



BOY SCOUTS OF AMERICA®  
SANTA FE TRAIL COUNCIL

# OFFICIAL RECHARTER PACKET

## for January 1 – December 31, 2017



**Prepared. For Life.™**

# SANTA FE TRAIL COUNCIL RECHARTER INSTRUCTIONS

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**NOTE**

**Registration Fee for 2017**  
\$24 per person

***Boys’ Life* for 2017**  
\$12 per subscription

**Annual Unit Liability Fee for 2017**  
\$40 per unit

**\*\*Be “ON TIME – ERROR FREE”**  
**Every hour spent by volunteer and**  
**Council staff chasing down late**  
**recharterers and fixing errors can’t be**  
**spent helping youth.**

**Thank you, in advance for helping us**  
**make the most effective use of our**  
**limited resources while we assist you in**  
**providing the best possible Scouting**  
**programs for the youth of our area!**

## **IMPORTANT THINGS TO REMEMBER**

- All Adult registered leaders must complete Youth Protection Training every two years and must be current at recharter time. Adults without current Youth Protection Training must be dropped from the unit during the recharter process. Dropped adult leaders are eligible for reregistration by submitting a new adult application with Youth Protection Training completion certificate attached.
- Please make sure all mailing addresses and email addresses are up-to-date. Returned mail means a Scouting family is missing out on valuable Scouting information. Feedback through the emailed Voice of the Scout surveys is also important to meeting the needs of our Scouting families.
- Use **ONLY** legal names on applications. **NO NICK NAMES!**
- If making corrections on the final printout, use **RED INK** only!
- **DO NOT** make name changes during the Recharter process. If a name is misspelled or incorrect, please make corrections on the print-out in **RED INK**.
- Make sure all new Adult applications have the correct signatures (Committee Chair & Charter Rep), a Social Security number, a leadership position, Question #6 (Additional Information) is answered and the Disclosure Form and Youth Protection Training completion certificate are attached.
- Important note regarding the Recharter process – Council posting of the submitted recharters begins after the close of the membership year. Because of the volume, it can take a 2-4 weeks before all recharters are processed. This will affect your online advancement process. We do apologize for the inconvenience and will attempt to minimize the delay in your accessing the unit's most current roster in the Online Advancement System.

## **BOYS' LIFE SUBSCRIPTIONS**

***BOYS' LIFE*** Is ~~Optional~~ **Essential!** Unit leaders work hard to bring the best Scouting program possible to their unit members. Surveys and experience have shown that ***BOYS' LIFE*** magazine is **ESSENTIAL** to a strong Scouting program. Successful leaders use ***BOYS' LIFE***.

Units can qualify for a **100% *Boys' Life* Streamer** if every family receives one subscription. If your unit is a Journey to Excellence Unit, you will also qualify to wear the **NEW Journey to Excellence/100% *Boys' Life* emblem**.

## **JOURNEY TO EXCELLENCE UNIT ASSESSMENT (JTE)**

The Journey to Excellence Assessment program is designed to recognize units, districts, and councils in achieving excellence in providing a quality program to a growing youth population in America at all levels of the Boy Scouts of America. Units that qualify may wear specialized emblems ordered through the Council office. All units must turn in their completed recharter paperwork, JTE form, and award order form by December 1<sup>st</sup> to be considered for the JTE award.

## **GETTING STARTED**

Congratulations, you have been selected as the Online Recharter Processor for your unit. The Online Rechartering process is great because you will be in complete control of your information - this ensures that it will be correct, and you can do it from home or office, anytime that is convenient for you. It's a secure and easy-to-use system.

Now that you have been selected, you must attend your district's Online Recharter Training. During this training session, you will receive more information and help on how to log on and process your recharter. A tutorial is also available on the recharter website if you need a refresher on the information heard at the meeting.

Beginning **Thursday October 6, 2016**, the Online Recharter access will open.

