meetings and activities include physical fitness components.

Commissioner Comments

Troop Assessment

Scouts are recognized for their badges at courts of honor.

Commissioner Comments

Action Needed

Accountability

Target completion date

--	--	--	--	--	--	--	--

Actual completion date

--	--	--	--	--	--	--	--

Section: 6 **Leadership and Governance**

Leadership and Governance Assessment Score

Leadership and Governance Assessment (Select score or answer questions below to calculate score).

Commissioner Comments

Have a trained and engaged troop committee (elements include direct contact leaders).

Commissioner Comments

Troop Assessment

Action Needed

Accountability

Target completion date

Actual completion date

The troop uses the patrol method.

Commissioner Comments

Action Needed

Accountability

Target completion date

Actual completion date

Section: 7 Unit Priorities and Other Details

Calculated Score

Unit striving to achieve the following JTE Award:

Key Leader(s) changing within the next 4 months:

Membership

Troop Assessment

Advancement

Program/Activity/Camping

Training

Finance

Leadership (Youth or Adult)

Need to discuss unit with ADC/DC (optional)

Have a possible UC candidate in this unit (Enter name and contact information)

Youth Attendance: (only for meetings where youth would be in attendance)

Issues with Key 3

Unit not meeting

Unit with no leader

Unit with no committee

Unit with no new members

Unit conflict with the Chartered Organization

New unit leader lacks orientation or training

Troop Assessment

Unit with weak leadership

Team Assessment

Section: 1 Team Contact Details

Unit

Date of Contact

Contact Made By

Section: 2 Training and Membership

YPT Current

YPT Expired

YPT Never Taken

Training Data As Of

Leaders Not Trained

Leaders Trained

Leaders Not Trained List

YPT Status List

Youth Registered in Unit

Adults Registered in Unit

Section: 3 Finance

Finance Assessment Score

Finance Assessment (Select score or answer questions below to calculate score).

Commissioner Comments

Team Assessment

The team has a budget this is continually reviewed by the committee and follows BSA policies relating to fundraising and fiscal management.

Commissioner Comments

Action Needed

Accountability

Target completion date

--	--	--	--	--	--	--	--

Actual completion date

--	--	--	--	--	--	--	--

Section: 4 Membership

Membership Assessment Score

Membership Assessment (Select score or answer questions below to calculate score).

Commissioner Comments

Improve (youth) retention rate.

Commissioner Comments

Team Assessment

Have an increase in membership or be larger than the average size team.

Commissioner Comments

Complete charter re-registration, obtain all signatures, and submit paperwork to the council office or your commissioner prior to the expiration of your charter.

Commissioner Comments

Action Needed

Accountability

Target completion date

--	--	--	--	--	--	--	--

Actual completion date

--	--	--	--	--	--	--	--

Section: 5

Program

Program Assessment Score

Program Assessment (Select score or answer questions below to calculate score).

Commissioner Comments

The unit conducts an Annual Program Planning meeting. Add comments regarding adult led for packs, youth led for all others,

Team Assessment

and communication of the plan to the units families.

Commissioner Comments

Increase the percentage of Varsity Scouts earning rank advancements and Varsity awards.

Commissioner Comments

The team conducts regular activities in the five fields of emphasis.

Commissioner Comments

The team participates in at least one high adventure activity.

Commissioner Comments

The team participates in service projects, with one benefiting your chartered organization.

Commissioner Comments

Team meetings and activities include physical fitness components.

Commissioner Comments

Varsity Scouts are recognized for their Varsity awards.

Commissioner Comments

Team Assessment

Action Needed

Accountability

Target completion date

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Actual completion date

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Section: 6 Leadership and Governance

Leadership and Governance Assessment Score

Leadership and Governance Assessment (Select score or answer questions below to calculate score).

Commissioner Comments

Have a trained and engaged team committee and advisors (elements include direct contact leaders).

Commissioner Comments

Action Needed

Accountability

Team Assessment

Target completion date

--	--	--	--	--	--

Actual completion date

--	--	--	--	--	--

The team uses the team/squad method.

