

# REGISTRAR PROCEDURES MANUAL



BOY SCOUTS OF AMERICA®

# Registrar Procedures Manual



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# INTRODUCTION

The purpose of the *Registrar Procedures Manual* is to acquaint the registrar with the important role she or he plays as part of the team of people employed by the local council to administer the programs of the Boy Scouts of America.

Your success as a team member will have a great impact on the quality of service that chartered organizations, Scouting volunteers, and members experience.

This manual provides information concerning the processing of all personnel paperwork and the handling of subscriptions for *Boys' Life* and *Scouting* magazines. The council registrar, by following these procedures carefully, can help ensure that charters and certificates will be accurate and processed in a timely manner.

Changes in registration and magazine subscription procedures will be published in *News & Notes*. Each issue of the newsletter should be filed as a part of this manual to keep all procedures current. When major changes occur, a revised page of the manual will be posted online.

Please keep us informed of items that you feel should be included in the manual and may help registrars to do their jobs more efficiently.

An index of all subjects is located in the back of this manual. We recommend that you place a copy of all registration forms in the back of this manual in form order. Registrars should be familiar with these forms, which in most cases include instructions for completion.

## PURPOSE OF THE BSA

The purpose of the Boy Scouts of America is set forth in the original certificate of incorporation under the laws of the District of Columbia, dated February 8, 1910, and restated in the Act of Incorporation enacted by the Congress of the United States of America on June 15, 1916, as follows: "That the purpose of this Corporation shall be to promote, through organization and cooperation with other agencies, the ability of boys to do things for themselves and others, to train them in Scoutcraft, and to teach them patriotism, courage, self-reliance, and kindred virtues, using the methods which are now in common use by the Boy Scouts of America." In achieving this purpose, emphasis shall be placed upon its educational program and the oaths, promises, and codes of the Scouting program for character development, citizenship training, and personal fitness.

## BSA Mission Statement

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



### Scout Oath

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

### Scout Law

A Scout Is

Trustworthy	Obedient
Loyal	Cheerful
Helpful	Thrifty
Friendly	Brave
Courteous	Clean
Kind	Reverent

### PURPOSE OF THE LOCAL COUNCIL

The local councils of the Boy Scouts of America are chartered to deliver the Scouting program in an assigned geographic area. Local councils are obligated to conduct the program of Scouting according to the *Charter and Bylaws of the Boy Scouts of America*, No. 57-491, and *Rules and Regulations of the Boy Scouts of America*, No. 57-492. These documents outline the specific rules by which the Scouting program functions. These requirements are administered jointly by the national council and each local council. Your role as registrar is to know these rules and to help staff members and volunteers understand them.

# PROGRAM OF THE BOY SCOUTS OF AMERICA

## CUB SCOUT PACKS

**Cub Scouting** is a family- and neighborhood-centered program for *boys* in the first through fifth grades.

**Tiger Cubs** are boys under the age of 8 who have completed kindergarten, or are in first grade, or are age 7.

**Cub Scouts** are boys who have completed first grade but have not completed third grade, or are age 8 or 9.

**Webelos Scouts** are boys who have completed third grade, but have not completed fifth grade, or are age 10, but not yet 11½.

Cub Scouts meet weekly in small groups called dens, under the leadership of an adult den leader. All of the dens, along with their family members, get together once a month for the pack meeting. A boy may remain in the Cub Scouting program **until** age 11½ or until completing the fifth grade, whichever comes later.

## BOY SCOUT TROOPS

**Boy Scouting** is a program for *boys* who have completed the fifth grade and are at least 10 years old, or who are 11 years old, or have earned the Arrow of Light Award and are at least 10 years old, but have not reached age 18. It is designed to achieve Scouting's objectives through a vigorous outdoors program and peer group leadership under the counsel of an adult Scoutmaster.

## VARSITY TEAMS

**Varsity Scouting** is an active, exciting program for *young men* who are at least 14 and not yet 18 years old. The program revolves around five fields of emphasis: advancement, high adventure, personal development, service, and special programs and events.

## VENTURING CREWS

**Venturing** is a traditional program for *young men and women* who are at least 13 years old and who have completed the eighth grade, or who are 14 years old but not yet 21 years old. The program revolves around the areas of high adventuring, sports, leadership development, advancement, service, teaching others, and fun with friends.

## SEA SCOUT SHIPS

**Sea Scouting** is a traditional program of aquatic activities centered around sailing, scuba diving, water-skiing, and surfing. The program uses a strong advancement program to enhance and guide the development of young men and women who are at least 13 years old and who have completed the eighth grade, or who are 14 years old but not yet 21 years old.

## **THE REGISTRAR POSITION HAS SEVERAL ELEMENTS**

1. Your records are the official source of information about registered members of the Boy Scouts of America in your council.
2. You are a key staff member in support of the professional staff who organize and conduct the Scouting program in their respective administrative areas (districts).
3. You are also a key resource to the many leaders and members who are registered with the Boy Scouts of America.

## **A REGISTRAR'S MAJOR FUNCTIONS**

1. Receive applications for charters and membership.
2. Check that these applicants meet membership requirements.
3. Verify that the appropriate fees are collected.
4. Record the membership information for council records.
5. Key the membership information into the PAS system and post.
6. Submit criminal background checks as per Scout executive's assigned role.
7. Issue membership cards and charter certificates for all registered individuals, and distribute these to the appropriate district and unit personnel.
8. Maintain membership files.
9. Prepare recharter kits for units that are due to reregister.
10. Produce reports for use by the management team.

## **SUGGESTED REGISTRAR WORK SCHEDULE**

### **Daily**

- Register new members.
- Register new leaders.
- Add new *Boys' Life* subscriptions.
- Transfer members and leaders.
- Register new units (post by registration date).
- Reregister existing units as they are received.
- Print expire rosters for units that will expire; file rosters in units' history file (permanently).
- Make address changes.
- Update member and leader information.



- Enter advancement and training data.
- Print Daily Record of Changes and distribute to management.
- Respond to inquiries and requests for information from volunteers and staff members.

### **End of Day**

Print Electronic Fund Transfer transmittal, make a copy, file the original, and give copy to the bookkeeper.

### **Weekly**

- Print Objectives Progress Report and distribute to management.
- Print membership cards from the registration print queue file.
- Print charter certificates from the registration print queue file.
- Print Units Due to Recharter Report and distribute to management.
- File reports (paper management).
- Organize and distribute the results from the printouts.
- Process Eagle Scout applications, using member advancement history where appropriate.

### **End of Month**

- Print charter renewal rosters and prepare charter renewal kits.
- Run Objectives Progress Report.
- Run District Totals Report and Detail Cub District Total Report.
- Print Units Due to Recharter Report.
- Print a new Unit Status Report and distribute to management.
- Print council EFT transmittal and give to bookkeeper.

### **End of Year**

These reports will zero out when the year is closed:

- Print District Advancement Report
- Print Unit Status Report
- Print Total Youth Served

### **As Needed**

- Print charter renewal rosters.
- Print mailing labels.
- Print leader list.
- Print new rosters for binders.
- Print Separated Member/Leader lists.

## **Helpful Hints**

Membership volume is different each month. When large-volume months are expected, plan to secure extra help from staff members or volunteers to help smooth out the peaks.

**DO NOT** use periods, commas, or other punctuation when entering registration records into your computer. This will save entry time and computer space, and assure that entries are handled properly.

When processing unit registrations, keep applications that are defective in a separate file, but enter any information you do have in the new or reregistered programs. This will allow you to print a current status of the unit as often as needed to complete the unit registration.

## **Electronic Fund Transfers**

EFTs occur each Tuesday and Friday. It is important that the local council bookkeeping service have all funds on deposit by Monday and Thursday afternoons. A copy of each transmittal should be sent to bookkeeping to keep the bookkeeper aware of the need for funds on Tuesdays and Fridays.

## **Month-End**

It is important that the month's business be entered and posted no later than 11:59 P.M. Central time on the first business day of the following month. This will ensure that work is included in the proper month. This could be critical when a registration is sent for a unit that renews in that particular month, since a delay could place the unit in a lapsed state and the new members would not be added to the previous month.

## **Credits and Debits**

The annual BSA membership registration fee for leaders and members is a nonrefundable administrative fee. However, fees processed in error are refundable, subject to the local council's completion and submission of the proper refund request form. Units, leaders, or members that are involuntarily separated from BSA membership as a consequence of behavioral or other policy violations will be issued prorated refunds for the remaining period of their registration.

Twice a year, credits and debits are compiled by national. If the total equals at least \$25, the council will receive either a check or a bill for payment along with a summary of all requests.

## **Expire Roster Info**

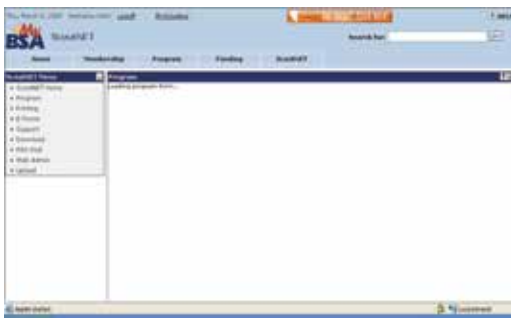
Print expire rosters before you begin to print next month's charters.

## **Printing Expire Rosters**

An Expire Roster must be printed each year prior to the unit going into a lapsed period and before the unit recharter for the next year. These are kept as a permanent record and placed in the history files.

# BASIC RULES OF REGISTRATION

1. All membership is voluntary.
2. All leaders and youth members must meet membership standards.
3. All members register with the National Council, Boy Scouts of America, and not with the local council. (Youth registration fee, *Rules and Regulations*, Section 3, Clause 6.)
4. There are separate and distinct Scouting programs that have their own membership qualifications.
5. All Scouting happens through local community groups called chartered organizations. Chartered organizations have 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 on all membership applications.
6. Local councils serve a specific geographic territory, and only chartered organizations located within that boundary can be served by your council.
  - a. Districts: *Standard Local Council Articles of Incorporation and Bylaws*, Article VIII, Section 2, page 12.
  - b. Units: *Standard Local Council Articles of Incorporation and Bylaws*, Article IX, Section 2, page 13.
7. Local councils operate under an executive board of selected members of the community. The board employs a Scout executive, who has responsibility for all other paid personnel.
8. Local councils exist to serve the communities in their territory through chartered organizations that organize and conduct the Scouting program.
9. Districts are geographic subdivisions of the council organized for the administrative convenience of the local council.
10. 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.
11. 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*, Section 3, Clause 21.)



1. Select PROGRAM



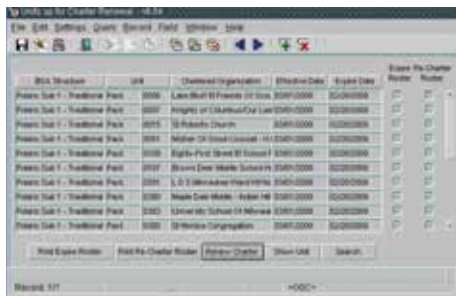
2. Select MEMBERSHIP



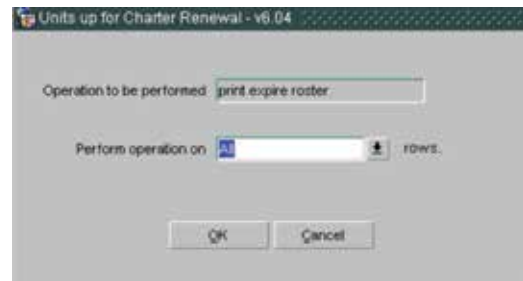
3. Select CHARTER RENEWAL



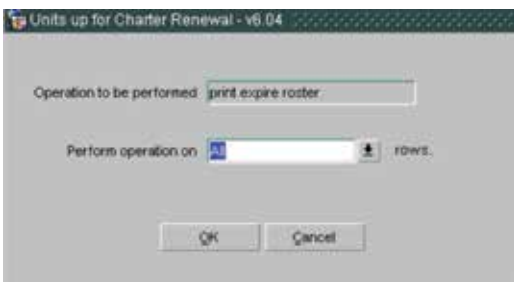
4. Key EXPIRE DATE you want rosters for in the RECHARTER DATE and click OK. If you'd like a specific roster for a particular program, select the program and/or units you'd like rosters for and click OK.



5. Select the units you want by clicking each one; if you want all rosters, click the PRINT EXPIRED ROSTER button.



6. On the PERFORM OPERATION drop-down menu, select ALL or SELECTED ROSTERS and click OK.



7. Click OK again.

# MEMBERSHIP RESOURCES REGISTRATION FORMS

Registration forms are **not** sent in bulk each year. Registration forms should be ordered as needed, by using the Local Council Order for Forms, No. 524-950. To receive a blank order form, call the national Membership Resources at 800-888-4705. **Phone orders will not be taken. Do not order any registration forms from the National Distribution Center or use their order form.** We must receive all orders via mail, email to [membershipforms@scouting.org](mailto:membershipforms@scouting.org), or by fax at 972-580-2416. All items on this order blank are free and may be ordered at any time. When ordering by email using the Local Council Order for Forms, No. 524-950, please make sure your previous order is cleared from the form.

Anticipate your needs when ordering—combine orders and send an order about once a month. Inventory should be taken each month and all forms needed should be ordered at one time.

Be careful not to order more than you need; try to maintain a two- to three-month supply. When changes are made, all old forms should be destroyed and only the most current printing should be kept. Following this procedure will help us be thrifty with the use of forms and prevent councils from using outdated forms. Most forms that are two years old or older are outdated—throw them away.

There is no cost to councils for shipping, except for overnight and special shipping. Councils will be billed for overnight and special shipping only.

Plan for peak season usage such as school nights, roundups, and other special recruiting efforts.

The *Procedures for Maintaining Standards of Membership and Leadership* booklet, No. 524-105, is located on the Scout Executive Only tab on MyBSA. This booklet is to be used when placing someone on the Ineligible Volunteer File. It is not for other professionals' use.

If an order has been faxed or emailed, do not mail it to the national office.

If an order is not received in two or three weeks or is incorrect, please call us immediately at 800-888-4705. **Do not reorder.**

Note: Applications can be ordered on form No. 524-950 or downloaded from <http://www.scouting.org/forms.aspx>. Some forms are available in Spanish.

The Annual Memorandum of Understanding is used for processing Learning for Life participants and can be found at <http://info.netbsa.org> under Learning for Life.

The following forms for Learning for Life/Explorer posts can be found at BSA Info/Learning for Life:

- Staff Guide for Renewal of Programs
- Learning for Life Adult Application
- Exploring Youth Application
- Learning for Life Explorer Post Application
- Exploring Annual Memorandum of Understanding
- Criminal Background Check Exemption

See Appendix 4—Telephone Reference Checklist for a suggested form to use when checking the references of adults. Reproduce this form locally.

## MEMBERSHIP RESOURCES FORMS

NUMBER	FORM
28-107	Procedures for Maintaining Standards of LFL Participation <b>(MyBSA Scout Executive Only tab)</b>
524-403	Unregistered Unit Report <b>(BSA Info only)</b>
28-412	Additional Registrants <b>(BSA Info only)</b>
28-533	Membership Growth Opportunity Index <b>(BSA Info/Council and District Operations/ Growth Plan Workbook)</b>  Annual Memorandum of Understanding—LFL <b>(BSA Info/Learning for Life)</b>
28-557	Group Certificate—LFL
524-565	Learning for Life Explorer Post Application <b>(BSA Info only/ Learning for Life/Exploring)</b>  Exploring Annual Memorandum of Understanding <b>(BSA Info only/ Learning for Life/Exploring)</b>
28-569	Group/Post Poly Bag—LFL
28-573	Criminal Background Check Exemption—LFL <b>(BSA Info/ Learning for Life/Exploring)</b>
28-802	Change of Address for Membership and Magazines <b>(BSA Info only)</b>
28-803	Subscription Inquiry <b>(BSA Info only/BSA Magazines)</b>
28-902	Chartered Organization Code List—Alpha <b>(BSA Info only)</b>
28-903	Chartered Organization Code List—Numeric <b>(BSA Info only)</b>
524-095	Registration Poly Bag for Charters and Certificates
524-104	Youth-Serving Executive's Guide to Registration <b>(BSA Info Only)</b>
524-105	Procedures for Maintaining Standards of Membership and Leadership booklet <b>(MyBSA Scout Executive Only tab)</b>
524-176	Membership Inventory form <b>(BSA Info and scouting.org/forms)</b>
524-182	Chartered Organization Discussion Agreement <b>(BSA Info and scouting.org/forms)</b>
524-309	Exploring Youth Application <b>(BSA Info/Learning for Life/Exploring)</b>

524-312	Learning for Life Adult Application ( <b>BSA Info/Learning for Life/Exploring</b> )
524-320	20-Year Veteran Membership Certificate
524-325	Annual Local Council Membership Validation Procedures ( <b>BSA Info only</b> )
524-401	Transfer form ( <b>BSA Info and scouting.org/forms</b> )
524-402	New-Unit Application ( <b>scouting.org/forms</b> )
524-404	Membership Card
524-406	Youth Membership Application ( <b>BSA Info and scouting.org/forms</b> )
524-407	Charter Certificate
524-410	Charter Renewal Envelope
524-420	Unit Renewal Application Instructions ( <b>BSA Info and scouting.org/forms</b> )
524-421	Charter Renewal Overflow Page ( <b>BSA Info and scouting.org/forms</b> )
524-423	Youth Membership Application—Spanish ( <b>BSA Info and scouting.org/forms</b> )
524-426	Unit Budget Plan ( <b>BSA Info and scouting.org/forms</b> )
524-501	Adult Application ( <b>BSA Info and scouting.org/forms</b> )
524-502	Adult Application—Spanish ( <b>BSA Info and scouting.org/forms</b> )
524-510	National Council Member Roster ( <b>BSA Info only</b> )
524-571	Exploring Post Certificate—LFL
524-572	Exploring Participant card—LFL
524-701	Veteran Application ( <b>BSA Info only</b> )
524-804	<i>Boys' Life</i> Only Subscription Order ( <b>BSA Info/BSA Magazines</b> )
524-851 to 862	Registration and Subscription Fee Information—by Month ( <b>BSA Info only</b> )
524-901	Registrar Procedures Manual ( <b>BSA Info only</b> )
524-925	Local Council Index and Finance Facts Book ( <b>BSA Info only</b> )
524-950	Local Council Order for Forms ( <b>BSA Info only</b> )



# AWARDS AND RECOGNITIONS

## VETERAN RECOGNITION

Veteran recognition includes both youth and adult registration tenure. The periods of service claimed need not be continuous, but the individual must be currently registered to receive the recognition. Military time can only be for the time an individual was drafted or serving in a war. After five years of registered service in the Boy Scouts of America, a person may file an application for veteran recognition. Local councils issue 5-, 10-, 15-, and 20-year veteran recognitions; the national office issues recognitions for 25 years and up. A 50-year veteran receives an engraved gold plate with the recognition, and a 75-year veteran receives an engraved silver plate.

