

Online Club Chartering System Instructions



CLUB INSTRUCTIONS: BGCA ONLINE CHARTERING SYSTEM

STEP ONE: Getting Started: How to Create an Account and/or Log into the System

NOTE: If you've previously submitted an online nomination for a National Service Recognition award, you will use the same account to submit online charter applications or site status change forms. Use the link below and login (in the left column) with your email and password.

1. Go online to: <https://bgcaawards.secure-platform.com/a/account/login>
2. Enter the required information under the **Create a New Account** column, then click the **Register** button.
3. Follow any additional instructions provided by the system to access your new account.

GREAT FUTURES START HERE.



**BOYS & GIRLS CLUBS
OF AMERICA**

HOME MY ACCOUNT NATIONAL SERVICE RECOGNITION PROGRAM HELP

Login or Create an Account

Login

Email Address *

Password * [lost password?](#)

☐ remember me

Login

Create a New Account

Email Address *

First Name *

Last Name *

Mailing Street Address *

Street Address

Line 2

City

Country

United States ▼

State / Province

Select ▼

Zip / Postal Code

Contact Phone Number *

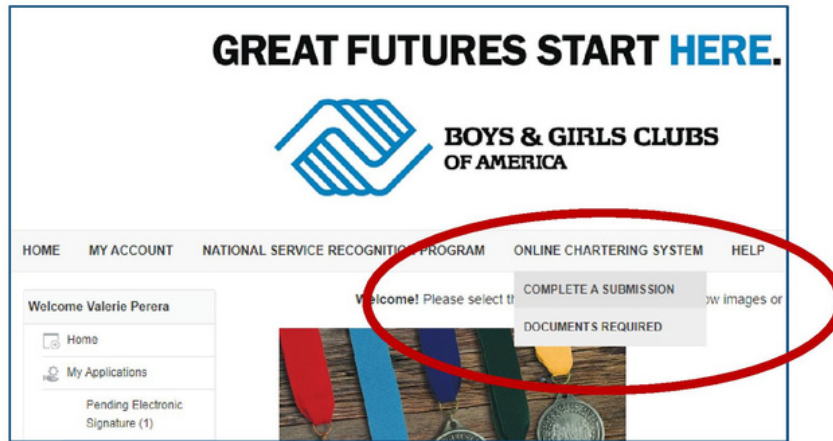
Create a Password *

Retype Password *

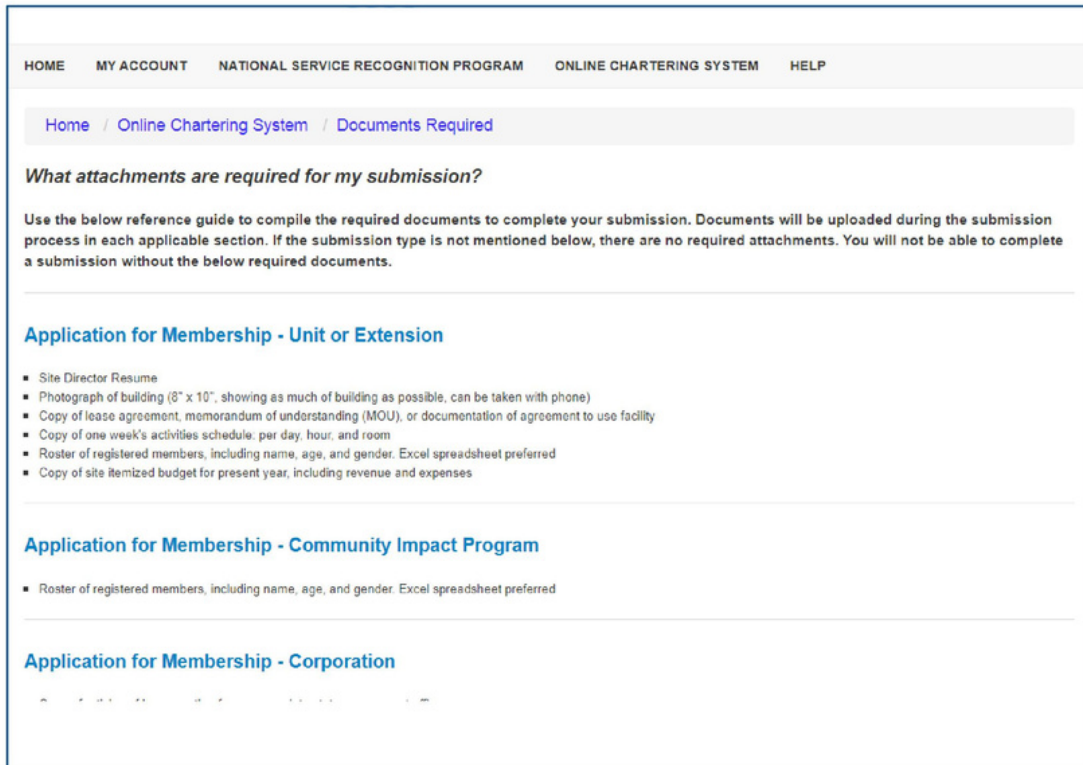
Back Register