Commissioner Comments

Action Needed

Accountability

Target completion date

--	--	--	--	--	--

Actual completion date

--	--	--	--	--	--

Section: 7 **Unit Priorities and Other Details**

Calculated Score

Unit striving to achieve the following JTE Award:

Key Leader(s) changing within the next 4 months:

Membership

Advancement

Team Assessment

Program/Activity/Camping

Training

Finance

Leadership (Youth or Adult)

Need to discuss unit with ADC/DC (optional)

Have a possible UC candidate in this unit (Enter name and contact information)

Youth Attendance: (only for meetings where youth would be in attendance)

Issues with Key 3

Unit not meeting

Unit with no leader

Unit with no committee

Unit with no new members

Unit conflict with the Chartered Organization

New unit leader lacks orientation or training

Unit with weak leadership

Crew Assessment

Section: 1 Crew Contact Details

Unit

Date of Contact

Contact Made By

Section: 2 Training and Membership

YPT Current

YPT Expired

YPT Never Taken

Training Data As Of

Leaders Not Trained

Leaders Trained

Leaders Not Trained List

YPT Status List

Youth Registered in Unit

Adults Registered In Unit

Section: 3 Finance

Finance Assessment Score

Finance Assessment (Select score or answer questions below to calculate score).

Commissioner Comments

Crew Assessment

The crew has a budget and follows BSA policies relating to fundraising and fiscal management.

Commissioner Comments

Action Needed

Accountability

Target completion date

--	--	--	--	--	--	--

Actual completion date

--	--	--	--	--	--	--

Section: 4 **Membership**

Membership Assessment Score

Membership Assessment (Select score or answer questions below to calculate score).

Commissioner Comments

Improve (youth) retention rate.

Commissioner Comments

Crew Assessment

Have an increase in membership or be larger than the average size crew.

Commissioner Comments

Complete charter re-registration, obtain all signatures, and submit paperwork to the council office or your commissioner prior to the expiration of your charter.

Commissioner Comments

Action Needed

Accountability

Target completion date

--	--	--	--	--	--	--	--

Actual completion date

--	--	--	--	--	--	--	--

Section: 5 Program

Program Assessment Score

Program Assessment (Select score or answer questions below to calculate score).

Commissioner Comments

The unit conducts an Annual Program Planning meeting. Add comments regarding adult led for packs, youth led for all others, and communication of the plan to the units families.

Crew Assessment

Commissioner Comments

The crew has regular activities throughout the year reflecting the interests of the youth members.

Commissioner Comments

The crew participates in a super activity.

Commissioner Comments

The crew participates in service projects, with one benefiting your chartered organization.

Commissioner Comments

Crew meetings and activities that include physical fitness components.

Commissioner Comments

Action Needed

Accountability

Crew Assessment

Target completion date

--	--	--	--	--	--

Actual completion date

--	--	--	--	--	--

Section: 6 Leadership and Governance

Leadership and Governance Assessment Score

Leadership and Governance Assessment (Select score or answer questions below to calculate score).

Commissioner Comments

Have a trained and engaged crew committee (elements include advisors and youth).

Commissioner Comments

Action Needed

Accountability

Target completion date

--	--	--	--	--	--

Actual completion date

--	--	--	--	--	--

The crew has elected youth leaders who are leading the crew activities.

Commissioner Comments

Crew Assessment

Action Needed

Accountability

Target completion date

--	--	--	--	--	--	--	--

Actual completion date

--	--	--	--	--	--	--	--

Section: 7 **Unit Priorities and Other Details**

Calculated Score

Unit striving to achieve the following JTE Award:

Key Leader(s) changing within the next 4 months:

Membership

Advancement

Program/Activity/Camping

Training

Finance

Leadership (Youth or Adult)

Crew Assessment

Need to discuss unit with ADC/DC (optional)

Have a possible UC candidate in this unit (Enter name and contact information)

Youth Attendance: (only for meetings where youth would be in attendance)

Issues with Key 3

Unit not meeting

Unit with no leader

Unit with no committee

Unit with no new members

Unit conflict with the Chartered Organization

New unit leader lacks orientation or training

Unit with weak leadership

Ship Assessment

Section: 1 Ship Contact Details

Unit

Date of Contact

Contact Made By

Section: 2 Training and Membership

YPT Current

YPT Expired

YPT Never Taken

Training Data As Of

Leaders Not Trained

Leaders Trained

Leaders Not Trained List

YPT Status List

Youth Registered in Unit

Adults Registered in Unit

Section: 3 Finance

Finance Assessment Score

Finance Assessment (Select score or answer questions below to calculate score).