When a Scouter completes 25 or more years of registered service, an application should be filed with the national office using the Veteran Application, No. 524-701.

Many professionals and retired professionals are not currently being recognized for veteran status. Any professional or retired professional who has not been recognized should submit a Veteran Application showing total tenure. Once these individuals are in our files, we automatically process their veteran recognition. When sending Veteran Applications to the national office, please be sure all items are entered correctly and legibly.

1. Please put the correct council number on the application.
2. Be sure to indicate which award is being requested: 25-year, 30-year, 35-year, etc. Also indicate previous award received and date earned.
3. It takes time to engrave the 50-year and 75-year plates. Send these applications early to ensure processing can be completed before the presentation date. Allow 4 to 6 weeks for processing.
4. The applicant's name must be legible. This name will appear on the applicant's certificate.
5. Include a full address, with city, state, and proper zip code. Recipients receive a congratulatory letter along with a certificate.
6. Please verify the registration records. An individual must be registered at the time a recognition is processed, even if the individual completed tenure for the award one or more years prior.
7. The applicant and the Scout executive should sign the Veteran Application. Missing signatures could cause the application to be defective.
8. The application should be dated.
9. The national office processes **ALL** professional Scouters' Veteran Applications. The local council processes volunteers' veteran recognitions with less than 25 years of service. Volunteer veterans with 25 years or more are processed by the national office.
10. All veteran certificates and congratulatory letters are sent to the local council for presentation, with the exception of BSA retirees registered with the national council.
11. A defective notice is issued if information is missing or does not agree with registration records. This defective notice should be returned with the application when the updated information is submitted to Membership Resources.
12. Send completed Veteran Applications for 25 years or more of registered service to Membership Resources, S218, Boy Scouts of America, 1325 West Walnut Hill Lane, P.O. Box 152079, Irving, TX 75015-2079, or fax to 972-580-2416, or email to [veteran.awards@scouting.org](mailto:veteran.awards@scouting.org).

## **VETERAN UNIT BAR**

When a unit has rechartered a minimum of 25 years, or 300 months, of continuous service, all registered youth members and adults registered with that unit are entitled to wear a veteran unit bar. Even if the unit was part of several different chartered organizations, the members remain qualified for the veteran unit bar as long as the unit was in continuous service. The service must be validated by the number of consecutive months listed on the unit charter. The bar is worn on the left sleeve of the uniform between the council shoulder strip and the unit number, as shown in the *Insignia Guide*, No. 33066. Veteran unit bars are available from the national Supply Division in the following yearly intervals: 25, 50, 55, 60, 65, 70, and 80.

## **CITIZENSHIP REQUIREMENTS**

Any youth member may register with the BSA if they are a resident of the United States, whether they are a citizen or not.

Effective October 13, 1989, the membership requirement changed for noncitizens. Article VIII, Section 2, Clause 1 of the *Rules and Regulations of the Boy Scouts of America* is amended to read as follows:

“Adults who are not citizens of the United States but who reside within the country may register with the Boy Scouts of America in any capacity if they agree to abide by the Scout Oath and Law, to respect and obey the laws of the United States of America, and to subscribe to the excerpt from the declaration of Religious Principle.”

### **Ineligible Volunteer File**

The ineligible volunteer file was established to help protect youth members and the Boy Scouts of America from individuals who should not be registered as adult leaders. This file provides a safety check in making certain that individuals who are not suitable for membership or leadership are not registered.

The application of each adult is questioned whenever there is any concern about the individual’s identity. In such cases, the national office faxes an identification questionnaire to the council requesting more information. The questionnaire is sent to the Scout executive’s attention and is marked “Personal and Confidential.” The registrar must be aware of the request so that questions can be properly answered. The questionnaire should be completed and returned to Membership Resources in a timely manner.

## **POLICIES RELATED TO CRIMINAL BACKGROUND CHECKS**

### **National Policies**

- All adult volunteers who register will have a criminal background check (CBC).
- Social Security numbers are required for all adult volunteers in the traditional program.
- All adult applicants must sign the Adult Application, giving informed consent to conduct a background check. No one may sign for another person.
- The Adult Application now includes a disclosure/authorization form. This form must be signed and filed with the Adult Application. No one should be submitted for a criminal background check without the disclosure/authorization form completed.

- The National Council has contracted for the costs of the criminal background checks.
- All new Explorer leaders will have a criminal background check, except those employed by and participating in governmental agency–sponsored Explorer posts.
- Form No. 28-573 must be completed and signed by the head of the organization for each post adult. The registrar follows the instructions on marking the adults for a completed CBC.

### **Scout Executive Responsibilities**

- The Scout executive is responsible for making certain that proper screening procedures are being followed. If a criminal record is found, the Scout executive will be personally responsible for seeing that proper procedures are followed in a timely manner.
- The Scout executive will determine the course of action to be taken by referring to the booklet *Procedures for Maintaining Standards of Membership and Leadership*. Scout executives should call Membership Resources if they have questions on the procedures.
- Only those council employees approved by the Scout executive will have access to the background check information.

### **Volunteers Without a Social Security Number**

Adult volunteers in the BSA’s traditional program must provide their Social Security number to become a registered leader. Those who decline to provide their Social Security number may not be allowed to register as leaders in the Boy Scouts of America.

However, there are some rare situations where the individual applying as an adult volunteer does not have a Social Security number or refuses to provide it. Exceptions will be granted to those individuals on a case-by-case basis. The process to request an exception to the Social Security number requirement is as follows:

- The Scout executive determines an individual does not have a Social Security number and the explanation for this exception. The council must verify the applicant’s identity.
- The council enters the individual into the Name File within the Program Administration System (PAS) of ScoutNET and prints a personnel profile report for the person.
- The Scout executive completes the Social Security number exemption request form found on MyBSA/Resources/Membership Resources/Order, Refund, and Data Change Request Forms. This form can be faxed to Membership Resources at 972-580-2416 or emailed to a membership assistant.
- The director of Membership Resources will grant or reject the request based on information provided or additional information received. If the request is granted, Membership Resources will mark the personnel record within PAS as “SSN not required.” This will allow the council to process the registration of this individual without a Social Security number.

Any questions concerning this process should be directed to Membership Resources at 800-888-4705. The written request also can be mailed to Membership Resources S218, Boy Scouts of America, 1325 West Walnut Hill Lane, P.O. Box 152079, Irving, TX 75015-2079, or faxed to 972-580-2416.

The BSA adult application has a disclosure/authorization form. This form must be signed and turned in with the completed application sheet. Only those who have completed the disclosure/authorization form can be submitted for a criminal background check.

Also see the disclosure/authorization form for the details on the volunteer's rights as outlined by the Fair Credit Reporting Act. A copy can also be found on the BSA Info website.

Any other requests for exceptions should be discussed with the director of Membership Resources.

### **Council Level**

The registrar enters all information into the council computer system, including the birth date and Social Security number of all adult volunteers who completed the application. Employees who have access to ScoutNET have access to this information. Except on the criminal background check report, the Social Security number is not printable (it is viewable, but not printable) on any report.

If this is a new applicant, the data is encrypted and electronically submitted to **the CBC vendor** for a background check.

The Fair Credit Reporting Act is the U.S. government law that includes the requirements for criminal background checks for volunteers. The BSA, through its criminal background check vendor, does not report any financial history or records. At times, volunteers and staff are misled by the name of the act. Under the federal law, and by contract, the CBC vendor is not allowed to share any of the information they receive from BSA councils.

There are three dates related to the criminal background checks on the personnel record in PAS. Those dates are:

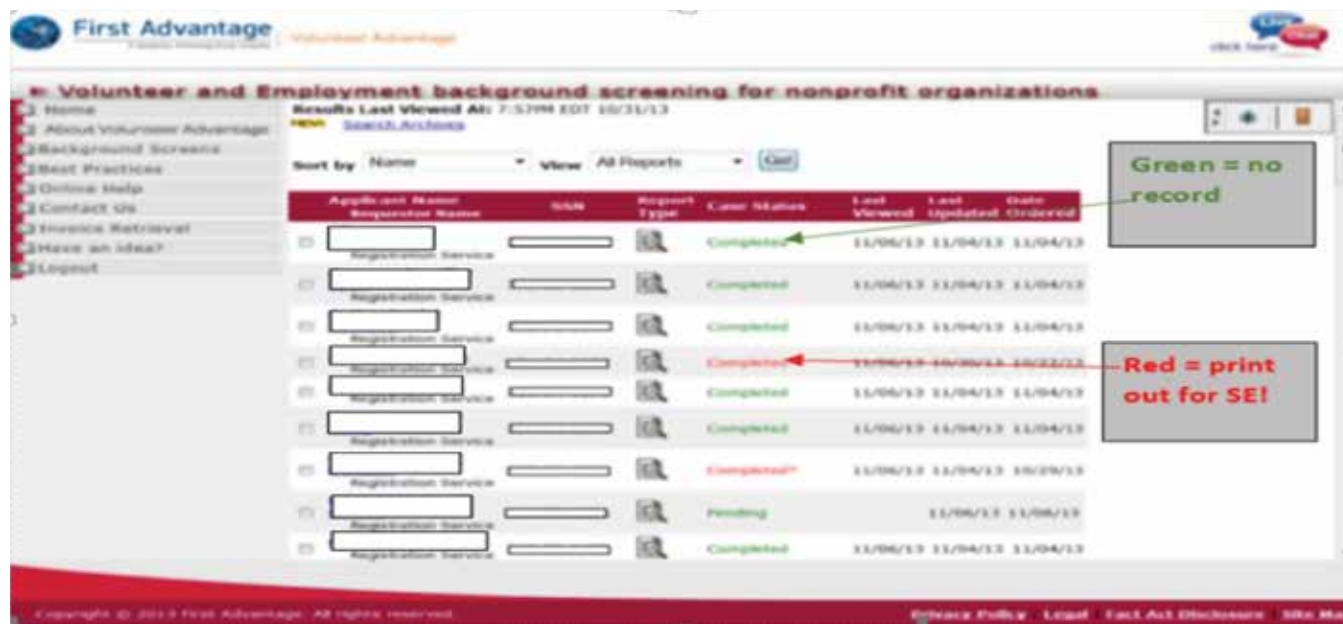
- CBC entered date
- CBC submitted date
- CBC completed date

When adults are entered into the system, they are placed on the CBC submit screen in PAS. Registrars are to validate the social security number. Each person being submitted will have a check box next to the name field. Those without a disclosure/authorization form should not be checked for submitting. When ready, the registrar clicks on the submit button.

The background check results are usually available 24-48 hours after submitting. The results of the background check are available for viewing on the First Advantage website. Access to this is by a user ID and password that is unique to each council and changes during the year. Each council gets an update on their user ID and password. The Scout executive designates who in the council should have access to the First Advantage website. That individual should log onto the website and review the results.

The website lists all the volunteers from that council that have been submitted recently. (Note: An archive feature allows councils to see all background check results since April 2003.)

Below is a screenshot of the site:



Names and social security numbers have been blocked out for privacy. Under the case status column, the word “Completed” appears in either red or green. Green means the background check found no record in the person’s history. Red means there is at least one item in their history or there is a problem validating the Social Security number for that individual.

The policy is to print out all records with a red “Completed” from the First Advantage website and give them to the Scout executive for review.

In PAS on the personnel record:

- Those with a green “Completed” automatically get the “CBC Completed Date” entered.
- Those with a red “Completed” will not get the “CBC Completed Date” entered—it must be done manually.
  - o The “CBC Entered Date” is manually entered when the record is printed out for the Scout executive.
  - o Entering the “CBC Completed Date” does not indicate any decision on the volunteer’s membership status. It simply means that the CBC process was completed.

Approximately five percent of the applicants will not be processed automatically.

The Scout executive will decide if the red “Completed” volunteers meet the standards of leadership and membership in the Boy Scouts of America.

Those who the Scout executive decides are eligible for membership in the BSA should be kept on a list by the Scout executive. Printed reports for those individuals should be shredded as they contain private information.

Tools for the local council to include:

- CBC worksheet
- CBC tracking report
- CBC submittal confirmation
- CBC submittal edit list
- CBC complete dates edit list

All of these should be shredded once the individual records have been updated.

The application should be attached to the record that was received from the CBC vendor.

If the Scout executive decides to place the individual on the Ineligible Volunteer File, he or she should follow the instructions in the *Procedures for Maintaining Standards of Membership and Leadership* booklet, No. 524-105, located on My BSA under the Scout Executive Only tab. The Scout executive should make sure that the most current booklet is being used. Any information sent to the national office should also include the record from the CBC vendor and the original application.

The Scout council should maintain four paper files on enrollment and application information:

1. Current file. The current file includes the original application and the disclosure/authorization form (which has the Social Security number). Applications may be shredded after three years.
2. History file. The history file is the unit’s permanent record and should be kept forever. These are kept separately from the other files because other people can have access to these files.
3. Advancement file. This file contains the unit’s advancement reports.
4. Confidential file. The confidential file contains the names from the CBC vendor of individuals that were not placed on the Ineligible Volunteer File, preferably secured in the Scout executive’s office.

All records for individuals placed in the Ineligible Volunteer File are to be sent to Membership Resources at the national office. No confidential information should be kept locally.

Scout councils need to determine:

- Where these files are kept and the degree of security required. This will vary from council office to council office.
- The method of how youth and adult applications are kept at the council office for the three-year retention period.
- A policy restricting who has access to confidential files.

## **RECOMMENDATIONS**

- Keep the original applications on file for a minimum of three years.
- After the three-year retention period, the original applications should be shredded, not just thrown away.
- Maintain the current file in a secure environment, preferably a locked file cabinet. If a locked file cabinet is not available, select a comparable method.
- The Scout executive should designate a person to control access to the current file.
- Do not include original applications in either the History or Advancement files. These files can then be stored in a less secure environment.

### **Unit Level**

- The original application is completed and signed by the adult volunteer.
- Applications are collected by an adult associated with the unit: chartered organization representative, committee chairman, district executive, etc.
- Adult applications must be safeguarded as they contain confidential information.
- The application signed by the volunteer includes the top or original copy that is maintained in the council office, a copy for the chartered organization, and a copy for the unit. These two copies do not include the Social Security number. Only the council keeps the original which includes the Social Security number.

#### **The application must be signed by the:**

- Individual completing the form
- Chartered organization representative or (IH) chartered organization head approval
- Committee chairman approval
- Scout executive or designee acceptance

Most Scout executives delegate signing authority to the district executive. The second copy goes to the chartering organization for their records and the third copy to the unit for their records.

# INTERNET RECHARTERING

**General Description:** Internet Rechartering is an Internet-based application that is indirectly connected to the council's ScoutNET membership data and provides the ability for unit leaders to complete the paperwork portion of rechartering from their home (office, etc.) over the Internet. Once the unit completes the renewal process and submits its data through this application, a charter renewal batch is created within PAS for this unit and is placed on hold, waiting for the registrar to review the paperwork and post the batch. The unit prints its charter renewal application upon completing the submittal process and sends it, along with other required documents, following the council's annual charter renewal plan.

**Preparation:** The council prepares a unit charter renewal kit for each unit due to reregister, including a letter outlining the use of the new optional Internet Rechartering system, the council's website address, and the unit's unique access code.

**90 and 60 days before the renewal date:** Done the same way as the paper process.

**60–45 days before the renewal date:** Units choosing to renew their charters online will visit the local council's website, complete the steps through the submittal process, and print a revised charter renewal application.

**45 days before the renewal date:** The commissioner and unit committee chairman conduct the charter renewal meeting with the unit per the standard charter renewal process. Additional changes may be made to the application. The renewal application with appropriate signatures, applications for new youth and adults, appropriate fees, Journey to Excellence unit recognition qualifications, and commitments for the coming year are all completed at this meeting.

All forms and fees are then delivered to the council office or to the district's charter renewal turn-in meeting.

**Following the renewal meeting:** The council's registrar receives the charter renewal application, new youth and adult applications, and appropriate fees following the charter renewal meeting. If the unit has renewed its charter using the Internet, the registrar selects the unit's on-hold recharter batch from the PAS program. All changes that were made by the unit, including new members, dropped members, and editing of member data are reflected in the on-hold batch. The registrar reviews the recharter information and posts the batch to create the new charter for the unit.