To be eligible for the Journey to Excellence Unit Award, your recharter must be On Time. This means the recharter must be submitted, signed and delivered to your unit commissioner with payment between **November 5th and December 1st**. All paperwork must be processed on-time, or **your unit will lapse on January 1, 2017**. **This means no meetings, outings, insurance, etc. Don't let this happen to your Scouts!**

**Please contact your District Commissioner or District Executive for your District's turn in night and location.**

### **Here is what you'll need to get started:**

1. The website: [www.sftcbsa.org](http://www.sftcbsa.org). Select "Internet Rechartering" shown on the lower right of the website home page. The Internet Rechartering application requires the use of Microsoft Internet Explorer (set in Compatibility View or Compatibility Mode, depending on the version being used) for proper operation.
2. Your Access Code (label affixed to the front of this booklet)
3. **Gather all information needed to start recharter:**
  - a. Current Unit Roster (can be obtained from your Unit Advancement Processor or from your unit's secretary). Also, the Unit Key 3 has the ability to create a roster through [my.scouting.org](http://my.scouting.org).
  - b. List of youth and adults to remain on roster.
  - c. List of youth and adults to be removed from roster.
  - d. List of youth and adult that want Boys' Life.
  - e. Completed applications of **New** youth and adults (with disclosure forms for **New** adults).
  - f. Youth Protection Training certificates for all new adults & list of YPT completion dates for returning adults.

Once you have logged onto the Internet Recharting website:

1. Select First-time user and enter the unit access code. Each year you are considered a First-time user when accessing the system for the initial time. (*Codes and passwords from prior years will be accessing old data - no warning is given to alert user data is from an earlier year*).
2. Select the unit type and enter the unit four-digit number. (ex: unit 70 will be 0070)
3. Create a password as instructed.
4. Complete the information requested on each screen.
5. **Note:** You can stop at anytime, log off the system, and begin again where you left off by reentering your access code and password.

## **INTERNET RECHARTERING TIPS FOR SUCCESS**

### ***From the Council Registrar***

1. **Simplify your recharter process:** Turn in all new youth and adult registrations to the Council Office at least 10 days prior to starting your recharter. This will make the process go much faster.
2. **Do Not** change names in the online recharter area (this includes correcting spelling). Please **handwrite in red** correct names on the final printout only.
3. Please make sure that when deleting, you delete the correct person. If deleted by accident, **handwrite the person on the printout with an explanation. Do Not Reenter online.**
4. **No One should be marked as a transfer;** there are no transfers at recharter time.
5. **There has to be at least 5 paying youth for a Unit to Recharter. (LDS units excluded)**
6. Check and confirm all multiple registrations. (*See section on "Multiple Registrations"*)
7. If a Scout or adult leader wants *Boys' Life*, **please be sure to mark it** during the online rechartering process.
8. Only **New** members need applications. A list of those needing applications is printed with the final recharter (on the cover page). Please be sure to review the final recharter cover page to insure all required paperwork is completed and attached. Cover page must be included even if no items are shown.
9. Social security numbers are no longer required to be input online during the recharter process. Only the council will be able to input SSN when processing adult leader applications.
10. Please make sure **all New** applications are completed, with signatures, birthdates and correct adult social security numbers. These must be attached to the recharter packet at turn-in. If a new member (adult or youth) is active in 2015, their application must be turned in to the office and a copy attached to the recharter indicating the earlier processing.
11. Please make sure that you complete the last step in the online rechartering process by **SUBMITTING and PRINTING** the recharter. (**Print** 3 copies one for the council, one for your commissioner & one for the unit)
12. Please make sure that all paperwork is ready to be submitted together, this includes:
  - Recharter (printed in the last step of the online recharter process)
  - Signatures on the recharter (Executive Officer/IH and Unit Leader)
  - All new applications (completed & approved)
  - Fees for Recharter – An invoice is printed with recharter (\$24 per person registration, \$12 per *Boys' Life* Subscription and \$40 per unit for the Annual Unit Liability Fee).
13. **Be the first to return your recharter packet to your unit commissioner by December 1st.**

**P.S.** Please make sure that all youth and adults that should be registered are registered. Unregistered leaders and youth are not covered by insurance and the youth may not qualify for advancement. **Be sure to immediately turn in new applications at the Council Service Center anytime during the year.**

## UPDATING ONLINE ROSTER

There are six steps in Stage 2: Update Roster:

1. Update chartered organization information (contacts, addresses, phone #)  
Review your chartered organization information and make any necessary changes.
2. Select members for renewal.  
Select for renewal only the members who will be renewing with your unit.
3. Promote members:  
Select members from another unit to become members of your unit. *(These require a completed application to be attached)*
4. Add new members *(These require a completed application to be attached)*  
Add new adults and youth to your roster.
5. Update member data:  
Update the personal information of members on your roster (birthday, email address, home address, phone number or occupation). *Every scout & leader should have an email address. Parent emails may be used for youth members.*
6. Update adult positions  
Update the positions of all adults.