Commissioner Comments

Ship Assessment

The ship has a budget and follows BSA policies relating to fundraising and fiscal management.

Commissioner Comments

Action Needed

Accountability

Target completion date

--	--	--	--	--	--

Actual completion date

--	--	--	--	--	--

Section: 4 **Membership**

Membership Assessment Score

Membership Assessment (Select score or answer questions below to calculate score).

Commissioner Comments

Improve (youth) retention rate.

Commissioner Comments

Ship Assessment

Have an increase in membership or be larger than the average size ship.

Commissioner Comments

Complete charter re-registration, obtain all signatures, and submit paperwork to the council office or your commissioner prior to the expiration of your charter.

Commissioner Comments

Action Needed

Accountability

Target completion date

--	--	--	--	--	--	--	--

Actual completion date

--	--	--	--	--	--	--	--

Section: 5 Program

Program Assessment Score

Program Assessment (Select score or answer questions below to calculate score).

Commissioner Comments

The unit conducts an Annual Program Planning meeting. Add comments regarding adult led for packs, youth led for all others, and communication of the plan to the units families.

Ship Assessment

Commissioner Comments

The ship has regular activities throughout the year reflecting the interests of the youth members.

Commissioner Comments

The ship participates in a super activity/long cruise.

Commissioner Comments

The ship participates in service projects, with one benefiting your chartered organization.

Commissioner Comments

Ship meetings and activities that include physical fitness components.

Commissioner Comments

Action Needed

Accountability

Ship Assessment

Target completion date

--	--	--	--	--	--

Actual completion date

--	--	--	--	--	--

Section: 6

Leadership and Governance

Leadership and Governance Assessment Score

Leadership and Governance Assessment (Select score or answer questions below to calculate score).

Commissioner Comments

Have a trained and engaged ship committee (elements include skipper, mates and youth).

Commissioner Comments

Action Needed

Accountability

Target completion date

--	--	--	--	--	--

Actual completion date

--	--	--	--	--	--

The ship has elected youth leaders who are leading the ship activities.

Commissioner Comments

Ship Assessment

Action Needed

Accountability

Target completion date

Actual completion date

Section: 7 Unit Priorities and Other Details

Calculated Score

Unit striving to achieve the following JTE Award:

Key Leader(s) changing within the next 4 months:

Membership

Advancement

Program/Activity/Camping

Training

Finance

Leadership (Youth or Adult)

Ship Assessment

Need to discuss unit with ADC/DC (optional)

Have a possible UC candidate in this unit (Enter name and contact information)

Youth Attendance: (only for meetings where youth would be in attendance)

Issues with Key 3

Unit not meeting

Unit with no leader

Unit with no committee

Unit with no new members

Unit conflict with the Chartered Organization

New unit leader lacks orientation or training

Unit with weak leadership

PRIVACY OF PERSONAL INFORMATION

National problems with identity theft have caused a number of questions to be raised related to our right to collect Social Security numbers, as well as the confidentiality of the information we collect.

In addition, we have received communication expressing a belief that the Privacy Act of 1974 is legal authority for individuals to refuse to give us their Social Security numbers as a condition of BSA membership. The Privacy Act of 1974 specifically applies **only** to governmental agencies and information systems maintained by those governmental agencies. The act specifically states that “it shall be unlawful for any **federal, state, or local government agency** to deny to any individual any right, benefit, or privilege provided by law because of such individual’s refusal to disclose his Social Security number.”

Neither the Boy Scouts of America nor First Advantage is a “federal, state, or local government agency,” nor is membership in the BSA a “right, benefit, or privilege provided by law.”