**30 days after renewal date:** The commissioner makes a formal presentation of the new charter and membership certificates at an appropriate gathering of the chartered organization.



## UNIT CHARTER RENEWAL REPORT PACKAGE

This is the paperwork that the unit's Internet recharter processor brings to the council office along with the appropriate fees.

Package includes:

- List of new adult members, new youth members, and transfer adults and youth members\*
- Charter renewal application
  1. Charter renewal application must be signed with all of the appropriate signatures
  2. Note: The fees are calculated on the charter renewal
- Multiple reports: Multiple adult members, multiple youth members
- Dropped report: Dropped adult members, dropped youth members report
- No fee report
- Promoted adults report, promoted youth members report
- Summary sheet with unit contact person information

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\*All new youth members, new adults, and transfers must have an application.

### What the Registrar Does

The registrar reviews the unit's charter renewal application for signatures, new applications, and appropriate fees. It is then ready to process in PAS. This is what the registrar will now do in PAS:

- Find the on-hold batch. From the List Batches menu, find all batches with the user ID: UCRS\_USER and select the unit for processing.
- Verify chartered organization information, 100% *Boys' Life*, and on-time rechartering.
- Proceed to the posting screen and view the Show Errors report. If the Show Errors button is not available, then the unit is ready to be posted. If the button is displayed, then review the report.

There should be no errors because all BSA requirements have been checked already; however, there may be warnings that need special attention, including transfers. The charter renewal application paperwork from Internet Rechartering will identify the council and unit where transferring members are currently registered. The Show Errors feature in PAS includes a warning message for transfers. For in-council transfers, the registrar should use the normal transfer process and then delete the original entry for this member in the recharter batch. This will expire the member in the previous unit and register the member in the new unit. After rechartering, complete the Merge Person routine to combine these person records so only one record remains.

Once all errors are corrected and warnings appropriately handled, check fees and post the unit. Process certificates and cards as usual.

There are three reports to aid the commissioner and professional staff:

- Commissioner Status Report
- Members Not Renewed
- New Members Added

### Commissioner Status Report

Run Date: 4/21/2006		COMMISSIONERS UNIT CHARTER RENEWAL STATUS REPORT				
Run Time: 1:41:03PM						
-- Selected Options						
BSA Organization:		989 - BSA				
Stop Level: Council						
Program: All						
Unit Expiration Date:		02/29/2006				
Units: All						
List by Program Code:		Yes				
List by Initial Log-in:		Yes				
BSA						Unit Expiration Date: 02/29/2006
<u>Unit Type</u>	<u>Number</u>	<u>Log-in-Date</u>	<u>Used UMS</u>	<u>Stage Status</u>	<u>Submit Date</u>	<u>Note</u>
Pack	0011	02/25/2006	N	4-Summary		
Pack	0251	02/26/2006	N	5-Submitted	03/03/2006	
Troop	0241	03/08/2006	N	3-Check Roster		
Troop	0011	03/09/2006	N	1-Load Roster		
Crew	0921	03/09/2006	N	1-UMS Reconciliation		
Pack	1281	03/06/2006	Y	3-Check Roster		
Team	0051	03/16/2006	N	2-Renew Roster		

The Commissioners Unit Charter Renewal Status Report keeps the commissioner informed as to the status of each unit. This provides the commissioners the data to properly monitor and support the rechartering process.

The Stage Status column shows the stage (or section) of the rechartering process that the unit is currently completing. If the status says is “submitted,” the date that the information was submitted also appears.

## UCRS Members Not Renewed Roster

Report ID: 6:01	Columbia-Montour	Page 7 of 7			
Run Date: 4/21/2006	Iroquois				
Run Time: 1:39:35PM	UCRS Members Not Renewed Roster				
	Crew 9018				
		Unit Expiration Date: 2/29/2006			
Renewal Processor Test CD Adult (972) 5802000 tadult@netbsa.org					
<u>Name</u>	<u>Address</u>	<u>Birth Date</u>	<u>Grade</u>	<u>Sex</u>	<u>Phone</u>
Test G Youth	1325 West Walnut Hill Ln Irving, TX 75038	1/1/1987	11	M	H (972) 580-2000
Test H Youth	1325 West Walnut Hill Ln Irving, TX 75038	2/22/1980	9	M	H (972) 580-2000
Test I Youth	1325 West Walnut Hill Ln	6/6/1987	10	M	H (972) 580-2000

A list of those individuals who have not renewed their registrations can be obtained using the UCRS Members Not Renewed Roster; use it for recruiting individuals back into the program.

## UCRS New Members Added Roster

Report ID: 6:01	Columbia-Montour	Page 1 of 5
Run Date: 4/21/2006	Iroquois	
Run Time: 1:36:14PM	UCRS New Members Added Roster	
	Crew 9018	Unit Expiration Date: 02/29/2006
Selected Options		
BSA Organization: 989 - BSA		
Stop Level: Council		
Program: All		
Unit Expiration Date: 02/29/2006		
Units: All		
List by Program Code: Yes		
Renewal Processor		
Test CD Adult		
(972) 5802000		
tadult@netbsa.org		
Name	Address	B/L Sub
Birth Date	Grade	Sex
Phone		
Test BJ Youth	1325 West Walnut Hill Ln Irving, TX 75038	Y
9/19/1987	11	M
H (972) 580-2000		
Test WQ Youth	1325 West Walnut Hill Ln Irving, TX 75038	N
1/21/1980	9	M
H (972) 580-2000		
Test KD Youth	1325 West Walnut Hill Ln Irving, TX 75038	Y
5/6/1989	11	M
H (972) 580-2000		

All new members to Scouting should be registered when they first join the unit; however, sometimes this process does not get completed. Therefore, these new members are identified during the charter renewal process. *The UCRS New Members Added Roster* provides a listing of all new members being added during the Internet Rechartering process and the name and contact information of the unit's Internet Rechartering processor. The council can use this report to identify, secure applications for, and register new members before the charter renewal process has been completed.

# **CHARTER RENEWAL**

## **CHARTER RENEWAL KITS**

Charter renewal kits for the entire year may be prepared during the summer months. The Charter Renewal Envelope, No. 524-410, should contain local council information concerning the charter renewal and forms needed by the person responsible for preparing the charter renewal in each unit.

Some suggested forms are:

1. Unit Renewal Application Instruction Sheet, No. 524-420
2. Adult Application, No. 524-501; Adult Application (Spanish), No. 524-502
3. Youth Membership Application, No. 524-406; Youth Membership Application (Spanish), No. 524-423
4. Transfer Form, No. 524-401
5. Proper Fee Chart, No. 524-851 through 862 (use one per unit)
6. Charter Renewal Overflow Page, No. 524-421
7. Appendix 4—Telephone Reference Checklist

## **CHARTER RENEWALS TO UNIT**

Approximately two months before renewal date, produce a complete listing of individuals registered by unit number from the council computer. Update these charter renewals, if necessary, by adding any youth or adult members registered since the renewals were printed. Use the Charter Renewal Overflow Page, No. 524-421, to add youth members or adult members who have registered after the charter renewals were printed. Please list the additional youth members and adult members on separate forms. Use this form only with a charter renewal.

Insert two copies of the charter renewal for each unit in the prepared Charter Renewal Envelope. Give the envelope to the district executive who is responsible for that unit.

The district executive should visit the executive officer of each unit and either leave the charter renewal with him or her, or deliver it to a person designated within that unit.

## **UNIT PREPARATION OF CHARTER RENEWAL**

The unit should delete the names of leaders and members no longer registered by drawing a line completely through the name and other information. If a reregistering leader position should be changed, cross out the old position and write the new position on the charter renewal. An adult application is not required. All other information should be checked carefully for accuracy. Errors should be corrected below the incorrect item. List new leaders and members on individual applications, which should be attached to the charter renewal. The executive officer, unit leader, and council representative are required to sign the renewal. The proper number of copies of the renewal should come to the council service center. One copy of the renewal should be kept by the unit.

The Unit Renewal Application Instruction Sheet, Form No. 524-420, gives complete instructions for the preparation of the charter renewal forms.

# RECEIVING AND PROCESSING REGISTRATIONS

## REGISTRATION

The first steps of processing registrations should begin at the council service center counter. This is true for charter renewals, new applications, and for additional enrollments—whether delivered personally or sent through the mail.

Group together by unit the individual applications of additional registrations. Generate one routing sheet (see Appendix 1) for each group of applications. All the required information should be clearly indicated. All boxes and radial buttons should be completed with the proper information so the individuals can be added to the correct unit. The fees should also be indicated in the proper spaces on this form.

Attach the routing sheet, a written receipt, a copy of this receipt, and all registration papers for the registrar's review if nothing is defective at this point. The steps and information to be checked are outlined on the routing sheet.

The registrar checks unit applications and verifies the renewal date, term, and fees as indicated. The registrar also verifies that the mandatory adult leader positions have been filled and:

- There is an application for all new members and leaders.
- Adult applications should be checked for age requirements.
- All individual applications should have complete addresses.
- All adult applications must have Social Security numbers and include a signed disclosure/ authorization form.
- Check item number 6 on the adult application and if there are any questions answered “yes,” this application should be given to the Scout executive or his designee (IH, CR, or CC) to process for approval.
- The number of youth members should be checked to determine if they are paying the total fee; if not, the unit they are transferring from should be clearly indicated.
- Check *Boys' Life* subscriptions and fees, magazine term, start issue, and end date.
- All applications should be checked for signatures and approvals.

All of this should be done so that the registrar makes certain the individuals are added to the proper unit.

Make sure there is a Chartered Organization Discussion Agreement, No. 524-182, for all units each year.

Once all the information is received on the application and no other information is needed, the registrar should enter the application into PAS.

- Any application that is not entered into PAS by the end of the day should be placed in a secured place where unauthorized individuals will not have access to it.
- Any application that has been entered into PAS and posted should be placed in a file cabinet or filed in the unit's current file, secured where unauthorized individuals will not have access to it.
- At no time should applications be left unsecured.

## REGISTRATION POLICY FOR SIGNATURES ON BSA FORMS

Data collection in our ever growing technological society is changing from paper to electronic methods. Faxes and emails are enabling our organizations to use different ways to gather needed information and to perform those processes more effectively.

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, 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 Exploring application or charter, your staff may:

1. Either electronically scan or fax the form with the missing signature to the person who needs to sign it.
2. This person may sign where needed and return it to your office electronically or by fax.
3. In addition, emails from the appropriate person will be accepted in lieu of a signature so 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).
4. 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, an email, scan, or fax from the parent authorizing their child to be registered with the BSA is acceptable with the unit leader's approval. A copy of the email, scan, or fax should be attached to the application.
5. A phone call authorization should only be accepted as an absolute 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.

See Parental Signature Exceptions in the Youth-Serving Executive's Guide to Registration, No. 524-104.

## 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 try and guess the age of the youth.
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 in the Youth-Serving Executive's Guide to Registration, No. 524-104 (BSA Info only).
4. Signature of the unit leader (or designee)
  - The designee can only be the Executive Officer/Institutional Head, Chartered Organization Representative or the Committee Chair if the unit leader is not available.

#### 5. Tiger Cub Adult Partner (AP)

- If the AP is not living at the same address, he/she must complete an Adult Application and attach it to the Youth Member Application.

### **DEFECTIVE PAPERWORK**

When applications contain incomplete or incorrect information and the registration process cannot be completed by the registrar, the papers should be returned to the person who is submitting the work (if an error is caught at the counter) or to the district executive. A suggested form to be used for this purpose is included with the forms in this manual (see Appendix 2).

### **EFT TRANSMITTALS**

A transmittal identifies registration activity by unit and indicates the number of members registered, leaders registered, magazine subscriptions ordered, and the fees calculated for each activity. An EFT transmittal should be printed daily for the registration files, and a copy should be given to the bookkeeper. The transmittal can also be used as a check and balance of what was processed that day.

### **ADDITIONAL REGISTRATION**

Submit all additional registrations of individuals during the year using the Youth Membership Application, No. 524-406 and Youth Membership Application (Spanish), No. 524-423, or Adult Application, No. 524-501 and Adult Application (Spanish), No. 524-502. Each is a two-part form, except the Adult Application, which has four copies. One part is kept by the unit, one is sent to the council, one copy of the Adult Application is kept by the chartered organization, and the last page is kept by the adult applicant. All applications should be thoroughly completed and legible. As explained on the application, applications should be signed by the proper authority before forwarding to the council service center.

### **MEMBERSHIP APPLICATION SCANNING**

- When you scan the applications, it is critical that they are placed in the scanner paper chute correctly.
- Compile only the current membership applications for scanning.
- Scan original applications only (not copies)—and only the local council copy.
- Confirm that all applications are from new members, transfers, or multiples. New units, charter renewals and non-unit registrants cannot be processed.
- Make sure Tiger Cub applications include adult partner information and that the Tiger Cub Adult Partner circle is filled in.
- Verify required data and signatures.
- Sort the forms by school and unit if you want registrants associated with their school.
- Place up to 40 applications in the scanner at one time.
- Submit a maximum of 200 applicants per batch.

For additional scanning resource information, go to the Scanning Information page on the ScoutNET support site (*MyBSA/Support/Support Site/Scanning Information*).



# **REGISTERING UNITS**

## **NEW UNITS**

1. A new unit is one that has not been organized previously and, therefore, can be registered after being developed into a working organization.
2. A new unit could also be one that is being registered after having been dropped for more than 12 months after the previous charter renewal date. At that time, the unit must be considered new.
3. If a unit is changing programs. Example: a post changing to a crew. This would be a new crew.

New units are registered by completing the New-Unit Application, No. 524-402, and the individual applications for adults and youth members (Cub Scouts, Boy Scouts, Varsity Scouts, or Venturers) who are to be registered. The chartered organization name and code should be identified clearly by using the Chartered Organization Code Listing, No. 28-902 or 903. The program, unit number, renewal date, and all other information must be clear and complete. The Annual Charter Agreement, No. 524-182, should also be filled out when registering a new unit, but it is not required.

The physical location of the chartered organization must reside within your council's geographic area. The BSA uses this physical location—not the mailing address—as the determining factor in who should serve a unit. The number of people registering and the fee information should be indicated on the New-Unit Application. The local council copy should be sent by the unit to the local council service center. This is true of both the unit application and the individual applications for those registering.

## **REREGISTERED UNITS**

In order to be considered reregistered, a unit must register before the renewal date or within the two months following. The unit's tenure must be continuous and the renewal date must remain the same unless the term is changed to correspond with the new renewal date. Conditions such as membership or the chartered organization must remain the same for a unit to be considered as reregistered.

## **LAPSED UNITS**

A unit that has not reregistered by the renewal date is considered a lapsed unit. The unit remains in lapsed status for up to two months after the renewal date and may reregister during this time. The unit is also counted on reports while in the lapsed period.

## **UNREREGISTERED UNIT REPORT**

The Unreregistered Unit Report, No. 524-403, is used when a unit does not reregister. This form can be used as a valuable tool for helping councils reduce the number of dropped units by identifying the status of a unit during the rechartering process. The Unreregistered Unit Report can be found on BSA Info under Membership Resources. An unregistered unit report should be kept on file for each dropped unit.

The report is generated automatically at the end of each month when the membership month is closed. It shows units not reregistered for three monthly closing periods based on national membership closing dates. (**Note:** Paper Form No. 524-403 is no longer available.) This report prints the:

- first-month lapsed period
- second-month lapsed period
- third-month when the unit is dropped

The report does not show units on hold. Print the report from ScoutNET's print repository. **Important:** The report remains in the Print Repository for *seven days only*. You can delete the report prior to the seven-day expiration period.

### **DROPPED (SEPARATED) UNITS**

A lapsed unit that has not reregistered in the two months after its renewal date is "separated" or dropped. The members and unit figures are subtracted from council membership totals.

### **SEPARATED-REREGISTERED (S-R) UNITS**

A unit that has been registered but separates at the end of the two-month lapse can return as a separated-reregistered unit. All registered units separated as of the first of the third month following the renewal date may be separated-reregistered from that date for the next 10 months. With units that have been dropped because of administrative problems, the tenure should remain continuous. The renewal date for S-R units normally should not be changed when the unit reregisters. All tenure accumulated prior to the date of separation will be maintained if a unit reregisters within the 10-month period after the drop date.

If a unit has dropped and ceases all activity, it may be reorganized during that same 10-month period. It may retain all tenure previously accumulated, but it will have a space between tenures for the months during which no fee was paid. A unit may be classified as separated-reregistered only if some of the individuals or the chartered organization remain the same.

### **CODES FOR UNITS SERVING SCOUTS WITH SPECIAL NEEDS**

Members who have special needs, whether because of mental, physical, or emotional problems, may participate in a particular program for as long as needed so they may progress at their own skill rate.

The unit's chartered organization determines, with approval of appropriate medical authorities, whether a youth member is qualified to register as a member beyond the normal registration age (based on the definitions of each disability). To certify the approval of the chartered organization, the unit leader's signature must be on the BSA youth application, or on the unit's charter renewal application, for the youth to register. The local council must approve these registrations on an individual basis.

The medical condition of all candidates for membership beyond the normal registration age must be certified by a licensed health-care provider, or an evaluation statement must be certified by an educational administrator.

Use the Annual Health and Medical Record form, No. 680-001 (found at [scouting.org/forms](http://scouting.org/forms)), to support this registration process. Any corrective measures, restrictions, limitations, or impairments must be noted. Parents must inform the Scout leader of the name and phone number of their child's doctor. Their medical history should be discussed in full. Appropriate medical permission should be obtained.

