

Unit Charter Renewal 101

A detailed, strategic overview of a successful, time-tested, step-by-step methodology that when followed, results in organized, well planned and on-time charter renewals for individual unit sponsors and/or entire zones.

1. **Pre Schedule Charter Renewal Dates in Advance.** The following dates and times should be predetermined “this” year for the “next” year, by the current individual zone or sponsor leadership. This allows calendaring well in advance and helps avoid the scheduling conflicts of short term planning.
 - **Recharter Kickoff Meeting** – *Charter renewal materials are presented, instructions given, and questions answered.*
 - **Charter Review Meeting** – *Progress for a specific zone is reviewed by Zone Commissioners/ADC approximately one week prior to the Charter Turn-in Meeting. Straggler sponsors are encouraged, new questions answered, and problems solved.*
 - **Charter Turn-in Meeting** – *Sponsors arrive at predetermined times to have their Charter Renewal efforts reviewed checking for required paperwork and appropriate signature approvals where necessary*
 - **Friends of Scouting Kickoff Meeting** – *Asking the same zone or sponsor leadership for their one day/one week FOS Campaign Kickoff date has been very successful. It helps facilitate a smooth and successful campaign.*

Calendaring Process:

- 1) Using a soft copy calendar, shade out specific dates that might cause conflict for either sponsors or District Staff. Not having the calendar show options beyond the Thanksgiving Day Holiday has proven very successful.
- 2) Circulate the calendar via eMail to current leaders requesting their choice of dates and times for each of the above meetings, specifying it’s on a first response, first choice basis. Copying ones direct up-line authority has proven helpful and often generated very timely responses.
- 3) When a response is received, the master calendar is updated with the new dates and times and redistributed to those that have yet to select. This process continues until all zones have scheduled their meeting dates and times.

Note: The most successful scheduling occurs during the middle of summer or very early fall. Anything later may preclude the dates from being included in the upcoming years calendar. Additionally, posting the schedule on the District Website is a convenient reference for changing leadership. *See example entitled “Summary – FOS & Recharter Calendar”*

2. **Provide a mid-year reminder.** The “FOS & Recharter Calendar” should be sent out in late summer or early fall via eMail as a reminder and asking them to review the dates they established the previous year. It’s not too late for them to adjust times and/or exchange dates among themselves.
3. **Recruit, Train, and Schedule a District Charter Renewal Staff.**
 - 1) **Recruit** a staff of six or seven individuals usually allows plenty of coverage for the scheduled Charter Turn-in Meetings. The smaller number allows for more detailed training but still provides opportunity for each person to have some flexibility in the schedule. This should be completed by the first part of September.
 - 2) **Train** by holding one, possibly two training sessions to accommodate the recruits. Generally review the process and answer any questions, address the top-ten reasons for defective charters, specify required signature locations, what to look for concerning multiple registrations for individuals in more than one unit, and for multi-unit sponsors, step through the process of verifying that boys do not get dropped inadvertently, etc.

3) **Schedule.** Distribute a schedule shell indicating the various zone dates and times, asking them which of the dates and times they can attend. When those results are in, update team schedule and distribute it to the various zones and sponsors. The schedule indicates how many District staff members will be at their Charter Turn-in Meeting. The Zone Commissioner has already established a “start” time, and this lets him/her know how many sponsors to invite at a specific time. Sometimes an entire zone can be completed at one time, while another zone might accomplish the same thing in two waves 45 minutes apart. It appears to be less stressful when one doesn’t have to wait because they all showed up at the same time. *See example entitled “Recharter Team Schedule”*

4. **Train Zone Commissioners.** Zone Commissioners play a huge role in making the Charter Renewal Process be successful. September and October Staff Meetings should be primarily focused on this training. It needs to be detailed enough for the new staff members. You can’t assume they already know. Review the complete list of Charter Renewal responsibilities as well as the necessary steps required for “Rescheduling” sponsors in their zones that may not complete the Charter Renewal Process on their designated night or time.

Re-Scheduling Delinquent or unprepared Sponsors. There are **no** makeup meetings scheduled, zero. When a sponsor fails to show up at their designated time or is so unprepared that they cannot complete the work before the “meeting” is over, it becomes the Zone Commissioners responsibility to work with them and get them to another Charter Turn-in Meeting in another zone. This effort requires that they approximate when the delinquent sponsor will be ready, reference the Charter Renewal Calendar, coordinate an attendance time at another zone’s Charter Turn-in Meeting with that other Zone Commissioner. It usually winds up as a piggyback schedule onto the end of the zones “already established” times.

Note: When zones schedule a date and time “this” year for the “next” year, look closely at their track record, and when they have had delinquent sponsors, don’t allow them to be one of the last scheduled meeting on the calendar. When they are, completion of your Charter Renewal Process can easily slide past Thanksgiving and into December, neither of which is desirable.

See example entitled “Zone Commissioner Rechartering Responsibilities”

5. **Conduct Multiple Kickoff Meetings.** A one hour (often less) kickoff meeting for each zone has proven most successful. It is small enough to allow all the attending sponsors to get their questions answered and large enough to handle all the sponsors in one zone.

Require that the Zone Commissioner get the correct people to attend the Charter Renewal Kickoff Meeting for their zone. Insist that it NOT be a “send somebody to pick up the materials” kind of meeting. You really need to have the “worker bees” attend, the people that will actually access the website and complete the updates.

You should require that the Zone Commissioner for that zone be in attendance to conduct, make introductions, and be available for Q&A. This becomes extremely important for LDS sponsors and their payment methodology.

