

Great Lakes Council

Boy Scouts of America



New Unit Organization Guide

The New-Unit Organization Process

*Before We Can Put Scouting's Values Into Youth,
We Have to Put Youth Into Scouting.*

The Steps	Who Is Responsible
1. Identify the Prospect	District membership committee
2. Approach the Prospect	Influential Scouter
3. Make the Sales Call (Presentation)	Influential Scouter, new-unit organizer, and district executive
4. Organization Adopts the Program	Chartered organization head
5. Organizing Committee Meets	Chartered organization representative and new-unit organizer
6. Select and Recruit Key Leaders	Organizing committee
7. Train the Leaders	District training team
8. Plan and Organize the Program	Unit committee and new-unit organizer
9. Recruit Youth Members	Unit committee and new-unit organizer and Orient Parents
10. Complete the Paperwork	Unit committee and new-unit organizer
11. First Unit Meeting	Unit leadership
12. Charter Presentation/Follow Up	New-unit organizer, unit commissioner, and chartered organization representative

Teamwork, Planning, and the Process

From experience, the Boy Scouts of America has learned that one sure way to get more youths into Scouting is to have more units available for them to join. One person can't effectively organize a new unit alone, but one person can motivate others to get involved. It takes a team to organize a new unit. **That team usually consists of the district executive, new-unit organizer, unit commissioner, training committee, and is supported by district committee members.**

The New-Unit Organizer

Organizing units is a function of the district membership committee, which designates people to be new-unit organizers. Although there is no limit to the number of new-unit organizers in a district, each prospective new unit should have an assigned organizer. A new-unit organizer can work with more than one unit at a time if the units are in different stages of development. For instance, a new-unit organizer may work with one unit in the final stages of organization, as well as work with another unit that is just starting.

The District Executive

The district executive usually helps make the sale to the head of the prospective chartered organization. Once the organization agrees to appoint an organizing committee, the new-unit organizer should assume responsibility. The district executive will continue working with other chartered organizations in the early stages of unit organization, thus extending the opportunity for additional organizations to offer Scouting as part of their youth programs. The district executive is also available to advise and support the new-unit organizer.

Following the Plan

Later on, the process will involve other members of the district committee, such as members of the training committee. The unit commissioner continues to nurture and serve the new unit as it begins its program.

Take no shortcuts in new-unit organization. Omit a step and the new unit will likely suffer. A unit that is organized using all the time-tested steps stands an excellent chance of enjoying a long tenure.

Follow All 12 Steps

Successful new-unit organization requires teamwork and careful attention to the 12 steps discussed. Skip a step and that becomes a weak link in the process. Remember that following each step closely helps ensure strong new-unit organization and reinforces the unit's ability to build tenure and develop quality leaders.

It's up to the district executive, new-unit organizer, and unit commissioner—with support from district committee members—to work as a team with the chartered organization toward a common goal.

Step # 1: Identify the Prospect

Determining the Youth Market

The new-unit organizer, with the district executive's help, surveys the youth market. This includes the use of total available youth, or TAY—the number of youths in an area who meet BSA membership requirements. They may also pinpoint the location of existing units on a map. They should find out the following:

- The location of underserved areas
- The location of public schools, charter schools, home-schooling associations, school expansions, or other after-school programs that could benefit from the organization of new units
- New religious institutions being organized that may want to use Scouting with their youth members
- Other community organizations in the district that serve youth (There may be service clubs, veterans groups, community centers, public housing, religious organizations, and others.)
- Current chartering organizations without the full family of Scouting

Researching Potential Chartered Organizations

After potential chartered organizations have been identified, find out everything possible about their purpose, structure, leadership, and history of youth and community involvement. Find out the following:

- What potential adult unit leaders does the organization have?
- How adequate are the organization's program resources?
- How compatible are the organization's values and goals with those of the BSA?
- What facilities can the organization provide for an adequate meeting space?
- What Scouts are already members of the organization?
- What other similar organizations already use the Scouting program?

Prioritize the Organizations

After potential organizations have been researched, list them in order from the most promising to the least promising for potentially working with Scouting.

Step # 2: Approach the Prospect

With the district executive and the membership committee chair, determine who should approach each organization to schedule an appointment. This could be a member of the district new-unit organization team, a Scouter who is a member of the organization, an influential community member who is a Scouter and who knows the head of the organization, and/or the district executive.