In the case of candidates with cognitive, intellectual, development, or emotional disabilities, their condition must be certified with a statement signed by a licensed psychologist or psychiatrist. Current health, medical, or certification records of all youth members with disabilities are to be retained in the unit file at the council service center.

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

The following codes should be used when registering a unit that has members with disabilities. (Use these codes **only** when the unit is primarily for members with a particular disability.)

V – Visual

O – Orthopedic

E – Emotional

D – Developmental

H – Hearing

L – Learning disabled

M – Mentally disabled

## CHARTERED ORGANIZATIONS

The physical location of the chartered organization must reside within your council's geographic area. The BSA uses the physical location, not the mailing address, as the determining factor in who should serve a unit. Charters to organize and maintain Scouting units are granted to organizations meeting the requirements of the *Bylaws of the Boy Scouts of America* and *Rules and Regulations of the Boy Scouts of America*. These groups, which have goals compatible with those of the Boy Scouts of America, include religious, educational, civic, fraternal, business, labor, corporate organizations, professional associations, and groups of citizens. Governmental entities, the military, and public schools cannot charter traditional units, only Learning for Life groups.

The chartered organization must be clearly identified and **may not use** only 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 full street address, city, state, zip code, and phone number.

The Church of Jesus Christ of Latter-day Saints has indicated that all its charters be shown with the indication "LDS" followed by the ward and stake designations. By using "LDS" instead of the complete name of the church, the charter application usually has enough space for the ward, stake, and address, which aids in identification for many purposes.

A unit may change their charter organization during the year if the following documents are obtained: a letter from the charter organization releasing the unit, a New-Unit Application, No. 524-402, with the new charter organization name, and a completed Chartered Organization Discussion Agreement, No. 524-182.

## Chartered Organization Types

Please be certain that all unit registrations have the correct chartered organization codes. An incorrect code places the unit in the wrong chartered organization grouping. Some organizations are not allowed to charter traditional units. Chartered organization code lists are available on ScoutNET at <http://info.netbsa.org>. The alphabetical list is No. 28-902; the numerical list is No. 28-903. When only the name of the executive officer is changed, the chartered organization code should remain intact.

## Dual Chartered Organizations

A unit can be sponsored by more than one chartered organization.

Two chartered organizations may want to organize a Scouting unit. Duplicate charters can be issued, if requested, so that each chartered organization has one for its own use.

## UNIT REQUIREMENTS

Troop, Varsity, Venturing, and Sea Scout units are required to have a chartered organization representative, a chair, two committee members, and a unit leader. Packs are required to have a chartered organization representative, a chair, two committee leaders or one committee member and one pack trainer, a unit leader, and at least one den leader, who may be a Tiger Cub, Cub Scout, or 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**. The CR may only multiple as committee chair (CC) or a committee member (MC). The Parent coordinator (PC) may multiple as chartered organization representative (CR).

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 since the (CR) serves as a voting member of the district committee and the council. The executive officer (IH) should also be the same person for all units chartered to that organization.

There must be at least five paid boys in a pack, troop, or team, and five paid youth members in a crew or ship. It is possible to register a unit with fewer, 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 members or fewer than five at registration time must be approved by the Scout executive. This approval should be in writing and kept in the unit's historical file.

## UNIT POSITIONS

### Required Positions

Each unit is required to have:

- One (1) chartered organization representative (CR)
- One (1) committee chair (CC)
- Two (2) committee members (MC)\*
- One (1) unit leader
  - Packs—Cubmaster (CM)
  - Troops—Scoutmaster (SM)
  - Crews—Crew Advisor (NL)
  - Teams—Varsity Coach (VC)
  - Ships—Skipper (SK)
- A pack also must have at least one den leader who may be a Tiger Cub den leader (TL), a Cub Scout den leader (DL), or a Webelos den leader (WL).
- Also, if a pack has Tiger Cubs, there must be a Tiger Cub adult (AP) for each Tiger Cub.

### Optional Positions

#### Pack

- Assistant Cubmaster (CA)
- Assistant den leader (DA)
- Assistant Webelos den leader (WA)
- Pack trainer (PT)
- Parent Coordinator (PC)
- Unit Scouter Reserve (91U)
- Unit College Scouter Reserve (92U)

#### Troop

- Assistant Scoutmaster (SA)
- Parent coordinator (PC)
- Leader of 11-Year-Old Scouts (10) (LDS troop only)
- Unit Scouter Reserve (91U)
- Unit College Scouter Reserve (92U)

#### Team

- Assistant Varsity Scout Advisor (VA)

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\* A pack may also have one (1) committee member (MC) and one (1) pack trainer.

- Parent Coordinator (PC)
- Unit Scouter Reserve (91U)
- Unit College Scouter Reserve (92U)

**Crew**

- Crew associate Advisor (NA)
- Parent Coordinator (PC)
- Unit Scouter Reserve (91U)
- Venturing College Scouter Reserve (92V)

**Ship**

- Mate (MT)
- Parent Coordinator (PC)
- Unit Scouter Reserve (91U)
- Venturing College Scouter Reserve (92V)

Number of members required:

- There must be at least five paid boys in a pack, troop, or team.
- There must be five paid youth members (male or female) in a crew or ship.
- Units can register with as few as two paid members with Scout executive approval (if special circumstances exist).
- *No* unit can register with fewer than two paid youth members.

**Executive Officer/Institutional Head (IH)**

All units must have an executive officer/institutional head (IH). This is a nonpaid position. The executive officer/institutional head can register in any of the registered positions required or optional by the type of unit. If the executive officer/institutional head (IH) wants to register, he or she must complete an adult application and pay the registration fee. If the executive officer/institutional head (IH) changes during the year, a New-Unit Application, No. 524-402, must be filled out completely with the required signatures.

## Positions by Program

### Tiger Cubs

Positions

Find %

Code	Type	Description
TL	V	Tiger Cub Den Leader
AP	O	Tiger Cub Adult
M	M	Youth Member

Find OK Cancel

### Cub Scouts

Positions

Find %

Code	Type	Description
DL	V	Den Leader
M	M	Youth Member
DA	V	Asst. Den Leader

Find OK Cancel

### Cub Scouts

Positions

Find %

Code	Type	Description
PC	V	ScoutParents Unit Coordinator
AP	O	Tiger Cub Adult
CA	V	Assistant Cubmaster
MC	V	Committee Member
PT	V	Pack Trainer

Find OK Cancel

### Webelos Scouts

Positions

Find %

Code	Type	Description
M	M	Youth Member
WL	V	Webelos Leader
WA	V	Assistant Webelos Leader

Find OK Cancel

## **UNIT NUMBERS**

Unit numbers are assigned to a chartered organization by the council. When a unit fails to recharter, the number is reserved for a minimum of one year. It is recommended by the National Council that the number be reserved for two or three years to maintain good relationships with chartered organizations.

A unit number may change at any time during the year as requested by the DE. Fill out a New-Unit Application, No. 524-402, indicating the new unit number and have the Scout executive approve the change by signing the New-Unit Application.

A unit may not change from one program to another. If the unit's membership wants 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. The local council may want to assign renewal dates so that a certain percentage of unit charter applications are due each month (except June, July, and August). Spreading the reregistering of units over this nine-month period provides a reasonably balanced workload for district Scouters and the local council service center's registration staff. Here is a suggested plan:

Renew 20 percent of units each month during January and February; 10 percent of the units each month during March, April, September, October, November, and December. No units renew in May, June, July, or August. The reason for this recommended plan is that units reregistering during the summer months have the lowest percentage of reregistering youth.

It is recommended that councils reregister all units in a district during the same month. Assigning districts to different months helps ensure an even work flow to the local council service center and to the national office.

Councils may want to schedule Venturing unit renewals in September or October, since this seems to be the best time to reregister and recruit crew members. Use this practice only if renewal dates of the other units can be adjusted to maintain the even renewal distribution.

Units normally register for 12 months but may register for a term between six to 18 months to adjust to a new renewal schedule. The unit's renewal date cannot be changed during the year. The renewal date can be changed only at renewal time.



## Position Code List

The following leadership positions are used in the traditional program's packs, troops, teams, crews, and ships. Those holding positions may be male or female and must be 21 years of age, except as noted with an asterisk.

AP*	Tiger Cub adult— <i>minimum age 18</i>
BU	Bulk recipient
CA*	Assistant Cubmaster— <i>minimum age 18</i>
CC	Committee chair
CM	Cubmaster
CR	Chartered organization representative
DA*	Assistant den leader— <i>minimum age 18</i>
DL	Den leader
IH	Executive officer/institution head
MC	Committee member
MT	Mate
NL	Crew Advisor
NA	Crew associate Advisor
PC	Parent Coordinator
PT	Pack trainer
SA*	Assistant Scoutmaster— <i>minimum age 18</i>
SK	Skipper
SM	Scoutmaster
TL	Tiger Cub den leader
VA*	Assistant Varsity Coach— <i>minimum age 18</i>
VC	Varsity Scout Coach
WA*	Assistant Webelos den leader— <i>minimum age 18</i>
WL	Webelos den leader
10*	Leader of 11-Year-Old Scouts (LDS troop only) — <i>minimum age 18</i>
91U	Unit Scouter Reserve
92U*	Unit College Scouter Reserve— <i>minimum age 18</i>
92V	Venturing College Scouter Reserve

# CUB SCOUTING

## PROGRAM REQUIREMENTS AND QUALIFICATIONS

### UNIT REQUIREMENTS

Minimum leadership positions . . . . .	CR, CC, CM, 2 MCs, or 1 PT and 1 MC, a DL or WL or TL, and an AP for each Tiger Cub if there are Tiger Cubs
Can have . . . . .	CA, WA, DA, PC, 91U, 92U
Minimum youth members needed . . . . .	Five paid
Standard renewal date required? . . . . .	No
Exceptions to standard requirements . . . . .	Units may register with as few as two paid male youth members with prior permission of the Scout executive
Term . . . . .	Minimum six months, maximum 18 months

### ADULT LEADERSHIP REQUIREMENTS

Minimum age . . . . .	21, except CA, WA, DA, AP, 92U, who may be 18
Gender limitations. . . . .	Male or female
Transfers allowed? . . . . .	Yes, except AP
Multiple registrations allowed? . . . . .	Yes
Membership fee for 12 months. . . . .	\$24 per year, except APs are always multiple
<i>Boys' Life</i> subscription for 12 months . . . . .	\$12
Exceptions to standard requirements . . . . .	None

### YOUTH MEMBERSHIP REQUIREMENTS

Age . . . . .	See below
Grade . . . . .	See below
Gender. . . . .	Male only
Transfers allowed? . . . . .	Yes
Multiple registrations allowed? . . . . .	Yes
Membership fee for 12 months. . . . .	\$24 per year
<i>Boys' Life</i> subscription for 12 months . . . . .	\$12

**Tiger Cub**—Must be under the age of 8 and have completed kindergarten, or be in the first grade, or be age 7.

**Cub Scout**—Must have completed first grade but have not completed third grade, or be age 8 or 9.

**Webelos Scout**—Must have completed third grade but have not completed fifth grade, or be age 10 but not yet 11½.

A pack may register with only Tiger Cub members, only Cub Scout members, only Webelos members or any combination of the grade groups, as long as the pack has the appropriate adult leadership. A boy may remain in Cub Scouting until he is 11½ years of age or has completed the fifth grade, whichever comes later.

### FORMS USED IN THIS PROGRAM

Charter Organization Discussion Agreement . . . . .	524-182 (BSA Info and <a href="http://scouting.org/forms">scouting.org/forms</a> )
Transfer Form . . . . .	524-401 (BSA Info and <a href="http://scouting.org/forms">scouting.org/forms</a> )
New-Unit Application. . . . .	524-402 ( <a href="http://scouting.org/forms">scouting.org/forms</a> )
Membership Certificate. . . . .	524-404
Youth Membership Application . . . . .	524-406 or <b>(Spanish)</b> 524-423
Charter Certificate. . . . .	524-407
Charter Renewal Envelope . . . . .	524-410
Additional Registrants . . . . .	28-412 (BSA info only)
Unit Renewal Instructions. . . . .	524-420 (BSA Info and <a href="http://scouting.org/forms">scouting.org/forms</a> )
Charter Renewal Overflow Page. . . . .	524-421 (BSA Info and <a href="http://scouting.org/forms">scouting.org/forms</a> )
Adult Application . . . . .	524-501 or <b>(Spanish)</b> 524-502

All paid Cub Scout leaders will receive *Scouting* magazine.

### PACK REGISTRATION CLARIFICATION

- Packs registering with Tiger Cubs must indicate a Tiger Cub adult partner for each Tiger Cub (first grade).
- All packs must have one Cubmaster, one chartered organization representative, one committee chairman, two committee members (or one committee member and one pack trainer), and one den leader who may be a Tiger Cub den leader, a Cub Scout den leader, or a Webelos den leader.

### Optional Positions

CA	Assistant Cubmaster
DA	Assistant den leader
WA	Assistant Webelos den leader
PC	Parent Coordinator
PT	Pack trainer
91U	Unit Scout Reserve
92U	Unit College Scouter Reserve

## TIGER CUBS

Tiger Cubs is for boys who are under the age of 8 who have completed kindergarten, or are in the first grade, or are age 7, and their adult partners. The adult partner must be 18 or older. If the adult partner is not the parent or guardian living at the same address, an adult application must be completed. Noncustodial partners ***must completely fill out*** an adult application and have complete approval for BSA membership.

The Tiger Cub registration fee for the boy is \$24 per year, or \$2.00 a month, and can be prorated from the date of joining up to the renewal date. Tiger Cub den leader, position code "TL," is a **pack** position. The individual ***must*** be at least 21 years of age and may be male or female.

To graduate the Tiger Cub to a Cub Scout in the same pack, change the Tiger Cub's grade from first to second grade and add the rank. A Tiger Cub may graduate to Cub Scouts ***without*** an *additional fee*; however, if a Tiger Cub transfers to another Cub Scout pack, he must complete an application. Please complete the transfer information box (council number, program, Cub Scout pack number) at the top of the Cub Scout application. Tiger Cub adults who become adult leaders in the pack ***must*** complete an adult application and pay the same prorated adult registration fee as new Cub Scout adult leaders. The adult partner (AP) cannot transfer to a registered position; a new adult application is required and has to be approved.

# BOY SCOUTING

## PROGRAM REQUIREMENTS AND QUALIFICATIONS

### UNIT REQUIREMENTS

Minimum leadership positions . . . . .CR, CC, 2 MCs, SM  
Can have . . . . .SA, PC, 10 (LDS troop only), 91U, 92U  
Minimum youth members needed . . . . .Five paid  
Standard renewal date required? . . . . .No  
Exceptions to standard requirements . . . .Units may register with as few as two paid male youth members with prior permission of the Scout executive  
Term . . . . .Minimum six months, maximum 18 months

### ADULT LEADERSHIP REQUIREMENTS

Minimum age . . . . .21, except SA, 92U, who may be 18  
Gender limitations. . . . .Male or female  
Transfers allowed? . . . . .Yes  
Multiple registrations allowed?. . . . .Yes\*  
Membership fee for 12 months. . . . . \$24 per year  
*Boys' Life* subscription for 12 months . . . \$12  
Exceptions to standard requirements . . . .None

\*A registered adult in a troop who is age 18 may multiple in a crew as a youth member. He/she must fill out a separate youth application.

### YOUTH MEMBERSHIP REQUIREMENTS

Age . . . . .11 to 17  
Grade. . . . .Completed the fifth grade and be at least 10 years old, or be age 11, or have earned the Arrow of Light Award and be at least 10 years old, but have not reached age 18  
Gender. . . . .Male only  
Transfers allowed? . . . . .Yes  
Multiple registrations allowed?. . . . .Yes, with crew, ship, team, or troop

Membership fee for 12 months . . . . . \$24 per year

*Boys' Life* subscription for 12 months . . . \$12

**Arrow of Light Award:** The requirements for the Arrow of Light Award state that a boy must be active in a Webelos den for at least six months since completing the fourth grade (or for at least six months since becoming 10 years old), and earn the Webelos badge. The requirement means that a Webelos Scout may not earn the Arrow of Light Award as a fourth-grader unless he is at least 10½ years old.

### FORMS USED IN THIS PROGRAM

Charter Organization Discussion . . . . . 524-182 (BSA Info and [scouting.org/forms](http://scouting.org/forms))

Transfer Form . . . . . 524-401 (BSA Info and [scouting.org/forms](http://scouting.org/forms))

New-Unit Application . . . . . 524-402 ([scouting.org/forms](http://scouting.org/forms))

Membership Certificate . . . . . 524-404

Youth Membership Application . . . . . 524-406 or (**Spanish**) 524-423

Charter Certificate . . . . . 524-407

Charter Renewal Envelope . . . . . 524-410

Additional Registrants . . . . . 28-412 (BSA info only)

Unit Renewal Instructions . . . . . 524-420 (BSA Info and [scouting.org/forms](http://scouting.org/forms))

Charter Renewal Overflow Page . . . . . 524-421 (BSA Info and [scouting.org/forms](http://scouting.org/forms))

Adult Application . . . . . 524-501 or (**Spanish**) 524-502

All paid Boy Scout leaders will receive *Scouting* magazine.

