

UNIT: _____

ACCESS CODE: _____

DUE DATE: _____



Virginia Headwaters Council

2020-2021 Charter Renewal

INSTRUCTION BOOKLET

www.vahcbsa.org/recharter

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NOTE

**Scouts, BSA/Venture/Sea Scout
Youth**

Any youth who has turned 18 in 2020, must complete the Adult leader application. Please use the newest BSA Adult app

There are NO Transfers during renewal

BE ON TIME – ERROR FREE
Every hour spent by volunteers and Council staff chasing down late Charters and fixing errors can’t be spent helping youth succeed.

Thank you, in advance for helping us make the most effective use of our limited resources while we assist you in providing the best possible Scouting program for the youth in the Virginia Headwaters Council!

If you have questions please contact your Unit and District Commissioner

INTRODUCTION TO Charter Renewal

What is the Charter?

The chartering process is one of the oldest traditions in Scouting. It is the formal (legal) document that certifies the agreement between a Chartered Partner – an organization that agrees to utilize Scouting as part of its service to youth and community outreach – and the Boy Scouts of America, setting expectations for the quality of the program to be delivered to the Charter Partner’s youth population.

Why is a Charter Renewed Annually?

- Fosters a formal, timely plan for regular dialogue between the charter organization and BSA.
- Assures up to date member registration in district/council Scout activities and rank advancement.
- Makes units eligible to qualify for yearly Journey to Excellence goal setting, the review process, and recognition.

Unit Charter Renewal

Unit Charters are issued for one year and expire on the last day of the charter renewal month (aka recharter date) printed on the charter. **After that, units are “separated” from Scouting, the unit is “dropped” from BSA membership, as are all its members. Units are given 30 days past the expiration date (December 31st) to correct any problems and issues.**

When a unit is separated from Scouting, it ceases to exist and CANNOT legally operate in any capacity, including activities and advancement. An expired unit has no status in BSA and no insurance coverage for any of the unit’s members and Chartered Organization. Youth and adults are unregistered, cannot attain awards and recognition. Advancement or achievement of any kind for the boys – including Eagle Rank – cannot take place, and tenure in rank and for leadership positions is stopped.

Units have access to the online Charter system two months before they expire. Please be sure to process your Charter accurately and on-time.

Privacy Policy

Charter renewal involves confidential and/or private information and accepting the responsibility for maintaining the privacy and confidentiality of that information. Private and/or confidential information must never be shared outside the Boy Scouts of America. If the Charter processor cannot accept this responsibility, a different person must be identified to complete the Charter.

Submitting the Final Charter

After submitting the renewal online, please print the final paperwork, secure signatures, and collect fees. The charter package needs to be reviewed and submitted during the District Charter Renewal Night. Use your Unit or District Commissioner as a resource as their experience will help spot potential issues that might hold up your Charter’s processing.

Due to COVID-19 each District will be handling submitting the final charter differently. This will allow a minimal person to person contact. You must reach out to your Scouting Professional to obtain this information.

GETTING STARTED

Congratulations, you have been selected as the Online Charter Processor for your unit. The Online Charter Renewal process allows you to be in complete control of your information - this ensures that it will be correct, and you can do it from home or your office, anytime that is convenient for you. It's an easy-to-use and secure system.

Now that you have been selected, plan to attend our District's Charter Renewal Roundtable. During this session, you will receive more information and help on how to log on and process your Charter. An online tutorial and PowerPoint presentation are also available on the Charter Renewal website if you need a refresher on the information heard at the meeting.

The Online Charter Renewal access will open for the following Districts:

Massanutten District: **November 6th**

Valley District: **December 1st**

Southern and Monticello District: **January 1st**

To be eligible for the Journey to Excellence Unit Award, your Charter must be On Time. This means the Charter must be submitted, signed, and delivered to your District Charter Renewal event with payment.

Please plan on turning in all JTE paperwork when you turn in your Charter Renewal.

