RECHARTERING YOUR SCOUTING UNIT

A WORKSHOP FOR QUIVIRA COUNCIL

NOVEMBER 2022
ZOOM MEETING INSTRUCTIONS

• This presentation is being recorded and will be uploaded to the Quivira Council recharter webpage in about a week.
• Please remain on mute for the presentation.
• Ask your questions in the comments as you think of them.
• At the end of the presentation will be time for questions.
• Use the icons to raise your hand to ask a question.
• When called on, please unmute to ask your question, then mute again.
• If we don’t know the answer, we will find out and post it on the Quivira Council recharter webpage.
AGENDA

• Resources
• What is “recharter”? 
• Key points for 2023
• Unit Recharter Plan
• Wrap-up

WELCOME

• Thank you for being here!
RESOURCES TO HELP YOUR UNIT COMPLETE THE TASK

• Contains links to helpful information including this presentation
  www.quivira.org/recharter

• BSA website for Internet Charter Renewal 2.0
  https://www.scouting.org/commissioners/internet-rechartering/

• 2022 Internet Charter Renewal 2.0 User Guide

BSA website for online registration
https://www.scouting.org/resources/online-registration/
RESOURCES TO HELP YOUR UNIT COMPLETE THE TASK

• FIRST POINT OF CONTACT IS YOUR DISTRICT COMMISSIONER

<table>
<thead>
<tr>
<th>District</th>
<th>Name</th>
<th>Phone</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kanza</td>
<td>John Austin</td>
<td>620-352-0566</td>
<td><a href="mailto:Jcaustin.scouts@gmail.com">Jcaustin.scouts@gmail.com</a></td>
</tr>
<tr>
<td>Osage Nation</td>
<td>Bill Carson</td>
<td>508-725-6164</td>
<td><a href="mailto:bill.carson.bsa@gmail.com">bill.carson.bsa@gmail.com</a></td>
</tr>
<tr>
<td>Pawnee</td>
<td>Ted Hammarlund</td>
<td>620-245-7331</td>
<td><a href="mailto:thammarlund@cox.net">thammarlund@cox.net</a></td>
</tr>
<tr>
<td>South Winds</td>
<td>Flip Monier</td>
<td>316-806-0571</td>
<td><a href="mailto:jhmonier@hotmail.com">jhmonier@hotmail.com</a></td>
</tr>
<tr>
<td>White Buffalo</td>
<td>Vickie Glancy Cannon</td>
<td>316-655-7221</td>
<td><a href="mailto:quivira.high.plains@gmail.com">quivira.high.plains@gmail.com</a></td>
</tr>
<tr>
<td>Council Comm. For Recharter</td>
<td>Vickie Glancy Cannon</td>
<td>316-655-7221</td>
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</tr>
</tbody>
</table>

- Your friendly commissioner team
  - For answers to recharter questions. The commissioners will be your first stop when you have a recharter question.
  - Can provide a review of your Internet Rechartering 2.0 roster before your unit submits; recommended but not required – let your commissioner know when you are ready for this step
  - Review must be conducted while unit is logged in to Internet Rechartering, either in-person or virtual.
  - Email questions to quivira.high.plains@gmail.com. Use this format for the subject: unit type and #, charter partner. Ex. Troop 1999 Friends of Quivira
WHAT IS RECHARTER?

• LET’S BE SURE WE’RE ALL ON THE SAME PAGE FOR SOME TERMS WE WILL USE TO TALK ABOUT RECHARTER

RECHARTER IS ...

