**Conducting Unit Membership Inventory**

**&**

**Preparing for Recharter**

Before a unit can complete their recharter process, they must follow the Scout Motto “**Be Prepared.”** During the months of September & October, each unit should conduct a full membership inventory, so when recharter opens on November 1st, the information they need is available and ready.

**Purpose**

1. Encourage current members to remain in the program for another year
2. Membership inventory is a “roll call” in which each unit member is contacted to determine the quality of program received, to follow up on absent and inactive members, and to ensure everyone is registered.

The inventory is a part of the unit’s recharter process and assists the unit in building strength through a quality program and by member recruitment & retention.

**Inventory Process**

1. Identify a unit leader to serve as the Charter Renewal Processor
	1. All committee members should be involved with the preparation to complete recharter
	2. It is best that only one person complete the online renewal process
2. Invite your Unit Commissioner (UC) to assist
	1. Contact your District Commissioner or District Executive if you don’t know your UC
3. Obtain copy of unit’s current roster from Internet Advancement or my.scouting.org
4. Internet Advancement: Log into Internet Advancement

Stage 1 - Click Load Roster

Stage 2 - Click Review Unit Roster (Left corner), Roster opens in new tab & print

1. My.scouting.org
	1. Go to Member Manager
	2. Select green check mark
	3. Click blue down arrow
	4. Select export type (Member List)
	5. Click submit - roster opens in Excel Spreadsheet, print sheet
2. Conduct review of youth & adults active in unit, but not on unit’s roster (not registered)
	1. Identify corrections to names (no initials or nicknames), address, DOB, phone number, e-mail, and adult leadership position
	2. Determine if any are a “multiple”, identify their primary unit (unit they pay fee in)
3. Collect completed BSA Youth & Adult applications and fees for those identified in #4 above
	1. Include current proof of YPT completion for all adults/participants (18 & above)
	2. Register all active youth regardless of participation level
	3. Submit applications & fees to Council ASAP (before completing recharter process)
		1. No fee if a multiple in your unit i.e. your unit is not their primary
		2. Fees will be prorated for dues and Boy’s Life
4. Determine inactive members, assign leader to contact and attempt to reactivate them
	1. Brief leaders on what to say & ask
	2. They must note reasons given for those not returning to the unit, necessary to complete recharter process
5. Conduct review of youth & adults who are active in unit and on roster (registered)
	1. Identify updates/corrections to names (no initials or nicknames), address, DOB, phone number, e-mail, and adult leadership position
	2. Determine if any are a “multiple”, identify their primary unit (unit they pay fee in)
	3. All adults/participants (18 & above) must complete YPT in current year
		1. Obtain proof of completion
6. Identify youth & adults who will drop from the unit roster for recharter
	1. Unit members who are no longer remaining in the unit before or after 1 Jan
	2. Units are required to have a reason for why youth dropped, to complete recharter process
		1. Common reasons: aged out, transferred/bridged, moved out of area, lost interest
7. On November 1, 2017, starting at 1AM, go to my.scouting.org
	1. Go to Legacy Web Tools, click Internet Recharter button to complete Recharter process
		1. Refer to One Page Recharter Instructions, included in Recharter packet and Recharter Guide found on the Council website or use the Recharter Help Desk at cvcrecharter@gmail.com

**Membership Inventory Worksheets - Multiple Unit Types**

* + - List all membersfor your unit (both those already on the roster & those being added)
		- Add names in applicable boxes, use first & last names, check spelling
		- Do not use partial names, initials, or nicknames
		- Worksheets help identify required leadership positions that must be filled
		- Verify and update all individual information as necessary/required
		- Use blank worksheet to list additional members

**Pack Adult Membership Inventory Worksheet**

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| --- | --- | --- | --- | --- | --- |
| Position | Code | Name / Address | Multiple(Y/N) | Multiple’s Unit Paid In | Paid(X) |
| Ph# / e-mail |
| Institutional HeadSame for all units | IH |  |  |  | NoFee |
|  |
| Chartered Org. RepSame for all units | CR |  |  |  |  |
|  |
| Committee ChairRequired | CC |  |  |  |  |
|  |
| Committee MemberRequired | MC |  |  |  |  |
|  |
| Committee MemberRequired | MC |  |  |  |  |
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| CubmasterRequired | CM |  |  |  |  |
|  |
| Asst. Cubmaster Recommended | CA |  |  |  |  |
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| Lion GuideReq’d for Lion Den | LL |  |  |  |  |
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| Tiger LeaderReq’d for Tiger Den | TL |  |  |  |  |
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| \*Den LeaderReq’d for Wolf Den | DL |  |  |  |  |
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| Asst. Den Leader Wolf Den | DA |  |  |  |  |
|  |
| \*Den LeaderReq’d for Bear Den | DL |  |  |  |  |
|  |
| Asst. Den LeaderBear Den | DA |  |  |  |  |
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| Webelos LeaderReq’d for Web 1 | WL |  |  |  |  |
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| Asst. Webelos LeaderWebelos 1 | WA |  |  |  |  |
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| Webelos LeaderReq’d for Web 2 | WL |  |  |  |  |
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| Asst. Webelos LeaderWebelos 2 | WA |  |  |  |  |
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| Committee Member | MC |  |  |  |  |
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| Committee Member | MC |  |  |  |  |
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\*At Least 1 Den Leader is Required to Recharter a Unit