Here is what you'll need to get started:

1. The website: <https://scoutnet.scouting.org/ucrs>
2. Your Access Code (label affixed to the front of your Charter Renewal packet)
3. **Gather all information needed to start the Charter:**
 - a. Current Unit Roster (can be obtained from my.scouting.org - instructions available online)
 - b. List of youth and adults to remain on the roster.
 - c. List of youth and adults to be removed from the roster.
 - d. List of youth and adults who want Boys' Life.
 - e. Completed applications for ONLY **New** youth and adults. (if a youth member is a Lion write Lion on the top of the application please)
 - f. Disclosure forms for **New** adults.
 - g. Youth Protection Training certificates for all new adults.
 - h. **Complete additional disclosures & background check authorization forms for ALL ADULTS!**
 - i. Proof of completion of background checks for all new adults. Check with the Registrar.
 - j. A copy of the Unit Training Report (can be obtained from my.scouting.org)

Once you have logged onto the Online Charter Renewal website:

1. **Select First-time user** and enter the unit access code. (Each year you are considered a First-time user when accessing the system for the initial time. Codes and passwords from prior years are no longer active).
2. Select the unit type and enter the unit four-digit number. (ex: unit 70 will be 0070)
3. Create a password as instructed.
4. Complete the information requested on each screen.

Note: You can stop at any time, log off the system, and begin again where you left off by reentering your access code and password.

IMPORTANT THINGS TO REMEMBER

- Be sure that your computer is set to compatibility view mode. Incorrect settings will prevent the charter from being submitted. Be sure scouting.org is added to the compatibility view.
- Please make sure all mailing addresses and email addresses are up-to-date. Returned mail means a Scouting family is missing out on valuable Scouting information. Feedback through the emailed Voice of the Scout surveys is also important to meet the needs of our Scouting families.
- When entering names, use **ONLY** legal names on applications. **NO NICKNAMES!**
- If making corrections on the final printout, use **RED INK** only!
 - ***Make sure to tell staff that corrections need to be done so that none of them are missed***
- Do not make name changes during the Charter Renewal process. If a name is misspelled or incorrect, please make corrections on the print-out in REDINK.
 - ***Please make note if changes need to be done so Council Staff can make sure to update the system***
- DO NOT overtyping on an existing record. You must add/delete the old record for position changes.
- Make sure all new adult applications have the correct signatures (Committee Chair & Charter Rep), a Social Security number, a leadership position, Question #6 (Additional Information) answered, the signed BSA Disclosure Form attached, and a signed release for the background. The applicant must sign the form and initial the 4 lines above the signature.
- Tiger and Lion Parents (position AP & LP) cannot be changed to a registered position without completing an adult application and required background checks.

REQUIRED TRAINING

Youth Protection Training (YPT) must be taken every year by every registered leader in your unit. If a volunteer's YPT record is not current at the time of charter renewal, or if it expires during the charter renewal processing period (which can be weeks), **the volunteer cannot be registered**. Units should not wait until charter renewal to make sure all YPT is current. Failing to ensure compliance now will make unit charter renewal more difficult and take more time to complete.

All Cubmasters, Tiger Leaders, Den Leaders, Assistant Den Leaders, Webelos Leaders, Pack Committee Chairs, Scoutmasters and Troop Committee Chairs are required to have the training for their position.

Tip: Your unit's Key 3 leaders can review your unit's current YPT and leader training list to see who is currently trained or needs renewal by accessing my.scouting.org. Encourage everyone needing YPT and position training to complete their course before you start to renew your charter!

BOYS' LIFE SUBSCRIPTIONS

BOYS' LIFE Is ~~Optional~~ Essential! Unit leaders work hard to bring the best Scouting program possible to their unit members. Surveys and experience have shown that *BOYS' LIFE* magazine is **ESSENTIAL** to a strong Scouting program. Successful leaders use *BOYS' LIFE*.

JOURNEY TO EXCELLENCE UNIT ASSESSMENT (JTE)

The Journey to Excellence Unit Assessment includes recognition for outstanding packs, troops, teams, and crews, that strive for continuous improvement and conduct a quality program for their youth on an annual basis. All units must turn in the JTE scorecard with their completed charter renewal paperwork to be considered for the JTE award. Units that qualify may wear specialized emblems ordered through the Council Scout Shop.