• ANNUAL RENEWAL OF INDIVIDUAL MEMBERSHIPS OF THE UNIT’S YOUTH AND ADULT MEMBERS; CONDUCTED BY VOLUNTEERS.
• ANNUAL RENEWAL OF THE RELATIONSHIP BETWEEN BSA AND THE CHARTERED ORGANIZATION, SIGNED BY THE CHARTER PARTNER AND THE BSA.
A QUICK REVIEW OF TERMINOLOGY USED HERE TO BE SURE WE ARE ALL ON THE SAME PAGE

As used in this presentation:

• **Chartered Organization** means a local organization wanting to use one or more BSA programs to serve youth in this area; it owns its units. May also be called the chartered partner.
• **Charter Agreement** is executed between a chartered organization and BSA to define the relationship between the parties.
• **Chartered Organization Representative** (CR or COR) is assigned by the Chartered Organization; the link between unit and organization.
• **A UNIT** is a Cub Scout pack, Scouts BSA troop, Venturing crew, Sea Scout ship or Exploring post.
• **Unit Leader** (UL) means “top direct contact leader” in the unit. The Cubmaster, Scoutmaster, Venturing Advisor, Skipper, or Exploring Advisor.
• **Committee Chair** (CC) is the head of the unit committee.
• The unit **Key 3** are the unit’s CR, CC, and UL.
• **“Key 3 delegate” or “COR delegate”** means a registered leader in the unit who is authorized by the Key 3 or COR to act as a Key 3 member or the COR in My.Scouting
• **YPT** is Youth Protection Training, required of every registered adult leader, taken every two years.
• **CBC** is Criminal Background Check, signed permission form is required of every registered adult leader.
KEY POINTS FOR 2023

IMPORTANT THINGS EVERYONE – FIRST TIMER OR BADEN-POWELL’S BFF – NEEDS TO KNOW ABOUT RECHARTER
NEW BSA MEMBERSHIP FEES

• BSA fee structure in effect
  • $75 for youth members in Cub Scouts, Scouts BSA, Venturing and Sea Scouts.
  • $45 for youth members in Exploring.
  • $45 for adult members.
  • $25 one-time joining fee for first-time youth members (packs, troops, crews, ships).
  • $100 unit charter fee for packs, troops, crew, ships, and posts.
• $15 Scout Life Magazine
NEW FOR 2022 RECHARTER SEASON

• YPT non-compliance now an Error for the unit
• Council Registrar enabled to view charter and assist unit in real-time
• Enabled printing of unit charter prior to submittal for review
• Updated features to both register and identify multiples
• Improved recharter validation (e.g., min # of ldrs, too many ldrs in a position, CBC, YPT)
• Improved payment processes, particularly using ACH
• Improved recharter support for Exploring Posts and Clubs
• Email approval will be sent to both Unit Key 3 and Key 3 Delegate

• FAQs – Internet Recharter 2.0
• The BSA change log
INTERNET RECHARTERING 2.0

- Click on the picture for a link to the Internet Rechartering 2.0 User Guide.
  - Recharter is accessible only through Internet Advancement 2.0 menu.
  - Usable only by unit Key 3, “Key 3 delegate”, or “COR delegate”.

- Two stages - roster preparation and payment/confirmation.
  - Roster preparation allows attachment of images of completed applications, CBC authorization forms, and YPT certificates. Only one (1) attachment per member. Units can identify members multiple to your unit, and purchase Scout Life for members.
  - Units may pay online by credit card (3% fee assessed to the unit) or by electronic check ($1 fee assessed to the unit).
  - Units may pay at council by credit card (3% fee assessed to the unit), by check, by cash, or by withdrawing funds from unit FHOD accounts. Credit card deposits to FHOD will also be assessed a 3% fee.
  - If unit is requesting council or KanCare registration financial aid, unit MUST choose pay at council. We can not accept a financial aid form, nor adjust membership roster after the unit has been posted to the national database.