STEP TWO: Gather Documentation Needed for the Charter Application or Site Status Update

1. On the BGCA home page, click on the **Online Chartering System** in the top ribbon and two options will appear: **Complete A Submission** and **Documents Required**.



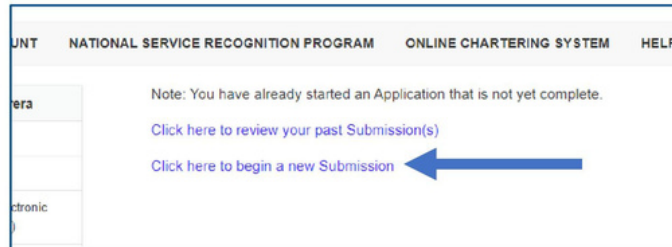
2. Click on the **Documents Required** option. It's recommended to have available all attachments and supporting documentation prior to beginning the online charter application. To assist you with this process, we have provided lists of the documentation needed for each application category.



STEP THREE: Determine the Category to Select

1. When you are ready to start the online submission, click on the **Online Chartering System** option in the top ribbon and choose **Complete A Submission**.

2. New options appear. Select **Click here to begin a new Submission**.



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Note: You have already started an Application that is not yet complete.

[Click here to review your past Submission\(s\)](#)

[Click here to begin a new Submission](#)

ctronic

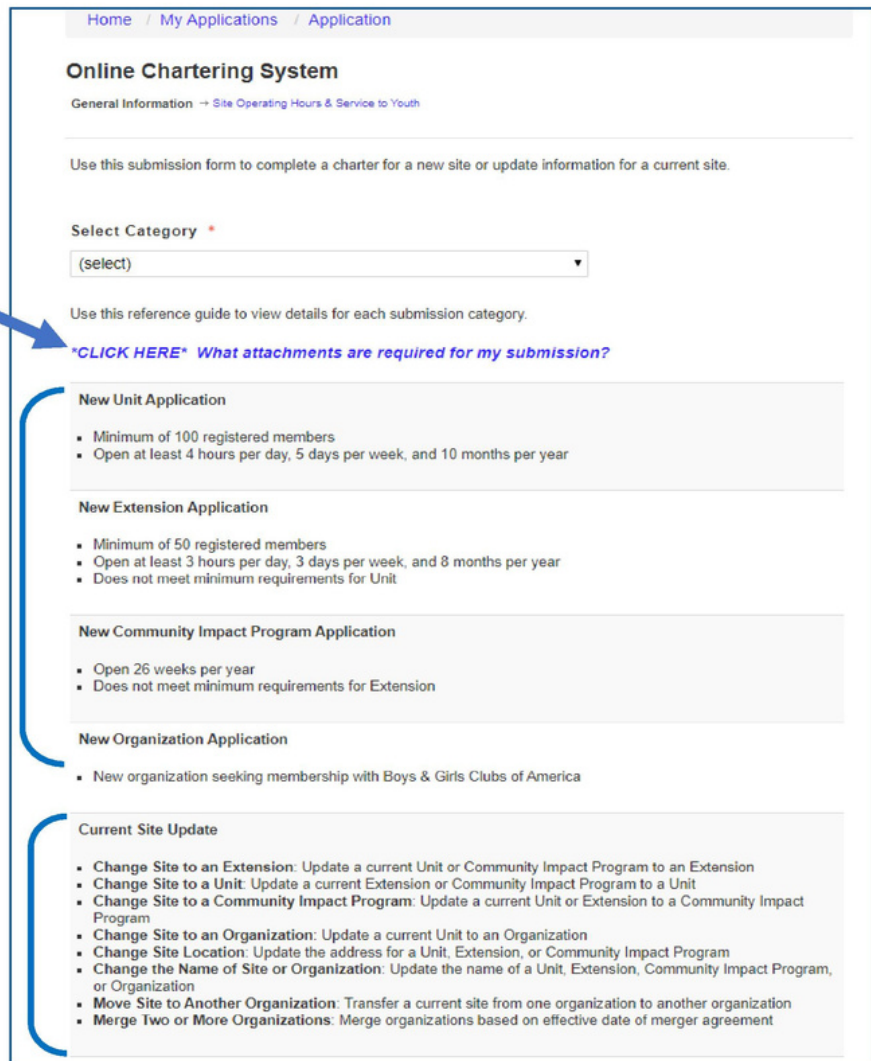
3. The application home page will open. This page provides a reference guide to help you decide which type of charter or site update you should choose from the dropdown menu of the **Select Category** field.