RECHARTERING TIPS FOR SUCCESS

From the Council Registrar

1. Take advantage of the UPDATE Button use it multiple times throughout your charter process.
2. **Simplify your charter renewal process:** Turn in all-new youth and adult registrations to the Council Office at least 15 days before starting your renewal. This will make the process go much faster.
3. **Do Not** change names in the online charter area (this includes correcting spelling). Please handwrite in red correct names on the final printout only.
4. Please do not add **fake birthdates**. The age of youth is relevant to the BSA program.
5. Please make sure that when unselecting/deleting, you delete the correct person. If deleted by accident, handwrite the person on the printout with an explanation. **Do Not Reenter Online**.
6. **No one should be marked as a transfer;** there are NO transfers at charter renewal time.
7. **There must be at least 5 paying youth for a Unit to charter.**
8. Check and confirm all multiple registrations. (*See section on “Multiple Registrations”*)
9. If a Scout or adult leader wants *Boys’ Life*, **please be sure to mark it** during the online chartering renewal process and include fees in the final payment.
10. Only **new** members need applications. A list of those needing applications is printed with the final charter renewal (on the front page). Please be sure to review the final charter front page to ensure all the required paperwork is completed and attached.
11. Please make sure **all New** applications are completed, with signatures, birthdates, and correct adult social security numbers. These must be attached to the charter renewal packet at turn-in.
12. Please make sure that you complete the last step by electronically **SUBMITTING and PRINTING** the charter renewal. (**Print** a copy to be submitted at your Charter Renewal Night)
13. Please make sure that all paperwork is ready to be submitted together, (See page 9).
14. Be the first to return your charter renewal packet to your commissioner before the deadline.
15. Checks or cash only for annual renewal. (No credit cards)

Note: Please make sure that all youth and adults that should be registered are registered. Unregistered leaders and youth are not covered by insurance and the youth may not qualify for advancement. Be sure to immediately turn in new applications at the Council Service Center anytime during the year.

RECHARTER STEPS

Stage 1 – Load Unit Information. This will populate the online system using your current membership.

Stage 2 – Update Roster. Update information, select which members to drop from next year’s roster, add adult members, add youth members, update member data, and update member positions.

Stage 3 – Check Roster. Validate the data to be submitted conforms to BSA rules (such as adults in required positions and all Tiger Cubs & Lion members have an adult partner)

Stage 4 – Update Member Fees. Update fees, assign multiple statuses and sign up members for *Boys’ Life*.

Stage 5 – Submit Roster. Review the draft version before selecting the “Submit to Council” button. Complete youth not renewing survey.

UPDATING ONLINE ROSTER

There are six steps in Stage 2: Update Roster:

1. Update chartered organization information (contacts, addresses, phone #)
 - Review your chartered organization information and make any necessary changes.
2. Select members for renewal
 - Select for renewal only the members who will be renewing with your unit.
3. Promote members
 - Select members from another unit to become members of your unit.
4. Add new members (*These require completed application to be attached*)
 - Add new adults and youth to your roster.
5. Update member data
 - Update the personal information of members on your roster (birthday, email address, home address, phone number, or occupation). *Every Scout & leader should have an email address. Parent email address should be used for youth members.*
6. Update adult positions

POSITION CODES and TITLES

Position codes – All positions can be held be male or female and the minimum age requirements for each position are in parentheses next to the position. These are all fee-paying positions – except AP & IH

CR	Chartered Organizational Rep (21)	SM	Scoutmaster (21)
CC	Committee Chairman (21)	SA	Assistant Scoutmaster (18)
MC	Committee Member (21)	NL	Crew Advisor (21)
TL	Tiger Cub Den Leader (21)	NA	Crew Associate Advisor (21)
CM	Cubmaster (21)	SK	Sea Scout Ship Skipper (21)
CA	Assistant Cubmaster (18)	MT	Sea Scout Ship Mate (21)
WL	Webelos Den Leader (21)	91U	Unit Scouter Reserve (21)
WA	Assistant Webelos Den Leader (18)	92U	Unit College Scouter Reserve (18)
DL	Den Leader (21)	92V	Venturing College Scouter Reserve (21)
DA	Assistant Den Leader (18)	VP	Venturing Participant (youth 18-21 Adult app)
PC	Parent Coordinator (21)	AP	Tiger Cub Adult (18) – <i>Non-Paying Position</i>
LL	Lion Guide (21)	LP	Lion Partner (18) - <i>Non-Paying position</i>
PT	Pack Trainer (21)		
IH	Institutional Head (21) – <i>Non-Paying Position</i>		
	(Executive Officer and IH are the same people)		

Required Positions per Unit:

