CROSSROADS OF AMERICA COUNCIL
BOY SCOUTS OF AMERICA

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ANNUAL RECHARTER GUIDE

UNIT RECHARTERING MADE EASY

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The internet charter renewal guide is your roadmap to a successful charter renewal. It will guide you through each step and help you to deliver your charter renewal on time.

Internet re-chartering allows you to perform the following tasks:

- Select members from your existing roster
- Update member information
- Add new members

Every unit should use the internet re-chartering. The manual method of rechartering is still available if requested.

PLEASE NOTE:

THE ON-LINE CHARTER RENEWAL SYSTEM *DOES NOT* INCLUDE THE INSURANCE FEES

Please use the recharter worksheet to determine the total fees.

Getting Started

Items you need to gather before you begin Re-chartering:

- Gather current copies of your unit's roster (*this can be obtained by using the internet advancement)* – contact the Scout Service Center for your unit code.
- Collect completed applications for all new youth and adults***
- The re-chartering notification with your unit's access code found in the email
- Collect copies of the Youth Protection Training certificates for all registering adults. Crew/Ship members must take Youth Protection Training Venturing Version.

IMPORTANT: You are going to view and handle information confidential to your unit and the Boy Scouts of America. By working with this private information, you accept the responsibility of maintaining the privacy and confidentiality of this information. You agree you will share this information only with individuals in your unit or the Boy Scouts of America. This information must never be shared outside of the Boy Scouts of America for privacy reasons. If you cannot accept this responsibility, you must notify your unit Committee Chair and withdraw from seeing or working with these materials.

Your unit's charter is available 90 days before your unit's charter expiration date.

Identify Key Charter Renewal Team and confirm renewal month. This team plans and leads the charter renewal effort.

→ *Suggested attendees: Unit Commissioner, Unit Leaders, Unit Committee Chairman, and unit "Renewal Processor". The renewal processor is the unit level person in charge of processing the charter renewal data. Recommend someone who is comfortable using computers.*

Confirm charter renewal month.

Get dates for district charter renewal training and district turn-in date. Check district calendars or contact your Unit Commissioner to obtain these dates.

Remember you cannot change the date the charter renewal packet is due or the "window" when you can gain access into the on-line charter renewal.

*****Submit applications to the Crossroads of America Council as soon as possible. This is a year-round process; DO NOT wait to update your unit records during your charter renewal. Youth and adults not properly registered are not part of the unit, not insured, not eligible for youth advancement and generally cannot participate in activities. The charter renewal process is MUCH easier if your paperwork is current at the council office.**

Review this guide.

Attend District Charter Renewal training and turn-in dates. This is a great time to ask and receive answers to your questions.

Correct a copy of your most recent unit roster before correcting originals and software. Write unit roster changes in another color (e.g. red) to make official data entry easier. During this time confirm every family member.

- Invite members to return and confirm that they are staying active with your unit.
- Confirm accuracy of birth dates, school grade, addresses, and if they want Boys' Life.
- Date of birth and social security numbers are required for every registered adult. Social Security numbers are not required for adults that are only filling the role of Tiger Cub Adult Partner or ScoutParent.
- Youth Protection Training is required for every registered adult. Crew/Ship members must take Youth Protection Training Venturing Version. If an adult is in a Pack, Troop, Team and a Crew or Ship they must take both versions of Youth Protection Training.

Important Notes on Social Security Numbers

(1) Social Security Numbers are a critical part of BSA's youth protection efforts and are not used, shared, printed, or divulged for any reason. If an adult has concerns about revealing their Social Security Number, they should contact their District Executive or the Crossroads of America Council.

Confirm you have applications for all new youth and adults. Verify that the applications for all new members are complete (e.g. all required, signatures, social security number for adults, completed BSA Disclosure/Authorization forms for adults (*located on the inside top cover of the adult application*). You **should not** process a registration if you do not have a completed application on hand.

Fees:

Most youth and adults will remit $15 for annual registration, $1.00 for insurance and $12 for Boys' Life (optional).

