

# SCOUTING FORWARD

## Pathway to Adventure Council 2024 Membership Renewal Webinars

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# Scope of Webinar and Slide Deck

- Provide tips and suggestions to assist our units with their Membership Renewal and Retention
- The following material is a supplement to the Scouting America materials referenced within this slide deck
- Please note, the Membership Renewal and Unit Charter Renewals are different payments
  - Once Membership is renewed, you will not need to re-pay at Charter Renewal
  - Will hold Unit Charter Renewal Webinars in October, November and December to review the new process (Dates: TBD)

# General Membership Renewal Tips

- Beginning March 1, 2024, Membership Fees will be separated from unit renewal
- Payment of yearly membership fees will be completed with a family /self-pay option
- The unit can elect to pay the Scouting America membership fees for any member of the unit
- All adult leadership changes need to be completed prior to Unit Renewal
- All membership changes need to take place in my.scouting and not through Scoutbook
- Please contact your DE if you have any questions regarding your Membership Renewal
- Potential Membership errors:
  - SSN is missing
  - Email address is missing
  - YPT has expired
  - CBC is missing
- Units can update emails in My.Scouting & Scoutbook themselves
- To avoid these potential errors, consider doing an audit of your roster to identify any missing information

# The rechartering / renewal process is changing on March 1, 2024.

Please review the information below to understand the upcoming changes

In summary, the difference between the rechartering process is that unit renewal and member renewal will no longer be one and the same. Membership is now a set 12 month term from the time of registering regardless of when the unit renews.

## Unit Renewal after March 1, 2024

### Auto Renewal Process

**i** Youth and adult leader membership fees will be separated from the unit charter.

#### Auto Renewal

Individual membership renewal and fees are paid automatically by the individual.

#### Manual Renewal

Individual membership renewal and fees are paid to the unit or local council office.

#### Unit Paid Renewals

Individual membership renewal and fees are paid by the unit.

National Link: <https://www.scouting.org/resources/unit-and-membership-renewal/>  
(Includes a brief video)

1

### Login

At My.Scouting.org and go to Organization Manager (Unit Leader, committee chair, chartered organization representative, or designee have access).

2

Click On "Unit Renewal" on the menu.

3

Validate Information 12-month term.

4

Make Changes To Leadership if needed in Position

Manager – Have leaders take YPT if needed.

5

E-Sign the Page

Add the sign in the required field.

6

Pay and Submit

[View the Unit Renewal Infographic in PDF format](#)

## – Job Aids

- [Approvals for Unit and Member Renewals Job Aid](#)
- [BSA Registration and Renewal Job Aid](#)
- [Council Initiated Unit and Member Renewals Job Aid](#)
- [Council Support of Unit & Member Renewal Job Aid](#)
- [Members Without Units Job Aid](#)
- [Unit ACH for Renewals Job Aid](#)
- [Unit Pay for Member Renewal Job Aid](#)
- [Unit Renewal with Annual Membership Job Aid](#)
- [Unit Renewal Guide Job Aid](#)

## – Additional Resources

- [Member Renewal Infographic](#)
- [Annual Member and Unit Renewal Webinar Presentation 6.18.24](#)
- [Annual Member and Unit Renewal Webinar Recording 6.18.24](#)
- [Unit and Member Renewal Processes May 2024](#)
- [Council Membership Tools Webinar Presentation 4.25.24](#)
- [Council Membership Tools Webinar Recording 4.25.24](#)
- [2024 NAM Partial Presentation \(Deck has been revised to slides only relevant to the new processes\)](#)
- [Scoutbook Plus Updates](#)

# Auto-Renewal Membership

For all youth and adult members of the BSA

*Note: All registrations are for 12 months. For example, if your current registration expires on 12/31/2023, your renewed membership will start on 1/1/2024 and run through the entire calendar year until 12/31/2024. Membership renewal can be completed by either the individual, the family or the unit.*

## Auto Renewal Membership Family/Self Pay

- An email notification and a renewal link will be sent 60 days before membership expires.
- The link provided in the email will direct individuals to a renewal form on My.Scouting
- If registered in multiple positions, select the primary position. Renewing the primary position will automatically renew multiple positions.
- The individual pays with a credit card and submits the renewal.
- The unit will approve the membership renewal.