For your convenience, a link to the listing of attachments required for each submission is provided. Just open the link in a new tab and the **Documents Required** page will open.

**New sites
seeking membership**

If you are still unsure about which option to choose, please contact your Club's DOD or CSS as listed in your BGCA.net profile or call one of our three service centers for assistance.

**Changes to
existing chartered sites**



Home / My Applications / Application

Online Chartering System

General Information → Site Operating Hours & Service to Youth

Use this submission form to complete a charter for a new site or update information for a current site.

Select Category *

(select) ▼

Use this reference guide to view details for each submission category.

***CLICK HERE* What attachments are required for my submission?**

- New Unit Application**
 - Minimum of 100 registered members
 - Open at least 4 hours per day, 5 days per week, and 10 months per year
- New Extension Application**
 - Minimum of 50 registered members
 - Open at least 3 hours per day, 3 days per week, and 8 months per year
 - Does not meet minimum requirements for Unit
- New Community Impact Program Application**
 - Open 26 weeks per year
 - Does not meet minimum requirements for Extension
- New Organization Application**
 - New organization seeking membership with Boys & Girls Clubs of America
- Current Site Update**
 - **Change Site to an Extension:** Update a current Unit or Community Impact Program to an Extension
 - **Change Site to a Unit:** Update a current Extension or Community Impact Program to a Unit
 - **Change Site to a Community Impact Program:** Update a current Unit or Extension to a Community Impact Program
 - **Change Site to an Organization:** Update a current Unit to an Organization
 - **Change Site Location:** Update the address for a Unit, Extension, or Community Impact Program
 - **Change the Name of Site or Organization:** Update the name of a Unit, Extension, Community Impact Program, or Organization
 - **Move Site to Another Organization:** Transfer a current site from one organization to another organization
 - **Merge Two or More Organizations:** Merge organizations based on effective date of merger agreement



STEP FOUR: Complete the Online Charter Application or Site Status Update

1. **Select Category:** Click on the dropdown menu under **Select Category** and choose the application type.

For a **new site**, select the application type for which the site meets membership requirements.

The screenshot shows the 'Online Chartering System' interface. At the top, there are navigation links: 'Home / My Applications / Application'. Below this, the title 'Online Chartering System' is displayed. A subtitle reads: 'Use this submission form to complete a charter for a new site or update information for a current site.' The 'Select Category' dropdown menu is open, showing the following options: '(select)', '(select)', 'New Unit Application', 'New Extension Application', 'New Community Impact Program Application', 'New Organization Application', 'Current Site Update', and 'New Unit Application'. A blue arrow points to the 'Current Site Update' option. Below the dropdown, a note states: 'Minimum of 100 registered members'.

To **update the status of a current site**, select **Current Site Update** and an additional dropdown menu will open. Select the status update needed for your Club site:

The screenshot shows the 'Online Chartering System' interface. At the top, there are navigation links: 'Home / My Applications / Application'. Below this, the title 'Online Chartering System' is displayed. The 'Select Category' dropdown menu is set to 'Current Site Update'. A second dropdown menu is open, showing the following options: '(select)', '(select)', 'Change Site to an Extension', 'Change Site to a Unit', 'Change Site to a Community Impact Program', 'Change Site to an Organization', 'Change the Name of Site or Organization', 'Change Site Location', 'Close Site or Organization', 'Move Site to another Organization', and 'Merge Two or More Organizations'. A blue arrow points to the 'Change Site to an Extension' option. At the bottom right, there are two buttons: 'Save' and 'Save and Finalize'.