Tiger Cub Adult Partners (AP) and ScoutParents (PS) do not pay a registration fee. If they accept another adult leader position, they **must** complete an adult application and pay the registration and insurance fees.

There is no charge for the Institution Head (IH). If the IH accepts another leadership position then they must complete an adult application and pay the registration and insurance fees.

Important: Charter renewal software does not automatically include the mandatory insurance. The charter renewal team must manually add the insurance fees. The insurance fee is $1.00 each for all youth and adults who are registering in the unit.

Transfer fees: **Note**: The transfer function built into Internet Charter Renewal is intended for transfers from other councils into the Crossroads of America Council, not for transfers between units in Crossroads of America Council.

Adults or youth members who have paid their primary registration fee elsewhere in the Crossroads of America Council (e.g. another unit, district or council-level) are considered "multiple" registrations and do not pay registration or insurance fees again.

Begin the internet charter renewal process

Register and Log In

"Renewal processors" must register as a first time user each year. **Do Not** click on "returning" to start the process. Processors can begin the process and stop before finishing. When these processors return, they will follow the process for the returning user to log in.

Charter Renewal Data Entry Cautions

- **Your entry overwrites Council data – Be careful!**
- **DO NOT change a name** *if the information is incorrect note it on the print out after you submit the final version.*
- Name entries.
  - ✓ Do not put spaces between prefixes (Decarlo not De Carlo)
  - ✓ Do not enter apostrophes (Obrian not O'Brian)
  - ✓ Do not use hyphens (John SmithPayne not John Smith-Payne)
- Do not enter bogus data to bypass prompt. Contact the Crossroads of America Council Registrar instead.

Stage 1: Load roster

The first step will require you to load roster either from ScoutNet or upload from Packmaster/Troopmaster. If you load from ScoutNet you will only get the members currently posted to your unit. In **Stage 2, Step 2** (*select members for renewal)* if additional enrollments are posted by the council after the "renewal processor" has begun the renewal process; you will be able to import them (upper right hand corner) as long as this is done before you select submit in Stage 5.

Stage 2: Update Roster

Step 1 – Update information for the Chartering Organization. Organization telephone number is required.

Step 2 - Select members
The current roster for the unit is displayed. Confirm the youth and adult members who are renewing (*all members are automatically selected; deselect the members who will not be renewed).* If a member is not renewing, uncheck the box. Beginning in this stage you can review/print your roster (upper left hand corner). The next page is a confirmation of who is being renewed and who is not being renewed.

Step 3 – Promote members
You have the option to Promote Members from another unit. When you click **Promote** you will see a Unit Selection screen that will display any units that are chartered to the same organization as your unit. If you are in a unit eligible to convert youth members into adult leaders (troop, team, crew, and ship only) you will see your own unit listed also. If you are promoting a member from youth to adult or from another unit you must have an application to register them (*consider them new members).*

Step 4 – Add new members
You must have their completed applications before you begin this process. Complete new adults first (review adult applications for age requirements) and then add new youth (review youth applications for age and grade requirements). You must enter an ethnic background (*if not provided select not provided*). Enter and confirm new registrants' information to ensure accuracy. **DO NOT** enter a new member if you **do not** have an application. **Note:** There are no transfers during charter renewal.

Step 5 - Update members
Review member data and make necessary changes to member records (i.e. address, phone number, position, etc). **DO NOT change a name** *if the information is incorrect note it on the print out after you submit the final version.* Use the remove selection to delete a member from the renewal. This screen now shows whether an adult is Youth Protection Trained or not (*must be current- within the last 2 years)* and the date it was last taken. If the youth protection training is going to expire shortly after your charter expires then it should be retaken before the current charter expires.

Step 6 - Update member position
This page displays a list of the required positions for your unit and information on who is filling these positions. The unit adult positions table presents a summary of required positions. The number in the **Current** column must be within the minimum and maximum requirements. To change the position(s) for an individual, click the update button to the left of the individual's name. **Note:** Quality Unit Recognition requires an assistant unit leader.

