Charter Renewal Audit Checklist
Lake Erie Council BSA

This document provides guidance on the contents of the Charter Renewal. The submittal package must include all roster pages, (the summary, for unit use, does not include roster pages). The Draft version will not be accepted; a draft version may mean the unit did not electronically submit the roster to LEC. Once a final copy of the recharter paperwork has been reviewed and accepted, electronically SUBMIT the charter to LEC and print out the submitted Final 2019 Charter Renewal Form (must have signature lines, the draft form has no lines) for signatures.

1. Signatures
   • Only the Executive Officer or the Chartered Organization Representative may sign on the top line. Also, if certifying online, only these two people are personally allowed to digitally sign the charter.
   • The unit leader signs certifying the youth membership.
   • The individual responsible for completing and submitting the package and their contact information must be listed on the last page of the printed charter.
   • The Unit Commissioner (or other designated Commissioner) signs only after the package has been reviewed and found complete, error free and has signatures.

2. Summary of New Applications Attached. Each new member added during charter renewal will be listed on the back side of the check list with check marks confirming certain critical information is on the application. Submit only the Council Copy of the Applications.
   • Youth applications: All personal information particularly contact data for the youth AND the parent/guardian. REQUIRED SIGNATURES: the PARENT or GUARDIAN and the UNIT LEADER.
   • Adult application: The Application must include contact information and the SOCIAL SECURITY NUMBER. All questions in the right-hand column also need to be answered. REQUIRED SIGNATURES: THE APPLICANT’S FULL SIGNATURE AND INITIALS and the CHARTERED ORGANIZATION REPRESENTATIVE are required. The Background Check Authorization must be filled in completely, SIGNED BY THE APPLICANT, and attached to the completed application.
   ➢ Additional Disclosures and Background Checks Authorization Forms. All paid adult volunteers must submit the “Additional Disclosures & Background Check Authorization” after reviewing the “Background Check Disclosure” form. The BSA will now also perform periodic rechecks of criminal backgrounds to support the continued safety of youth in our programs. Please note that these steps must be completed by each registered adult leader before your 2020 Charter Renewal can be processed.

3. Youth Protection Training Verification. All members 18 years and older must have completed the current Youth Protection Training to remain as a registered member. Venturing Crews and Sea Scout Ships will identify youth (under age 18) on the 2019 charter who have or will “age out” before Jan 1. To continue as “Participants” to age 21 in a crew or ship, the individual must complete YPT and submit a certificate and an adult application.

4. Payment Calculation The recharter software calculates a “Final Payment” (Line a) including national membership for youth and adults, $36.00. (see Line d below concerning “transferred” individuals) the LEC insurance fee, $12.00 (fee is based on all individuals printed on the charter except the Institution Head, a no fee ‘position,’ and individuals identified as multiples), Boys Life subscriptions, and the national chartered organization fee.

Multiples are: a) individuals identified on the roster as paying dues and insurance for 2020 in another unit, b) the Charter Organization Representative if another of the chartered partner’s affiliated units paid the fee or, c) the COR is listed in a second position in the unit. THE UNIT IS RESPONSIBLE FOR IDENTIFYING INDIVIDUALS IN MULTIPLE POSITIONS AND WHERE THEIR 2020 REGISTRATION FEES WILL BE PAID. If the Executive Officer takes a committee member or leader role in the unit, that position requires a membership and individual insurance
fee payment. THE CALCULATION DOES NOT INCLUDE PRORATED REGISTRATION AND INSURANCE FEES FOR THOSE NEW TO SCOUTING INDIVIDUALS ADDED TO THE ROSTER DURING THE RECHARTER PROCESS.

ADJUSTMENTS TO THE CALCULATED FEES:

- **Line b)** ADD FOR NEW YOUTH AND ADULTS $____ PER INDIVIDUAL FOR ONE MONTH MEMBERSHIP; Note the LEC insurance fee will be prorated at $1.00/individual/month starting in January 2020.
- **Line c)** ADD $____ FOR NEW LAST-MINUTE APPLICANTS (youth and adults) WHO ARE MANUALLY ADDED AFTER FINAL SUBMITTAL;
- **Line d)** A transferred member is an individual already in Scouting in another unit but choosing to join a new unit. **NOTE**: PLEASE DO NOT CHECK THE “TRANSFER TO THIS UNIT” BOX WHEN ENTERING NEW ADULTS OR YOUTH TO THE ROSTER, THE RECHARTER SOFTWARE DOES NOT CORRECTLY TOTAL FEES IF THIS BOX IS CHECKED. As a precaution, check the total calculated membership fees for paid adults and youth printed on the roster and compare to a manual calculation of the with the same number of youth and adults times the stated per person membership fee. If the individual is already a member of a LEC unit, ADD $____ for ANY TRANSFERRED MEMBERS (youth and adults) MANUALLY ADDED DURING RECHARTER. THIS WILL INCLUDE INDIVIDUALS WHO WERE REMOVED FROM THE ROSTER FOR WHATEVER REASON BUT ARE MANUALLY ADDED BACK IN PRIOR TO TURNING IN THE PACKAGE. Transferred members from another unit in LEC do not pay the $2.75, one-month membership as they are already registered thru December; IF THE INDIVIDUAL IS TRANSFERRING FROM ANOTHER COUNCIL PLEASE CHECK WITH A LEAD COMMISIONER OR USE. The old council may be on a different recharter cycle than the LEC and the fees due may be different.
- **Line e)** ADD ANY LAST-MINUTE BOYS LIFE SUBSCRIPTION REQUESTS at $12.00 for the year;
- **Lines f and g)** DEDUCT $____ FOR POST FINAL SUBMITTAL INDIVIDUALS IDENTIFIED AS MULTIPLES WHOSE 2020 FEES ARE BEING PAID IN ANOTHER UNIT.

After tabulating the adjustments, recalculate the total amount due. **IF TURNING THE CHARTER IN TO THE LEC RATHER THAN USING ONLINE APPROVAL OF THE CHARTER DOCUMENT AND ONLINE PAYMENT, IT IS RECOMMENDED THE AMOUNT SECTIONS OF THE PAYMENT CHECK BE LEFT BLANK UNTIL A COMMISSIONER COMPLETES THEIR REVIEW.**

5. **Payment Source and Payee.** Several payment options are available, including online payment in conjunction with the online approval of the Charter Renewal Document. HOWEVER, IF YOU ADDED NEW MEMBERS DURING RENEWAL OR ARE NOT CERTAIN THERE WILL BE NO FURTHER ADDITIONS (like youth or adults who want to join Scouting, pack leaders or youth who want to renew but hadn’t paid their 2020 dues to the unit), THE ONLINE PAYMENT METHOD IS NOT SUGGESTED BECAUSE NEW APPLICATIONS (AND YPT CERTIFICATES) MUST BE TURNED IN TO THE LEC. LEC payment options include:

- **Check including those of the chartered partner.**
- **Cash.**
- **LEC Unit Account.** Units may deposit the funds in their LEC unit account to pay for registration. If using this method, turning in the charter package at the Unit Service Center corresponding to charter turn-in times at the Unit Service Center is preferred. The registrar can then certify the funds are available.
- **Note,** the LEC does not accept credit cards for charter renewal payments.

The individual completing the charter review and payment shall provide their name and contact information.

6. **Journey to Excellence Scorecard.** Check the calculations. If there are many blank items or the total score is close to the next higher level, the commissioner will discuss the scores with the unit. Indicate the scorecard is attached. The unit’s score and achievement level are recorded on the audit sheet.

7. **Commissioner Review.** Signed by an active LEC Commissioner as noted.