## POSITION CODES

**Position codes** – All positions can be held by male or female and the minimum age requirements for each position is in parentheses next to the position. These are all fee paying positions – except AP & IH

CR	Chartered Organizational Rep (21)	SM	Scoutmaster (21)
CC	Committee Chairman (21)	SA	Assistant Scoutmaster (18)
MC	Committee Member (21)	VC	Varsity Scout Coach (21)
TL	Tiger Cub Den Leader (21)	VA	Assistant Varsity Scout Coach (18)
CM	Cubmaster (21)	NL	Crew Advisor (21)
CA	Assistant Cubmaster (18)	NA	Crew Associate Advisor (21)
WL	Webelos Den Leader (21)	91U	Unit Scouter Reserve (21)
WA	Assistant Webelos Den Leader (18)	92U	Unit College Scouter Reserve (18)
DL	Den Leader (21)	92V	Venturing College Scouter Reserve (21)
DA	Assistant Den Leader (18)		
PC	Parent Coordinator (21)	AP	Tiger Cub Adult Partner (18) – <i>Non Paying Position</i>
PT	Pack Trainer (21)	IH	Institutional Head (21) – <i>Non Paying Position</i>

### **Required Positions per Unit:**

**PACK** IH, CR, CC, 2 MC's, or 1 MC and 1 PT, CM and one den leader, either a TL, DL or WL. There must be an AP for every registered Tiger Cub. (The CA, WA, DA, PC, PT, 91U, and 92U positions are optional)

**TROOP** IH, CR, CC, (2) MC's and SM. (The SA, PC, 91U, and 92U positions are optional)

**TEAM** IH, CR, CC, (2) MC's and VC. (The VA, PC, 91U, and 92U positions are optional)

**CREW** IH, CR, CC, (2) MC's and NL. (The NA, PC, 91U, and 92V positions are optional)

## **SCOUTER RESERVE POSITIONS**

These positions are for adults that wish to remain on their unit rosters, without registering as an assistant leader or committee member when appropriate.

These positions use the same application, fees and registration process, as any other adult volunteer but the only training requirement is Youth Protection. Scouter Reservists do not need to complete Position Specific Leader training or any other adult leader training after completing YPT.

If the young person or adult continues to be highly active with the unit (attending at least 1 or 2 meetings per month and participating in several campouts or other activities during the course of the Scouting program year), then registering them as an assistant leader may be more appropriate. In that case, they should complete both Position Specific Leader and Outdoor Leader trainings to be a more valuable asset to the unit.

UNIT COLLEGE SCOUTER RESERVE  
(Position code 92U)

For Packs, Troops, and Teams  
Minimum age requirement of 18

VENTURING COLLEGE SCOUTER RESERVE  
(Position code 92V)

For Venture Crews.  
Minimum age requirement of 21

- If a young person is away at college, on a mission, or in the service and wants to stay registered with the unit, the Unit College Scouter Reserve or Venturing College Scouter Reserve would be the appropriate method of maintaining their registration with the unit.

UNIT SCOUTER RESERVE  
(Position code 91U)

For Packs, Troops, Teams and Crews  
Minimum age requirement of 21

- If an adult supports the unit but is not an ongoing participant in meetings, activities and outings the Unit Scouter Reserve would be the appropriate method of maintaining their registration with the unit.

## **MULTIPLE REGISTRATIONS**

**Only the Chartered Organization Rep (CR) can hold more than one position in a unit.**

**The CR may also serve in a multiple capacity as an assistant unit leader or member of the committee** within that unit if there are not enough adults registered for these positions. The CR cannot serve as the unit leader (Cubmaster, Scoutmaster, Varsity Scout Coach or Crew Advisor).

Other adults may register in only one position per unit. If a unit feels that better service can be provided by an adult already serving in another unit, that individual may still hold only one position in each unit. There are no restrictions on the number of positions one person may hold as long as the individual serves only one position per unit.