Stage 3: Check roster

Step 1 - To begin validation - select **Check Roster**. This allows the "renewal processor" to do a final update on the charter renewal data and to have the unit information validated against BSA unit requirements. If the charter renewal data does **NOT** conform to the BSA unit requirements, the check roster results page will inform the user. *Refer to the appendix for common re-charter problems.* **Or** if you wish to make more changes to your roster before you continue you can select which stage you wish to go back to by selecting the stage at the bottom of the page.

Step 2 – Check roster Errors and Warnings
When the Internet Rechartering has finished validating your information, you will be informed of any errors or warnings concerning your roster. This step will display any warnings and errors in the validation process and give you the opportunity to make corrections. You cannot proceed to the next stage until all errors have been resolved. Warnings should be reviewed and corrected if possible but will not prevent you from continuing to the next stage. Internet Rechartering will provide you with suggestions on how to correct errors and warnings. All adults must have current youth protection training; this information will be entered at the council; however, <u>the unit must provide copies of the youth protection training certificates with the charter renewal application</u>.

Stage 4: Summary

In this stage you can review your final roster and fees.

Step 1 – Update fees
The fees include the member fee and the Boys' Life subscription fee, and the total fee per member (*these fees **do not** include the insurance fees, these must be calculated manually).* If you want to update the Boys' Life subscription or if a member holds multiple positions and pays in another unit, select update to the left of the name, select member paid in another unit and complete the requested information (***the renewal processor should verify with the member which unit is their primary registration.*** *Many times each unit that the member is registering with indicates that the member is a multiple and as a result the member is not paid in any unit which could result in the member having their primary registration changed.)* All paying adults receive Scouting magazine, do not select Boys' Life unless they want to receive both magazines. Please click the ***Boys' Life*** button to verify and select 100% *Boys' Life* recognition for your unit.

Step 2 – Membership Inventory
This step is only required if you did not renew some of your members. You must respond to the questions on this page in order to continue.

Stage 5: Submit roster

Print and Review the draft renewal one more time. If changes are still needed, click Home link to navigate back through the stages.

SUBMIT the renewal. Once the "renewal processor" submits to council they **cannot** go back to make any changes.

- **The process is NOT COMPLETED even after you hit submit. The charter renewal MUST be PRINTED and SIGNED**

PRINT the Renewal Application. This opens a PDF. It prints with the signature lines for the Executive Officer, Council Representative and the Unit Leader (no designees) **Obtain approval signatures and attach forms requested by BSA.** The printed renewal application **must** be signed before submitting to the council. The charter renewal **must** be signed by the Executive Officer (***cannot*** *be signed by the chartered organization representative)* **and must** be signed by the Unit Leader *(**cannot** be signed by the committee chairman, a committee member or another unit leader)*

Renewal processor should complete the last page.

FEES
*The fees listed on the renewal report package **do not** include the insurance fees, these must be calculated manually. Please use the fee calculator area on your unit recharter envelope.*

The following must be included in your charter packet when dropping off:

- **All** completed new adult and youth applications
- The adult applications should include the BSA disclosure/authorization form.
- Signed charter renewal application (all pages) must be signed by the Executive Officer (***cannot*** *be signed by the chartered organization representative)* and must be signed by the Unit Leader (***cannot*** *be signed by the committee chairman, a committee member or another unit leader).*
- Signed annual charter agreement
- Council representative signature – can be obtained at turn in.
- Monies due (*don't forget to add the insurance)*
- Youth Protection Training Certificates for all registering adults.

Remember the charter renewal paperwork is a contract and the correct procedures must be followed. The completed signatures are required to demonstrate that the organization agrees to continue its charter and that all the adults are approved to serve in the positions listed on the charter. Keep a copy of all forms for your unit's records.