NOTE

The following pages provide general instructions to guide you through an application for a New Unit. Each application or site status update is a little different, but the process of submitting online paperwork is the same. Please use the instruction boxes on the following pages to learn and understand how to complete the various sections and upload documents in the Online Chartering System.



2. **General Information Page:** Once a category selection is made, the page will open additional fields on the General Information page and a path of pages to complete the application will appear as hyperlinks at the top of the page.

Please follow the screenshots with instruction boxes below and on the following pages to assist you in learning how to navigate the Online Chartering System:

The screenshot shows the 'Online Chartering System' interface. At the top, there are links for 'Home / My Applications / Application'. Below this, a breadcrumb trail reads: 'General Information → Site Update → Site Operating Hours & Service to Youth → Additional Site Updates → Organization Approval'. A blue arrow points to the 'General Information' link in this trail. A red oval highlights the entire breadcrumb trail. A yellow callout box states: 'List of pages to be completed with hyperlinks to each page for easy navigation.'

The main form area is titled 'Organization Information'. It contains several fields with red asterisks indicating they are required:

- Select Category ***: A dropdown menu with 'Current Site Update' selected.
- Change the Name of Site or Organization ***: A dropdown menu.
- Region ***: A text field with 'Midwest' entered.
- State ***: A dropdown menu with 'Illinois' selected.
- Organization Name * Global ID ***: A dropdown menu with 'Select' chosen.
- Application Name: ***: A text field with the instruction 'Enter a unique name for this application, to be used for reference to this submission'.

Callout boxes provide additional guidance:

- A pink box notes: 'Note: All fields with a red asterisk * must be completed.'
- A blue box explains: 'First, enter the Club's region. Once entered, another field will open to select your state and then another field to select your Organization's Name.'
- A blue box states: 'Next, enter a unique name for this application so you can easily find it in your submissions list.'
- A yellow box recommends: 'Recommendation: Use the site name'.
- A blue box instructs: 'Next, enter your contact information as the Point of Contact for this application.'

At the bottom, there is a section for 'Point of Contact for this Application' with fields for 'First Name *' and 'Last Name *'. A blue arrow points to the 'Save and Next' button, with a callout box stating: 'When finished entering information on a page, click Save and Next to move to the next page.'

At the very bottom of the page, there is a decorative horizontal bar with a repeating pattern of chevrons and a central diamond shape.

3. Site Information Page

General Information → **Site Information** → Site Facilities & Financials → Site Operating Hours & Service to Youth → Organization Approval

Site Information

Site Name *

Site Location Address *
Street Address

Line 2

City

Country

State / Province

Zip / Postal Code

County *

Is the mailing address different than the location address? *
☐ Yes
☐ No

Is the shipping address different than the location address? *
(Must be physical location for receipt)
☐ Yes
☐ No

Site Phone Number *

Website *

What date did site begin operations? *

Enter the official site name for this new Club site as you want it to appear on the charter certificate. Please review the membership requirements available on BGCA.net and/or speak with your Club's DOD if you have any questions regarding naming your site.

Note: For Site Updates, provide the site name and location address of the site for which the update is being requested.

Next, enter the LOCATION ADDRESS for this site.

*If the mailing and/or shipping address is DIFFERENT from the Club's location address, then select YES and a new set of address fields will open for you to enter this information.
If the mailing and/or shipping address is the SAME, click NO.*

Next, enter the site's phone number, Club website, and date the site began operating.



4. **Site Information Page (continued):** Staff of the Qualifying Site

Staff of the Qualifying Site

Site Director *

☐ Mr.
☐ Ms.

Next, enter the Site Director's information and upload a copy of the Site Director's resume.

Site Director Name *

Site Director Phone Number *

Site Director Cell Number

Site Director Email Address *

Site Director Annual Salary *

*To upload a copy of the Site Director's resume, click **CHOOSE FILE** and a new box will open. Find the file on your computer and just "drag & drop" a copy into the box.*

Upload a copy of site director's resume *

No file chosen

Number of Full-Time Boys & Girls Club Staff (not including Site Director) *

Next, enter the number of full-time and part-time staff members (not including the Site Director).