Youths who are registered as Boy Scouts may multiple register as members of the Venturing crew or a Varsity Scout team. Members of a Varsity Scout team may also multiple register in a crew, ship or troop. Youth members **may not** multiple register in like unit types.

Registration fees are paid only for an individual's primary position; there is no fee for multiple positions. Multiple registrants will only receive a membership certificate for their primary position.

Some leaders choose to have their primary registration with the district or council. Mark them as multiple in the recharter process, and remind them to pay their 2015 registration fees to the Scout office by December 1, 2014.

If a new individual is registering as a multiple, please indicate that on the application by writing MULTIPLE on the application. A youth cannot multiple register as an adult and an adult cannot multiple register as a youth.

## **PROMOTE MEMBERS**

The promote members provides the ability to move youth and adults from one unit to another. The units must expire on the same date and be from the same council. Promote members is integrated seamlessly into Internet Rechartering and is a simple process with step by step instructions.

In the promote members process the unit doing promotions will have automatic access to units that are chartered to the same chartering organization. If the chartered organization is different, the unit must obtain the access code to the other unit in order to obtain records of members in that unit who will be joining their unit. They must contact that unit to get the access code. This will encourage inter-unit cooperation and confirm who is seeking their member information.

*(A youth application is required to complete this process).*

### **Youth to Adult Promotion**

The promote member process can be used to promote youths in the troop to an adult position in the troop (ex. youth member to Assistant Scoutmaster). All adult leaders must meet the adult requirements before joining.

*(An adult application and social security number are required to complete this process).*

## **POSITION VALIDATION**

All registered adults must be assigned a valid position from the above list. Adults without a valid position will be listed on the DRAFT VERSION of the recharter during the updating process. This is the unit's opportunity to update the positions for each person shown. Persons without a valid position assignment will not be shown on the final recharter.

## **UNIT KEY 3**

The Unit Key 3 consists of the unit leader, the chartered organization representative, and the unit committee chairman. The Unit Key 3 is a critical component to the success of your unit. The Unit Key 3 meets once a month to discuss the unit, its challenges, coming events, and progress towards completing their action plan and Journey to Excellence goals. It is a time for the Unit Key 3 to spot early warning signs and work together toward continued unit success.

When rechartering the unit, please align your leadership to support and implement the Unit Key 3. This three person structure insures that each person contributes their individual unique strengths, abilities, and perspectives based on the focus of their assigned position.

## **COMPLETING THE RECHARTER**

Please make sure that you complete the last step in the online recharting, by **SUBMITTING and PRINTING.**

1. Correct any "warning" messages before submitting and printing charter paperwork. Submit and Print final paperwork. (**Print** 3 copies one for the council, one for the commissioner, and one for the unit)
2. Gather all required signatures (for recharter and applications)
3. Collect fees that are due.
4. Hand deliver completed Recharter (Packet, fees, new applications, JTE form & JTE award order form) to your Unit Commissioner, District Executive, or to the Council Office on or **before December 1, 2016.** **Do not mail to the Council Office.**



5. Please make sure that all paperwork is ready to be submitted together, this includes:
  - Recharter (printed in the last step of the online recharter process)
  - Signatures on the recharter (Executive Officer/IH and Unit Leader)
  - All new applications (completed – including required signatures)
  - Fees for Recharter (Only one check per unit is accepted for payment. Fees may be charged to unit account provided balance will cover total amount due).
  - Journey to Excellence Unit Performance form (**required for all units**) and JTE patch order form.
  - **Note: All recharter fees are sent to the National Office. No registration fees remain with the local council.**
6. **Please be aware that if there are any issues with your Recharter, it will not be posted until those issues are cleared up. So please check and double check your charter before turning it in.**

## **FREQUENTLY ASKED QUESTIONS**

### **Where can I get a copy of our current BSA Roster?**

The first person to ask would be your unit Advancement Coordinator. Rosters are available through the Online Advancement System. The Unit Key 3 has the ability to create a roster through [my.scouting.org](http://my.scouting.org).

### **I have not received my membership card?**

Membership cards are mailed out to the Unit leaders after the recharter has been processed by the council office. If you are looking for person ID #, the Advancement Coordinator for your unit can print temporary cards or a roster with everyone's personal ID#. The Unit Key 3 has the ability to print membership cards through [my.scouting.org](http://my.scouting.org). **Note:** A member will only receive a membership card for their primary position (the position which they paid for).