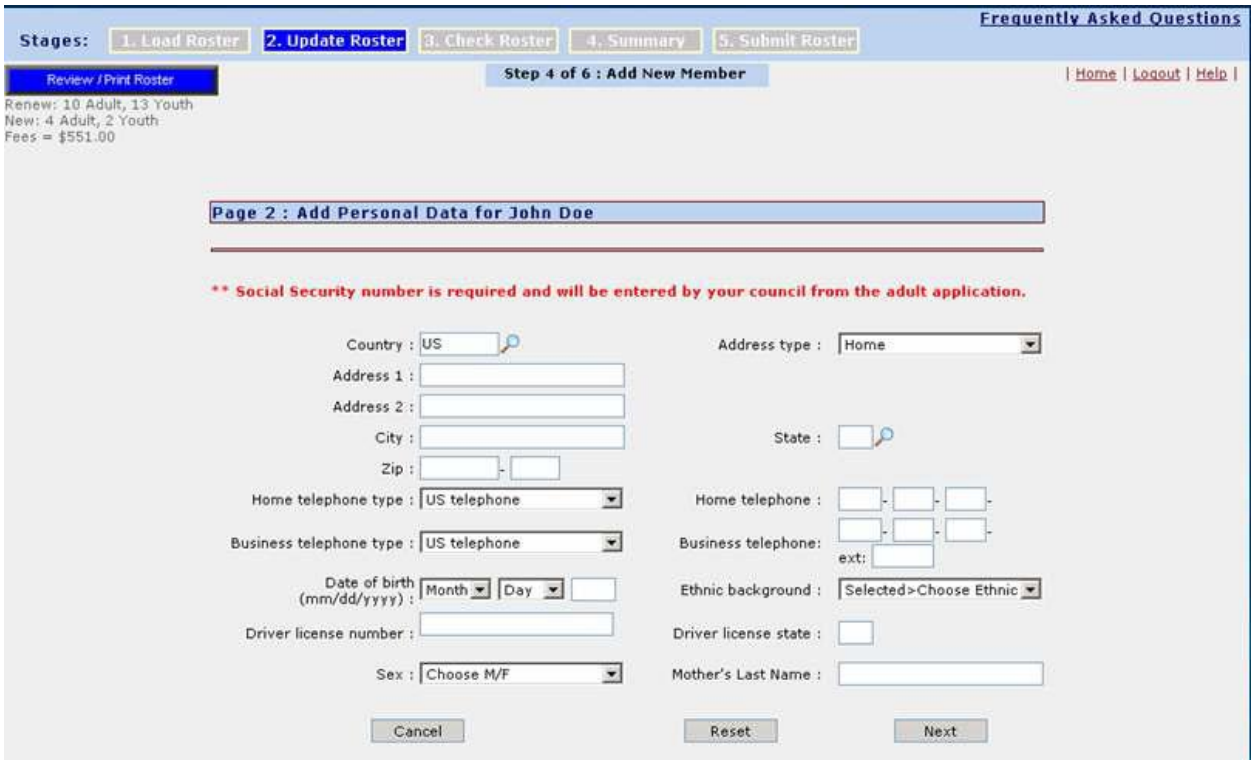
Change in Social Security Number Entry during Internet Rechartering Due to Privacy Concerns

All Social Security Number (SSN) entry fields and references have been removed from Internet Rechartering and replaced with the display of an informational text message as follows: "****Social Security Number is required and will be entered by your council from the adult application**."

The local council will assume the responsibility for entering SSNs for new adult leader applicants once the renewal has been submitted through Internet Rechartering, and the required paperwork has been received at the council office. The current Charter Renewal posting process in local councils does not allow an adult leader registration to be posted without a valid SSN, so this implementation will not compromise or change the current SSN requirement or validation.

Support documentation for Internet Rechartering will be revised so that the Help document and Tutorial will be changed to explain this change.

The following is a sample of where the new text message box will display in Internet Rechartering:



Annual Charter Renewal Checklist

Charter renewal signatures:

- ☐ Executive Officer/Institutional Head of Sponsoring organization.
- ☐ Council Representative (District Commissioner, Unit Commissioner or District Executive) can be obtained at turn-in.
- ☐ Unit Leader (Cubmaster, Scoutmaster, Crew Advisor, Varsity Coach, Skipper)