Initially, contact the head of the organization. If this person would like to have another key member of the organization or a member of the organization's board present, try to determine who that person will be before the initial meeting.

Planning the Approach

When arranging to meet, this approach works best. Ask if you may come by to talk about something you feel is very important to the community. If possible, don't go into more detail on the phone. If asked what this is about, simply state that it is related to the youth of the community and you would like to seek their ideas and share some of your own. Don't be evasive, but save the "sale" for the personal visit. Allow at least 30 minutes for the initial visit.

This is a two-step process:

- 1) Fact, need, and information gathering
- 2) Making the presentation.

Fact, Need, and Information Gathering (Meeting the needs of the prospects)

You should visit with the head of the prospective organization to gather facts and information and to determine the organization's needs before you make the sales presentation mentioned in step three. This visit involves a lot of listening. Find out about the organization's goals and dreams. Then you will be able to determine how Scouting can help the organization meet its needs.

A typical conversation may lead to questions like:

- What is your organization doing in our community?
- What should you be doing?
- What roadblocks keep your organization from achieving those objectives?
- Who else from your organization should I talk to?

Completing the Profile

Following that initial visit and prior to the sales presentation, complete the background information about the organization and the community. Address details such as

- Total youth available (TAY) in the organization's membership
- Total youth available in the surrounding community
- Members of the organization who are already Scouters
- Similar organizations that utilize the Scouting program
- The organization's community service efforts
- The organization's past affiliation with Scouting, if any

New-Unit Prospect Profile Worksheet

1. Organization

Name _____

Address _____

Phone _____

Has the organization had Scouting previously? Yes No

If yes, what type? (Check all that apply.) Cub Scouting Boy Scouting Venturing

2. Organization head

Name _____ Title _____

Scouting background _____

Personal interests _____

3. Members with Scouting background

Name _____ Phone No. _____

Name _____ Phone No. _____

Name _____ Phone No. _____

4. Other similar organizations that are chartered organizations

Name _____ Organization head _____

Name _____ Organization head _____

Name _____ Organization head _____

5. Total available Scout-age youth _____

6. The organization's objectives

(See the notebook *Foundations for Growth: A Resource for Unit Development*, No. 4-925, for information on chartered organizations and endorsement letters. This publication may be found on the ScoutNET info site in the council service center.)

7. Other information

Step # 3: Make the Sales Call (Presentation)

Select two or three people to make the sales call. One is not enough, and more than three may be intimidating. Choose the presentation team from the following:

- New-unit organizer
- District executive
- Scouter who is a member of the prospective chartered organization
- Influential community leader who is a Scouter

Before the sales call, determine who will take the lead role and who will fill supporting roles.

If the head of the organization does not invite you to stay longer, the sales call should not last longer than 45 minutes. Try to stay on track, unless the person you are calling on decides to tell stories about their Scouting experiences.

Three Parts of the Presentation

Part # 1: Initiate the Opening

Establish a comfort level by getting everyone into a circle or around a large table. Try to get the head of the prospective organization out from behind a desk.

The opening should include introductions of the presenters and their roles in Scouting. Be sure to distinguish between professional Scouters and volunteer Scouters. Help put those from the prospective chartered organization at ease by asking about their hobbies and interests or community service efforts.

Part # 2: Make the Sale

Be sure to address the goals, needs, and priorities of the organization uncovered through the initial visit (inquiry) and your research. Cover the following concerns and details:

- The organization's priorities, particularly its youth programs
- The organization's concerns about the youth in the community
- The needs of youth in the neighborhood (Present facts about the number of potential Scouts in the area.)
- The membership needs of the organization, as well as its goals and purposes
- The purposes of Scouting—character development, citizenship training, and fitness—and how these complement the goals and purposes of the organization
- The benefits of using Scouting as its youth program or as an addition to current youth programs
- The organization of the unit
- The program of Scouting—leadership, activities, meetings, planning, and resources
- Local council and district support—training, commissioner service, staff and volunteer assistance, literature, advancement program, camps, facilities, and activities

- General liability insurance and accident and sickness insurance provided by the Boy Scouts of America for volunteer leaders and chartered organizations
- The role of the chartered organization in Scouting
- The next steps—appointing an organizing committee, selecting and recruiting leaders, recruiting youth, and following the registration process

Establish Deadlines. Use key upcoming events to establish deadlines. For example, you may encourage the starting of a Boy Scout troop in time for the spring camporee, or of a Cub Scout pack in time for the boys to attend day camp, or of a Venturing crew to participate in a high-adventure opportunity.

