
June Share concept and cost with council Key 3.

July

- Commissioner staff briefed on Internet Rechartering.
- License agreement is submitted to the national office.

August

- License fees are included in the next year's operating budget.
- Council communications, training, and support plans are developed, including the use of:
 - ✓ DVD with testimonials on Internet Rechartering
 - ✓ Internet Rechartering tutorial
 - ✓ Council newsletter and Web site announcements
 - ✓ Determination of units that will use Internet Rechartering and units that will use "paper" recharter application

September Promotion and training is conducted for:

- Professional staff and support staff
- Commissioner staff
- Unit leadership

October Webmaster prepares council Web site.

Licensing Fee The licensing fee covers **one calendar year**. It can be paid in one lump sum or in monthly installments (but it is not a monthly fee). The fees are based on council classification.

Council Class	Fee
200–400	\$5,004
500–600	\$2,496
700–800	\$996

If you sign up before the first payment is due (January), the fee for the partial year before January is waived. Therefore, the sooner in the year that you sign up, the more free months you have to develop and implement your training and communications plans. Your first payment is not due until January if you are signing up for the first time.

Sample Plan

This sample plan can be used as a guide for any council implementing Internet Rechartering.

May

- Conduct Internet Rechartering staff training and growth planning conference.
 - Set charter renewal turn-in dates and mark them on calendar.
-

June

- Secure approval from executive board and Key 3.
 - Complete and submit licensing agreement.
-

July

- Conduct district commissioner briefing at council commissioner meeting, including commitment that Internet Rechartering is the official method of Rechartering.
 - Include charter renewal rollout plan in council program preview CD.
-

August

- Disseminate council rollout plan at program planning meetings.
 - Distribute paper/electronic selection form on program disk. Print paper charters for units only on request.
-

September

- Offer Internet Rechartering training for unit commissioners at council college of commissioner science. Use Internet Rechartering DVD movie and tutorial.
 - Begin chartered organization visits and sign chartered organization agreements for December units.
-

October

- Begin chartered organization visits and sign chartered organization agreements for January units.
 - Disseminate December recharter kits with access codes at roundtables.
 - Registrar completes input of School Night registrations.
-

Continued on back

November

- Begin chartered organization visits and sign chartered organization agreements for February units.
- Open recharter access window for December units.
- Disseminate January recharter kits with access codes at roundtables.
- December units begin Internet data entry process.
- E-mail biweekly Commissioner's Status Report to district commissioners.
- Conduct "early bird" charter turn-in meetings for December units during last weekend. District representatives from each district will be present.

December

- Open recharter access window for January units.
- January units begin Internet data entry process.
- E-mail biweekly Commissioners Status report to district commissioners.
- Conduct "early bird" charter turn-in meetings for January units during last weekend. District representatives from each district will be present.

January

- Open recharter access window for February units.
- February units begin Internet data entry process.
- Conduct "early bird" charter turn-in meetings for February units during last weekend. District representatives from each district will be present.
- E-mail biweekly Commissioner's Status Report to district commissioners.

February

- Close recharter access window for December units at month-end.
- E-mail biweekly Commissioner's Status Report to district commissioners.

March

Close recharter access window for January units at month-end.

April

Close recharter access window for February units at month-end.

**INTERNET RECHARTERING LICENSING AGREEMENT
BY AND BETWEEN
_____ COUNCIL, BSA (“Council”)
AND
NATIONAL COUNCIL, BSA (“BSA”)**

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.

Internet Rechartering is a browser-based application designed for use with Microsoft’s Internet Explorer browser. Browser software from other vendors may not fully function with Internet Rechartering.

BSA Agrees to:

1. Provide Council with access to the Internet Rechartering application through a link from the Council’s official Web site to the appropriate Internet address.
2. Maintain the Internet Rechartering application in compliance with BSA membership policies, including periodic releases for maintenance and enhancements.
3. Provide customer service help desk support and Council administrator documentation to Council employees responsible for the implementation and use of the Internet Rechartering application.
4. Provide support materials to the Council for implementing its training and communications plans, including the Internet Rechartering DVD, the interactive tutorial, recommended training outlines, sample Web site design, and sample Council newsletter articles.
5. Waive the annual license fee for the initial signup year.