Required Adult members

- ☐ Executive Officer
- ☐ Chartered Organization Representative – *The only person who can hold more than one position in a unit; he or she can serve as a committee chairman or a member of committee.*
- ☐ Committee Chairman
- ☐ Minimum of 2 members of Committee (*one of which can be a ScoutParent Unit Coordinator or Pack Trainer)*
- ☐ Unit Leader (Cubmaster, Scoutmaster, Crew Advisor, Varsity Coach, Skipper)
- ☐ Cub Packs must also have at least one of the following:
  - Tiger Cub Den Leader (*If your pack has Tiger Cubs)*
  - Den Leader (*One for each rank: Wolf and Bear; your pack has)*
  - Webelos Den Leader *(If your pack has Webelos)*
- ☐ Packs/Troops/Teams must also have at least one
  - Assistant Cubmaster/Assistant Scoutmaster/Varsity Assistant (*required to qualify for the Journey to Excellence Award [JTE])*
- ☐ Crews/Ships must also have at least one
  - Associate Advisor/Mate (*required to qualify for the Journey to Excellence Award [JTE])*
- ☐ Adult partner (*No-fee, non-registered volunteer position)* for every registered Tiger Cub

Youth members

- ☐ Verify Name, Address, Grade and rank for each registered youth
- ☐ Verify Boys' Life Subscription for each youth.

- ☐ **Packs**
  - If a Tiger Cub verify Tiger Cub Adult Partner information is complete. A Tiger Cub must be under age 8, **have** completed kindergarten **or** be in the first grade **or** be age 7.
  - A Cub Scout must have completed first grade but not completed third grade **or** be age 8 or 9.
  - A Webelos Scout must have completed third grade but not completed fifth grade, **or** be age 10 but not yet 11 ½.

☐ **Troops**

- **All** Boy Scouts **must** have completed the fifth grade **and** be a least 10 years old, **or** be age 11, **or** have earned the Arrow of Light Award **and** be at least 10 1/2 years old, but have not reached age 18.

☐ **Teams**

- **All** Scouts **must** be at least age 14 and not yet reached age 18.

☐ **Venture Crews**

- **All** Venture Crew/Sea Scout youth participants **must** be 14 years of age**, or** 13 years **and** have completed the eighth grade. The maximum age for youth participation is under 21 years.

New Youth and Adult member registration check lists

Youth applications

- ☐ Unit Type and Number
- ☐ Full Name (NO initials or nicknames)
- ☐ Address, City, State, Zip
- ☐ Phone Number
- ☐ Date of Birth (month/day/year)
- ☐ Grade
- ☐ Boys' Life
- ☐ Parent's Name
- ☐ Parent's Date of Birth (Absolutely, if youth is Tiger Cub)
- ☐ An adult application is required if a Tiger Cub is not the parent or is not living at the same address as the youth.
- ☐ Signature of Unit Leader or Designee
- ☐ Parent's Signature

Adult applications

- ☐ Unit Type and Number
- ☐ If a Multiple, indicate at the top of the application what unit paid in and circle.
- ☐ Full name (NO initials or nicknames)
- ☐ Social Security number (an adult cannot register if this is not on the application)
- ☐ Address, City, State, Zip
- ☐ Home Phone and Business Phone or Cell Phone
- ☐ Date of Birth (month/day/year)
- ☐ Driver's License
- ☐ Occupation and Place of Employment
- ☐ Position that will be held in the unit
- ☐ Questions 1 – 6e.
- ☐ Signature of Applicant
- ☐ Signature of Committee Chairman and Chartered Organization Representative (or Chartered Organization Head)
- ☐ BSA Disclosure/Authorization form (inside front cover of adult application)
- ☐ **Copy of their current Youth Protection Training certificate. Crew/Ship members must take Youth Protection Training Venturing Version.**

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VARSITY

VENTURING • BSA

MEMBERSHIP INVENTORY

(To be conducted sixty days prior to the charter renewal date as well as during the month of December)

PURPOSE

1. Provides a roll call in which each unit member is contacted to determine quality of program received, to follow up on absent and inactive members, and to see if everyone is registered.
2. Invites each member to continue the program for another year and thus increases tenure of members.