It is critically important that all personal information be kept confidential. Social Security numbers are removed from all ScoutNET reports except those directly related to criminal background checks. Using or providing applicant information to others for non-official BSA purposes may result in legal action against the individual who violates this policy, and may also subject the council to legal action.

Please be sure that your council procedures protect all personal information.

VOLUNTEERS WITHOUT A SOCIAL SECURITY NUMBER

There are some rare situations where an individual applying as an adult volunteer does not have a Social Security number. Exceptions will be granted to those individuals on a case-by-case basis.

- The Scout executive determines that an individual does not have a Social Security number, and the Social Security number exception request form is submitted to the team leader of Membership Resources at the national office.

SPECIAL NEEDS

RULES FOR SPECIAL NEEDS:

➤ Article XI, Section 3, Clause 20, of the *Rules and Regulations of the Boy Scouts of America (No. 57-492)*, states:

Retarded or severely physically disabled youth members: At the discretion of the Executive Board, and under such rules and regulations as it may prescribe upon consultation with appropriate medical authorities, registration of boys who are either mentally retarded or severely physically handicapped, including the blind, deaf, and emotionally disturbed, over age 11 as Cub Scouts and over age 18 as Boy Scouts or Varsity Scouts; and registration of young adults who are either mentally retarded or severely physically handicapped, including the blind, deaf, and emotionally disturbed, over age 21 as Venturers; and the participation of each in the respective advancement programs while registered, is authorized.

The operative words are: **mentally disabled or severely physically disabled** young people. Examples of these medical conditions include:

- Down syndrome
- Legal blindness
- Severe autism
- Deafness

The Annual Health and Medical Record form, (No. 680-001), must be used as part of the procedure for registering a severely physically disabled youth in Scouting. The person's medical condition must be certified with a signed statement from a licensed physician. In the case of mentally disabled or emotionally disturbed candidates, their condition must be certified by a statement signed by a licensed psychologist or psychiatrist. Individuals whose medical conditions are not severe, as defined in Clause 20, do not qualify as a special-needs Scout, and may not register as such.

UNAPPROVED TIME EXTENSIONS FOR EAGLE SCOUT CANDIDATES

In the past, families of Eagle Scout candidates have tried to use non-severe, temporary medical conditions as "extenuating circumstances" to get national approval for a time extension that would enable the candidate to work toward Eagle requirements beyond his 18th birthday. Such requests will continue to be denied, and families and individuals should be discouraged from requesting a time extension for these reasons.

These procedures should be followed when youth initially join. If they become unregistered and register again, the same procedures will have to be followed.




NON-UNIT REGISTRANTS


District Scouters (non-unit positions) should register during the year using an adult application. The registration for district Scouters should be processed yearly. A renewal roster is produced each year for the purpose of reregistering the individuals in the district.


Adults pay a \$24 yearly registration fee. The registration fee can be prorated at \$2.00 a month. No other fees should be included.

The National Executive Board sets registration fees. Dues, insurance, and other expenses cannot be added to the registration fee (see *Rules and Regulations of the Boy Scouts of America*, Article XI, Section 3, Clause 6). References to dues and accident and sickness coverage must be listed as additional costs separate from the registration fee.

The non-unit position applicants may be male or female and must be at least age 21, except for where noted.

Non-Unit Registrants Important to the District	Code
● Merit badge counselor	42
 Camp staff	49
Supernova mentor	52
Nova counselor	58
District chair	61
District vice chair	62
Neighborhood chair	64
Neighborhood committee	65

Non-Unit Registrants Important to the District	Code
District member-at-large	75
Unit commissioner	80
District commissioner	81
Assistant district commissioner	82
Roundtable commissioner	83
Assistant Roundtable commissioner	84
Scouter reserve	91
 College Scouter reserve	92

 The minimum age to serve on day camp or resident camp staff (code 49) is addressed in the current camp standards. Youth are expected to complete a youth application and register through their established unit, an approved camp staff unit, or be directed to enroll in an existing unit.

➤ Refer to *2011 National Standards for Cub Scout/Boy Scout/Venturing Resident Camps* (No. 430-111), No. M-29, and *2011 National Standards for Local Council Precamp and Operational Accreditation of Cub Scout/Webelos Scout Day Camps* (No. 430-109), No. M-33 and M-44.