Council Agrees to:

1. Limit access to Internet Rechartering to only those units over which the Council exercises effective control.
2. Develop and implement effective training and communications plans for the inclusion of Internet Rechartering in the annual charter renewal process. This must include training for Council staff, commissioners, and unit leadership as well as the utilization of communication media, including Council newsletters and the Council Web site.
3. Develop and implement a plan for support of unit leadership and commissioners in the use of the Internet Rechartering application. This must include supporting units in password maintenance and resetting data, as well as supporting the staff and commissioners with appropriate status reports.
4. Provide at least 30-days written notice of the cancellation of this perpetual, nontransferable annual license agreement to the Registration Service at the national office.
5. Authorize BSA to audit the Internet Rechartering processes as part of validating compliance with license terms and supporting and maintaining the Internet Rechartering application, including the use of a user feedback survey.

Continued on back

Indemnification:

BSA agrees to indemnify and hold harmless Council from any loss or expense resulting from any claim or action arising from the use of Internet Rechartering application, when used within the terms of this license agreement.

Terms:

This license agreement is effective with the acceptance of both Council- and BSA-authorized approvals and will remain in force until cancelled by the Council with at least a 30-day written notice or by BSA with a 90-day written notice. In either event, this license is for a calendar year and perpetual for additional calendar-year licenses until cancelled by either party. Partial-year licenses require payment of the full calendar-year license fee, unless specifically waived by BSA. The license is nontransferable and may not be resold.

License Fee:

The annual license fee is based on the classification of the Council within three groupings. The annual fee for the Council is accepted as selected below, based on the Council’s classification: _____

- ___ Class 200, 300, and 400 councils Annual license fee of \$5,004
- ___ Class 500 and 600 councils Annual license fee of \$2,496
- ___ Class 700 and 800 councils Annual license fee of \$996

Payment Schedule:

The annual license fee is for a calendar year and may be paid either in a single payment in January or in 12 equal monthly payments. The Council selects to pay the annual fee as indicated below and will continue this payment schedule until changed by written notification to the Registration Service at the national office.

- ___ Single payment in January
- ___ 12 equal monthly payments

Amendments:

This agreement may be dissolved or amended upon the mutual consent of the Council and BSA.

Accepted by:

National Council, BSA

_____ Council, BSA

By: _____

By: _____

Title: _____

Title: _____

Date: _____

Date: _____

This license agreement may be submitted electronically from My BSA. From the BSA Resources menu, select Internet Rechartering Signup, then select License Agreement from the menu. A copy of the submitted license agreement will automatically be e-mailed back to the person approving the agreement.

Or, mail this form to Registration Service, S218, at the national office.

Items for the Council's Web Site

Councils will direct unit leadership to their official council Web site to begin the Internet Rechartering process. On your home page, post instructions to guide the unit leader to a new page on your Web site. This new page would include the following:

- Web page title: Internet Rechartering
- Short paragraph welcoming the unit processor to Internet Rechartering and providing any specifics for your rechartering campaign, for example, your council's recommended date range for access, dates for charter turn-in meetings, and instructions on completing the recharter process once the Internet Rechartering file is submitted.
- A link to access **Internet Rechartering** at the following URL:
<https://scoutnet.scouting.org/ucrs/UI/home/default.aspx>
- A link to the **Internet Rechartering Tutorial** at the following URL:
<https://scoutnet.scouting.org/ucrs/Help/tutorial/main.html>
- A link to the user's help documentation at the following URL:
https://scoutnet.scouting.org/ucrs/Help/EndUserHelp/end_user_help.htm, where the spaces are underscores.

Tip: Copy and paste these URLs to ensure the correct links.

National Activation

Once the council has submitted the signed licensing agreement for Internet Rechartering, the national office will activate your council's access to the software. The tutorial is fully functional and available before activation; however, a unit leader trying to log in using an appropriate access code will be denied access to the Internet Rechartering software until it is nationally activated.

Access Window

The Internet Rechartering system is designed so that the council may select the "access window" offered to their units. The window is the same for all units and is based on the unit's expiration date. The council may decide to allow access up to two months prior to the unit's expiration and up to two months after the expiration date. No access is granted to either the unit or council outside of this access window. We recommend two months prior and two months after as the initial access window.

Continued on back

Access Window
(continued)

As you make this selection, keep in mind that units will have access to “real time” ScoutNET data at the time of their initial login. This data will not refresh if changes are made in ScoutNET once the unit has completed its initial login. Therefore, to avoid “stale” data, the council should carefully consider and communicate to its unit leadership the timeframe for access that meets your council’s charter renewal campaign schedule.

The council has the authority, through the administration module, to reset a unit that became overly anxious and initialized its data too soon.