Number of Part-Time Boys & Girls Club Staff *

*Click **Save and Next** to move to the next page.*



4. **Site Facilities & Financials Page:** Building Facilities

General Information → Site Information → **Site Facilities & Financials** → Site Operating Hours & Service to Youth → Organization Approval

Building Facilities

Is the building or Boys & Girls Club quarters owned by the corporation? *

☒ Yes
☐ No

Does the Boys & Girls Club have exclusive use of the entire building? *

☐ Yes
☐ No

What other activities, if any, are carried on in the building? *

Is this Club located on Native Lands? *

[*CLICK HERE* to view definitions of Native Lands](#)

☐ Yes
☐ No

Please indicate if the Club is operating in any of the following Service Locations *

[*CLICK HERE* to view definitions of service locations.](#)

Select ▼

Is this Club licensed by the state? *

☐ Yes
☐ No

Is this Club located in a school? *

☐ Yes
☐ No

Is this Club a separate, stand-alone teen center? *

☐ Yes
☐ No

Please indicate whether this Club is located in an Urban, Suburban, or Rural Community *

[*CLICK HERE* to view definitions of community designations](#)

☐ Urban
☐ Suburban
☐ Rural

Next, enter information related to the building facilities, including: ownership, use, service locations, licensure, teen center status, and community location.

Definitions are available for review to assist in answering certain questions.

Additional questions may open based on answers to specific questions.

Is this Club located in a school? *

☒ Yes
☐ No

Please specify *

☐ Elementary School
☐ Middle or Jr. High School
☐ High School

Is the school a Charter, Private, or Public School? *

☐ Charter
☐ Private
☐ Public

Based on the interior space available for your use and your knowledge, the maximum number of youth that can be served at one time? *



5. **Site Facilities & Financials Page (continued):** Building Construction and Size

Building Construction and Size

Type of construction (brick, concrete, wood frame, etc.) *

Approximate total square footage of building *

Number of Floors *

Approximate square footage used by this Boys & Girls Club *

Upload a photo of the building, showing a majority of the building in a large format (8x10 preferred) *

Cell phone images are acceptable if the building is visible and photo shows more than just the front entrance. Capture as much of the building as possible in the photo.

Choose File No file chosen

Please check any of the following amenities that apply to this site

☐ Games Room

☐ Swimming Pool

☐ Basketball Court

☐ Baseball/Softball Field

☐ Playground

☐ Computer Lab

☐ Exercise Equipment (gym)

☐ Transportation from Local School(s)

Does or will the site display on the building the official Boys & Girls Clubs Service Mark and adhere to BGCA's graphic standards with the understanding that any previous rights to the name or mark are merged herein and use of the name or mark is contingent upon good standing? *

☐ Yes

☐ No

Next, provide additional details regarding building construction and size.

Next, identify the amenities available at this Club site and use of the Boys & Girls Clubs Service Mark.



5. **Site Facilities & Financials Page (continued):** Financials

Financials

Income *

Projected Expenses *

Is this site a 21st Century site? *

☐ Yes

☐ No

Attach a copy of an itemized budget for the site, including revenue and expenses *

Choose File

No file chosen

Next, provide the revenue and expense information for this site. Also, provide information on whether this is a 21st Century funded site.

Upload a copy of the itemized budget for this site. Please be sure that the numbers provided in the fields above are supported by the attached budget.

Prev

Save

Save and Next

Click **Save and Next** to move to the next page.

6. **Site Operating Hours & Service to Youth:** Operating Hours

Online Chartering System

[General Information](#) → [Site Information](#) → [Site Facilities & Financials](#) → **[Site Operating Hours & Service to Youth](#)** → [Organization Approval](#)

Operating Hours

Next, enter information related to the operating hours and upload a program schedule for this site.

If this Club is operating within a school, what is the school year schedule? *

☐ August - May

☐ September - June

☐ Not operating in a school

Number of months open per year during school year *

Unit site must be open at least 10 months per year

Number of days per week open during school year *

Unit site must be open at least 5 days per week

Number of hours per day during school year *

Unit site must be open at least 4 hours per day

Is the Club open during the summer? *

☐ Yes

☐ No

Upload a copy of one week's typical program schedule *

[*CLICK HERE* to download a Program Schedule Template](#)

Program schedule must show activities per room, per hour, per day. Cleanup and staff planning do not count towards hours of operation.

No file chosen

*Upload a copy of the program schedule for this site.
Please be sure that the information provided in the schedule matches the operating hours entered above.*

A program schedule template is also available.

REMINDER: Information provided for site operating hours must meet membership requirements. If not, you will receive an error message like this when you attempt to submit your charter application.

Number of months open per year during school year *

Unit site must be open at least 10 months per year

Please enter a value greater than or equal to 10.

Number of days per week open during school year *

Unit site must be open at least 5 days per week

Please enter a value greater than or equal to 5.