➤ Adult camp staff are 18 years of age or older and MUST complete an adult application.

- Merit badge counselors (code 42) must be at least 18 years old. This position can pay a registration fee, multiple or pay no fee. Even if a registration fee is not paid, an adult application MUST be completed for the purpose of processing their name through the computer system and running a criminal background check. The Merit Badge Counselor Information form (No. 34405) must be filled out and attached to the adult application for council approval. This form can be located on [MyBSA/Resources/Links to BSA info/Boy Scout Program/Forms](#).

-  College Scouter reserve (code 92) must be an active college student and be at least 18 years old.

More information about district operations can be found at:

 [MyBSA/Resources/BSA info/Council Solutions Group/Leadership Support](#)

FORMS LOCATION

FORMS

Location: **Log into MyBSA** (mybsa.netbsa.org)

Go to: Resources/BSA Resources/Membership Resources

The following forms and documents can be found at this location:

Past and current *News and Notes*

Disclosure/Authorization Form

Registrar Procedures Manual

Annual Local Council Membership Validation Procedures

Current Local Council Index

National Chartered Organizations

Chartered Organization Code Lists

Order Refund, and Data Change Request Forms

Youth-Serving Executive's Guide to Registration

The following resources can be downloaded as PDF documents:

- [Telephone Reference Checklist](#)
- [Membership Inventory \[524-176\]](#)
- [Annual Charter Agreement \[524-182\]](#)
- [Unit Budget Plan \[524-426\]](#)
- [Leadership Transfer Notice \[524-401\]](#)
- [Transfer Form \(Youth Member\) \[524-401\]](#)
- [Unregistered Unit Report \[524-403\]](#)
- [Additional Registrants \[28-412\]](#)
- [New-Unit Application \[524-402\]](#)
- [Unit Renewal Application Instructions \[524-420\]](#)
- [Charter Renewal Overflow Page \[524-421\]](#)
- [Veteran Application \[524-701\]](#)
- [Change of Address for Membership and Magazines \[28-802\]](#)
- [Registration and Subscription Information \[524-863\]](#)

REPORTS LOCATION

REPORTS

Location: **Log into MyBSA** (mybsa.netbsa.org)

Go to: ScoutNET/Program/Membership/Membership Reports

Below is a list of reports found under the various membership types that may be of help to you.

➤ If you have not been given the ability to access these, a request for these reports can be made to your council's registrar.

Advancement and Training:

Adult Leader Training List

District Advancement Report

Unit Advancement Detail Report

Management:

Non-Renewed Member Report

Total Available Youth Report

Lists:

District Committee Roster

Non-Unit Registrants Roster

Unit Roster Report

Recharter and General Ledger:

Charter Renewal Roster

Non-Unit Registrants Renewal Roster

Unit/Group Status Report

Units Due to Recharter Report

Internet Rechartering Reports:

➤ All of the following reports are located under Recharter and General Ledger.

Commissioner's Status Report

UCRS Unit Renewal Processor Listing Report

UCRS Members Not Renewed Roster

UCRS New Members Added Roster

| **Learning For Life**

INTRODUCTION

LEARNING FOR LIFE

PROGRAMS AND METHODS

Learning for Life was developed to meet the critical needs of our nation's schools and communities. Youth today have more needs than ever before. We live in a changing world that has seen the disintegration of many families, rampant drug abuse, extreme violence, and moral decay, and young people these days are thrown into a hothouse of competition and social change that tests their decision-making skills.

Learning for Life is designed to support schools and other youth-serving organizations in their efforts to prepare youth to successfully handle the complexities of today's society and to enhance self-confidence, motivation, and self-worth. Learning for Life also helps youth develop social and life skills, facilitates the formulation of positive personal values, assists in character development, and prepares them to make ethical decisions that will help them achieve their full potential.

Nationwide, school demand for character education and career education programs has greatly influenced the dramatic growth of Learning for Life.