PAS Role

The council’s system administrator must grant the appropriate council staff member(s) the role of UCRS administrator within PAS. This role will allow the staff member to access the various administration modules for Internet Rechartering. Within these modules, the council will be able to reset passwords for units, reset data so the unit can begin again, block a particular unit from access, view rosters, and track the progress of each unit.

2 The Annual Charter Renewal Process



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 Web site address, and the unit's unique access code.

At Least 90 Days Before Renewal Date

The district executive visits the head of the chartered organization to renew the Scouting relationship and to discuss the current state of the unit.

60 Days Before Renewal Date

The unit commissioner and unit committee conduct a membership inventory of youth and adults. Visits are made to inactive members. The charter review date is set, and all unit adults are urged to attend.

60–45 Days Before Renewal Date

Units choosing to renew their charters online will visit the local council's Web site, complete the steps through the submittal process, and print a revised charter renewal application.

To assist in this process, there is a report available to council employees with membership reporting capabilities entitled *Commissioner's Status Report*. This report provides the commissioner with the renewal status of each unit, including the date of first login, the current stage of the process completed, and date submitted.

Two other reports that are available are the *New Members Added Report* and the *Members Not Renewed Report*. Both of these reports are designed to provide information to the district in an effort to follow up with new youth and dropped youth identified through the renewal process.

45 Days Before 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, Quality 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

Continued

**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.

3 Helping Units to Be Successful

Be Prepared to Support Your Units

It is imperative that your council develop a written plan for supporting your unit leadership during the Internet Rechartering process. A fully trained commissioner staff is your best resource to accomplish this task. Failure to develop a plan will likely result in frustrations with an otherwise simple process.

Renewal Options

Commissioners and professional staff must be sensitive to the fact that some units (for a variety of reasons) may need to use the “paper” method for charter renewal. These may include units with short or long terms and “special care” units.

Tutorial

The interactive tutorial program is available on the Internet as self-guided training or as a training session for several Scouters (commissioner training, roundtable training, staff training, etc.). Placing a link to the tutorial on the council’s Web site allows unit leaders, commissioners, and staff to visit it at their leisure at home, at the office, or at a training session. The tutorial is also available from the Tutorial folder on the Internet Rechartering DVD.

Help Link

Internet Rechartering has a full set of Help screens available to the unit leader if questions arise while completing the unit’s charter renewal. Click the Help link on each page to view helpful topics, to search by key word, or to run the interactive tutorial. The Help contents includes a list of frequently asked questions.

Council Administration

After the UCRS administrator role has been granted within PAS, the user sees a blue “Web Admin” button on the Flash page of ScoutNET. From this button, the user can select UCRS Admin – Unit Charter Renewal System Administration. The administration screen offers three options in the upper left-hand corner: Activity, Function, and Management.

Unit Activity: For each unit currently within the access window for Internet Rechartering, this screen will display the following: unit type and number, chartered organization name, the date the unit first initiated the process, the name of the processor, the current status or stage the processor is in, and the number of new and renewing members. The new and renewing members include both adults and youth.

Continued

**Council
Administration**
(continued)

Unit Function: For each unit currently within the access window for Internet Rechartering, this screen provides both information and functionality for the administrator. In addition to the unit type, number, and chartered organization name, the unit's expiration date and the current status or stage the processor is in are displayed. The administrator can also complete three functions for each unit: view the current roster for the unit with changes to-date, reset the processor's password, and reset the unit's data so they can start over.

Unit Management: On this view, the administrator can block (or remove the block from) any unit from participating in the Internet Rechartering process. For example, units changing their charter term or their chartered partners require professional attention and can be blocked from the normal Internet Rechartering process, if necessary.

Help Desk Support

The Customer Service Help Desk at the national office is available to provide support to council employees with the UCRS administrator role. Councils are responsible for all support to their unit leadership. The help desk will not be able to directly support your volunteers.

4 Monitoring Your Charter Renewal Campaign



Campaigning

A successful charter renewal process is designed, implemented and managed like any other campaign (fall recruitment, popcorn sales, Friends of Scouting). The council charter renewal campaign requires a detailed timeline or schedule of deadlines, a commissioner staff, training, communications, and monitoring. To assist in the communications and monitoring of the campaign, Internet Rechartering has four reports that are available through the PAS Membership report submitter under the Recharter and General Ledger selection. The UCRS administrator creates the reports and distributes them appropriately.