# VARSIITY SCOUTING

## PROGRAM REQUIREMENTS AND QUALIFICATIONS

### UNIT REQUIREMENTS

- Minimum leadership positions . . . . . CR, CC, 2 MCs, VC
- Can have . . . . . VA, PC, 91U, 92U
- Minimum youth members needed . . . . . Five paid
- Standard renewal date required? . . . . . No
- Exceptions to standard requirements . . . . Units may register with as few as two paid male youth members with prior permission of the Scout executive
- Term . . . . . Minimum six months, maximum 18 months

### ADULT LEADERSHIP REQUIREMENTS

- Minimum age . . . . . 21, except VA, 92U, who may be 18
  - Gender limitations. . . . . Male or female
  - Transfers allowed? . . . . . Yes
  - Multiple registrations allowed? . . . . . Yes\*
  - Membership fee for 12 months . . . . . \$24 per year
  - Boys' Life* subscription for 12 months . . . \$12
  - Exceptions to standard requirements . . . . None
- \*A registered adult in a team who is age 18 may multiple in a crew as a youth member. He/she must fill out a separate youth application.

### YOUTH MEMBERSHIP REQUIREMENTS

- Age . . . . . Must be at least age 14 but not yet age 18
- Gender. . . . . Male only
- Transfers allowed? . . . . . Yes
- Multiple registrations allowed . . . . . Yes, with crew, ship, troop, or team
- Membership fee for 12 months . . . . . \$24 per year
- Boys' Life* subscription for 12 months . . . \$12

## FORMS USED IN THIS PROGRAM

Charter Organization Discussion . . . . .	524-182 (BSA Info and <a href="http://scouting.org/forms">scouting.org/forms</a> )
Transfer Form . . . . .	524-401 (BSA Info and <a href="http://scouting.org/forms">scouting.org/forms</a> )
New-Unit Application. . . . .	524-402 ( <a href="http://scouting.org/forms">scouting.org/forms</a> )
Membership Certificate. . . . .	524-404
Youth Membership Application . . . . .	524-406 or ( <b>Spanish</b> ) 524-423
Charter Certificate. . . . .	524-407
Charter Renewal Envelope . . . . .	524-410
Additional Registrants . . . . .	28-412 (BSA Info only)
Unit Renewal Instructions. . . . .	524-420 (BSA Info and <a href="http://scouting.org/forms">scouting.org/forms</a> )
Charter Renewal Overflow Page. . . . .	524-421 (BSA Info and <a href="http://scouting.org/forms">scouting.org/forms</a> )
Adult Application . . . . .	524-501 or ( <b>Spanish</b> ) 524-502

All paid Varsity Scout leaders will receive *Scouting* magazine.



# VENTURING

## PROGRAM REQUIREMENTS AND QUALIFICATIONS

### UNIT REQUIREMENTS

- Minimum leadership positions . . . . . CR, CC, 2 MCs, NL
- Can have . . . . . NA, PC, 91U, 92V
- Minimum youth members needed . . . . . Five paid
- Standard renewal date required? . . . . . No
- Exceptions to standard requirements . . . . Units may register with as few as two paid youth members  
with prior permission of the Scout executive
- Term . . . . . Minimum six months, maximum 18 months

### ADULT LEADERSHIP REQUIREMENTS

- Minimum age . . . . . 21
- Gender limitations. . . . . Male or female
- Transfers allowed? . . . . . Yes
- Multiple registrations allowed? . . . . . Yes
- Membership fee for 12 months . . . . . \$24 per year
- Boys' Life* subscription for 12 months . . . \$12
- Exceptions to standard requirements . . . . None

### MEMBERSHIP REQUIREMENTS

- Age . . . . . 13 to 20 and have completed the eighth grade OR 14 years of  
age and not yet 21
- Gender. . . . . Male and female
- Transfers allowed? . . . . . Yes
- Multiple registrations allowed . . . . . Yes, with ship, troop (male only), crew, or team (male only)
- Membership fee for 12 months . . . . . \$24 per year
- Boys' Life* subscription for 12 months . . . \$12

**A Venturer registered in a crew or ship prior to age 21 may continue as a member at age 21 until the crew or ship recharter or until age 22, whichever comes first.**

## FORMS USED IN THIS PROGRAM

Charter Organization Discussion Agreement . . . . .	524-182 (BSA Info and <a href="http://scouting.org/forms">scouting.org/forms</a> )
Transfer Form . . . . .	524-401 (BSA Info and <a href="http://scouting.org/forms">scouting.org/forms</a> )
New-Unit Application. . . . .	524-402 ( <a href="http://scouting.org/forms">scouting.org/forms</a> )
Youth Membership Application . . . . .	524-406 or <b>(Spanish)</b> 524-423
Charter Renewal Envelope . . . . .	524-410
Additional Registrants . . . . .	28-412 (BSA Info only)
Unit Renewal Instructions. . . . .	524-420 (BSA Info and <a href="http://scouting.org/forms">scouting.org/forms</a> )
Charter Renewal Overflow Page. . . . .	524-421 (BSA Info and <a href="http://scouting.org/forms">scouting.org/forms</a> )
Adult Application . . . . .	524-501 or <b>(Spanish)</b> 524-502

All paid Venturing leaders will receive *Scouting* magazine.

# SEA SCOUT SHIP

## PROGRAM REQUIREMENTS AND QUALIFICATIONS

### UNIT REQUIREMENTS

Minimum leadership positions . . . . .CR, CC, 2 MCs, SK  
Can have . . . . .MT, PC, 91U, 92V  
Minimum youth members needed . . . . .Five paid  
Standard renewal date required? . . . . .No  
Exceptions to standard requirements . . . .Units may register with as few as two paid youth members  
with prior permission of the Scout executive  
Term . . . . .Minimum six months, maximum 18 months

### Adult Leadership Requirements

Minimum age . . . . .21  
Gender . . . . .Male or female  
Transfers allowed? . . . . .Yes  
Multiple registrations allowed? . . . . .Yes  
Membership fee for 12 months . . . . . \$24 per year  
*Boys' Life* subscription for 12 months . . . \$12  
Exceptions to standard requirements . . . .None

### YOUTH MEMBERSHIP REQUIREMENTS

Age . . . . .13 to 21 and have completed the eighth grade OR 14 years of  
age and not yet 21  
Gender . . . . .Male or female  
Transfers allowed? . . . . .Yes  
Multiple registrations allowed . . . . . Yes, with crew, troop (male only), team (male only), or ship  
Membership fee for 12 months . . . . . \$24 per year  
*Boys' Life* subscription for 12 months . . . \$12

**A Sea Scout registered in a ship prior to age 21 may continue as a member at age 21 until the ship recharterers or until age 22, whichever comes first.**

## FORMS USED IN THIS PROGRAM

Charter Organization Discussion Agreement . . . . .	524-182 (BSA Info and <a href="http://scouting.org/forms">scouting.org/forms</a> )
Transfer Form . . . . .	524-401 (BSA Info and <a href="http://scouting.org/forms">scouting.org/forms</a> )
New-Unit Application. . . . .	524-402 ( <a href="http://scouting.org/forms">scouting.org/forms</a> )
Youth Membership Application . . . . .	524-406 or <b>(Spanish)</b> 524-423
Charter Renewal Envelope . . . . .	524-410
Additional Registrants . . . . .	28-412 (BSA info only)
Unit Renewal Instructions. . . . .	524-420 (BSA Info and <a href="http://scouting.org/forms">scouting.org/forms</a> )
Charter Renewal Overflow Page. . . . .	524-421 (BSA Info and <a href="http://scouting.org/forms">scouting.org/forms</a> )
Adult Application . . . . .	524-501 or <b>(Spanish)</b> 524-502

All paid Sea Scout leaders will receive *Scouting* magazine.

# LONE CUB SCOUTS

## PROGRAM REQUIREMENTS AND QUALIFICATIONS

This program is available for Cub Scout–age boys who do not have access to traditional Scouting units.

Boys who are eligible to become Lone Cub Scouts include:

- Boys being home schooled
- Sons of American citizens who live abroad
- Male exchange students away from the United States for a year or more
- Boys with disabilities that may prevent them from attending regular meetings of packs and troops
- Boys in rural communities who live far from a Scouting unit
- Sons of migratory farm workers
- Boys who attend special schools, night schools, or boarding schools
- Boys who have jobs that conflict with den or pack meetings
- Boys whose families frequently travel, such as circus families, families who live on boats, and so on
- Boys who alternate living arrangements with parents who live in different communities
- Boys who are unable to attend unit meetings because of life-threatening communicable diseases
- Boys whose parents believe their child might be endangered in getting to Scout unit meetings

To register a Lone Cub Scout, the only requirement is there must be a Lone Cub Scout friend and counselor and a youth member. Leadership is provided by an adult who is at least 21 years old.

The Lone Cub Scout friend and counselor is position code 88. All Lone Cub Scout friend and counselors receive *Scouting* magazine. Youth members use Youth Membership Application, No. 524-406, and Youth Membership Application (Spanish), No. 524-423; adult leaders use Adult Application, No. 524-501, and Adult Application (Spanish), No. 524-502.

A Lone Cub Scout and counselor may register for a term of six months to 18 months and may expire at any time. To renew a Lone Cub Scout and counselor, the youth and the adult must submit a new application each year.

# LONE BOY SCOUTS

## PROGRAM REQUIREMENTS AND QUALIFICATIONS

This program is available for Boy Scout–age boys who do not have access to traditional Scouting units.

Boys who are eligible to become Lone Boy Scouts include:

- Boys being home schooled
- Sons of American citizens who live abroad
- Male exchange students away from the United States for a year or more
- Boys with disabilities that may prevent them from attending regular meetings of packs and troops
- Boys in rural communities who live far from a Scouting unit
- Sons of migratory farm workers
- Boys who attend special schools, night schools, or boarding schools
- Boys who have jobs that conflict with troop meetings
- Boys whose families frequently travel, such as circus families, families who live on boats, and so on
- Boys who alternate living arrangements with parents who live in different communities
- Boys who are unable to attend unit meetings because of life-threatening communicable diseases
- Boys whose parents believe their child might be endangered in getting to Scout unit meetings

To register a Lone Boy Scout, the only requirement is there must be a Lone Boy Scout friend and counselor and a youth member. Leadership is provided by an adult at least 21 years old.

The position code for Lone Boy Scout friend and counselor is 96. All Lone Boy Scout friend and counselors receive *Scouting* magazine. Youth members use Youth Membership Application, No. 524-406, and Youth Membership Application (Spanish), No. 524-423; adult leaders use Adult Application, No. 524-501, and Adult Application (Spanish), No. 524-502.

A Lone Boy Scout and counselor may register for a term of six months to 18 months and may expire at any time. To renew a Lone Boy Scout and counselor, the youth and the adult must submit a new application each year.

# REGISTERING MEMBERS AND LEADERS

## LEADER AGE REQUIREMENTS—MALE AND FEMALE

Please be certain all leaders meet the following age requirements. With the exception of the following positions, which require a minimum age of 18, all adult leaders in units must be 21 years old or older:

Assistant Scoutmaster	Assistant den leader	Tiger Cub adult
Assistant Cubmaster	Assistant Webelos den leader	Assistant Varsity Coach

All adult positions are open to male and female applicants. There is no gender restriction on any adult position at any level in the organization.

## ADULT APPLICATION

An Adult Application must be completed by every adult who registers for the first time with the Boy Scouts of America. Any adult who moves from one position or unit to another must complete an application. This is necessary so that the applicant's past history, strengths and weaknesses, and other characteristics can be reviewed. The appropriate individuals must approve each application. The application should be completed in full whenever the registration involves a new chartered organization, a new district location, changing positions during the year, transferring from one unit or district to another, or multiplying in another unit. References must be provided and all questions on the application must be answered. On item #6, if a question is circled "yes," then this should be brought to the attention of the Scout executive. Follow up with any questions related to the responses.

## LEADERSHIP APPROVAL

Excluding the unit committee chair and the chartered organization representative, all unit adult applications must be approved by the unit committee chair. The chartered organization representative must be approved by the head of the chartered organization. The head of the chartered organization or the chartered organization representative must approve all unit adult applications for leadership. The local council Scout executive (or a designee) must accept the applications for membership of all unit personnel and approve all applications for council and district Scouters. Most Scout executives have the district executives serve as the council designee for unit adult applications.

## YOUTH APPLICATIONS

A Youth Member Application must be completed for every youth who registers for the first time with the Boy Scouts of America. Any youth who moves from one unit to another or one council to another must complete a new application.

The Cub Scout application, Boy Scout application, and Varsity application must be signed by a parent or guardian approving the youth's participation and signed by the Cubmaster, Scoutmaster, or Varsity Scout Coach, respectively. The Venturing application must be signed by a parent (if the Venturer is under 18 years), the Venturing crew member and the Skipper or Advisor.

The unit leader's or designee's signature must be on all youth applications. If the unit leader is not available, the application could be signed by a unit representative.

All applications shall be submitted on official forms prepared for that purpose and carrying due reference to the requirements and provisions of the Boy Scouts of America (see Article XI, Section 3, clause 11 of the *Rules and Regulations of the Boy Scouts of America*).

## NAMES AND ADDRESSES

1. All applications must have the applicant's full name and address, including city, state, and zip code. This rule applies to all registered youth members and adults, so that all individuals receive their proper mailings.
2. All registration applications must indicate the full legal name. Always use this for names on applications, rosters, and overflow pages.
3. Each registering member's full name should be entered on the application and computer. Do not use Mr. or Mrs. as the first name for adults, and do not use initials or nicknames for youth members.

**The date of birth for all youth members and adults is necessary for identification and for accurate statistical reporting. All Venturing members should be identified as male or female.** This information is used for statistical reports and program analysis.

### Individual Addresses

It is important that a complete and correct address be entered for each registered youth and adult.

When an individual moves from your council territory, we recommend that you enter the new address which you are given. An individual pays the registration fee until the renewal date of that particular unit. Since most mailings are done on a bulk basis, the cost to you should be insignificant. The "no mail" flag may be used, if desired.

If an individual requests to be removed from membership, we suggest that the individual's record be expired. However, this deletion request should be obtained in writing so that you know from where the request originated.



# FEES

## UNIT LIABILITY INSURANCE FEE

All units are required to pay a \$40 Unit Liability Insurance Fee when registering or reregistering. The 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.

## ADULT AND YOUTH MEMBER FEES

The registration fee for both youth and adult is \$24 per year, or \$2 a month.

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.

## COUNTING FEES FOR NEW UNITS

The fee for a new unit should be included in the business for the month in which the unit is to be registered and the month the unit expires. Example: A unit registering in January should be included in January of the current year's business and expire January of the next year; the term should be 13 months, because you count the beginning month and the ending month.

Number of Months	Months
1	January (current year)
2	February
3	March
4	April
5	May
6	June
7	July
8	August
9	September
10	October
11	November
12	December
13	January (next year)

## NEW AND S-R UNIT FEES

Any unit registering as new or separated-reregistered must pay registration fees for the month in which that unit is transmitted. It must also pay registration fees for the months of renewal.

For example, a unit transmitted in November of this year with a renewal date in November of next year must count this November and every month through next November. The registration fee would be for 13 months.

The registration fee must be paid so that individual members receive credit and tenure for that particular month. Individuals are technically not covered by unit accident insurance or eligible for advancement during months for which no fees are paid.

## **MULTIPLE REGISTRATIONS**

### **Adult**

The chartered organization representative (CR) and the parent coordinator (PC), are the only individuals who can be registered in more than one position within the same unit. The CR and the PC may also serve in a multiple capacity, with the CR as the chair or member of the committee and the PC as the chartered organization representative within that unit if there are not enough adults registered for these positions.

Other adults may register in only one position per unit. If a unit feels that better service can be provided by an adult already serving in another unit, that individual may still hold only one position in each unit. There are no restrictions on the number of positions one person may hold as long as the individual serves only one position per unit. In any case, most individuals do their best job if serving in only one position.

Adults should pay a fee in only one position per year in traditional programs and be considered multiple in any other position in which they serve.

Multiple adults should have their position code circled on their registration application so that they are processed as multiple and not counted twice in the membership totals. Multiple adults only receive membership certificates and *Scouting* magazine subscriptions for their paid position.

### **Youth Members**

Individuals who are registered as Boy Scouts may multiple register as members of a Venturing crew, a Varsity Scout team, a Boy Scout troop, or a Sea Scout ship. Members of a Cub Scout pack may multiple register in another pack.

A youth can multiple across councils. A registration fee has to be paid for the youth to serve in both councils.

A multiple youth will not receive a certificate in his multiple registration or be counted in membership totals. A certificate will be issued and a count made in the unit where the fee is paid.

Girls who are Venturers or Sea Scouts **may not** register in a troop or team.

Multiple youth may be listed on charter renewals or on individual applications. On the charter renewals, their names should be circled. On individual applications, indicate an "M" for multiple immediately under the birth date and circle the "M." A youth member in a crew can multiple register as an adult in a troop as an assistant Scoutmaster.

## DUPLICATE REGISTRATIONS

Members should only be registered in units where they are actively participating.

No one should be registered in a unit without their knowledge and consent.

Care should be used when transferring members from one unit to another so that membership is not duplicated. Use the “look up” (binocular) feature in PAS to be sure members are not already registered elsewhere.

## IN-COUNCIL TRANSFERS

If an applicant has an unexpired registration certificate from one unit, he may transfer to any other unit, district, or council position by completing an application. The certificate should be presented with the new application so that the council can verify that the registration certificate has not lapsed.

A youth transferring to an adult position in the *same unit must* complete an Adult Application and Disclosure/Authorization form. The member should be transferred by following the transfer procedures explained below. If the youth has been receiving *Boys' Life* magazine, the magazine service will continue. Do not add *Boys' Life* unless the individual is paying for the subscription at the time of the transfer.

An individual transferring from one adult position to another within the same unit must complete an Adult Application and Disclosure/Authorization form, except at recharter time.