## Auto Renewal Membership Unit Pay

- In Organization Manager, the unit selects the Unit Pay option.
- Unit Key 3s are notified each month about which members are due to renew that month.
- Using the Roster tab, the unit selects which members they are renewing.
- The unit can choose not to renew a member (opt-out). The unit can also change the Scout's Life subscription settings for each person.
- The unit pays with a credit card or establishes a securely stored electronic fund transfer payment (ACH) and submits the renewal.

# PTAC Membership Renewal Tips & Suggestions

- Families should receive an email from National starting two months before expiration date and extends into a two-month “lapsed” period after the expiration date (Unit Pay).
  - Includes 30, 15, & 7-days + 24 hrs. prior to & 7 days after expiration date
- Adults need to have their Youth Protection Training current to renew their membership (ROT: Greater than 30 days).
- Scout Life Subscriptions will be selected by default. If a member does not want to subscribe, then they need to uncheck the box.
- Units should consider having the Families pay their Membership Fees.
- Unit can go into their roster and select “Opt-Out” for a member if you know they have left the unit or if the unit plans to pay for their members.
  - ***NOTE: A unit can only pay for those members who are within their 60-day renewal window, meaning a unit will need to make payments every 1 - 2 months to avoid having a lapsed membership of any of their families.***
- If a family is struggling to pay, either unit can pay, or family could talk with their DE and pay at council.

# Membership Renewal - Unit Pay



BOY SCOUTS OF AMERICA®

Unit Payment of Membership Renewal

For use when your unit is paying for membership Renewal but you need to pay at the office.

Turn this paperwork along with payment to the council office by the 15th of the month.

Council Heart of America Council 307  
 District Pelathe 75  
 Unit Type Post  
 Unit Number 8008  
 Date Printed 07/17/2024

### Members to be Renewed

First Name	Last Name	Position	Member ID	Scout's Life Subscription
Deakon	[REDACTED]	Youth Member	[REDACTED]	No
Charli	[REDACTED]	Youth Member	[REDACTED]	No





Members to be renewed: 2

Fees Due	Total	Amount
BSA Youth Registration	2 youth(s)	\$ 100.00
BSA Adult Registration	0 adult(s)	\$ 0.00
Council Program Fees	0 fee(s)	\$ 0.00
Scout's Life Magazine Subscription	0 subscription(s)	\$ 0.00
	<b>Total</b>	<b>\$ 100.00</b>

- Go to Org Manager, Roster, click on who they want to renew.
- Then instead of clicking renew members, they click Print and then Unit Payment of Membership Renewal.
- Form will download an “invoice” sheet that shows the names of the people to renew and the fees.
- Unit can turn in this “invoice” to Council with payment, and Council will manually post the renewal.



# Membership Renewal - Example of a PTAC Renewal Receipt Breakout

Summary		
	BSA Non-Unit Adult Reg [REDACTED] Valid until June 2025.	\$65.00
	Council Fee [REDACTED] Valid until June 2025.	\$12.00
	Administrative Fee	\$2.31
	Scout Life Magazine ⓘ [REDACTED] Valid until June 2025.	\$15.00

3% Credit Card  
Processing Fee

# Membership Renewal - Example of a my.scouting / My Applications screen shot





**NOTE: Credit Card is on file and can now Auto Renewal.**  
**Need to ensure this credit card is current for Auto Renewal to process upon expiration date.**

MEMBERSHIPS   TRANSFER / MULTIPLE APPLICATIONS   MY APPLICATIONS   MY RENEWALS

**MEMBERSHIPS**

! Only memberships added or renewed since August 2023 will display here (functional positions excluded). To view a list of all your positions, select My Profile.