Learning for Life makes academic learning fun and relative to real-life situations. It helps youth reach beyond themselves by placing them in situations that help them to understand and act constructively. As a result, the values and skills learned by participating in Learning for Life not only make youth more confident and capable, but give them an invaluable understanding of how things work in the real world.

Learning for Life utilizes two methods and seven programs.

One program method is based on instructional settings and can take place in the classroom or after school. The six programs in Learning for Life that use this method include:

- Seekers: Early childhood through second grade
- Discoverers: Third and fourth grades
- Challengers: Fifth and sixth grades
- Builders: Seventh and eighth grades
- Navigators: Senior high school grades nine through 12 and the first two years of college
- Champions: For students with mental disabilities (no age or grade requirement.)

The second method is Exploring, which is based on a unique relationship between youth and the organizations in their communities. Worksite-based Exploring programs are called "posts" and are not considered members of the BSA. Local community organizations initiate a specific Explorer post by matching their people and program resources to the interests of young people in the community. The result is a program of activities that helps youth pursue their special interests, grow, and develop.

Organizations involved with Learning for Life are known as **participating organizations**. Learning for Life participating organizations are **NOT** chartered by the BSA. There are no chartered organization representatives in instructional setting programs or Exploring posts.

Learning for Life committee participants for a district or council must complete the Learning for Life adult application form.

THE SEVEN PROGRAMS OF LEARNING FOR LIFE

Seekers/Discoverers/Challengers: Sixty-one age-appropriate, theme-oriented lesson plans have been developed for each grade, from prekindergarten through sixth grade. The lesson plans are used in the classroom to enhance and support the core curriculum. Lesson plan themes such as "Accepting Consequences," "Choosing What's Right for Me," "Respecting Differences," "Money Management," and a code of ethics are directed toward the development of self-esteem, experiential learning, enhancing ethical behavior, and problem solving. The early childhood program has 57 lesson plans.

Classroom sessions are conducted by the teacher or, in some instances, by a professional or volunteer representative of LFL. A student recognition plan using wall charts, stickers, and iron-ons helps motivate position behavior, fosters a sense of belonging, enhances self-esteem, and instills and rewards a positive work ethic.

Builders: The junior high/middle school program includes the following key components: “Developing Positive Attitudes and Behavior,” “Relating School Skills to Occupations,” “Developing Positive Relationships With Adults,” “Demonstrating Effective Listening and Communications Skills,” “Experiencing Various Career Clusters,” “Recognizing School and Community Needs,” and “Reflecting on Peer and Social Challenges.” There are 44 lesson plans each for the seventh and eighth grades.

The seventh-grade program includes role models and presenters who help students relate school courses to a career and understand the importance of setting positive goals. These role models also enable students to see the business community as friendly and reachable, and connect academics to the real world. The eighth-grade material includes classroom-based workshops on personal values and skills assessments.

Navigators: This program serves to guide grades nine through the first two years of college in making a successful transition from high school into real-world endeavors, including post-secondary education, acquiring a job, being productive citizens, and establishing and maintaining positive relationships with others. There are two books in the Navigators series.

The second part of the senior high school program, the career seminars program, covers careers students have chosen to learn more about. Community presenters talk to students in depth about their own careers, giving them first-hand knowledge of entry-level requirements and conditions, and mid-management views of related careers.

Champions program for special needs: This program is designed for students with disabilities. Note: there are no age or grade restrictions for special needs. The curriculum teaches students the living skills they need to achieve self-sufficiency. This program focuses on the development of individual self-esteem and the skills necessary to gain future employment.

The special-needs curriculum also has a recognition program called Champions, which has its own honor wall chart and incentive stickers.

Exploring: Exploring is a worksite-based program. It is part of Learning for Life’s career education program for young men and women who are 14 (and have completed the eighth grade) through 20 years old.

Exploring’s purpose is to provide experiences that help young people mature and to prepare them to become responsible and caring adults. Explorers are ready to investigate the meaning of interdependence in their person relationships and communities.

REGISTRATION

Learning for Life instructional-based programs must complete the Learning for Life Annual Memorandum of Understanding. This form must be signed by the head of the organization. The form includes an estimate of the number of youth that will be served by the program. There is no need for rosters, letters, or previously used forms for renewing or starting a new instructional setting Learning for Life program.