Number of hours per day during school year *

Unit site must be open at least 4 hours per day

Please enter a value greater than or equal to 4.



6. **Site Operating Hours & Service to Youth (continued):** Service to Youth

Service to Youth

Are boys and girls admitted into membership of the Club without discrimination as to age, nationality, class or creed? *

- ☒ Yes
☐ No

What is the average amount of dues per Club member per year? *

What is this site's Average Daily Attendance? *

Percentage of Total Registered Membership (Best estimate is acceptable)

Total should equal 100%

% African American *

% Asian *

% Caucasian *

% Hispanic *

% Multi-Racial *

% Native *

Registered Members Count

Number of female registered members *

Numbers of male registered members *

Number of teen registered members (Age 13 & older) *

Total number of registered members *

Unit site must have a minimum of 100 registered members

Please upload a roster of registered members for this site including name, age, and gender *

Roster must include name, age, and gender. **Excel spreadsheet preferred.**

No file chosen

Next, enter information related to youth membership for this site, including total membership counts.

Note: The system does not calculate totals. Please be sure the ethnicity breakdowns total 100% and the total number of registered members equals the gender breakdowns entered.

Upload the membership roster including name, age and gender (Excel spreadsheet if possible). Please be sure the information provided in the roster matches the counts entered above.

Prev

Save

Save and Next

Click Save and Next



7. **Organization Approval:** Organization signatures required via electronic approvals.

Online Chartering System

[General Information](#) → [Site Information](#) → [Site Facilities & Financials](#) → [Site Operating Hours & Service to Youth](#) → **Organization Approval**

Organization Signatures

***Chief Executive Officer and Board Chair electronic signatures are required for this submission.**

Please enter each full name and email address below. This system will send an automated email to the specified individual requesting certification for this submission.

*This submission will not be approved until both Chief Executive Officer and Board Chair have completed their certifications.

Chief Executive Officer *

(Not Sent)

Full Name

CEO and Board Chair electronic signatures are now required for all online submissions (even when the CEO is completing the charter application).

Please enter the name and email address for both the CEO and the Board Chair of the Organization, then click *Save and Finalize*.

Email

Board Chair *

(Not Sent)

Full Name

Note: We will verify the name and email addresses submitted against the information contained in our records for both the CEO and Board Chair, so please be sure to have this information updated in our records regularly. Contact the Club's DOD and/or CSS with any updates.

Email

Prev

Save

Save and Finalize



STEP FIVE: Submitting the Online Charter Application or Site Status Update

1. **Error Checking:** The online system will check for errors or incomplete answers.

*When you click **Save and Finalize**, the online system will review the application and identify any questions that were not completed or had data entered that was not consistent with membership requirements.*



Prev	Save	Save and Finalize
------	------	-------------------

ERRORS OR INCOMPLETE ANSWERS

The online system will direct you to the pages where the questions still need to be completed. It will highlight the answer box in red and will occasionally provide instructions in red text.

*When finished on that page, scroll to the bottom and click on **Save and Finalize** again. The system will either advance to the next page that needs to be corrected or it will advance to the final submission page (see below).*

Number of months open per year during school year *

Unit site must be open at least 10 months per year

8

Please enter a value greater than or equal to 10.

Number of days per week open during school year *

Unit site must be open at least 5 days per week

3

Please enter a value greater than or equal to 5.

Number of hours per day during school year *

Unit site must be open at least 4 hours per day

3

Please enter a value greater than or equal to 4.

READY TO SUBMIT



Press OK to Submit your application. You will not be allowed to make changes after submitting.

Press Cancel to return to the application.

You may also press 'Save' instead of 'Save and Finalize' to save and return later.

Cancel

OK

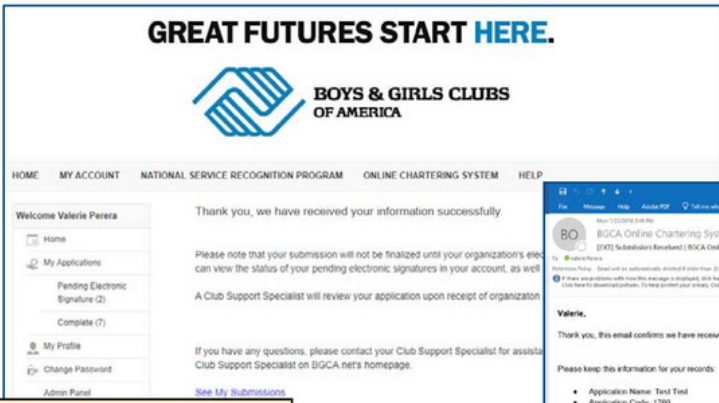
The online system will verify that you want to submit this application. No corrections can be made once you click OK.