<u>PACK</u>	IH, CR, CC, 2 MC's, or 1 MC & 1 PT, CM, and one den leader, either a TL, DL, or WL, or LL (Lion Guide). There must be an AP or LP for every registered Tiger Cub and/or Lion Cub. (CA, WA, DA, PT, PC, 91U, and 92U positions are optional)		
<u>TROOP</u>	IH, CR, CC, (2) MC's and SM.	(SA, PC, 91U, and 92U positions are optional)	
<u>CREW</u>	IH, CR, CC, (2) MC's and NL	(NA, PC, 91U, and 92V positions are optional)	

UNIT KEY 3

The Unit Key 3 consists of the unit leader (CM, SM, NL, SK), the chartered organization representative (CR), and the unit committee chairman (CC). The Unit Key 3 is a critical component to the success of your unit. The Unit Key 3 meets once a month to discuss the unit, its challenges, coming events, and progress towards completing their action plan and Journey to Excellence goals. It is a time for the Unit Key 3 to spot early warning signs and work together toward continued unit success.

When Chartering the unit, please align your leadership to support and implement the Unit Key 3. This may mean spreading out the positions if one person is serving as committee chairman and chartered organization representative. This three-person structure allows each person to contribute their strengths, abilities, and perspectives based on the focus of their trained position.

UPDATE ROSTER BUTTON – USE THIS OFTEN

The “Update” Button can be selected anytime during the charter renewal process before Stage 5. This button allows units to reload their roster from the BSA system adding additional youth and adult applications that were recently processed by the Council Office or the new Online tool. The update does not overwrite any changes already made to the system. You will then be able to go through stages 2-4 for these new additions to the roster.

Example: Unit turns into Council applications after they have started the online roster. Use the update button to reload the roster with the new names added. Continue the charter renewal process.

SCOUTER RESERVE POSITIONS

These positions are for adults that wish to remain on their unit rosters, without registering as an assistant leader or committee member when appropriate.

These positions use the same application, fees, and registration process, as any other adult volunteer but the only training requirement is Youth Protection. Scouter Reservists do not need to complete Position Specific Leader training or any other adult leader training after completing YPT.

If a young person or adult continues to be highly active with the unit (attending at least 1 or 2 meetings per month and participating in several campouts or other activities during the program year), then registering them as an assistant leader may be more appropriate. In that case, they should complete both Position Specific Leader and Outdoor Leader training.

UNIT COLLEGE SCOUTER RESERVE
(Position code 92U)

for Packs and Troops
Minimum age requirement of 18

VENTURING COLLEGE SCOUTER RESERVE
(92V)

for Venture Crews and Ships (Position code
Minimum age requirement of 21

- If a young person is away at college or in the service and wants to stay registered with the unit, the Unit College Scouter Reserve or Venturing College Scouter Reserve would be the appropriate method of maintaining their registration with the unit.

UNIT SCOUTER RESERVE
(Position code 91U)

for Packs, Troops, Crews, and Ships
Minimum age requirement of 21

- If an adult supports the unit but is not an ongoing participant in meetings, activities, and outings the Unit Scouter Reserve would be the appropriate method of maintaining their registration with the unit.

MULTIPLE REGISTRATIONS

Only the Chartered Organization Rep (CR) can hold more than one position in a unit.

The CR may also serve in multiple capacities as the committee chairman or member of the committee within that unit if there are not enough adults registered for these positions. The CR cannot serve as the unit leader (Cubmaster, Scoutmaster, or Crew Advisor).

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 if the individual serves only one position per unit.

Youth who are registered as Scouts, BSA may multiple registers as members of a Venturing crew. Members of a Crew may also multiple registers in a Ship or Troop.

Registration fees are paid only for an individual's primary position; there is no fee for multiple positions. Multiple registrants will only receive a membership certificate for their primary position.

Some leaders choose to have their primary registration with the District or Council. Mark them as multiple in the charter process, and remind them to pay their registration fees to the Council Service Center by December 31st.

If a new individual is registering as a multiple, please indicate that on the application by writing MULTIPLE on the application.

Only youth in a Ship or Crew may multiple registers as both an adult and youth.

PROMOTE MEMBERS

The promote members provide the ability to move youth and adults from one unit to another. Promote members are integrated seamlessly into Internet Chartering and is a simple process with step by step instructions.