The Transfer Form, No. 524-401, is used to list the record of an adult or youth member transferring from one unit to another in the same or different council. It should not be used to separate or add an individual from or to a unit. It should be used only by the unit leaders of the units involved. The unit leader should not send the transfer form to the council service center unless an adult or youth is leaving the council area. If the adult or youth is leaving the council area, the council should send the transfer form to the new council, not to the national office.

A transferred membership is considered a paying registration.

When an individual transfers from one unit to another, do not expire the individual. Simply transfer the individual from one unit to another so that the record moves to the new unit.

To transfer an individual with an active status from one unit to another, go into Additional Enrollment and key in the unit they should transfer to. When the Add Unit Registrant screen appears, click on the Transfer Registrant button at the bottom of the screen. This will bring up the search screen; key in the program and unit number the individual is coming from. Once the Unit Registrants screen appears, find the individual that needs to be transferred, select the person, click OK; this will allow you to transfer the individual from the unit they are transferring from and into the new unit.

## OUT-OF-COUNCIL TRANSFERS

For an out-of-council transfer, go into Additional Enrollment and key in the unit they should transfer to. When the Add Unit Registrant screen appears, click in the transfer box on the same line as the name of the individual. This will allow the system to register the member in the new unit in your council. **Do not use this method for in-council transfers.**

### **Transfer, Then Add *Boys' Life***

If an individual wants to transfer from one unit to another unit and begin receiving *Boys' Life* magazine, complete the transfer transaction first, post the transaction, then add the *Boys' Life* subscription under the Add *Boys' Life* Subscription form. This will give the individual the correct start and expiration date for his or her subscription.

If an individual with a *Boys' Life* subscription transfers from one unit to another and wants to extend the *Boys' Life* subscription to match the new unit, this process **cannot** be completed online. Complete a *Boys' Life* Subscription Order form, No. 524-804, and send it with a council check to Subscription Customer Service.

# **JOURNEY TO EXCELLENCE UNIT PROGRAM**

Units will receive Journey to Excellence recognition on an annual basis at the time of their charter renewal. This is different from Centennial Quality recognition, which was at the end of the year. There are no goals to be set. Units will work from their Journey to Excellence scorecard and achieve the requirements throughout their charter year, and then complete the scorecard at the same time they are doing their charter renewal. There are two ways to achieve the requirements: one is to meet or exceed a determined standard and the other is to show improvement in that requirement.

There are three levels of achievement. The Bronze level is satisfactory performance, Silver level is excellent performance, and Gold level is outstanding performance. The goal of Journey to Excellence is continuous improvement.

There are different scorecards for packs, troops, teams, crews, and ships, and all are color-coded to the program. The forms are online on MyBSA and also on scouting.org. All other materials developed for Journey to Excellence are also online in both locations.

Award ribbons will be available, as will other items that Supply Group develops.

## **COUNTING JOURNEY TO EXCELLENCE UNITS**

Journey to Excellence units will be counted on the District Totals Report (DT) and the Objectives Progress Report (OPR). Both reports will show the cumulative number of units attaining Journey to Excellence on a monthly basis, following their charter renewal date.

## **JOURNEY TO EXCELLENCE STATUS FOR NEW UNITS**

New units organized during the year can earn the award the first year. Because they have no history to compare to, they will achieve the award by meeting or exceeding the determined standards. The second year, they will be able to achieve recognition by meeting or exceeding the determined standards or by showing improvement.

## UNIT DEPOSIT ACCOUNTS

Many councils administer a unit deposit plan to expedite the handling of registrations, *Boys' Life* subscriptions, and orders for badges, insignia, and supplies. A unit makes a deposit to its unit account for credit in the council office. Orders may then be placed by mail, telephone, or in person and the charges deducted from the account. No supplies are sent, or registrations processed, unless there are adequate funds on deposit to take care of the full transaction.

Such a deposit plan makes it convenient for unit leaders to handle small transactions. It is particularly helpful for encouraging prompt registrations under the current procedures. It could be instrumental in helping the council meet membership and *Boys' Life* goals. References and procedures for setting up a unit deposit plan can be found in the *Council Operations Manual* and the *Local Council Accounting Manual*.

# COMMUNICATIONS

## COMMUNICATION WITH THE NATIONAL OFFICE

Your council number is your **address**. Please be certain it is correct on all documents sent to the national office.

When inquiring about a unit or member, give the **program type and the unit number and/or member ID number**. This will ensure that the inquiry will be handled promptly and correctly.

The national office uses “pouch mail” for sending mail to local councils. This mailing is done each Friday. When heavy mail volume is encountered, pouch mailing may occur more frequently.

When you receive the weekly pouch mail in your office, please make certain it is opened carefully. We find damage occurring to Eagle certificates, letters, and other materials that are on top of the cartons. Use care to prevent damage, which delays service to members.

## MEMBERSHIP RESOURCES WATS NUMBER

Use our WATS number, 800-888-4705, for assistance with registration business. When calling, be prepared to give us all the pertinent information related to your question. Have all pertinent information handy: your council number, the program type and unit number, district name, renewal date, EFT transmittal date, and names, addresses, and positions of individuals.

**Remember, the Membership Resources WATS number is restricted for your council service center use and should not be given to volunteers or any individuals other than your council service center personnel and professional staff members.**

This particular number is for Membership Resources business only; therefore, we cannot transfer WATS calls from this line to other departments at the national office.

You may also contact us via the following emails or by fax at 972-580-2416.

**Central Region** – *correspondenceCR@scouting.org*

**Northeast Region** – *correspondenceNR@scouting.org*

**Southern Region** – *correspondenceSR@scouting.org*

**Western Region** – *correspondenceWR@scouting.org*

**Registration Form Orders** – *membershipforms@scouting.org*

**Veteran** – *veteran.awards@scouting.org*

**Statistical Request** – *statistical.request@scouting.org*

## **HELP DESK**

Please call the National Support Center at 855-707-2644 if your problem does not concern registration policy, procedures, or information.

**Volunteers** – 972-580-2644

## **DEATH OF A MEMBER**

When there is a death of a member, flag them as *deceased* in ScoutNET. If that person was receiving *Scouting* or *Boys' Life* magazine, then notify Subscription at 972-580-2088 immediately with the person's name, address, unit, and council.

## **LOCAL COUNCIL REPRESENTATIVES**

The National Council members allotted to each council are as follows: "The duly elected president and council commissioner of a local council shall, during the term of office, be members of the National Council. Each local council may, in addition, elect one of its members as a member of the National Council for every 5,000 Cub Scouts, Boy Scouts, Varsity Scouts and Venturers or major portion thereof (2,501 youth members or more), enrolled as of December 31 of the preceding year according to the records for the corporation." These persons should be listed on a National Council Member Roster, No. 524-510. This roster should be submitted to Membership Resources at the time that all council and district renewal rosters are completed; a copy should also be filed with the region. National Council members must be registered and pay fees in a council or unit position. They do not pay as members of the National Council.

Please inform the Membership Resources when any of these individuals change address or when the status of an individual serving in this capacity changes. This procedure will keep the mailing list up to date and ensure that members receive the proper mailings.



# COUNCIL/DISTRICT SCOUTERS (NON-UNIT REGISTRANTS)

## PROGRAM REQUIREMENTS AND QUALIFICATIONS

The following positions are non-unit positions. Those holding positions may be male or female and must be at least age 21, except as noted below.

Council Registrations	Code	District Registrations	Code
President	11	Merit badge counselor†	42
Vice president	12	Camp staff*	49
Treasurer	13	Supernova mentor	52
Assistant treasurer	14	Nova counselor	58
Council commissioner	15	District chair	61
Assistant council commissioner	16	District vice chair	62
Executive board member	41	Neighborhood chair	64
Honorary member	44	Neighborhood committee	65
Associate member	45	District member at large	75
Advisory council	46	Unit commissioner	80
Council committee member	47	District commissioner	81
Council member at large	48	Assistant district commissioner	82
Scout supplier	87	Roundtable commissioner	83
Scouting alumnus	95	Assistant Roundtable commissioner	84
		Scouter reserve	91
		College Scouter reserve‡	92

Unit commissioners are counted on the Objectives Progress Report whether they are paid or multiple registered.

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Note: Non-unit registrants have no lapsed period.

\*The minimum age to serve on day camp or resident camp staff (49) is addressed in the current National Camp Standards. Refer to 2010 National Camp Standards for Resident Camps, No. 430-111, M-29, and 2010 National Standards for Day Camps, No. 430-109, M-33 and M-44. Youth are expected to complete a Youth Member Application, and register through their established unit, an approved camp staff unit that meets on a regular basis, or be directed to enroll in an existing unit. Adult camp staff are 18 years of age or older and **must** complete an Adult Application.

†Merit badge counselors must be at least 18 years old.

‡College Scouter reserve must be an active college student and at least 18 years of age.

## **COUNCIL AND DISTRICT SCOUTERS**

Council and district Scouters should register during the year using an Adult Application, No. 524-501. The position names and position numbers are listed under Council/District Scouters' Program Requirements and Qualifications on the previous page.

The registration for council and district Scouters should be processed yearly. A renewal roster is produced each year for the purpose of reregistering the individuals in the district. There is no lapsed period for non-unit registrants.

### **College Scouter Reserve (Code 92) or Unit College Scouter Reserve (Code 92U) or Venturing College Scouter Reserve (Code 92V)**

College students may register each year to maintain a Scouting affiliation. If they are not active in a unit, they may register as a College Scouter Reserve at the district or council level. This registration is open to both male and female students and has a minimum age requirement of 18. Because *Scouting* magazine is included in the registration fee, the application should indicate the college address.

College students who wish to keep an affiliation with a traditional Scouting unit such as a pack, troop, or team may register with their unit as a Unit College Scouter Reserve with the minimum age requirement of 18. College students who wish to keep an affiliation with a crew or ship may register as a Venturing College Scouter Reserve with the minimum age requirement of 21. These positions have all the same application requirements as any other adult volunteer, including a criminal background check, but the only training requirement is Youth Protection training.

### **Scouting Alumnus (Code 95) or Scouter Reserve (Code 91) or Unit Scouter Reserve (Code 91U)**

Individuals who wish to keep an affiliation with Scouting but are not presently able to serve actively may register as a Scouting Alumnus or Scouter Reserve at the district or council level. Adults who have no immediate specific leadership role but wish to officially register with a specific unit may register as a Unit Scouter Reserve in packs, troops, teams, crews, and ships.

### **District Member at Large (Code 75)**

District members at large are voting members of the district committee. They are nominated by the district nominating committee and are duly elected by the district committee. They may be elected either at the last district annual meeting or during the interim at a regular duly called monthly district committee meeting. District members at large also usually serve on one of the district's operating committees, appointed there by the district chairman. They may also chair a committee.

### **Nova Counselor (58) and Supernova Mentor (52)**

The new no-fee, non-unit adult leader position code 58, Nova Counselor, is now available in ScoutNet/PAS.

A Nova counselor can be any registered adult age 21 or older. A supernova mentor must be age 21 or older, be a subject matter expert in a STEM (science, technology, engineering, mathematics) field, and be registered under the Supernova Mentor position code 52. In addition to the BSA Adult Registration form, mentors must complete the Supernova Awards Mentor Information Application.

All Nova counselors and Supernova mentors must have current BSA Youth Protection training and certification appropriate for the programs being administered (Cub Scout and Boy Scout Y01, Venturing Y02). More information regarding Nova and Supernova awards, counselors, and mentors can be found at [http://www.scouting.org/stem/Council/Volunteer\\_Support.aspx](http://www.scouting.org/stem/Council/Volunteer_Support.aspx).

## **MERIT BADGE COUNSELORS**

All adults serving as merit badge counselors must be registered as a Merit Badge Counselor, position code 42, in the district they are serving by completing the Adult Application form, No. 524-501, and filing it in the local council. They may choose to pay a registration fee to receive *Scouting* magazine or to pay no fee. However, they must complete the adult application even if no registration fee is paid, for the purpose of processing their name through the computer system and completing a criminal background check. They must be at least 18 years old and qualified to teach their respective merit badge subjects.

The Scout executive or a designee must sign the adult application for merit badge counselors. The advancement chair registered in the district or council should approve the application.

## **PROFESSIONAL, PROFESSIONAL-TECHNICAL, PARAPROFESSIONAL, AND LOCAL COUNCIL EMPLOYEES**

Professional employees must be registered with the Boy Scouts of America. Professional-technical, paraprofessionals, and local council employees (staff) can register but are not required to register. The registration of each individual is entered into the local council computer with a suggested expiration date of December.

Use the designated codes listed on the following page to register professional and other exempt employees. Use code 54 for local council employees. The registration codes are not the same as those used by Human Resources. These registration codes are strictly for the purpose of registration and do not carry any other significance.

During the year, new employees should be registered through additional enrollments, as needed.

All registered adult members of the Boy Scouts of America are checked against a computer file to determine if they are individuals who should not be registered with the Boy Scouts of America.

We strongly recommend that all employees be urged to register. The Scout executive should be made aware of employees who decline to register as members of the Boy Scouts of America. This helps ensure each person meets the moral and ethical guidelines established by the BSA.

Each registered paid individual will receive *Scouting* magazine.

All employees should be contacted for registration each year at renewal time. This is a method of making certain everybody understands the procedure and the reason we are requesting registration. The main reason for employees to register is to keep them informed of Scouting policies and activities through *Scouting* magazine.

All local council employees reregister as non-unit registrants. Print a roster for those coded as local council employees. They are registered as non-unit registrants and follow the same procedures as volunteer non-unit registrants.

## APPROVED PROFESSIONAL POSITION CODES

<u>Code</u>	<u>Other</u>	<u>Position</u>	<u>Type</u>
E31C		Learning for Life Director	O
E33C		Learning for Life Executive	O
E34C		Senior Learning for Life Exec.	O
E38		Paraprofessional LFL Program Aide	O
E39		Paraprofessional LFL Coordinator	O
E10	SE	Scout Executive	P
E20	DFS	Director of Field Service	P
E21	ASE	Assistant Scout Executive	P
E23	BSE	Borough Scout Executive	P
E24	ADFS	Asst. Director of Field Service	P
E30	FD	Field Director	P
E31	LFLD	Learning for Life Director	P
E33	LFLE	Learning for Life Executive	P
E34	SLFLE	Senior Learning for Life Exec.	P
E35	ED	Exploring Director	P
E36	EXFD	Exploring Field Director	P
E40	DLFL	Director Learning for Life	P
E41	DE	District Executive	P
E42	DPP	District Paraprofessional	P
E43	DP	District Preprofessional	P
E44	EE	Exploring Executive	P
E45	DID	District Director	P
E46	PPP	Program Paraprofessional	P
E48	SDE	Senior District Executive	P
E49	SEE	Senior Exploring Executive	P
E50	DSS	Director Support Services	P
E60	DFIS	Director Finance Services	P
E70	DCS	Director Camping Services	P
E80	PD	Program Director	P
E90	CD	Camping Director	P
E91	AD	Activities Director	P
E92	TD	Training Director	P
E93	PRD	Public Relations Director	P
E95	OM	Office Manager	P
E96	BM	Business Manager	P
E97	SPP	Special Position Professional	P
E98	END	Endowment Director	P
E99	FID	Finance Director	P

# RETENTION SCHEDULE

## RULES AND RECOMMENDATIONS FOR MAINTAINING REGISTRATION FILES

Councils should keep four files:

### 1. Current File.

- Current file consists of three years: the present year and the prior two years.
- Current file includes the:
  - original adult applications (which have the Social Security number)
  - New Unit Application
  - current charter renewal
  - youth member applications
  - routing sheet
  - roster
  - correspondence for that unit
- These should be kept in a secured environment, preferably a locked cabinet, restricting access.
- The Scout executive should designate a person to control the access to this file.
- Keep three folders for each unit's registration: one for the current year and one for each of the past two years.
- Set up the files numerically (by unit).
- Use different colors for the programs.
- Place the unit's current application and routing sheet in the current folder after the charter and membership certificates have been sent and the date is noted.
- On the routing sheet, indicate the person to whom the materials were delivered or mailed.
- Keep the current charter renewal and individual adult applications for three years, and the Disclosure/Authorization forms indefinitely for file OR for three years after an adult ceases to be a registered member.
- An expire roster must be printed each year prior to the unit going into lapsed period and before the unit recharter for the next year's placement in the history file. Expire rosters are kept permanently and moved to the history file after the third year in the current file.
- At the start of a new charter year, place the oldest (fourth) year expire roster in the history file and shred the remaining (fourth) year folder contents.
- The expire roster should be placed in the appropriate year folder within the current file.

## 2. History File.

- The history file is the unit's permanent record.
- The history file contains the expire rosters for each unit.
- These files are kept separately from the other files because other people can have access to these files.
- In addition, dead storage can be used for units by having a second history folder for storing old files of active units that have records 10 years old or older.
- History records can also be scanned and transferred to a CD to save space.

## 3. Advancement Report.

- Pack advancement reports are kept for one year.
- Troop advancement reports should be stapled together by year.
- Crew advancement reports should be stapled together by year.
- Team advancement reports should be stapled together by year.
- Keep troop, team, and crew advancement reports for seven years.
- Discard the seventh year as a new year is placed into the files if space is an issue.
- Reports can be generated on the council computer on a unit, district, or council basis.
- At the end of the year, run a total report of the year's advancement and file in the unit's history folder.
- At that time, decide whether to keep last year's advancement reports in file.

## 4. Confidential File.

- The confidential file consists of the reports from the CBC vendor of criminal records of individuals that were not placed on the Ineligible Volunteer File.
- These files should be placed in a locked file cabinet in the Scout executive's office.
- The confidential record should be kept as long as an individual is registered or active.