If you still need to verify any information, click CANCEL and then click SAVE. You can return to the application at a later date when you have verified the information.

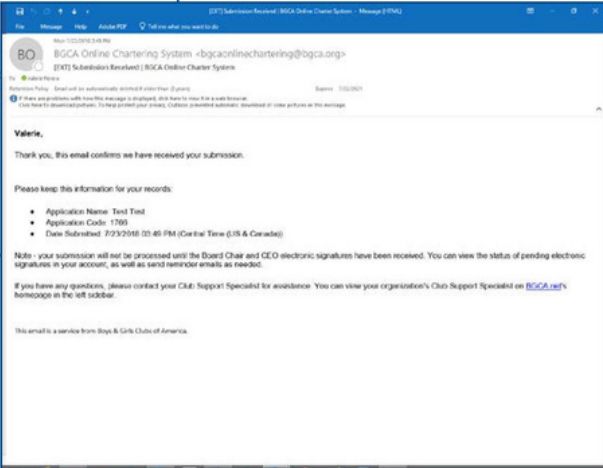
If you are finished with the application and ready to submit, click OK.



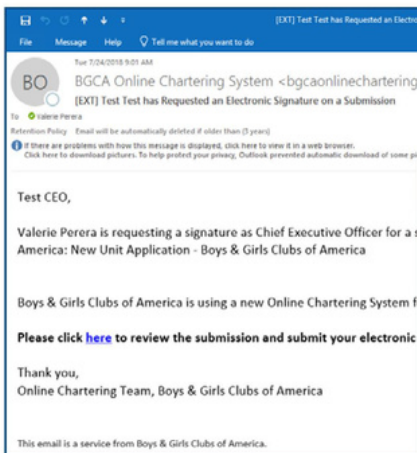
2. Confirmation: The online system verifies receipt of the application and explains next steps. You'll also receive an email from bgcaonlinechartering@bgca.org confirming receipt with the application code number assigned to your submission.



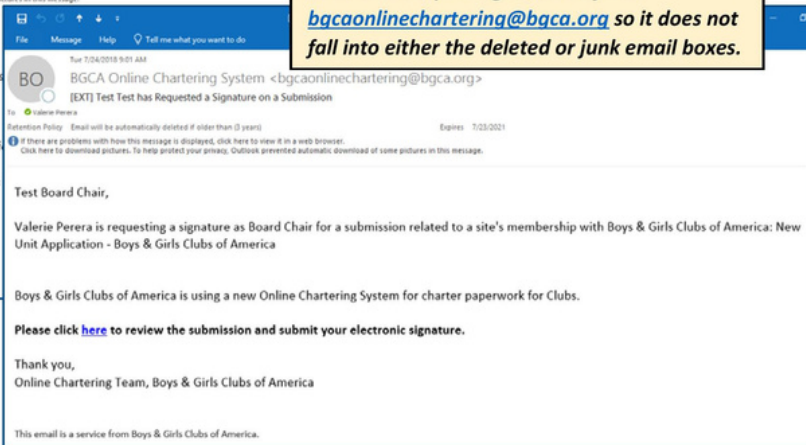
Note: Your dashboard identifies how many applications you have completed, in progress, needs attention or electronic signatures pending. Click on any of the options to see a list of submissions and/or access for editing.



3. Electronic Signatures Required: When the application is submitted, the online system automatically generates emails to the CEO and Board Chair based on the information entered on the last page of the application. The online submission is not finalized and ready for review until both the CEO and Board Chair electronic signatures are completed. You can view the status of the pending electronic signatures in your dashboard. Click on the option to resend the approval email or send reminder emails.



Recommendation: Notify your CEO and Board Chair to be expecting an email from bgcaonlinechartering@bgca.org so it does not fall into either the deleted or junk email boxes.