You might begin to use steps in closing the sale here as well. Try to establish when the organization might be able to hold an organizing committee meeting by asking about its upcoming schedule of meetings or events. Determine when selection of leadership could take place and/or when and where the unit might meet.

Be Prepared to Handle Objections. In advance, develop your own list of potential questions and answers. Write out answers and, before the presentation, practice answering these questions.

Take time to answer any questions the head of the organization (or others) may have.

- **"It costs too much."** - Any worthwhile program will incur some costs. Consider the return on expenses in relation to the positive effect Scouting will have on the youth of the community.
- **"We tried it once and it didn't work."** - That's unfortunate. Tell me what went wrong. (Most likely the leadership was not in place or fully trained.) Offer a solution to prevent that from happening again.
- **"Who will be the leader?"** - That will be the job of the organizing committee members. They should make a list of the best prospects for your approval, and then recruit these individuals.
- **"We don't have many Scout-age boys in our organization."** - Scouting can serve the entire community. What better way to bring more youths into your organization than through Scouting?
- **"What would be our liability exposure?"** - The Boy Scouts of America provides general liability insurance coverage to all chartered organizations for any liability that might stem from operating a Scouting unit.

Be sure to listen for additional needs of the chartered organization.

Part # 3: Close the Sale

Use carefully worded questions to close the sale. Use questions to which the prospect will answer "yes."

- Do you feel Scouting would be an answer to some of your goals?
- Would you lend your personal support to using Scouting as a part of your youth program?
- Would you be willing to ask three or four people to serve on an organizing committee that will explore the possibility of adopting Scouting to serve your youth members?

Review Responsibilities. Give the head of the organization a copy of "Chartered Organization and Council Responsibilities" and briefly discuss it. Try to set a date to meet with the organizing committee. Leave with a specific plan of who does what and deadlines for each step of the plan.

End on Time. Thank the head of the organization for the organization's commitment to youth. It is important to conclude the presentation and leave in a timely manner. When the prospect *has said yes* and *the next steps are established*, say *thank you* and *leave*.

Follow Up or Service the Sale. Send a thank-you note to those involved in the sales presentation within 24 hours. Use this opportunity to restate the next plan of action: "I appreciated the opportunity to talk with you this morning. Your organization's youth program is a fine example of your commitment to young people. I will call you on Monday to confirm the three people to assist in organizing your new Scouting unit."

Chartered Organization and Boy Scout Council Responsibilities

The chartered organization agrees to

- Conduct the Scouting program according to its own policies and guidelines, as well as those of the Boy Scouts of America.
- Include Scouting as part of its overall program for youth and families.
- Appoint a chartered organization representative who is a member of the organization and who will coordinate all Scout unit operations within it. They will represent it to the Scouting district and serve as a voting member of the local council. The chartered organization head or chartered organization representative must approve all leader applications to ensure that the individuals meet the organization's standards as well as the standards of leadership of the Boy Scouts of America.
- Select an organizing committee (minimum of three) of parents and members of the chartered organization who will assist in the selection of leaders.
- Provide adequate facilities for the unit(s) to meet on a regular schedule with time and place reserved.
- Encourage the unit(s) to participate in outdoor activities and all programs of the council.

The council agrees to

- Respect the aims and objectives of the organization and offer the resources of Scouting to help meet those objectives.
 - Provide year-round training, service, and program resources to the organization and its unit(s).
 - Provide training and support for the chartered organization representative as the primary communication link between the organization and the BSA.
 - Provide techniques and methods for selecting quality unit leaders and then share in the approval process of those leaders.
 - Provide primary general liability insurance to cover the chartered organization, its board, officers, chartered organization representative, and employees against all personal liability judgments. This insurance includes attorneys' fees and court costs, as well as any judgment brought against the individual or organization. Unit leaders are covered in excess of any personal coverage they might have, or, if there is no personal coverage, the BSA insurance immediately picks them up on a primary basis. Vehicles owned by the chartered organization and loaned to the unit will be covered on an excess basis for the chartered organization's benefit.
 - Provide camping facilities, a service center, and a full-time professional staff to assist the organization in every way possible.
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Step #4: Organization Adopts the Program

After meeting with the head of the organization and reviewing the organization's goals and how Scouting can help meet those goals, ask for a commitment from the organization to adopt Scouting.