Access Codes

The first report is the *UCRS Access Code Report*, which allows the council to create the required access codes for each unit. These codes are necessary for the unit processor to log in. Each code is unique for that unit. The report may be printed for the whole council or for a district or sub-district. Codes will be generated for all units by month for the specified unit charter expiration date. This report may be generated as a report, a word processing file for use in mail merge communications, or as labels for attachment to a generic communication. The distribution and control of these access codes must be a part of the council's charter renewal campaign plan.

Commissioner's Status Report

Because Internet Rechartering can be completed from any convenient Internet access, it is important to know if the unit leadership has begun the process and if so, what stage of completion they are in. The *UCRS Commissioner's Status Report* provides the details for each unit. The report format is separated into your council's structure much like a District Totals Report, thereby providing valuable information to the professional staff and commissioner staff on the progress of each unit in completing their Internet Rechartering.

Any council employee with the MS inquiry role in PAS (or higher) may print this report from Membership Reports in PAS.

Continued

**Members Not
Renewing**

A membership inventory is a vital part of the charter renewal campaign. The *UCRS Members Not Renewed Roster* provides a roster of all youth members not renewing their membership for the next charter year. This roster is created based on the month of unit expiration.

**New Members
Roster**

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.

**Unit Charter
Renewal Report
Package**

During the Internet Rechartering process, the unit processor can view the unit roster as it is being created. Once the renewal processing is completed and the renewal submitted, the processor will print the Unit Charter Renewal Report Package. This document is created in a PDF version, and it includes the charter renewal application with the appropriate signature lines.

This package also includes lists of all new adult and youth members, all transferring adult and youth members, any multiple adult and youth members, and all no-fee adults. The charter renewal application shows the registration fee to be submitted, and the application must have the needed certifying signatures. All new adult and youth application forms, any council-required applications or forms, and the fee payment must be attached to the package. The package instructions also request the unit to designate a contact person, who may not be the renewal processor, in case of any questions. This packet is presented at the unit charter renewal meeting for review, authorized signatures, and discussion.

5 Processing Submitted Unit Information



Saves Time

As detailed below, it will take considerably less time to process a charter renewal for a unit submitted through Internet Rechartering than one that is entered from the charter renewal application paperwork, because the data entry is completed up front. During pilot testing of Internet Rechartering, councils estimated saving up to 80 percent of the registrar's time to complete the charter renewal process using Internet Rechartering.

What the Unit Does

The charter renewal processor for the unit will complete several stages during Internet Rechartering. The first stage is called "Load Roster." In this stage:

- The processor accesses current unit data directly from ScoutNET at that point in time. The ScoutNET data is saved to another database for the unit. The two databases (ScoutNET and Internet Rechartering) are completely separate while the unit completes charter renewal.
- The unit processor may choose to upload the unit's data from unit-management software and complete a reconciliation process between unit-management software data and the ScoutNET data.

During the Internet Rechartering process, the unit must validate its member information against the BSA's membership regulations. The system checks this automatically and provides either errors (which must be corrected) or warnings (which may be corrected) for any violations. When completed, the unit will submit its Internet Rechartering file. This submittal process creates the charter renewal batch for the unit within PAS and places it on hold. The unit prints the charter renewal application, acquires the appropriate approval signatures, and follows the council's regular rechartering plan.

New Members

Members recently added to the unit in PAS are available during the Load Roster stage, eliminating the "stale" recharter roster. However, any additional enrollments added to this unit after the Load Roster stage is completed will not be available to the unit. Options for handling new members once the Internet Rechartering process has begun include:

- **Reset the Internet Rechartering process for the unit.** The council and unit may decide to reset the unit's Internet Rechartering after adding the new members into ScoutNET. This is a function of UCRS administration.
 - **Add as New.** If the unit has not completed the submit stage, the council may process new members as additional enrollments (including transfers) in the unit's current charter. After rechartering, complete the Merge Person routine for these new members to combine their person records so only one record remains.
-

Continued

New Members
(continued)

- **Select as New.** If the unit has completed the submit stage, process new members as additional enrollments in the unit's current charter by searching for and selecting the new members in PAS. The submittal process from Internet Rechartering will create the new person records. This technique will "link" the person records of the additional enrollment and recharter processes to ensure that only one record exists for each member.
-

Annual Recharter Process

Internet Rechartering is only a portion of the whole annual charter renewal process. Once the unit has completed Internet Rechartering and printed the charter renewal application, the application is taken to the unit charter renewal meeting. The commissioner and unit leaders review the charter application, new member applications, appropriate fees, dropped youth, and Quality Unit requirements. Then the paperwork and fees are delivered to the council office or to the district charter renewal turn-in meeting.