Your council pays an annual fee (see Fee Chart on page 73) to the National Council to use LFL instructional setting programs within the council service area. The annual fee replaces the fees for youth, adults, and the organization participating fee used in the past. Therefore, when renewing or starting a new LFL instructional setting program, there is no electronic fund transfer function in PAS.

The physical location, not the mailing address of the school or organization, must be within your council’s geographical area. This determines which council should serve the program.

Remember, the number of youth participants should be indicated on the Annual Memorandum of Understanding. The total participant count should be entered in the computer.

NUMBERING

Numbers and a program code are assigned to the participating organization for internal use only. Programs are no longer designated by group numbers, except within PAS.

ANNUAL RENEWAL

An Annual Memorandum of Understanding must be completed with local community organizations, such as schools, youth employment agencies, service clubs, or housing projects, in order to renew program. An Annual Memorandum of Understanding should be retained in the local council.

A certificate of participation is issued to each organization conducting the Learning for Life program. Use form No. 28-557.

RENEWAL DATES

The Learning of Life program will be listed through September 30 only. There are no short- or long-term renewals and no lapsed grace period. All groups drop after September 30.

NEW GROUPS

Councils can organize and process new instructional setting groups until September 30.

PARTICIPATING ORGANIZATIONS

Most Learning for Life programs are sponsored by boards of education, school districts, and individual schools. Some programs could be sponsored by traditional chartered organizations such as churches, service clubs, etc.

The school or organization must be identified clearly; initials or abbreviations cannot be accepted. It is necessary to have the principal or executive officer of the school or organization listed, along with the full physical address, email address, and correct zip code. Correct organization codes must be on all enrollments. Code lists can be obtained on ScoutNET at info.netbsa.org. The alphabetical list is No. 28-902 and the numerical list is No. 28-903.

RENEWAL PROCEDURES

1. Complete the Annual Memorandum of Understanding.
 - Reviewed with the organization head
 - Indicate the number of youth, as well as number of males and females, participating.
 - The organization head (or their designee) signs the memorandum each time the program is renewed.

The organization head's (or his or her designee's) signature certifies that the organization:

- **approves the use of the Learning for Life program, and**
- **ensures that all participating adults have had criminal background checks conducted by the organization.**

2. Learning for Life participant certificates are mailed to the head of the organization with a letter coming from the council LFL chair.

Contents on file for each program (maintained in local office):

1. The Annual Memorandum of Understanding signed by the organization head or designee
2. Annual Accreditation Award Application worksheet

License Fee Due by December 31

Does not include Exploring

Estimated No. of Youth	License Fee
60,000 +	\$300,000
40,000 – 59,999	\$200,000
30,000 – 39,999	\$150,000
20,000 – 29,999	\$100,000
15,000 – 19,999	\$75,000
10,000 – 14,999	\$50,000
6,000 – 9,999	\$30,000
5,000 – 5,999	\$25,000
4,000 – 4,999	\$20,000
3,000 – 3,999	\$15,000
2,500 – 2,999	\$12,500
2,000 – 2,499	\$10,000
1,500 – 1,999	\$7,500
1,000 – 1,499	\$5,000
500 – 999	\$2,500
200 – 499	\$1,000
1 – 199	\$500

EXPLORING

Exploring is a worksite-based program. It is part of Learning for Life's career education program for young men and women who are 14 (and have completed the eighth grade) through 20 years old.

Exploring's purpose is to provide experiences that help young people to mature and to prepare them to become responsible and caring adults. Explorers are ready to investigate the meaning of interdependence in their personal relationships and communities.