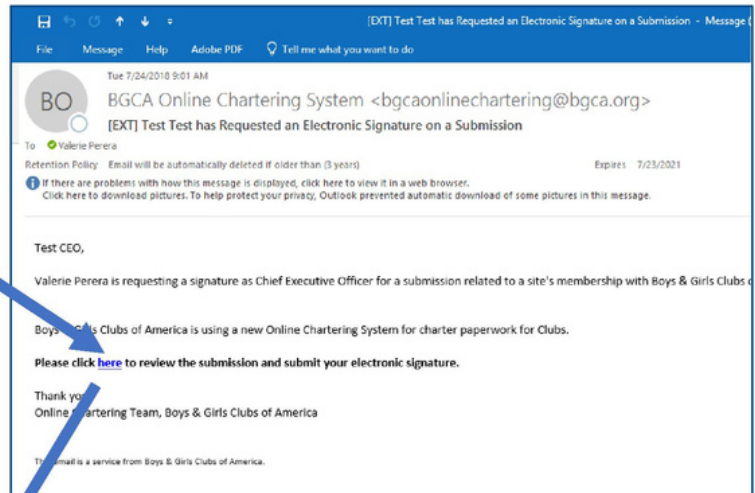




3. Electronic Signatures (continued):

CEO & BOARD CHAIR REVIEW:

Click on the link provided in the email and the CEO or Board Chair will be directed to a web page to review the application and then submit an electronic signature.



GREAT FUTURES START HERE.



**BOYS & GIRLS CLUBS
OF AMERICA**

HOME MY ACCOUNT NATIONAL SERVICE RECOGNITION PROGRAM ONLINE CHARTERING SYSTEM HELP

Online Chartering System

Application Submitted by: Perera, Valerie

You are Submitting an electronic signature for: Test Test

General Information

Category Name: New Unit Application

Organization Information

Category: New Unit Application

Region: Midwest

State: Illinois

SUBMIT ELECTRONIC SIGNATURE:

*After reviewing the application, CEO or Board Chair will enter their name, check "electronic signature" and then click on **Save**. The staff member who submitted the application will receive an email from bgcaonlinechartering@bgca.org notifying that a signature has been submitted.*

ELECTRONIC SIGNATURE

In accordance with federal law, by executing this Agreement electronically – the parties will be bound to the same degree as a handwritten signature – by using the following process to create an electronic symbol signifying an intent to be legally bound. Each party must fill in their name below, and insert a check mark in the box at the beginning of the line marked "Electronic Signature". Each Party shall retain a paper copy of the electronic mail.

I have examined the information entered on this submission and certify that to the best of my knowledge it is true, correct and complete.

Enter Full Name *

*

☐ Electronic Signature

Save



STEP SIX: BGCA Review and Approval

A member of the BGCA Club Support Services (CSS) staff will review the submission for completeness.

If a Submission is Complete: The CSS will submit the application for the required approvals. Once the approvals have been received, a confirmation email will be sent notifying that our records have been updated. In the case of new sites or site name changes, a charter certificate will be mailed to the organization's CEO.

If Additional Information is Needed: You may receive additional email communications from a member of our CSS staff or your Club's DOD to inform you of missing or incomplete information and what exactly is needed to finalize the submission. The CSS will re-open the submission so you can make edits and/or submit additional documentation. On your dashboard, you will see a new category under **My Applications** entitled **Needs Attention**. Click on this option to open and access the application.

The screenshot shows a user dashboard for Valerie Perera. The left sidebar contains navigation links: Home, My Applications, Needs Attention (1), Pending Electronic Signature (2), Complete (7), My Profile, and Change Password. A blue arrow points from the 'Needs Attention (1)' link to a secondary window. This window displays the 'Needs Attention' page with a table of applications. The table has columns for Program, #, Category, Title, and Action. One application is listed: 'Online Chartering System (Main)' with ID 1766, Category 'New Unit Application', and Title 'Test Test'. The 'Action' column for this entry contains a blue 'Open' link, which is highlighted by another blue arrow. The page also shows 'Showing 1 to 1 of 1 entries'.

Open the submission and use the hyperlinks at the top of the page to navigate to the correct section/page that needs attention. When finished editing, click through to the final page and/or use the hyperlinks at the top of the page to navigate to the **Organization Approval** page. Scroll to the bottom and click **Done**.

The screenshot shows a form titled 'Test Board Chair'. It contains a checkbox labeled 'Electronic Signature' which is checked. At the bottom right of the form are three buttons: 'Prev', 'Save', and 'Done'. A blue arrow points to the 'Done' button.

The **Needs Attention** section in your dashboard should disappear.

Additional Reviews: The CSS will conduct a second review and will either contact you for more information or will submit the application for approvals.