### **I forgot my log in for Rechartering?**

The council only has the unit access code since you created the password, please make sure it's something you can remember. You can also use the "forgot password" option.

**Is my Recharter access code the same as last years?** No, the access code changes every year.

### **How do I change my Charter Executive Officer?**

The easiest way is to cross out the old name in red ink and attach an application for the new Executive officer to your final recharter paperwork.

### **How do we change our Chartering Organization?**

Contact our District Executive. Attach a new unit application to your Recharter, along with a letter from the previous Organization releasing the number and all property to the new Organization.

### **Can a youth be registered in two units at the same time?**

A youth can be registered in a Troop and multiple in the Team and/or Crew at no cost. Youth may not register in two of the same type units.

**Why is my Charter not posted?** *Note: Please contact your District Executive for more details.*

There can be several reasons for this:

- a. Applications are missing and/or information on applications is missing, i.e. required signatures
- b. Fees have not been paid
- c. Charter was not submitted correctly online
- d. The Council begins posting charters after the close of the current membership year.
- e. Other recharterers from the same Chartered Partner are still outstanding.

**I changed a unit leader, but they are not on my Recharter Printout?**

There was no application submitted or the application was incomplete.

**I submitted my Recharter online to the Council and forgot to add someone, what can I do?**

- 1) If you have not submitted the recharter to your unit commissioner, write their name on the front page and submit an application for them and include the extra fees.
- 2) If you have already submitted the paperwork to your unit commissioner, turn in application to the council office and indicate it is for the recharter and pay applicable fees.

**Why do you need my Social security number?**

All adults must supply their social security for a National background check. It is BSA policy.

**I'm changing my position do I need to fill out a new application?**

No, all adult positions are validated by the signatures on the recharter.

**What do I do if the scout has the incorrect rank?**

Access the "Online Advancement" system to verify the rank shown. Update online and submit a completed Advancement Report to the scout office.

**What do I do if the scout is shown in the incorrect grade?**

Contact the scout office registrar or your district executive to make the change.

**COMMONLY MADE MISTAKES**

1. **No signatures or incorrect signatures on adult applications and Recharter.**
  - a. Adult applications should have the Committee Chair and Charter Reps signature.
  - b. Recharter should have Executive Officer (IH) and the Unit Leader signature.
2. **No fee or wrong amount attached.**
  - a. Remember NO ONE is a transfer at Recharter time.
3. **Applications missing.**
  - a. Make sure there are applications for everyone listed on the front of the Recharter.
  - b. Please be aware that even if you turned in an application for someone 6 months ago if they are listed on the front of the Recharter, please supply a new application or make a copy of the unit's copy of the previous submission with social security number added.
4. **Incomplete Applications.**
  - a. Adults missing Social Security number, not answering Question #6, and/or Disclosure form not attached or signed.
  - b. Youth missing parent information (important especially for Tigers) and/or missing birthdates.

# Journey to Excellence

## “Wrapping Up Your 2016 Journey to Excellence Assessment”

### Major Features of the Program

“To improve the **QUALITY** of program in every unit in America!”

- **Improve** and increase adult leader training.
- **Improve** youth recruitment and retention.
- **Improve** parent participation.
- **Improve** youth advancement.
- **Improve** outdoor program participation.
- **Improve** annual program planning.

**As the year comes to a close, it is time to complete your unit’s Journey to Excellence 2016 Scorecard. The process is fairly simple – you will need the following:**

- The unit’s roster as of January 1, 2016.
- The unit’s 2015 Journey to Excellence scorecard to use as comparison
- The unit’s completed recharter paperwork for 2017.
- The unit’s advancement records for 2016 (all advancement reports submitted throughout the year are available through the Online Advancement System – contact your unit advancement chairman)
- The unit’s activity/service project/meeting calendar and budget for 2016
- The unit’s leadership training records (Unit Key 3 members have access to this through my.scouting.org for all registered leaders in the unit)