- **Online recharter approval** after submission. Only IH, Comm Chair, Unit Leader, COR or COR delegate can sign.
CREATING A KEY 3 DELEGATE OR COR DELEGATE

• My.Scouting’s Position Manager function of the Organization Manager is used by a Key 3 member to create a “Key 3 delegate” or by the COR to create a “COR delegate”

• My.Scouting will permit a delegate to act as if he/she holds the delegated position, including the ability to use Internet Recharter 2.0

• Because these are very powerful positions, when creating delegates solely for the purpose of using Internet Rechartering 2.0, units are strongly encouraged to remove delegates promptly when the task is completed or to use expiration dates to deactivate delegates

• See the BSA help file for My.Scouting Position Manager for details
Upper left is Internet Advancement 2.0 roster screen.

Upper right is the drop down to choose a unit, if you are registered in more than one unit, also shows your registered position.

Lower left, under the horizontal line, is recharter is your positions allows you access.
RECHARTER SOFTWARE FIRST STEP

• All units should select 12 months, unless you have different instructions from the council.
RECHARTER TURN-IN

• Each unit is responsible for providing the office with additional documents needed for recharter completion.
  
  • Financial aid forms. Use financial aid forms on Quivira’s recharter webpage. KanCare insurance providers are Aetna and United. Only KanCare member IDs from these providers will be accepted.

  • Applications for new members that are being added to the recharter roster.

  • Signed CBC for members that have not already provided one.

• Money, if the unit selected “Pay at Council”.
COMMON RECHARTER ERRORS

Watch out for these common errors

• **Not updating member information in my.scouting prior to starting recharter software process**
  
  Existing members must update their contact information in My.Scouting, before starting recharter.

• Application errors (not provided, not completely filled out, missing required signatures).

  The best way to submit a youth application is using Online Applications to submit a paperless application before starting Internet Rechartering!

  [Link to checklist for using online registration]

• For adult applications, including persons aged 18 and older participating as youths:
  
  • CBC form (missing, not completely filled out)
  
  • YPT errors (missing or expired YPT certification) – ask any member whose YPT will expire before APRIL 30, 2023, to renew it now to avoid YPT expirations during recharter.
  
  • Youth ages 18-20 at time of charter expiration MUST register as adults, with CBC forms and YPT.

• Money issues:
  
  • Not correctly identifying persons that are registered in your unit, but they pay registration fees to another unit (multiple registered to your unit).
COMMON RECHARTER ERRORS – USING THE SOFTWARE

Do Not try this on a phone.

THE RECHARTER PAGE IS 16 COLUMNS WIDE AND IT IS VERY HARD TO CONTROL THE ICONS AND TYPING OF INFORMATION ON A PHONE.

PLEASE TRY TO FIND ACCESS TO A TABLET, LAPTOP, OR DESKTOP COMPUTER TO NAVIGATE THE RECHARTER SOFTWARE.
LION AND TIGER ADULT PARTNERS ARE NOT REGISTERED LEADERS. THEY ARE NO FEE ADULT PARTNER PARTICIPANTS.

Adult partners are part of the program participants as stated by Lion and Tiger requirements.

If you want to make an adult partner a member of the unit committee, you must turn in an adult application with CBC and current YPT and pay for them.
COMMON RECHARTER ERRORS
-- ADULT PARTNERS YPT

ALL LION AND TIGER ADULT PARTNERS SHOULD TAKE YOUTH PROTECTION IN my.scouting AND LINK TO THEIR MEMBER ID CREATED FOR THEM WHEN THEIR CHILD WAS REGISTERED.

1. This will allow a unit to make the partner an adult leader with minimal effort.
2. The person MUST create a my.scouting account using their partner ID so a new ID isn’t created in the future if they become a registered leader.
COMMON RECHARTER ERRORS
-- YPT

ALL AGE 17 YOUTH SHOULD TAKE YOUTH PROTECTION IN my.scouting AND LINK TO THEIR MEMBER ID.

1. The person has youth protection attached to their youth member ID, and when they register as an adult a second ID isn't created for them.

2. Units aren't waiting for a youth to take YPT so they can continue on the roster. This is especially hard when the youth has left for college or has an Eagle extension.