Distribute the Charter Renewal Packets to the appropriate sponsors, and have each packet include the following four additional items:

- 1) **Adult Membership Inventory Worksheet** (An expanded version of the worksheet previously found on the Charter Renewal Packet Envelope) *See example entitled “Worksheet for Multiple Unit Types”*
- 2) **Youth Membership Inventory Worksheet** (A four column worksheet used to inventory all of the youth currently registered and those going to be registered in each applicable unit effective on January 1st.) *See example entitled “Youth Membership Inventory Worksheet”*

- 3) **Blueprint for Successful Internet Charter Renewal** (A set of instructions to be read and then referenced by the new and inexperienced, and a refresher for the previously experienced. This is an excellent way to document any changes since the previous year and highlight pitfalls) *See example entitled “Blueprint for Successful Rechartering”*
- 4) **Charter Turn-in Checklist.** (This is the same list used in training the District Charter Renewal Staff. It works well to show the sponsors what the District staff will be checking for and why) *See example entitled “Charter Turn-in Checklist”*

During the Kickoff Meeting, the contents of the Charter Renewal Packet should be reviewed with Q&A opportunity for each item and all attendees should understand the deliverables in detail. For additional questions, refer individuals to the Zone Commissioner, District Commissioner, or anyone of the District Charter Renewal Team and provide telephone numbers.

Near the conclusion of the meeting, the question of how the “Charter Renewal and Registration Fees are to be paid is addressed to the Zone Commissioner, especially with LDS sponsored units. Does the Stake intend to just make out one check, or should each sponsor bring a check from the respective Ward? In the case of community units, questions about credit cards occur and yes, we will accept Visa, MasterCard, American Express, and Discover.

This question needs to be answered clearly so all attendees understand that either 1) they need to bring a check from the Ward or Troop Funds, or 2) they need to bring NO money and the stake will take care of the finances at the end of the meeting. Questions frequently arise about using personal checks and having the ward or stake reimburse the individual. Our traditional answer is whatever the “Zone Commissioner” would like to do. The District is okay with taking personal checks. The reimbursement part needs to be handled at the Zone level.

6. **Facilitate Charter Review Meetings.** The Charter Review Meeting is designed for the Zone Commissioner. A review or report of where each of his sponsors are in the “process” about a week before the Charter Turn-in Meeting is very helpful in eliminating problems before they become embarrassing.

- 1) Have they **successfully logged in** to the system?
- 2) Are they having **problems with passwords** or the re-entry process?
- 3) **What step are they in?**
- 4) **Will they be ready** for the Charter Turn-in Meeting?
- 5) Are they paying attention to **Multiple Registrants?**

These types of questions can be addressed by the Zone Commissioner and usually resolved. In the case of new or unsure Zone Commissioners, a week allows enough time to get the answer via eMails, phone calls, etc. and get the sponsors on-track for a successful Charter Turn-in. NOTE: Years ago, zones NOT having these meetings were embarrassingly blindsided, and were immediately sold on the concept. To help Zone Commissioners understand where their sponsors are in the process, it is very helpful for the District Executive to 1) have a copy of the FOS – Recharter Calendar with the Charter Review Dates highlighted, 2) request a “Commissioners Unit Charter Renewal Status Report” slightly in advance of any scheduled Charter Review Meeting(s), 3) eMail them to the District Commissioner who in turn will parse the attachment(s) and forward each specific report to each specific Zone Commissioner. This requires a little coordination between the DE and the DC, but is very helpful to the Zone Commissioner in understanding where his sponsors are. It’s also helpful to include a cheat-sheet so the Zone Commissioner can cross-reference unit numbers with sponsor names.

See examples entitled “Sample Charter Renewal Status Report” and “Registered Units – Master”

7. **Provide Multiple Charter Turn-in Meetings.** These meetings usually allow 30-45 minutes in between waves of sponsors and are attended by the District. The time has been determined by the Zone Commissioner and based on the level of readiness of the sponsors. With the Charter Renewal Team already prescheduled, often the process for an entire zone can be completed in about an hour or

possibly two “waves”, depending on the number of staff and if there are any delinquent sponsors scheduled from another zone. Summarizing the amounts due from each sponsor (when the stake is generating one check) is simplified by using the Registration Fee Worksheet. When sponsors bring their own checks, this worksheet can serve to show correct totals.

For sponsors that are missing documentation, it is preferred to accept the Charter when possible. In other cases providing the sponsor with a “TO DO” list is necessary. A “Fill in the Blank” or “Check the Box” type of worksheet is fast and has proven extremely successful. A preprinted “Unit Charter Followup Worksheet” with distribution checkboxes at the bottom allows (1) one copy to go to the sponsor as their “to do” list, (2) another copy to accompany the Charter Renewal Report Packages and go to the District Executive, documenting the missing items that are in process, (3) a third copy goes to the District Commissioner for potential follow up and reference, and (4) another copy goes to the Zone Commissioner for potential follow up and reference. When a sponsor completes their “things to do”, there is a variety of ways to get the paperwork to its rightful place. Communication via phone or eMail allows the DE, the DC, and Zone Commissioners to keep abreast of progress and jump in to help when required.

By letting everyone know in advance that Registration Fees must be paid at the Charter Turn-in, it seems to go very smoothly. It only takes one Charter Renewal cycle to change the culture. Things go even better once the sponsors and/or zones understand that even when the monies are off a little, they can still be successful. If they’ve overpaid a little, the difference will be refunded. If they’ve underpaid a little for some reason, they will be billed for the balance. The system works well.

See examples entitled “Registration Fee Worksheet” and “Unit Charter Followup Worksheet”

8. **Recognize and Thank the District Charter Renewal Staff.** Some kind of holiday social, special recognition, even a casual get together reaps great rewards in the future.