**UPDATE CREDIT CARD**

Personal Information	Expiration Date	Renewal Status
  Pathway to Adventure 456	30 June 2025	Active Auto Renewal
<b>OPT OUT AUTO RENEWAL</b>		
  Pathway to Adventure 456	30 June 2025	Active Auto Renewal
<b>OPT OUT AUTO RENEWAL</b>		

**NOTE: Scouter has multiple registrations**

# PTAC Membership Renewal Tips & Suggestions

- Does your unit have a New Member Coordinator (NMC)?
- If yes, provide them with a Tracking Report so they can follow-up with the families within your unit.
- Why utilize your New Member Coordinator?
  - They already are that “Welcoming” person and known by the new families in your unit.
  - They should know through tracking & monitoring, if your Scouts and their families are attending meetings and events along with advancing prior to Membership Renewal. Avoids surprises!!!!
  - Allows a unit to learn why a family and their child is not attending so you can address their issues or concerns.
  - Helps to create an environment where families will remain active in your unit, which improves youth and adult retention and avoids surprises at Membership Renewal.
- If you do not have an NMC, does your unit have an active COR/IH or parent who is willing to help?
- Following slides give 2 examples of Tracking Reports options

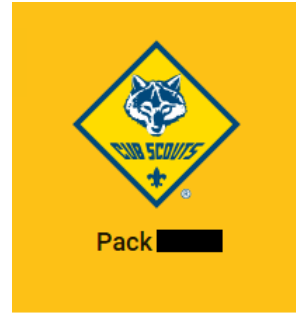
# Tracking Report Option 1

1. Unit can go their unit screen in my.scouting and select from either Roster or Reports.

2. This screen shot shows all available reports when the "Reports" tab is selected.

3. The report option (in this screenshot) to see which members (youth & adult) are due to renew their membership is the "MEMBERS DUE TO RENEW" report.

**NOTE:** Your unit members will not appear on this report until they are within 60 days of their expiration date.



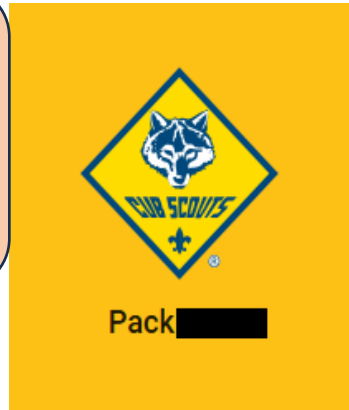
Organization Manager  
Unit Pin  
Unit Dashboard  
Roster  
Reports

EXPLORER POST SPECIAL INTEREST REPORT	Run
A report of all active Explorer Posts, showing Community Organization, membership and their special Interest code.	
FUNCTIONAL ROLE ASSIGNMENT REPORT	Run
Listing all functional roles assigned by unit. Can be sorted by role.	
MEMBER OPTED-OUT REPORT	Run
This Report lists all members who have Opted to not renew.	
MEMBERS DUE TO RENEW	Run
This report lists all members due to renew within 2 months or who are lapsed.	
MEMBERS WHO HAVE RENEWED	Run
This report will list all members, youth and adult, who have renewed this year. You can adjust the date range as needed.	
MEMBERSHIP TOTALS REPORT	Run
The Membership Totals Report returns a detail list of each active unit within the structure of the district or council. By unit, the reports give you demographic data such as the number of youth and adults, male and female along with the chartered organization and charter expiration date.	
NON RENEWED MEMBERSHIP REPORT	Run
This report will allow you to identify all those who dropped their membership within a specified date range, youth and or adults.	
RECORD OF CHANGE	Run
The Record of Change report will give you a detailed list, for the date range selected, of all registration changes such as, new enrollment, transfers, drops, multiples, transfers etc. This report will report the members name, unit and status code.	
RECORD OF CHANGE REPORT - ADULTS	Run
The Record of Change Report - Adults, will give you details for all changes to adult registration within the dates selected, of new, dropped and transferred Adult volunteers. It will report name, unit and status.	

Will need to generate a new report either every 2-weeks or at least monthly as new names will appear as they enter their 60-day window!!!!

# Tracking Report Option 2

1. With this option, a Unit can go their unit screen in my.scouting and select "Roster".



Organization Manager

Unit Pin

Unit Dashboard

Roster

Reports

3. The next 2 slides will show why this report is the better "proactive" option.

2. The report option (in this screenshot) is to select "Export Roster". This option shows the Expiration Date of all members (youth & adult) as of the date you pull this report.