In the promote members process the unit doing promotions will have automatic access to units that are chartered to the same chartering organization. If the chartered organization is different, the unit must obtain the access code to the other unit to obtain records of members in that unit who will be joining their unit. They must contact that unit to get the access code. This will encourage inter-unit cooperation and confirm who is seeking their member information.

Youth and Adult Promotion

All youth and adults being promoted will be required to complete a new application. The first page of the charter will show who an application is needed for.

Youth to Adult Promotion

The promote member process can be used to promote youths in the troop to an adult position in the troop (ex. youth member to Assistant Scoutmaster). An adult application and social security number are required to complete this process. All adult leaders must meet the adult requirements before joining.

Crew and Ship 18-Year-Old Youth

Scouts who are 18 years old and register with a Crew or Ship as a youth, and who are also an adult assistant Scoutmaster or 92U with a Troop, would pay membership with Crew or Ship for their primary registration and dual role as the adult. Remember, all new youth and any youth turning 18 in 2020 must complete an Adult Application with position code VP if 18 years or older.

COMPLETING THE RECHARTER

Please make sure that you complete the last step in the online charter, by **SUBMITTING and PRINTING.**

1. Look at “warning” messages and correct errors before submitting and printing charter paperwork. Submit and Print final paperwork. (**Print 2** copies one for the council and one for the unit)
2. Gather all required signatures (for charter renewal and applications.)
3. Collect fees that are due.
4. Deliver completed Charter Renewal during our District Charter Renewal Night.
5. Please make sure that all paperwork is ready to be submitted together. This includes:
 - Charter Renewal (printed in the last step of the online charter renewal process—this is the version that has signature lines)
 - Signatures on the Charter Renewal by the Executive Officer (IH) and Unit Leader (CM, SM, NL, SK)
 - All new applications (completed – including required signatures)
 - Youth Protection Training (YPT) updated and All Discloser Forms for ALL ADULTS
 - Fees (Only one check per unit payable to Virginia Headwaters Council, BSA is accepted for payment. Fees may be charged to unit account if the balance will cover the total amount due). No Credit Cards
 - Charter Partner Agreement Form (print in last of renewal step also signed by Executive Officer)
 - Journey to Excellence scorecard. Must be completed regardless of qualification
 - **Note: All Charter Renewal fees are sent to the National Office. No registration fees remain with the local council.**
6. Please be aware that if there are any issues with your renewal, it will not be posted until those issues are cleared up. So please check and double-check your charter before turning it in.

Note: If paperwork says **Draft Version**, the Charter Renewal has not been submitted online correctly and cannot be accepted. Before turning in paperwork, please be sure the final charter renewal has signature lines.

COMMONLY MADE MISTAKES

- A. No signatures or incorrect signatures on adult applications and Charter Renewal.**
 - 1) Adult applications should have the Committee Chair’s and Charter Representative’s signature.
 - 2) Charter Renewal should have the Executive Officer (IH) and the Unit Leader signature.
- B. No fee or wrong amount attached (Bring a BLANK CHECK to Charter Renewal Night).**
 - 1) Remember NO ONE is marked as a transfer at Charter Renewal time.
- C. Applications missing.**
 - 1) Make sure there are applications for everyone listed on the first page of the charter renewal.
 - 2) Please be aware that even if you turned in an application for someone months ago and they are listed on the front of the charter renewal, please supply a new application or make a copy of the unit’s copy of the previous submission with social security number added.
- D. Incomplete Applications.**
 - 1) Adults missing Social Security number, not answering Question #6, not including a Disclosure form, and/or not providing background check paperwork.
 - 2) Youth missing birthdates and/or parent information (important especially for Lion and Tiger Cubs)

FREQUENTLY ASKED QUESTIONS

Where can I get a copy of our current BSA Roster?

Rosters are available through my.scouting.org. For help call your local unit commissioner.

Where can I check the training status of unit leaders?

Go to my.scouting.org and select Legacy Web Tools & Training Validation to look up leaders. Or you can request from a member of the Unit Key 3 (CR, CC, unit leader) a copy of the Training Detail Report.

I have not received my membership card?

The Unit Key 3 can print cards or a roster with everyone's personal ID#. Note: You can always access a membership card for your primary position (the position which you paid for). You can now print your card from your personal my.scouting account.

I forgot my login for Charter Renewal?

The council only has the unit access code since you created the password. Please make sure it's something you can remember. You can also use the "forgot password" option or the Council can reset your password if necessary.