### **MEMBERSHIP REPORT RETENTION GUIDELINES**

Listed below are the minimum retention times for various registration and membership reports.

1. Unit Expire Roster—**keep permanently**
2. Registration Applications—**three years**
3. Disclosure/Authorization form—**keep permanently OR for three years after an adult ceases to be a registered member**
4. Unit Charter Renewal—**three years**

5. District Totals Report
  - a. Summary Page—**10 years**
  - b. Complete Report—**two to three years**
6. Objective Progress Reports—**three years**
7. EFT Transmittal Report—**three years**
8. Advancement Reports
  - a. Packs—**one year**
  - b. Troops, Teams, and Crews—**seven years**

**For answers to questions pertaining to the retention of membership records and/or reports, please call Membership Resources, 800-888-4705.**

We recommend councils keep the originals according to the published schedule. Digital archiving is a good idea but the council should still keep the required originals. If the originals were destroyed in a disaster, they would still have digital copies.

## **ADVANCEMENT RECORDS**

### **Basic Record**

The basic Scouting advancement records are maintained by the unit. Council records are secondary, but they have a particular value in the promotion and control of the advancement plan in the district and council and provide the necessary information for youth members transferring to another council.

The council can obtain information on the rank of each youth member from the unit charter application. A column has been provided on the application for recording this information.

If the unit loses its record of advancement, the current rank of each member can be obtained from the council service center records.

### **Unit Advancement Report**

The Advancement Report (Pack, Troop, Team, Crew, Ship), No. 34403, is available for reporting unit advancement to the council service center. This triplicate form contains an order form for awards.

One copy is retained by the unit and the other two are forwarded to the council service center with the necessary fees to cover the order for insignia.

Advancement certificates are returned to the unit with the insignia and another advancement report.

The council service center routes one of its two copies to the district executive and retains the other for posting the information to the necessary records.



# MAGAZINES

## ***BOYS' LIFE* MAGAZINE**

Any registered member of the Boy Scouts of America may receive *Boys' Life* at half the regular subscription price. Subscriptions must be made through the unit or council and transmitted to Membership Resources by the local council service center. Cancellation of a subscription **MUST** be requested by letter to Subscription Customer Service. Cancellations cannot be made through ScoutNET.

The member rate is a membership privilege. It may not be used by members for gifts to nonmembers, libraries, or institutions. Local councils, however, may enter subscriptions for Scouting promotional purposes for any organization or individual at the membership rate. Use *Boys' Life* Subscription Order form, No. 524-804, and insert "Council Subs" in the local unit number space.

*Boys' Life* is published 12 times a year, once each month. The membership subscription rate is \$12 per year. The regular subscription rate is \$24 per year. Single copies cost \$3.95.

For foreign subscriptions, add \$21 per year for postage. Addresses with U.S. zip codes or APO and FPO addresses are not considered foreign.

Copies of *Boys' Life* in braille may be obtained directly from the National Library Services for the Blind and Physically Handicapped, Library of Congress, 1291 Taylor Street NW, Washington, DC 20542. The price will be quoted at the time of the order.

Single copies can be obtained through local council service centers or authorized Scouting distributors. Issues may also be ordered directly from Subscription Customer Service at the national office. Councils and distributors may order a bulk shipment at \$1 a copy for resale at \$3.95. Billing will be made through People Soft by circulation.

## ***Boys' Life* Renewal Notices**

As part of the subscription program of *Boys' Life* magazine, subscribers who have not renewed through Scouts may renew at the time the subscription expires. The final issue of every subscription includes a cover wrap to announce that this is the last issue of the current subscription.

All records are held after a subscription expires. Subscribers who have not renewed are given several opportunities to renew. A direct-mail notice is sent out approximately one to three months after expiration. Because of variations in registration information from year to year, it is not possible to eliminate sending notices to all members who have already renewed. The notice should simply be ignored if the subscriber has already renewed and service has not stopped.

## **Subscription Term**

The unit subscription order **MUST** expire two months past the charter renewal date. Additional subscriptions for short-term units must follow the same pattern and expire two months after the charter renewal date. The minimum subscription term is two months. It is recommended that subscriptions start two months after registration entry.

Example: A unit with a March renewal date will have all subscriptions expire with the May issue. (New members added to the roster will start subscriptions with the June issue or later, depending on the month of registration and fee paid). For late registrations, it may be necessary to deliver back issues.

Councils, or units, should tell parents whose sons register as Cub Scouts or Boy Scouts during the charter year that, if they subscribe to *Boys' Life* at that time, the subscriptions will expire two months after the unit charter. Parents who are not aware of this policy become upset when their son receives renewal notices four or five months after the subscription has begun.

Free aids to help establish and continue correct subscription terms are Subscription Customer Service Folder, No. 28-801, *Guidebook for Registration and Boys' Life Fees*, No. 26-105, and Registration and *Boys' Life Fees* (sheets), No. 524-863, which may be given to unit leaders. Request No. 26-105 from *Boys' Life* Circulation Service. The fee sheet, No. 524-863, is found on BSA Info at <http://info.netbsa.org>, under Membership Resources. Individual sheets can be printed from this site.

### ***Boys' Life Subscription Duplications***

Because of overlapping subscriptions, a subscriber may receive two copies of the same issue. Our process is programmed to give an automatic extension. However, variations in names or addresses, or a late subscription sometimes create duplication.

When duplicate copies are received, the subscriber should staple or paste the *Boys' Life* labels from both magazines onto a plain sheet of paper and send it to Subscription Customer Service explaining the problem. If the labels have two different addresses, indicate which address is correct.

### ***Units That Are 100 Percent Boys' Life***

A unit qualifies as a 100 percent *Boys' Life* unit when at least one subscription to *Boys' Life* magazine goes to the **home** of each youth member. Every member in the unit does not have to subscribe to qualify.

### ***Boys' Life for Lapsed (or S-R) Units***

Normal *Boys' Life* magazine service may be affected if a unit charter lapses or is temporarily dropped. If continuous and full service is desired, the full \$12.00 annual subscription fee must be remitted. Subscriptions can be backdated to the beginning of the charter year.

Back issues will be sent to subscribers with the understanding that the copies will be late. If back issues are not available, a refund will be made through the council.

If a unit is registered late because of administrative problems and wishes to pay the back registration fee to maintain unit tenure, it is not necessary that the *Boys' Life* term be the same. For example, a unit that comes to us in the month of May with a February renewal date could start the *Boys' Life* magazine term in July and have it expire at the normal time, two months after the unit renewal date. This would mean that the *Boys' Life* term could run from July through April, for a term of 10 months instead of the usual 12 months. This is perfectly legitimate and eliminates the problem of subscribers receiving several issues of the magazine at the same time. But if they wish to receive continued service, they should purchase the same *Boys' Life* term as registration.

## **Bulk Deliveries**

Bulk deliveries can be made to one leader's address in special situations (see below), but this should be an exception.

The member's subscription rate is an individual membership privilege for members of the Boy Scouts of America through the unit and the local council service center. An institution, a unit committee, or its leadership as a group are not entitled to this special rate except as individual members of the Boy Scouts of America.

Bulk mailings could represent a loss of advertising income that is essential for maintaining a high-quality magazine. Advertisers purchase space on the basis of individual subscribers. Bulk deliveries of *Boys' Life* to Cub Scout, Boy Scout, or Venturing units will be made only under the following circumstances:

1. The Scout executive or a designated staff member gives approval and a reason why copies cannot or should not be mailed to individual members.
2. The order lists the name and address of the registered Scouter to whom all copies are to be mailed.
3. Copies can be ordered only for registered members of the Boy Scouts of America.

Bulk shipments of *Boys' Life* will be sent via postal services to APO and FPO bulk subscribers.

## **SCOUTING MAGAZINE**

The mission of *Scouting* magazine is to keep Scouters informed about the aims, policies, and programs of Scouting. In addition, certain issues contain program helps for Cub Scout and Boy Scout leaders. These program helps are inserted in various issues to assist unit leaders.

The **paid** registration position of the adult will determine which edition he or she receives. All paid registered traditional adults receive *Scouting* magazine as part of the registration fee. The membership and magazine portions of the fees cannot be separated.

For nonmembers, *Scouting* magazine can be purchased for \$9.95 for a one-year subscription. Bulk issues of *Scouting* are available to local councils for purchase. Bulk deliveries of *Scouting* magazine cannot be made to units.

*Scouting* magazine is published five times a year: January/February, March/April, May/June, September-October, and November/December. There is no July/August issue.

## **Change of Address**

A subscriber who changes address should notify the council service center or Subscription Customer Service well in advance of the move. Notifying the local post office is not enough. They will make no change of address. Normally the subscriber should use Post Office Form 3579. An address label or a complete copy of the label should be included to facilitate the adjustment.

## Handling Subscription Inquiries

The BSA's Registration Service handles millions of names for *Boys' Life* and *Scouting* magazines. This tremendous volume of names and addresses, which are sent by the unit through the local council, makes some errors unavoidable. In the interest of Scouting and good service, it is imperative that these errors be corrected immediately.

The Subscription Inquiry form, No. 28-803, should be used by councils for inquiries or concerns about *Boys' Life* or *Scouting* magazine service. Use of this form can help expedite problem solving in the council service center without mailing to the national office. This form may also be used by the local council to handle unit inquiries.

Most inquiries or concerns about *Boys' Life* come from nonreceipt of a magazine. This usually results because of:

1. Nonentry of the subscription order
2. An incorrect or incomplete address
3. Delayed first-copy arrival

Nearly all inquiries can be eliminated by following a few simple procedures:

1. Inform leaders and subscribers about delivery dates at the time the subscription order is placed with the local council service center. Allow six to eight weeks for the first copy to arrive after sending the order to Membership Resources.
2. Send the unit leader a copy of the unit roster, the proper expiration month, and the Registration and Subscription Fee Information forms, No. 524-863.
3. If the charter was received late in the council service center or was late being processed, tell the unit leader; don't pass the blame.

A delay in processing unit charter renewals can cause the first few issues of *Boys' Life* and *Scouting* magazines to arrive late. **It will take six to eight weeks from the time a subscription is entered into the national computer until delivery of the first magazine issue.**

## Preventing Incorrect Addresses

Many incorrect addresses can be prevented by following these procedures:

1. Emphasize the importance of complete and correct mailing addresses (including zip codes) in connection with all registration and *Boys' Life* procedures. Periodically emphasize the importance of correct addresses in the local council bulletins.
2. Charter applications and *Boys' Life* subscription orders in the council service center should be checked immediately for legibility and completeness of address.
3. Provide the complete and correct spelling of city names; do not abbreviate city names.

4. Exercise great care when using ditto marks. The insertion of a new town name should not be followed by ditto marks unless **all** names following reside in that town.
5. If the address will not certify, it's a good possibility the address is invalid.

### **Handling Incorrect Addresses**

The postal service is unable to deliver many thousands of *Boys' Life* and *Scouting* magazines each month because of incorrect addresses. This represents a great number of disappointed youth and adults as well as a sizable expense to the Boy Scouts of America.

*Boys' Life* and *Scouting* magazines pay the postal service to have the label from each copy returned. Upon receipt of a label from the postal service, the record is put in a suspension file, and a notice is sent to the local council service center requesting follow-up and entry of a proper address so that delivery can be made. Prompt action in the local council can save many subscribers from being disappointed.

We suggest the following procedure for suspension notices:

1. Check the member's address against the original copy of the subscription application received from the unit.
2. Telephone or write to the unit leader.
3. Check the telephone directory or telephone the member's home, if necessary.

**Note: No follow-up should be made on subscriptions that expire in the next one or two months.**

**LEARNING FOR LIFE**

**PROCEDURES**

## 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. 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 toward preparing 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, assists in character development, and helps them formulate positive personal values. It prepares youth 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 in instructional settings. These programs can take place in the classroom or after school. The six programs in Learning for Life that use this method include:

- Seekers: Early Childhood–Grade 2
- Discoverers: Grades 3–4
- Challengers: Grades 5–6
- Builders: 7–8 Grades
- Navigators: Grades 9–14
- Champions: for students with mental disabilities (no age or grade requirements)

The second method is work site–based and called Exploring. Exploring is centered around the activity in a business or a community-based organization that has employees engaged in a business or economic activity.

Work site–based Exploring programs are called posts. They are not considered members of the BSA.

Organizations involved in Learning for Life are known as participating organizations. Learning for Life participating organizations are not chartered to the BSA. There are no chartered organization representatives in instructional setting programs or Explorer 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 grade- and age-appropriate, theme-oriented lesson plans have been developed for each grade, pre-kindergarten through sixth. 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.

The 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 positive behavior, foster a sense of belonging, enhance self-esteem, and instill and reward a positive work ethic.

**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.

**Builders:** The junior high school/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 Communication Skills,” “Experiencing Various Career Clusters,” “Recognizing School and Community Needs,” and “Reflecting on Peer and Social Challenges.” There are 44 lesson plans each for grades 7 and 8.

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 assessment.

**Navigators:** This program serves to guide grades 9–14 in making a successful transition from high school into real-world endeavors, including post-secondary education, acquiring a job, being productive citizen, 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 firsthand knowledge of entry-level requirements and conditions, and mid-management views of related careers.

**Exploring:** Exploring is a work site-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.



## **GROUP REGISTRATION**

Learning for Life instructional setting 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 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 to the National Council to use LFL instructional setting programs within the council service area. The annual fee replaces the fees for youth and 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 of the school or organization must be within your council's geographical area. This factor determines which council should serve this 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.

### **Group Numbering**

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

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

### **Group Renewal Dates**

All groups in the Learning for Life program will be listed through September 30 only. There is no short- or long-term and no lapse period. All groups drop after September 30.

### **New Programs**

Councils can organize and process new instructional setting programs at any time during the year until September 30.

## **Participating Organizations**

Most Learning for Life groups are sponsored by boards of education, school districts, and individual schools. Some groups 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, with full address, email, and correct zip code.

Correct organization codes must be on all enrollments. Code lists can be obtained on ScoutNET at <http://info.netbsa.org>. The alphabetical list is No. 28-902 and the numerical list is No. 28-903.

### **Additional Group 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 group is renewed.  
**The organization head's (or their designee's) signature certifies that:**
    - **the organization approves the use of the Learning for Life program**
    - **the organization approves all participating adults listed**
    - **all adults listed are at least 21 years of age**
  - Must include key contact person including email address
2. Learning for Life group certificates are mailed to the lead teacher with a letter from the council LFL chair.

### **Contents of File for Each Group (Maintained in Local Office)**

1. The Annual Memorandum of Understanding, listing participating adults and signed by the principal or designee.
2. Annual Accreditation Award Application worksheet.



## POST RENEWAL INSTRUCTIONS

Review the information listed on the renewal worksheet that is printed from the local office computer.

Cross out any incorrect information and enter the correct information in the blank space directly below or on the proper form as indicated.

The district name and number, subdistrict name and number, county, local post number, status, term (the term may be from six to 18 months and the youth and adult fees would then be prorated) and renewal date can be changed if any are incorrect. The local council approves the change.

The participating organization's name, address, code number, and executive officer's name, address, and phone number can be changed if in error. The participating organization can be changed only with the completion of a Learning for Life Explorer Post Application form, signed by the head of the organization along with the approval of the local council.

The career interest code and description should be entered.

### **Participating Organization Approval by the Executive Officer**

**The signature of the executive officer of the participating organization approves the Exploring program being used by the organization. The executive officer's signature also indicates approval of all adults listed on the worksheet to participate in the Exploring program. (Additional or new adults need to complete a new Learning for Life Adult Application form, which must be signed by the executive officer.)**

### **Post Participation Fees**

- Enter the number of paid youth participants and their fees. Each post must have at least five paid youth participants. The annual fee for Exploring is \$24 per year. The fee may be prorated if the renewal is different than 12 months.
- Enter the number of paid adults and their fees. The annual fee for Exploring adults is \$24 per year. The fee may be prorated if the renewal is different than 12 months.

- Enter the number of multiple adults. Adult participants may not multiple between LFL and BSA. Youth participants may not multiple between LFL and BSA. Youth members and adults may multiple between Explorer Posts.

### **Unit Liability Insurance Fee**

- All organizations participating in Exploring are required to pay the 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.
- Enter total fees required.
- The number of months indicates the completed tenure for this post as of the last renewal date.

If the post is serving a majority of youth with disabilities, indicate the code on the proper line as follows:

- |                            |                            |
|----------------------------|----------------------------|
| <b>V</b> Visual            | <b>O</b> Orthopedic        |
| <b>E</b> Emotional         | <b>D</b> Developmental     |
| <b>H</b> Hearing           | <b>L</b> Learning disabled |
| <b>M</b> Mentally disabled |                            |

### **Explorer Post Adult Participant Listing**

- Go through the computerized Learning for Life renewal roster and draw a line through the name of any adult no longer active in the post. Make sure every active adult in the post is on the list. If any are missing or are new participating adults, they must complete a new Learning for Life Adult Application.
- Check all addresses, phone numbers, and birth dates. Correct any that are wrong or missing.

### **Requirements for Explorer Posts**

The following are paid adult positions that are mandatory for an Explorer post to be accepted:

- |            |                                     |
|------------|-------------------------------------|
| <b>PCC</b> | Post committee chairman (only one)  |
| <b>PMC</b> | Post committee member (minimum two) |
| <b>EA</b>  | Explorer Advisor (only one)         |

The following adult position is optional but strongly encouraged:

- |           |                   |
|-----------|-------------------|
| <b>AA</b> | Associate Advisor |
|-----------|-------------------|

All adults must be 21 years of age or older.