**Troop Adult Membership Inventory Worksheet**

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| Position | Code | Name / Address | Multiple(Y/N) | Multiple’s Unit Paid In | Paid(X) |
| Ph# / e-mail |
| Institutional HeadSame for all units | IH |  |  |  | NoFee |
|  |
| Chartered Org. RepSame for all units | CR |  |  |  |  |
|  |
| Committee ChairRequired | CC |  |  |  |  |
|  |
| Committee MemberRequired | MC |  |  |  |  |
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| Committee MemberRequired | MC |  |  |  |  |
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| ScoutmasterRequired | SM |  |  |  |  |
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| Asst. Scoutmaster Recommended | SA |  |  |  |  |
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| Asst. Scoutmaster | SA |  |  |  |  |
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| Committee Member | MC |  |  |  |  |
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| Committee Member | MC |  |  |  |  |
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**Team Adult Membership Inventory Worksheet**

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| --- | --- | --- | --- | --- | --- |
| Position | Code | Name / Address | Multiple(Y/N) | Multiple’s Unit Paid In | Paid(X) |
| Ph# / e-mail |
| Institutional HeadSame for all units | IH |  |  |  | NoFee |
|  |
| Chartered Org. RepSame for all units | CR |  |  |  |  |
|  |
| Committee ChairRequired | CC |  |  |  |  |
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| Committee MemberRequired | MC |  |  |  |  |
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| Committee MemberRequired | MC |  |  |  |  |
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| Varsity Scout Coach Required | VC |  |  |  |  |
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| Asst. Varsity Scout Coach Recommended | VA |  |  |  |  |
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| Asst. Varsity Scout Coach | VA |  |  |  |  |
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| Committee Member | MC |  |  |  |  |
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| Committee Member | MC |  |  |  |  |
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**Crew Adult Membership Inventory Worksheet**

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| Position | Code | Name / Address | Multiple(Y/N) | Multiple’s Unit Paid In | Paid(X) |
| Ph# / e-mail |
| Institutional HeadSame for all units | IH |  |  |  | NoFee |
|  |
| Chartered Org. RepSame for all units | CR |  |  |  |  |
|  |
| Committee ChairRequired | CC |  |  |  |  |
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| Committee MemberRequired | MC |  |  |  |  |
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| Committee MemberRequired | MC |  |  |  |  |
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| Crew AdvisorRequired | NL |  |  |  |  |
|  |
| Asst. Crew Advisor Recommended | NA |  |  |  |  |
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| Asst. Crew Advisor | NA |  |  |  |  |
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| Committee Member | MC |  |  |  |  |
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| Committee Member | MC |  |  |  |  |
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**Ship Adult Membership Inventory Worksheet**

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| Position | Code | Name / Address | Multiple(Y/N) | Multiple’s Unit Paid In | Paid(X) |
| Ph# / e-mail |
| Institutional HeadSame for all units | IH |  |  |  | NoFee |
|  |
| Chartered Org. RepSame for all units | CR |  |  |  |  |
|  |
| Committee ChairRequired | CC |  |  |  |  |
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| Committee MemberRequired | MC |  |  |  |  |
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| Committee MemberRequired | MC |  |  |  |  |
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| SkipperRequired | SK |  |  |  |  |
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| Mate Recommended | MT |  |  |  |  |
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| Mate | MT |  |  |  |  |
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| Committee Member | MC |  |  |  |  |
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| Committee Member | MC |  |  |  |  |
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**Adult Membership Inventory Worksheet (Add-On)**

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| Position | Code | Name / Address | Multiple(Y/N) | Multiple’s Unit Paid In | Paid(X) |
| Ph# / e-mail |
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**Lion & Tiger Scout and Adult Partner Membership Inventory Worksheet**

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| **Pd(X)** | **Lion / Tiger** | **Address** | **Name Adult Partner (No Fee)** |
| **Name Scout** | **e-mail** | **Adult DOB / Ph#** |
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**Pack, Troop, Team, Crew, and Ship Youth Membership Inventory Worksheet**

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| **Paid (X)** | **Name** | **Address** | **Multiple (Y/N)** | **Multiple’s Unit Paid In** |
| **Ph# / e-mail** |
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**Drop List**

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| --- | --- | --- | --- |
| **Adult/ Youth** | **Adult Position Code** | **Name** | **Reason for Drop****(only required for youth)** |
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