3. Crew, Post, and Ship youth HAVE to do this to continue on the roster.
COMMON RECHARTER ERRORS
-- YPT

1. **NOT HAVING ALL ADULTS 18+ CURRENT ON YOUTH PROTECTION TRAINING.**

2. **IF A YPT EXPIRATION DATE IS BETWEEN JANUARY 1 AND APRIL 30, THE MEMBER MUST TAKE YPT BEFORE SUBMITTING THE RECHARTER.**

Do not leave an adult on your roster that is not current on YPT.

Any member 18+ is required to have current YPT.

**Units can not submit the roster with expired YPT.**
COMMON RECHARTER ERRORS

-- CBC

-- NOT PROVIDING A CRIMINAL BACKGROUND CHECK FORM FOR EVERY ADULT 18+ MEMBER THAT NEEDS ONE.

The red mark in the CBC column means the BSA has not received permission to perform a criminal background check on that member.

For a member that has a red mark, send the name to Quivira.high,plains@gmail.com for verification that the CBC is on file.

Link to the CBC form is on the council recharter webpage.

We only need **ONE** CBC form per person.

ASK FIRST before sending a new one.
COMMON RECHARTER ERRORS

-- NOT IDENTIFYING MEMBERS WHO DO NOT PAY YOU REGISTRATION FEES. “MULTIPLE”

Someone who does NOT pay you registration fees is “multiple” to your unit. Not correctly identifying them will cost you fees you do not have to pay.

COORDINATE with your members that are registered in more than one unit to find out what unit they pay fees to. A member may also pay a district or a council.

IDENTIFY the unit the member pays to. The software asks for this information. The review by the commissioners or registrar will verify all multiple members.

My.Scouting User Guide to Transfers and Multiples
EVERY UNIT NEEDS AT LEAST TWO (2) PAID YOUTH MEMBERS

When you have youth that are members of other crews or troops, you **must** coordinate their payments to ensure your unit has the required two paid youth registrations.
EVERY UNIT THAT HAS FOUR (4) OR LESS YOUTH MEMBERS NEEDS A RECRUITMENT PLAN

Recruitment plans will be in writing and presented to the District Commissioner and District Executive. The Council Executive has to approve every unit with 4 or less youth. Recruitment plans will also be shared with membership teams.
COMMON RECHARTER ERRORS

FINANCIAL AID IS ONLY AVAILABLE FROM KANCARE PROVIDERS (Aetna and United) AND THE COUNCIL

As part of KanCare’s healthy child initiative, each KanCare provider supports one activity per child per year. Each KanCare card has the provider logo. Please use the appropriate form to request aid.

Find financial aid form links on the council recharter webpage.
UNIT RECHARTER PLAN

HOW RECHARTER IS ACCOMPLISHED
INTRODUCING AN EASIER RECHARTER

• Let’s call it: GET READY ... GET SET ... GET DONE!
HOW TO MAKE RECHARTER EASY

• “Get Ready” doesn’t require Internet Rechartering: do your homework to be sure all rechartering members are already on your unit roster, have all their documents, signatures on applications are correct, members are in the correct age group (youth 17 years and younger, adults 18 and older, cub ranks), and you know in which unit each member will pay registration fees BEFORE you begin the roster update process!

  NOTE: Council can not make fee payment adjustments for multiple registered members after recharter roster is submitted by the unit.

• Develop a plan for completing “GET READY...GET SET...GET DONE!” tasks with assignments and due dates.
• Publicize dates pertaining to unit members.
• Monitor progress to assure that tasks are completed on time.
• Be thorough and accurate.
GET READY! ...

- Unit Committee assigns recharter tasks, including selecting a recharter processor. (Key 3 or delegate)
- Unit recharter processor attends training.
- Unit completes a membership inventory and makes all changes in my.scouting.
- Contact every member about renewing, especially those not seen lately.
  
  Member (or parent) is responsible for updating contact information in my.scouting. 
  
  Email, phone, address, birthdate, etc.