Appointing the Organizing Committee

The organization head appoints a Chartered Organization Representative, who serves as head of the organizations' Scouting program, and an organizing committee of three to five people who will plan the next few steps. The committee probably will include some parents of potential Scouts. The new-unit organizer should schedule a meeting with the organizing committee as soon as possible. This organizing committee will work out details and plan the recruitment of unit leadership.

It is important that the organization head appoint the members of the organizing committee so that committee members will know that they have the chartered organization's support.

Members of the organizing committee may become unit committee members.

Step #5: Organizing Committee Meets

The new-unit organizer plays a key role in the success of the unit organization plan. The new-unit organizer helps to guide the organizing committee throughout the process. If a unit commissioner has been assigned, ask this person to assist with organization efforts.

Explain what is expected of the chartered organization and what is expected of the local council. Distribute copies of "*Chartered Organization and Council Responsibilities*." Walk everyone through this agreement.

Preparing for Unit Organization

The most important task of the organizing committee is selecting unit leaders. Before the selection process begins, it is important that the committee learn about Scouting. Committee members should

- Understand the aims and methods of Scouting.
- Know the steps to unit organization.
- Be familiar with program planning.
- Understand the process for selecting unit leaders.
- Be aware of training opportunities. Distribute copies of the council or district training schedule.
- Be familiar with literature and support materials available for leaders.

Step #6: Select and Recruit Key Leaders

The first priority of the organizing committee is selecting unit leaders. Give everyone a copy of Cub Scouting's *Selecting Cub Scout Leadership*, No. 13-500; Boy Scouting's *Selecting Quality Leaders*, No. 18-981; or *Venturing Fast Start*, No. 25-878.

Choosing Prospective Unit Leaders

Make a list of people who would make good leaders. Choose prospects who exemplify the values of the Boy Scouts of America. Don't make assumptions about whether a prospect will accept the job; give prospects the opportunity to make their own decisions.

Present the list of candidates to the head of the organization for approval and ask for additional suggestions. Also, have the organization appoint someone—perhaps a member of the organizing committee—to be the chartered organization representative. Explain the basic responsibilities of this person. (See the job descriptions in *The Chartered Organization Representative*, No. 33118D.) The chartered organization representative represents the organization at the district and council levels as a voting member.

Appointing Other Volunteers

The organizing committee must also recruit and appoint people to serve as the committee chair and committee members. These people may be members of the organizing committee.

With these people in place, and with members of the organizing committee also acting as members of the unit committee, you are ready to complete the process of selecting and recruiting leaders and youth.

Step # 7: Train the Leaders

Fast Start, This is Scouting, and Youth Protection Training

As soon as possible after a person has agreed to be a leader, they should be directed on-line for *Fast Start*, *This is Scouting*, and *Youth Protection Training*. The new leader will have a better perspective of their role and responsibilities.

Leader Specific Training

Leaders should be encouraged to attend leader specific training as soon as possible. The new-unit organizer may be able to get district trainers to conduct training especially for the new unit.

If a special training session is not possible, be sure to inform the new volunteers when and where the next district or council basic leader training session will be held. Arrange for car pools and child care so that every leader who needs to can attend. By going together, they will have the opportunity to provide support for each other in this new situation.

Roundtable

A roundtable is a monthly presentation of unit program ideas, inspiration, and additional training for all leaders. The new-unit organizer or the unit commissioner should let leaders know when and where the roundtable is held and give them an idea of what happens at a roundtable. Roundtables are enjoyable and convey many practical ideas for leaders to use.

Supplemental

The Boy Scouts of America offer many supplemental training opportunities on a district, council and national basis.

Step # 8: Plan and Organize the Program

The following resources will assist you in planning and organizing your unit program.

Cub Scouting

The Pack's First Three Months, No. 13-010
Webelos Leader Guide, No. 33853C
Cub Scout Program Helps, No. 34304B

Boy Scouting

Chapter 5, Troop Meetings, from the *Scoutmaster Handbook*, No. 33009C
Troop Program Features, Volume I (No. 33110), II (No. 33111), and III (No. 33112).