Is my Charter Renewal access code the same as last year? No, the access code changes every year.

How do I change my Charter Executive Officer/IH?

The easiest way is to cross out the old name in red ink and write in the new Executive officer name and date of birth on your final charter renewal paperwork.

How do we change our Chartering Organization?

Contact your District Executive. Attach a new unit application to your charter renewal, along with a letter from the previous Organization releasing the number and all property to the new Organization.

Why is my Charter not posted? *Please contact your District Executive or Council Registrar for details.*

There can be several reasons for this:

- a. Applications are missing and/or information on applications is missing, i.e. required signatures
- b. Fees have not been paid
- c. Charter was not submitted correctly online

I changed a unit leader, but he is not on my Charter Renewal Printout?

There was no application submitted or the application was incomplete.

I submitted my Charter Renewal online to the Council and forgot to add someone, what can I do?

- 1) If you have not submitted the Charter Renewal, write their name on the front page of the charter, attach an application for them, and include the appropriate fees.
- 2) If you have already submitted the paperwork, turn in the application to the council office with applicable fees for the current year plus the new Charter year.

Why do you need my Social Security number?

All adults must supply their Social Security number for a National background check. It is BSA policy.

I'm changing my position do I need to fill out a new application?

No, not during renewal. Yes, if you are a Tiger or Lion partner and wish to register in a paid position. After the annual renewal, every time you change positions or transfer to a new unit during the year, you must fill out a new application. Be sure the application is complete and the disclosure page is attached.

Journey to Excellence

“Wrapping Up Your Journey to Excellence Assessment”

Major Features of the Program

- Improve and increase adult leader training.
- Improve youth recruitment and retention.
- Improve parent participation.
- Improve youth advancement.
- Improve outdoor program participation.
- Improve annual program planning.

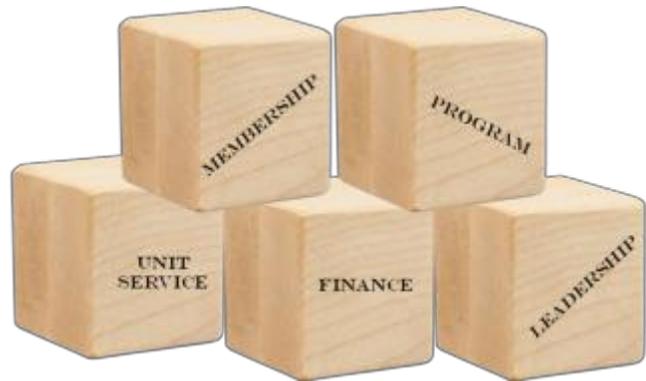
As the year ends, it is time to complete your unit’s Journey to Excellence Scorecard. The process is simple – you will need the following:

- The unit’s roster as of January 1, 2020.
- The unit’s 2019 Journey to Excellence scorecard to use as a comparison
- The unit’s completed charter renewal paperwork for 2021.
- The unit’s advancement records for 2020 (all advancement reports submitted throughout the year are available through the Online Advancement System – contact your unit advancement chairman of the Council Service Center.)
- The unit’s activity/service project/meeting calendar and budget
- The unit’s leadership training records (Unit Key 3 members have access to this through the Training Manager icon for all registered leaders in the unit)

Scorecards are available online at www.scouting.org/scoutsource/awards/journeytoexcellence.aspx

Required - Please print and complete with your Charter Renewal paperwork.

If you are unsure of how to complete the form, a commissioner will be happy to assist you at our District Charter Renewal Night.



The Building Blocks of a Successful Unit

The Journey to Excellence Unit Assessment includes recognition for outstanding packs, troops, teams, and crews, that strive for annual continuous improvement and conduct a quality program for their youth.

FINAL RECHARTER CHECKLIST

- Charter (printed in the last step in online charter renewal process)
- Signatures on the Charter Renewal by the Executive Officer/IH and Unit Leader (CM, SM, NL, SK)
- All new applications (completed – including required signatures)
- Fees (Only one check per unit payable to Virginia Headwaters Council, BSA is accepted for payment. Fees may be charged to unit account if the balance will cover total amount due). No Credit Cards
- Charter Partner Agreement Form (signed by the Executive Officer)
- Journey to Excellence scorecard. Completed regardless of qualification.
- Return to District Charter Renewal Night.
- Disclosure Form for each registered adult.