PARTICIPATING ORGANIZATION

- The physical location, not the mailing address, of the organization must be within your council's geographical area. In addition, the physical location of the organization, not the mailing address, must reside within your district's geographic area.
- All participating organizations in Exploring are required to pay a Unit Liability Insurance Fee of \$40. This fee is submitted with the post's application and helps defray expenses of the general liability insurance program. This form is retained in the local council.
- New Explorer posts must complete the Exploring Application for Participation (No. 524-565), the Exploring Memorandum of Understanding, and applications for youth and adult Exploring participants.
- The full name of the participating organization and organization code should be on the Exploring Application for Participation.
- The Learning for Life Exploring application forms for youth and adults are required; **NO** rosters may be used.
- The participating organization must be identified clearly; initials or abbreviations cannot be accepted. It is necessary to have the head of the organization or executive officer of the organization listed, along with the full physical address, email address, and correct zip code.
- Most Explorer posts' participating organizations are businesses, community groups, or schools.
- Explorer post numbers are assigned to the participating organization.

REGISTERING POSTS

- Explorer posts may have any month of renewal and may register for six to 18 months.
- *Boys' Life* can be ordered for the cost of \$12 for both youth and adult participants.
 - ⇒ Subscriptions for youth must be submitted on a *Boys' Life* Subscription Order form (No. 28-804)
- Transfers are allowed for either youth or adult participants.
- There must be at least **FIVE** paid youth. It is possible to register a post with fewer, if special circumstances exist. The Scout executive may give permission to allow a post to register with as few as two paid youth members. No post can register with fewer than **TWO** paid youth members.
- A career interest code identifies the type of career specialty that the post program will emphasize.
- A Certificate of Exploring Participation is issued to each organization conducting the Exploring program. Use form No. 524-571.
- Exploring participation cards are issued for each youth and adult participant. Use form No. 524-572.
- Adult and youth participants may not multiple participate between Learning for Life and Boy Scouts of America programs.

Youth Participation:

- Must be at least age 14 and have completed the eighth grade, or be age 15 but not yet 21.
- There is a yearly participation fee of \$15. The cost **can** be prorated at \$1.25 a month. No other fees should be included.
- Youth who turn 21 and wish to be listed as adults must pay the prorated fee.
- Explorers can also be enrolled in a traditional unit by paying the \$15 fee and filling out a youth application.
- Explorers wishing to be enrolled in more than one Explorer post can multiple in another post without paying another fee.
- Open to both males and females.

Adult Preparation:

All Explorer Posts require the following adult positions:

➤ Adult position codes:

- **IH** Executive officer
- **PCC** Post committee chair (only one)
- **PMC** Post committee member (minimum two)
- **EA** Explorer Advisor (only one)
- **AA** Associate Advisor (optional)

These four positions are mandatory for an Explorer post to be accepted.

- The IH (executive officer) and the PCC (post committee chair) are not voting positions of the council.
- All positions are open to both males and females who **MUST** be 21 years of age.
- There is a yearly participation fee of \$15. This cost includes liability insurance. The cost **can** be prorated at \$1.25 a month. No other fees should be included. The IH (executive officer) pays no participation fee.
- Adults may be multiple listed if they are already paid in another Explorer post.
 - ⇒ ***They cannot be listed in two positions in the same post***
- An adult paying in a traditional BSA unit or the Learning for Life program **cannot** multiple enroll in an Exploring post.
- Adults **MUST** have a criminal background check, so their birth date and Social Security number are required.
 - ⇒ **Exception:** Adults that are employed by local, state, or federal governmental agencies that require background checks as a condition of employment. **(Form No. 28-573 should be completed and signed by the participating organization certifying that a background check has been completed for all individuals on the Exploring adult participants roster or form.)**

For more information on criminal background checks and using Criminal Background Check form (No. 28-573), go to BSA Info and select Learning for Life and then click on Exploring. Then click on New Posts, Renewals, Applications; and select Criminal Background Check Information, [Criminal Background Check] Form No. 28-573, and Instruction for Registrars Using Form 28-573.

Forms:

Location: **Log into MyBSA** (mybsa.netbsa.org)

Go to: Resources/Links to BSA Info/Learning for Life

Select: ***Exploring/New Posts, Clubs, Renewals, Applications***

The following forms can be found:

Post Renewal Application Instruction

Explorer Memorandum of Understanding

Explorer Application for Participation

Explorer Adult Participant Application

Explorer Youth Participant Application

Any questions concerning these forms or the school-based or Exploring programs should be directed to Learning for Life at (972) 580-2432.