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, Quality Unit status, 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. See section below for details.
 - Once all errors are corrected and warnings appropriately handled, check fees and post the unit. Process certificates and cards as usual.
-

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.

6 Frequently Asked Questions



Q Is our council permitted to pay the annual Internet Rechartering license fee in one payment?

A Yes, and if paid in one payment, that payment will be due in January (and each January thereafter). At the time the license agreement is completed, the council will select either the annual payment option or the billing in 12 monthly installments.

Q Will the Internet Rechartering application work through any Internet connection?

A Internet Rechartering is supported by Microsoft Internet Explorer version 5.5 or higher and no other browser provides full functionality. The system works with a minimum 56-KB dialup modem connection to the Internet. Faster connections such as DSL and cable will speed up data transmission from the Web site.

Q How does the unit get its access code for Internet Rechartering?

A The council provides it. The council prints the access code from PAS, Membership Reports, Recharter and General Ledger. Select the report called UCRS Access Code Report. The council decides the best method to distribute access codes to the units.

Q Can the access code the council gives a unit be used to see another unit's data?

A No. The access code is unique for each BSA unit and must be used in combination with the proper unit type (pack, troop, team, crew, or ship) and number.

Q Should the council prepare a charter renewal packet for each unit as it has in the past?

A Yes, and the council may decide to include elements of the Internet Rechartering process in the packet. For example, the packet may include the council's Web site address, instructions for linking to Internet Rechartering, and the timeframe for completing electronic renewals. It may also include the Internet Rechartering access code. Distribution and control of the access code is part of the council's charter renewal campaign plan. Other materials in the packet may be general BSA guidelines for unit charter renewal, extra forms, and a current unit roster. Keep in mind that the "manual" charter renewal application includes the member inventory worksheets.

Q What is the local council's role as far as support and administration for Internet Rechartering?

A The council serves as the "help desk" for its units using Internet Rechartering. Council staff must know how Internet Rechartering works. They will answer questions from units, referring to a Help file designed especially for council support. The council will administer the process by providing units with their respective access codes, monitoring unit activity, changing passwords, resetting data, and creating reports requested by council management for staff and commissioner use.

Continued

Q What about questions concerning unit-management software (UMS)?

A The council should be able to answer questions about uploading a UMS file to start the Internet Rechartering process. If there is a problem with a UMS file, however, it is the unit's responsibility to contact the vendor who sold and supports that product and request assistance.

Q What other support materials will be available to councils for training and communicating about Internet Rechartering?

A A training and communications packet on Internet Rechartering will be sent to councils after they accept the license agreement. The packet will include guidelines for training, sample articles for the Web site and newsletter, and a timeline for implementing the training and communications plan.

Q In what ways may the Internet Rechartering DVD be used to support the council and its training of staff and volunteers?

A The DVD is useful with a variety of audiences. Show it to council executive board members, council and district commissioner staff, and district committee members. It is also a valuable tool for the orientation of council staff members. Segments of the DVD, such as "What Volunteers Say" and "How it Works" may be shown at roundtables and program launch meetings where Internet Rechartering is being introduced.

Q What is the proper way to play the Internet Rechartering DVD?

A Play it in any DVD player connected to a video screen or from a PC equipped with a DVD-ROM drive. The DVD also includes the Internet Rechartering Tutorial. To view the tutorial, insert the DVD into a DVD drive on a PC. Using My Computer, open the folder called Tutorial, and select the file called tutorial. To copy the tutorial to your computer, copy the entire Tutorial folder.

Q What other tools are available for orientation of volunteers and staff?

A The tutorial is readily available from the Internet Rechartering Welcome screen. You can also place a link on your council Web site to the tutorial. Help files are linked from the application itself. It is important to show both the volunteers and staff the availability of the Help contents with its searchable, interactive information and list of frequently asked questions.

Q If the council does not want a specific unit to use the Internet Rechartering process, what should be done?

A The council may choose not to provide the unique access code to the unit or it can block the unit by using the Block Unit process in Unit Management. If Block Unit is done while a unit is working online, it will prevent the unit from logging in again until the block is removed. Changing the password is only a temporary means of blocking a unit. Council management should determine if and when to block a unit's participation and should explain to the unit leader why the unit is not eligible to use the online process.