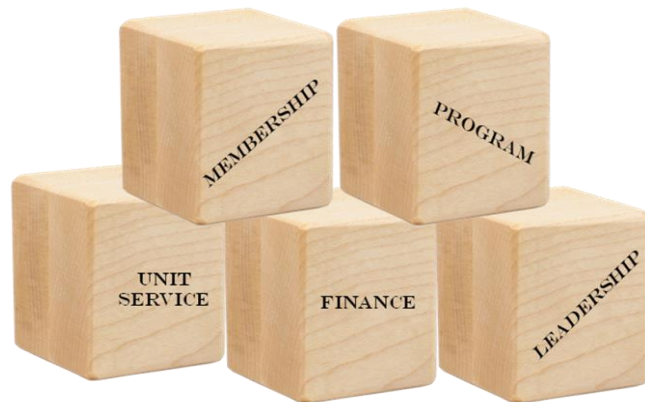
2016 Scorecards are available online at: [www.scouting.org/scoutsource/awards/journeytoexcellence.aspx](http://www.scouting.org/scoutsource/awards/journeytoexcellence.aspx)

**Required** - Please print and complete three copies – one to turn in with your recharter paperwork, one for your commissioner and one to keep for the unit record.

Also, if the unit qualifies for the recognition piece of the assessment, please complete the patch order form and submit it with the unit recharter paperwork.

Congratulations on a job well done!

**Don’t forget to order the patches and the ribbons for your units flag!!**



### The Building Blocks of a Successful Unit

The Journey to Excellence Unit Assessment includes recognition for outstanding packs, troops, teams, and crews, that strive for continuous improvement and conducts a quality program for their youth on an annual basis.

# ***BOYS' LIFE* Is ~~Optional~~ Essential!**

Yes, *BOYS' LIFE* is **ESSENTIAL!** Unit leaders work hard to bring the best Scouting program possible to their unit members. Surveys and experience have shown that *BOYS' LIFE* magazine is **ESSENTIAL** to a strong Scouting program. Successful leaders use ***BOYS' LIFE***.

Consider the recognized benefits of ***BOYS' LIFE*** to your Scouts:

## **LONGER TENURE**

Scouts who subscribe to ***BOYS' LIFE*** stay in Scouting longer than non-subscribers. The most recent study (by Globe Research Corporation) shows that ***BOYS' LIFE*** subscribers remain active in Scouting more than twice as long as non-subscribers.

## **GREATER ADVANCEMENT**

***BOYS' LIFE*** subscribers advance in rank faster and more often than non-subscribers. Nationally, two out of three ***BOYS' LIFE*** subscribers advance in rank annually. Only about one out of three non-subscribers advances in rank annually.

## **MORE ACTIVE**

***BOYS' LIFE*** subscribers and their parents tend to be more active in unit, district, and council activities than non-subscribers. Because a ***BOYS' LIFE*** subscriber spends more time in the Scouting environment, he has increased opportunities to benefit from Scouting's principles and ideals.

## **GOOD VALUE**

Members of the Boy Scouts of America pay just half the basic price for ***BOYS' LIFE*** -- a great value at 1.00 dollar per month. (The non-Scout rate is \$2.00) ***BOYS' LIFE*** is your *best value* in the youth magazine market.

## **FAMILY SUPPORT**

Because ***BOYS' LIFE*** is delivered to the Scout's home, it brings greater parental understanding and support. Brothers and sisters read ***BOYS' LIFE*** and become more supportive. Help keep the family involved in Scouting -- through ***BOYS' LIFE***.

## **GOOD READING**

Reading is a survival skill. Boys like reading ***BOYS' LIFE***. Parents appreciate that ***BOYS' LIFE*** is filled with wholesome stories that tell their sons "the world is full of exciting, interesting thing" for him to know about and to learn about (Bob Greene, *Chicago Tribune*, February 20, 1994). "Each month ***BOYS' LIFE*** brings to our Scouts a wonderful and exciting world of reading, with articles that help them to become better Scouts" (Roy Williams, past Chief Scout Executive).

**YOUR NEXT STEP** is to develop a plan to make your unit a **100% *BOYS' LIFE* UNIT**.

Units can qualify for a **100% *Boys' Life* Streamer** if every family receives one subscription.

If your unit is a quality unit, you will also qualify to wear the **NEW Journey to Excellence/100% *Boys' Life* emblem**. Contact your Unit Commissioner or District Executive for assistance.