Venturing

Venturing Fast Start, No. 25-878
How to Organize a Sea Scout Ship, No. 25-352
Venturing Leader Manuel, VJ346550

Step # 9:

Recruit Youth Members and Orient Parents

It is finally time to invite prospective youth members and their parents to join Scouting. The first group of youths to be invited should include those who are members of the chartered organization. Youth from the community can sometimes be reached by announcements through area schools. Your district executive can provide recruitment fliers and posters, and usually has contacts with school administrators.

Promoting the Sign-Up

Attendance at the sign-up meeting is very important. Youth and their parents will most likely sign up for scouting when they attend this meeting.

Some ideas for promoting attendance are:

- Boy Talks in the school the day before the meeting
- Informational flyers
- Radio & TV PSA's
- Personal visits to prospects
- Bring a friend
- Promotion at area churches, playgrounds, and parks
- School open houses
- Posters in schools
- Personalize invitation from organizational head

Use your resources and brainstorm other ideas.

Conducting the Sign-Up

Hold the sign-up at school or the location where the unit will meet. Make it a brief, upbeat, and well-planned rally. Be sure to

- Introduce the unit leadership.
- Present the unit program.
- Register new youth members.
- Select and recruit additional adults.
- Create an air of excitement of things to come.
- Provide information.
- Answer questions.
- Provide light refreshments.
- Announce the unit's next meeting date.
- In the case of Venturing-age youth - Have each youth complete the Venturing Activity Interest Survey. Brainstorm with youth their ideas that might not be on the survey. Review the potential for crew program based on the Program Capability Inventory and the chartered organization.

Step # 10: Complete the Paperwork

Although by this point much of the paperwork may already be done, the organizer or commissioner for the new unit may be involved now to ensure that all of the paperwork has been correctly completed. The unit commissioner may also take the paperwork to either the Dauch Scout Center or Waterford Service Center for processing.

Remember that

- The new-unit application requires the signature of the head of the chartered organization.
- Every youth and adult leader must complete an application.
- The registration fees must be collected and kept with the applications and then submitted to the council service center in a timely manner.

Youth Applications

When accepting youth applications, it's important to

- Make sure that all applications are completed in full, including the health history information on the back side.
- Collect the appropriate fees, including registration fees, charter fee, and *Boys' Life* subscription fees.
- Check applications for signatures of a parent and of the unit leader.

Adult Leader Applications

When accepting adult leader applications, it's important to

- Make sure that all applications are completed in full, including the names of references.
- Collect the appropriate fees.
- Be sure the authorized leaders approve adult leader applications. The chartered organization head or the chartered organization representative approves all adult applications. The unit committee chair approves all applications except that of the chartered organization representative, which is approved by the head of the chartered organization.
- The permission sheet to perform a criminal background check is completed
- Applicant provides social security number and date of birth.

Step # 11: First Unit Meeting

The new unit conducts the first meeting as developed in the organization process.

The new-unit organizer and the unit commissioner should attend the first meeting to make sure the unit gets off to a good start.

Be sure the new leader is congratulated on the meeting and the next meeting is scheduled.

Step # 12: Charter Presentation/Follow Up

Presenting the Charter

The new-unit organizer and unit commissioner should present the first charter. The charter presentation should occur at a full gathering of the chartered organization. For instance, in a church they should present the charter before the full congregation; a service club should present it at a meeting of all of its members. This way, everyone will know that Scouting is a part of the organization's youth program and can share in the pride of ownership.

Youth members and unit leaders should participate in the ceremony as the charter is presented to the head of the chartered organization. Unit leaders and the unit committee may also be installed during this ceremony.

The charter certificate should be framed and appropriately displayed after the ceremony.

Additional Follow-Up

Once the unit has been organized, it will need ongoing service from the district. At this point, the unit commissioner should step in to give the unit the support it needs to deliver a quality program to a growing membership. **The organizer must be sure the new unit is solidly under the care of a commissioner before the organizer leaves the unit.**

New-unit organizers may want to attend youth meetings or committee meetings periodically just to see how things are going and to enjoy seeing youth and leaders grow in Scouting because of their efforts.

The trainer who helped in the orientation meeting and/or basic leader training should follow up to ensure that leaders have an opportunity to attend other supplemental training provided by the district.