Pack [REDACTED]

Roster

Search

Compose Print Edit Profile Export Roster Filter

<input type="checkbox"/>	Name	Member ID	Role	Gender	Renewal Status	Opt Out	Expiration Date
<input type="checkbox"/>	[REDACTED]	[REDACTED]	Youth Member	[REDACTED]	Current	<input type="radio"/>	04/30/2025
<input type="checkbox"/>	[REDACTED]	[REDACTED]	Committee Member	[REDACTED]	Current	<input type="radio"/>	12/31/2024
<input type="checkbox"/>	[REDACTED]	[REDACTED]	Youth Member	[REDACTED]	Current	<input type="radio"/>	12/31/2024
<input type="checkbox"/>	[REDACTED]	[REDACTED]	Cubmaster	[REDACTED]	Current	<input type="radio"/>	12/31/2024
<input type="checkbox"/>	[REDACTED]	[REDACTED]	Youth Member	[REDACTED]	Current	<input type="radio"/>	03/31/2025
<input type="checkbox"/>	[REDACTED]	[REDACTED]	Committee Chair	[REDACTED]	Current	<input type="radio"/>	12/31/2024

# Tracking Report Option 2

1. This is the copy of the “Roster Report” that appears after selecting the Export Option from the previous page.



Council Pathway to Adventure 456  
District Tri-Star 7  
Organization Name [REDACTED]  
Spin Type Code 0413  
Tenure 813  
Report Generated By Richard Romani  
Date Report Generated 06/23/2024

[Export to CSV](#) [Export to PDF](#)

2. The next option is to select the “Export to CSV”. This report creates an editable spreadsheet with the complete list of all registered Youth and Adults in your unit.

[RELOAD](#)

[<](#) [<](#) [>](#) [>](#) Page 1 of 3 [GO](#)

Member ID	Prefix	First Name	Middle Name	Last Name	Suffix	Position Name	YPT Status	YPT Completion Date	YPT Expiration Date	Street	City	State	Zip	Email	P/G Email	Phone	Registration Expiry Date
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# Tracking Report Option 2

This screen shot shows the CSV Excel file of the "Roster Report".

..Member ID	Prefix	First_Nam	Middle_Nam	Last_Name	Suffix	Position_Name	YPT_Status	YPT_Compl etion_Dat	YPT_Expir ation_Dat	Street	City	State	Zip	Email
						Youth Member	Never Taken							
						Youth Member	Never Taken							
						Youth Member	Never Taken							
						Youth Member	Never Taken							
						Youth Member	Never Taken							
						Youth Member	Never Taken							
						Committee Member	Current							
						Youth Member	Never Taken							
						Cubmaster	Current							

**NOTE: An adult will not receive a renewal notification if the email address is missing.**

- A. Highlight the Header row and click on filter option.
  - B. Then click on the Registration Expiry Date arrow.
  - C. Select "Oldest to Newest" sort option.
- NOTE: this option allows a unit to be proactive as you can see the expiration date of all your youth and adults, even before they are within 60 days of their expiration date.**

P_G_Emai l	Phone	Registration_ Expiry_Dat	Membership_ Status	hip	Is_Yearly_ Members hip_Rene wal_Pai ly_Ende	Is_Manual ly_Ende	Is_UnitLes	Is_Auto_Ren ewal_Opted_ Out	Opt_Out_ Reason
		9/30/2024	Re-Registered	Yes			No		
		10/31/2024	Re-Registered	Yes			No		
		10/31/2024	Re-Registered	Yes			No		
		10/31/2024	Re-Registered	Yes			No		
		10/31/2024	Re-Registered	Yes			No		
		11/30/2024	Re-Registered	Yes			No		
		12/31/2024	Re-Registered				No		
		12/31/2024	Re-Registered				No		
		12/31/2024	Re-Registered				No		

# SCOUTING FORWARD

Review of BSA Registration Renewal  
&  
Unit Pay for Member Renewal



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Q & A

Thank you for your time and participation