The membership inventory is a part of the unit's charter renewal and will assist the unit in building strength with a quality program. It should be conducted 60 days prior to the unit's charter review meeting. Membership inventory is also held again in December to be sure all members are registered by year end.

INSTRUCTIONS

1. Select a unit adult to lead the inventory.
2. Invite your commissioner to assist.
3. Using the computer printout for charter renewal, the commissioner and unit adults conduct an inventory of youth and adults who are still active.
4. All inactive members are listed and assigned to various persons who will visit or contact them to attempt to reactivate them. Be sure to brief the visitors/callers on what to say when they make their calls.
5. Agree on a plan to recruit new youth and adults so the unit can reregister with no loss in membership. One of the standards for the national Quality Unit Award is to renew the unit's charter with an equal or greater number of youth over a year ago.
6. Now make every effort to recruit additional youth and adults.
7. Also be sure to register any youth who are participating but are not yet registered.

Charter Renewal Meeting Agenda

(Conducted 45 days before the charter renewal date.)

I.	Introduction and Opening Comments	Unit Committee Chair
II.	Membership Review ☐ Adult ☐ Youth	Unit Commissioner
III.	Collect Fees ☐ Charter ☐ Adult ☐ Youth ☐ Boys Life	Unit Committee Chair
IV.	Complete renewal form ☐ Executive office approves the charter renewal form ☐ Executive officer or chartered organizational representative approves and certifies volunteers ☐ Unit leader approves and certifies youth ☐ Check for accuracy and completeness	Commissioner
V.	Confirm charter presentation date	Commissioner
VI.	Closing comments ☐ Executive officer of the chartered organization ☐ Commissioner	

Rechartering

Re-chartering What is it?

On June 15, 1916, the United States Congress granted a federal charter to the Boy Scouts of America.

This charter can be found in the United States Code, Title 36 (Patriotic Societies and Observances), Chapter 2 (Boy Scouts of America). As stated in the U.S. Code regarding the BSA: "The purpose of the 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 were in common use by Boy Scouts on June 15, 1916."

The Boy Scouts of America renews its federal charter each year through a formal reporting to Congress. They (the BSA), in turn, have granted charters to sponsoring (chartered) organizations. And like the BSA and the U.S. Congress, these chartered organizations must report to Scouting once each year to renew their local charters. Chartered organizations are issued a charter, effective for one year, to operate a Scouting unit. The charter year is not necessarily the same as the calendar or program year (the current unit charter indicates the charter expiration date.) In the months prior to the charter expiration date, the District Executive, Unit Commissioner, Pack Committee, and Scout leader all play an important role in the preparation and execution of the re-chartering process.

Forty-five days before the charter renewal date, the commissioner and the unit committee chairman conduct the charter renewal meeting, which includes identifying youth and adults to reregister, completing forms, and collecting fees. The executive officer of the chartered organization or the chartered organizational representative approves all volunteers and the unit leader certifies the youth to be registered. Participants of this meeting should include the commissioner, chartered organizational representative, executive officer of the chartered organization, unit leader, and all other unit volunteers.

Fifteen days before the charter renewal date, the commissioner submits the complete charter renewal application to the district representative in November.

After the charter submittal, the charter should be available to the unit commissioner to conduct a formal charter presentation to the chartering organization.

Charter Presentation Ceremony

This ceremony may be used at a meeting of a service club or as a part of the regular religious service of a chartered organization religious group.

Opening Statement

I am pleased to be with you to recognize the great relationship that exists between the Boy Scouts of America and _____ (name of organization). The Boy Scouts of America exists primarily to serve chartered organizations and their needs as they reach out to serve youth of their respective organizations and youth in the nearby community.

In recognition of this great relationship, I would like to call forward at this time the chair and members of the unit committee.

Charge to the Unit Committee

You have assumed the responsibility of being the board of directors for Boy Scout Pack/Troop/Team/Crew/Post _____ (number) at _____ (organization). The chair of the committee presides over the monthly meetings of the unit committee and also assumes the direction of the unit should the unit leader or assistants be unable to serve in their leadership capacity. As members of the committee, you have assumed the role of providing the unit with outdoor opportunities, providing advancement opportunities, providing the unit with information on events and activities conducted by the district and council, providing transportation if the need exists for unit activities, and providing financial stability in support of approved money-raising projects for unit activities; and guaranteeing continuity of the unit through the years.