- Collect registration fees from those renewing.
- Identify members who are NOT paying registration fees to your unit. In the recharter software, these members will be coded as “multiple” in your unit.
- Obtain applications (including CBC form and YPT proof, if required) from members not included on current BSA unit roster. Hint: online youth application can eliminate the need for submitting paper applications! Bring paper applications, CBC, and YPT to the council office as soon as possible.
- Confirm all adults have current YPT and CBC;
- Get applications, CBC, and YPT proof for youth ages 18-20.
- Gather financial aid requests from youth who are covered by KanCare insurance providers, or Council forms.

  Members whose YPT will expire before April 30, 2023, should renew it NOW to avoid YPT expiration before recharter acceptance.
GET READY! ... BSA ID

• **New member**
  • Any youth member without an existing BSA ID from any council, any district, at any time, is considered a new member.
  • New youth will be assessed an additional $25 joining fee.

• **Primary member**
  • Any member that pays registration fees in your unit.

• Adult members should use the BSA ID number connected to their YPT. If you have proof of YPT, and the member is coded as missing YPT, check the BSA ID number on the proof.
  • If there is a discrepancy in the BSA ID number,
    1. Have the member link their iD’s in my.scouting using “Manage Member ID”.
    2. If the member has trouble linking their ID’s, contact your commissioner.

• **Adult Partners (for Lions and Tigers) registering in a leadership position**
  ◦ Provide an adult application with their partner member ID, proof of current YPT, and a signed CBC.
GET READY! ...BSA ID

➢ By providing the member BSA ID, you will maintain the connection of registrations, awards and training to the correct person.
➢ If the member has a BSA ID in another council, you must be able to provide the other Council name/location so the registrar can find the member.

• You need the member BSA ID for the following types of members.
• Multiple Member
  • Any member, youth or adult, who does not pay registration fees to your unit. They will be coded as “multiple” to your unit. Any unit that mis-labels a member as primary will be assessed the registration fee.
    This fee can not be removed nor refunded by the registrar after submitting the charter.
    Any refund because of overpayment will come from the national organization.
    Registrars will check that the member has paid fees in a unit.
  • Please identify members that are multiple to your unit BEFORE starting the recharter software.
• Transfers
  • Any member that has a currently active registration in any council, any district.
• Reactivations
  • Any member that has an expired registration in any council, any district, at any time.
GET READY! ...BSA ID

Promotions (Troop/Crew/Adult-21 ages are based on the age as of February 1, 2022)

To maintain the member BSA ID link to all youth awards/ranks, these applications must contain the member BSA ID.

Any member 18 and older must register as an adult with a new application, background check, and YPT.

- **Pack to troop**
  - Unit leaders can now transfer pack members to troops within the recharter software. This must be coordinated between the Cubmaster and Scoutmaster, because January may not be the right time for the pack to transfer the youth. Any youth that still needs to earn Pack-level awards should not be promoted to a troop in January.

- **Troop to crew or adult leader** (18 years old on or before the last day of January)
  - Any troop youth that moves from a troop to a crew unit participant or into an adult leadership position must register as an adult unit participant or as an assistant scoutmaster.
  - **Troop to adult participant for youth that have an Eagle extension** (18-20 years old). The youth must register as an adult unit participant. At the end of the extension, or upon earning Eagle, the member must register as ASM or transfer to a crew as a unit participant to stay active.

- **Crew to adult unit participant** (18-20 years old)
  - For all crew youth that are 18-20 and are still active in their crew.

- **Unit participant to adult-21** (21 years old)
  - For all youth that turn 21 and want to register in any adult leader position.

- **Assistant scoutmaster to adult-21** (21 years old)
  - For all ASM that turn 21 and want to register in any adult leader position.

- **College Scouter Reserve**
  - This position is for ages 18-20 who wish to stay registered in their crew but will not be participating on a weekly basis because they are temporarily living away from home.
... GET SET! ...