Each post needs to list the executive officer of the organization.

### **Fee Paid in Another Position/Post**

An adult who paid a participation fee as an adult in another Explorer post does not pay a participation fee in this post. Circle the two-letter position code to indicate multiple positions.

## **Additional Renewal Topics**

### **1. Complete the Exploring Annual Memorandum of Understanding.**

- Review the Exploring Annual Memorandum of Understanding with the executive officer of the participating organization.
- The executive officer (or designee) signs the Exploring Annual Memorandum of Understanding.

2. Post and participant certificates are mailed to Explorer Advisors with a letter from the council LFL chair.

## **REGISTERING POSTS**

New Explorer posts must complete the Learning for Life Explorer Post Application, No. 524-565, the Exploring Annual Memorandum of Understanding, and applications for Youth and Adult Exploring participants. Exploring Youth Application forms and Learning for Life Adult Application forms are required. No rosters may be used.

The full name of the participating organization, organization code, and special interest code should be on the Learning for Life Explorer Post Application, No. 524-565.

The physical location of the organization must be within your council's geographical area. This factor determines which council should serve the organization.

The number of youth members should be indicated on the new post application. The youth and adult members' names and addresses are entered into the computer.

## **Post Numbering**

The Explorer post numbers are assigned to the participating organization. Be certain to use the correct four-digit number. Numbers are used by the local Explorer posts to help identify themselves.

## **Annual Renewal Paperwork in the File for Each Post (Maintained in Local Office)**

Each post should have a file that contains the following items for each year of Exploring program participation.

1. The Exploring Annual Memorandum of Understanding, signed by the organization head or designee.
2. Completed Learning for Life renewal roster with signatures of executive officer (or their designee) and post Advisor.
3. Exploring youth and Learning for Life Adult Applications. The Exploring Youth Applications must be signed by the post Advisor. The Learning for Life Adult Application must be signed by the executive officer or their designee. (Include form No. 28-573 for participating adults employed by local, state, or federal governmental agencies that require background checks as a condition of employment. This form is signed by the executive officer or designee and certifies that a background check has been completed for the individuals on the Exploring Adult Participants roster or form.)

4. Copy of the Expired Roster (printed by the local registrar).
5. Completed Exploring Excellence Award application.

## **Explorer Participation Information**

### **Costs**

The cost of Explorer youth and adult participation is \$24 annually. This cost includes liability insurance for adults and can be prorated by month.

### **Transfers**

Youth or adult Explorer participants are allowed to transfer from one post to another. If a youth or adult wishes to move to another post, they must complete an application. If a youth turns 21 and wishes to be listed as an adult, they must pay the prorated fee.

### **Multiple Enrollment**

If an adult is paid in one Explorer post, that adult can multiple enroll in another post without paying another fee.

An adult paying in traditional BSA or school-based Learning for Life groups cannot multiple enroll in Exploring.

Explorers wishing to participate in more than one post can multiple enroll without paying another fee.

### ***Boys' Life Magazine***

When *Boys' Life* magazine is being ordered for a Learning for Life participant, a *Boys' Life*–only form should be filled out.

### **Annual Renewal**

The Explorer Annual Memorandum of Understanding must be made with the participating organization in order to renew the program. The annual renewal cost is \$40. The head of the participating organization or their designee must sign the memorandum. This form is retained in the local council.

An Exploring Post Certificate, No. 524-571, is issued to each organization conducting the Exploring program. Exploring Participant cards, No. 524-572, are issued for each youth and adult participant.

### **Adult Age Requirement**

All adults in Explorer posts must be 21 years of age or older. Males and females are accepted.

## Adult Participation

Each adult who participates in an Explorer post program is required to pay a \$24 annual cost. The head of the organization (or designee) and local council Scout executive (or designee) must approve all adult participation at the council or district level. Adults can subscribe to *Boys' Life* magazine at the special rate of \$12 a year. All new adults must fill out a Learning for Life Adult Application form and the accompanying disclosure/authorization form.

## Adult Positions

Each Explorer post must have a minimum of four adults on the post committee. Each post program is required to have:

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

The following is optional but strongly encouraged:

- AA** Associate Advisor

Adults may be multiple listed if they are already paid in another Explorer post. They must pay if they are listed in another instructional setting Learning for Life program or traditional BSA program. **They cannot be listed in two positions in the same post.**

The PCC (post committee chair) or the IH (executive officer) are not voting positions of the council. Only the chartered organization representative of the traditional units has a voting responsibility in the council.

All youth participants and adult participants must be listed with Learning for Life.

## Post Renewal Dates

Explorer posts may have any month as their month to renew. They may renew for six to 18 months. The fees for adults and youth are prorated based on a cost of \$24 for a 12-month period. A \$40 Unit Liability Insurance Fee is paid each time the program is renewed.

## Participating Organizations

Most Explorer posts' participating organizations are businesses, community groups, or schools.

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, with full address and correct zip code.

### **Disability and Special Interest Codes**

The following codes should be used for Explorer posts with youth participants who are disabled and have special needs:

- |                            |                            |
|----------------------------|----------------------------|
| <b>V</b> Visual            | <b>O</b> Orthopedic        |
| <b>E</b> Emotional         | <b>D</b> Developmental     |
| <b>H</b> Hearing           | <b>L</b> Learning disabled |
| <b>M</b> Mentally disabled |                            |

Special interest codes identify the type of career specialty that the post programs will emphasize. Explorer career interest codes are four-digit numbers.

### **Additional Participants**

The additional youth enrollments during the year should be received with participants being listed on the Exploring Youth Participation roster. Additional adults can be added using the Exploring Participation roster. The post committee chair should sign each roster.



# PROGRAM REQUIREMENTS AND QUALIFICATIONS

## LEARNING FOR LIFE

- Memorandum of Understanding (LFL)
- Renewal Instructions
- National Accreditation Award Worksheet
- National Accreditation Award Certificate
- Group Certificate (LFL) . . . . . 28-557
- All programs drop from the count after September 30.



**Can Be Found on BSA info**  
at <http://info.netbsa.org>

## **PROGRAM REQUIREMENTS AND QUALIFICATIONS EXPLORER POSTS**

### **Post Requirements**

Minimum participant positions . . . . . PCC, PMC, PMC, EA  
Can have . . . . . AA  
Minimum youth participants . . . . . Five paid  
Standard renewal date required? . . . . . None, can expire any month  
Exceptions to standard requirements . . . . . Unit may register with as few as two paid youth members with prior permission of the Scout executive  
Term . . . . . Minimum six months, maximum 18 months

### **Explorer Post Adult Participant Requirements**

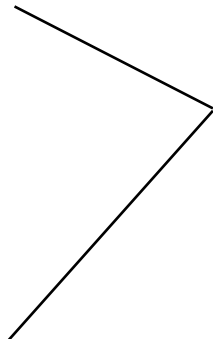
Minimum age . . . . . 21  
Gender . . . . . Male and female  
Transfers allowed? . . . . . Yes  
Multiple positions allowed? . . . . . Yes, they can only multiple with other posts  
*Boys' Life* subscription for 12 months . . . \$12 (*Boys' Life*-only form required)  
Participant fee for 12 months . . . . . \$24  
Exceptions to standard requirements . . . . . None

### **Explorer Post Youth Participant Requirements**

Age . . . . . 14 to 20  
Grade . . . . . 14 years of age and have completed the eighth grade or 15 years of age but not yet 21 years of age  
Gender . . . . . Male or female  
Transfers allowed? . . . . . Yes  
Multiple participation allowed? . . . . . Yes  
Participant fee for 12 months . . . . . \$24  
*Boys' Life* subscription for 12 months . . . \$12 (*Boys' Life*-only form required)  
Explorers enrolled in a post prior to age 21 may continue as a member at age 21 until the post recharter or until age 22, whichever comes first.

**Forms Used in Exploring:**

Exploring Post Certificate . . . . . 524-571  
Exploring Participant Card . . . . . 524-572  
Renewal Application Instructions  
Learning for Life Explorer Application . . . . . 524-565  
Learning for Life Adult Application . . . . . 524-312  
Exploring Youth Application . . . . . 524-309  
Exploring Annual Memorandum of Understanding  
National Exploring Excellence Award Worksheet  
National Exploring Excellence Award Certificate . . . . 99-281



**Can Be Found on BSA info**  
at <http://info.netbsa.org>

## **EXPLORING ADULT PARTICIPATION CRIMINAL BACKGROUND CHECK**

Learning for Life requires criminal background checks for all new adults involved with the Exploring program except those employed by local, state, and federal governmental agencies.

In addition, Social Security numbers are not required for volunteers employed by local, state, or federal governmental agencies that require background checks as a condition of employment. These participants can meet the requirements by using form No. 28-573. 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. **The local council registrar must follow the procedures found on BSA Info under Instructions for Registrars Using Form No. 28-573 to complete the process. If the PAS procedures for Form No. 28-573 are not followed, PAS will not recognize that these participants are exempt from providing a Social Security number and submitting to a criminal background check.**

For more information on criminal background checks and using form No. 28-573, go to BSA Info, select Learning for Life, select Exploring, select New Posts, Clubs, Renewals, Applications, select Criminal Background Check information, select form No. 28-573, select Instructions for Registrars Using Form No. 28-573.

## **LEARNING FOR LIFE COMMITTEE PARTICIPATION**

The local council can have a council Learning for Life committee. The positions include a committee chair and committee participants.

The council president, in consultation with the Scout executive, appoints the Learning for Life chair for the council. The council Learning for Life chair must be registered as a vice president of the local council executive board (having completed a BSA Adult Application and meeting BSA leadership standards).

Council Learning for Life committee participants should complete the Learning for Life Adult Application form to be associated with the Learning for Life corporation. Two participants of the council Learning for Life committee must be registered board members of the local council as well (having completed a BSA application and meeting BSA leadership standards).

Councils can also have a district Learning for Life committee. There is a district Learning for Life chair and district Learning for Life committee participants. They also complete the Learning for Life Committee Participation form. District Learning for Life committees should be established only in councils where a council Learning for Life committee is established.

The position codes are as follows:

Council LFL committee chair	34
Council LFL committee participant	34M
District LFL committee chair	63
District committee participant	63M

All LFL committee position holders must be 21 years of age.

Council LFL employees can also complete the Learning for Life Adult Application to be associated with the Learning for Life corporation (position code 301). In addition, the certified Learning for Life executive can complete the Learning for Life Committee Participation form to be associated with the Learning for Life corporation (position code 302).

The fee is \$24 per year and the fee can be prorated.

Multiple: Volunteers, employees and executives cannot multiple between BSA and Learning for Life; fees must be paid in both. Learning for Life volunteers cannot multiple on the committee. Committee participants cannot multiple with posts or Learning for Life program.

## **LEARNING FOR LIFE REGISTRATION INFORMATION ON SCOUTNET**

### **Staff Guide to Renewal**

A quick review of the steps to start or renew a Learning for Life program or post.

### **Renewal Application Instructions**

Detailed directions on the process for Learning for Life.

### **National Accreditation Awards**

Application forms for accreditation awards.

### **Learning for Life Annual Memorandum of Understanding**

Schools participating in the Learning for Life classroom programs must submit this agreement to the local Learning for Life office each year.

### **Safety First Guidelines**

These guidelines have been established to protect participants from potential hazards. Limitations on certain activities are best described as stepping-stones toward safe and enjoyable adventures.

### **Recommendation for Lifesaving or Meritorious Action Award**

Submit this form to the national office to recommend a Learning for Life participant for the Honor Plaque or National Certificate of Merit.

### **National Distinguished Learning for Life Award for Districts**

Use this worksheet to demonstrate your district has met the requirements for a National Quality Learning for Life Award.

### **National Distinguished Learning for Life Award for Councils**

Use this worksheet to demonstrate your council has met the requirements for a National Quality Learning for Life Award.

### **Supply Item or Bin Resource Order Form**

Use the appropriate form to order bin or Supply items to support Learning for Life and Exploring programs.

### **Money-Earning Permit Application**

Explorers and Learning for Life must submit this form for approval of any money-earning projects.

**Post Renewal Application Instructions**

Detailed directions on the process for posts.

**National Exploring Excellence Award**

For Explorer posts.

**Explorer Career Interest Codes**

A list of codes for Explorer interest areas—for use by the council registrar and staff only.

**Exploring Annual Memorandum of Understanding**

Organizations that have Explorer posts must submit this agreement to the local Learning for Life office each year.

**SSN Waiver**

Form 28-573, Criminal Background Check Exemption.

# APPENDIX

**APPENDIX 1—ROUTING SHEET**

Circle Status (New, Renew, S-R, Add)      Reg.      Cncl. No.      Dist. Name      Prog. Term      Unit No. Date      Regis.      Renewal

REGISTRATION AND *Boys' Life* FEES

	QTY	FEE	<i>Boys' Life</i>	
		Term _____	First Issue _____	Last Issue _____
		months	month, year	month, year
PD YOUTH	_____	\$ _____		
MULTIPLE YOUTH	_____	\$ _____		
YOUTH B/L SUBS	_____	\$ _____		
PAID ADULTS	_____	\$ _____		
MULTIPLE ADULTS	_____	\$ _____		TOP LEADER TRAINED _____
ADULTS B/L SUBS	_____	\$ _____		
UNIT LIABILITY INSURANCE FEE	_____	\$ _____		
TOTAL FEES				100% <i>Boys' Life</i> _____
SUBMITTED		\$ _____		
RECEIPT NO. _____	DATE _____	NET CHANGE: _____	YOUTH _____	ADULTS _____ <i>Boys' Life</i> _____

	ATTACH ROUTING SHEET TO APPLICATIONS AND LEAVE ATTACHED THROUGH PROCESSING	UNIT	OTHER
<b>COUNTER</b>	1. Full name of chartered organization and denomination		
	2. Signature of executive officer and/or unit leader approving application		
	3. Full names and addresses are legible (zip code included)		
	4. Required positions listed: CR CC MC MC Packs: CR CC MC MC or MC and PT		
	Unit leader: CM ___ SM ___ VC ___ NL ___ SK ___ Pack: TL or DL or WL		
<b>REGISTER</b>	5. <i>Boys' Life</i> subscription information given		
	6. Renewal date and term checked, fees calculated, receipt written and attached		
	7. Check unit renewal date, term, magazine first and last issue, and fees		
	8. Check council, district, and unit numbers (local and national), and unit city and state		
	9. Unit number, position (adults), member number marked for transfer within your council		
	10. Unit has chartered organization code Venturing unit coded with hobby interest		
<b>LATER</b>	11. Applications coded with employer and occupation codes		
	12. Entered in computer/mailed		
	13. Transmittal report number		
	14. Charter, rosters, and/or certificates received/produced		
	15. Old master record filed in Unit History Folder (reregistered or separated-reregistered only)		
	16. Routing sheet and copy of application filed in current unit folder		
	17. Rosters, charter, and/or certificates given/mailed to _____ on _____		

**REPRODUCE THIS FORM LOCALLY**





**APPENDIX 3—COUNCIL/DISTRICT MEMBER REREGISTRATION**

Here is a suggested form for your use to reregister council or district members.

TO:

Dear Scouter:

The registration of all Scouters serving the district or council is due to be renewed. You have been selected to serve the youth of our area in the position shown at the bottom of this page.

We look forward to the coming year and your help in meeting the challenges and opportunities of Scouting.

As a registered Scouter, you are entitled to a *Boys' Life* subscription for \$12 (half the regular rate of \$24). This will help keep you informed about Scouting and about the interests and concerns of today's youth.

To complete your registration, return the form with the appropriate fees.

Signed \_\_\_\_\_

TO: \_\_\_\_\_  
(Council)

I am presently registered and paid as \_\_\_\_\_ (Position) \_\_\_\_\_ (Council)

Enclosed is my membership fee of \$24 to register as \_\_\_\_\_ in \_\_\_\_\_  
(Title) (District, Council, or Committee)

By all means, include a subscription to *Boys' Life*  
(\$12 for one year)

Name \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

PLEASE RETURN FORM BY \_\_\_\_\_

**REPRODUCE ON COUNCIL LETTERHEAD**

Sample 3a

**APPENDIX 4—TELEPHONE REFERENCE CHECKLIST**

Name of applicant

Name of reference

Date \_\_\_\_\_ Telephone \_\_\_\_\_

---

This is \_\_\_\_\_ . I'm with pack/troop/team/crew/ship \_\_\_\_\_ of the Boy  
your name number

Scouts of America. \_\_\_\_\_ has made application to serve as a volunteer  
applicant's name

leader in Scouting and has given us your name as a character reference. We have been given written authorization to contact you. It will take only a few minutes. Could you please answer the following questions to the best of your ability?

1. How long have you known the applicant? \_\_\_\_\_  
years/months
2. In what capacity have you been affiliated with the applicant? \_\_\_\_\_  
friend/relative/business
3. What do you think of the applicant? \_\_\_\_\_  
leader/good follower/good with paperwork/fond of outdoor activities
4. What are the applicant's outstanding strong points? \_\_\_\_\_  
\_\_\_\_\_
5. Does the applicant have any difficulty in getting along with others? \_\_\_\_\_  
cooperative/personable/loner
6. Do you know of any problem the applicant has that would affect the leadership of youth? \_\_\_\_\_  
drug/alcohol/child abuse/immaturity
7. Would you entrust the care of your child to the applicant? \_\_\_\_\_

Reference checked by: Name \_\_\_\_\_

Phone \_\_\_\_\_

**REPRODUCE THIS FORM LOCALLY**

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