On behalf of the chartered organization, do you accept these responsibilities to be accomplished to the best of your ability? If so, answer 'We do.' (Committee members respond.)

Congratulations! Here are your registration cards." (Present cards to each person.)

Charge to the Unit Leader and/or Assistants
(Call forward the unit leader and assistants before the combined assembly.)

You have accepted a major role on behalf of this chartered organization by assuming leadership of young people who will enjoy the Scouting program. You have accepted the responsibility of providing weekly programs, monthly activities, and participation in council and district events for your unit members. The time you devote to these young people will only be rewarded in the satisfaction you get from seeing them grow into great American citizens who will live by the Scout Oath and Law. Do you accept the mantle of this great responsibility? If so, answer 'We do.'

Congratulations! Please accept these registration cards as a token of your commission in Scouting.

Charge to the Chartered Organization Representative
(Call the Chartered Organization Representative forward.)

You have been appointed by your chartered organization to represent it as a voice in the local council of the Boy Scouts of America. You become an automatic voting member of the Crossroads of America Council and represent your organization at the annual council meeting, which selects leadership for the council for each ensuing year. In addition, you have the responsibility of coordinating the various Scouting units that exist in your chartered organization, making sure that they work one with the other to coordinate a natural graduation program from the Cub Scout pack to Boy Scout troop to Varsity Scout team or Venturing crew or Explorer post. We hope you will also provide assistance to the district whenever and wherever your time could be made available, in

addition to your responsibilities to your local organization and the local council. Will you accept this responsibility? If so, answer "I will". (Present registration card)

Junior Leaders (if Troop)
(Call forth all youth leaders)

You have been selected as the youth leaders this unit. You will be expected to be an example and you will be asked to provide leadership, program ideas, and initiative to all members of the unit who fall under your influence. You are, above all, expected to abide by the Scout Oath and Law and set a leadership pattern for all to follow. Will you accept these responsibilities? If so, answer "We will". (Present registration cards)

Charge to Members of Pack

Will all members of the pack please stand? As members of the Scout unit will you do your best to attend meetings regularly, provide assistance to your leaders, take the opportunity to pursue advancement and demonstrate your willingness at all times to abide by the Scout Oath and Law? If so, answer "We will". (Present cards)

Charge to Parents

Will all parents stand? As parents you are expected to attend all parents meetings of the unit, assist with needed transportation, provide leadership support when needed, and be willing helpers in time of need in order to provide the unit with an outstanding program, quality leadership and good parental support. If you are willing to do your best to support the leadership of the chartered organization and provide what assistance you can give to the program, please answer "We Will".

Charge to the Organization

Will all members of _____ (name of chartered organization) please stand? You have heard the unit committee, the unit leadership, the Chartered Organization Representative, the junior leaders (if troop), members of the unit, and parents all pledge their support to the Scouting program in this chartered organization. May we ask you to cooperate and work with the Scout leadership chosen by your chartered organization and provide, whenever called upon, assistance and help to make this program a vibrant living part of the youth outreach of your congregation? If so, answer "We Will".

Charge the Head of the Organization

You have heard of the pledge of commitment of all these members of your organization and the unit in supporting the BSA Scouting program as a major youth program for your organization. With the acknowledgment of this support, I am pleased to present to you the charter signifying your right to use the Scouting program for the year ahead in a way that conforms with both the rules and regulations of your chartered organization and those of Scouting. On behalf of the National Council of the Boy Scouts of America, I present your charter and pledge the cooperation of the local district, council, area, and region to help make the program a vibrant living part of your organization and community.

I would also like at this time to introduce the volunteers (if present) from our district who will provide support for you. May I introduce (the district chair, your commissioner and/or district commissioner, and any other visiting Scouters) who will help you carry out an effective program of Scouting for the year ahead.

Thank you for the opportunity to present the charter and thank you for accepting Scouting as a program of action for your organization.