- Use Google Incognito Window, Avast Private Mode, Bing Incognito Browsing, etc.
- Clear cookies, clear history, power down computer, have as few programs running as possible.
- Confirm unit roster (with needed electronic attachments) using Internet Rechartering 2.0.
- Members with missing documents will have red codes.

    If there is not a current CBC code for a previously registered adult, contact quivira.high.plains@gmail.com to verify one is at the council office, before submitting the charter.

- Upload missing documents. Only one attachment per member is allowed. If uploading more than one document, create a combined adobe, word, powerpoint, zipc (compressed file), then upload the combined item.

- Changes made in my.scouting will be shown 24 hours later in Rechartering 2.0 by updating roster.
- Request a commissioner review.
- To complete Internet Rechartering 2.0 “submit and pay” to select payment method and submit roster with attached documents. Your unit can not pay online if requesting financial aid.
- COR or COR delegate should approve the submitted roster electronically. The unit COR must have an active email address in my.scouting.
The validation message window.

- **Red errors** must be fixed by the unit before the roster can be submitted.
- **Yellow warnings** must be fixed by the unit before the council can submit to the national database.
- When ready to submit and pay, click on “Proceed to payment”.

*For step by step directions watch software training video*

- Provided by National BSA
- Watch it on the Charter Renewal Resources webpage

https://www.scouting.org/commissioners/internet-rechartering/
PAYMENT

The top portion must be filled out by the processor.

3% fee for using a credit card.

$1 fee for paying by Automated Clearing House (electronic check).

MUST choose Pay at Council if asking for financial aid.

If paying at council, you will still be charged 3% fee for paying by credit card,

**NO REFUNDS** once the roster is submitted by unit or council to national database.
LAST CHANCE TO MAKE CHANGES

• If the unit elected to pay by Automated Clearing House (ACH)

• (also known as electronic check or e-check)

• THERE ARE MORE STEPS FOR THE UNIT TO TAKE.
... PAYING BY ELECTRONIC CHECK, NEW WEBSITE FOR APPROVAL

Registrar Screen – This tells us that you paid by ACH, but the payment hasn’t happened yet. We see the same information if a credit card payment hasn’t happened.

ACH Payment
COR = YES
Paid = NO
National BSA is creating a page to submit microdeposit information to validate ACH payments, which will allow us to not rely on email from WePay that was periodically going to junk and spam email boxes.

Created a webpage for unit treasurers to confirm microdeposits if they do not receive confirmation email from WePay.
Example from last year of the email that will be sent.

The unit will confirm that the unit bank account received 2 small amounts as deposits. Once the unit confirms the account number, BSA will take the registration fees. Until the confirmation happens and payment is taken, this roster is locked. It may be hours before you see these deposits in the unit bank account.

From: BSA Payment Platform via WePay <support@wepay.com>
Date: February 11, 2022 at 6:34:12 AM CST
To: Your email address
Subject: Confirm your bank account
Reply-To: BSA Payment Platform <-

We noticed that you still have not confirmed your bank account.

The transactions from this bank account will not be processed until confirmed.

WePay Payments has made two small deposits to this bank account. These deposits should appear in your bank account within the next few days.

To confirm this bank account, click here »

If the unit does not respond to the first email from WePay, another one will be sent.
... GET DONE, SIGN APPROVAL EMAIL!

DO NOT use a cell phone to open this email.

Emails will be sent to all the Key 3 and delegates using the email connected to their BSA registrations.

- The 1\textsuperscript{st} email will say the roster was submitted.
- The 2\textsuperscript{nd} email contains a secure signature Adobe pdf file. Any of the 4 positions can sign for roster approval. There are FIVE fields that need to be filled out.
- Once the roster is signed, the signature emails for the others will no longer work.

- The 3\textsuperscript{rd} email tells everyone the roster was signed and which person approved it.
UNIT LOCKED IN INTERNET RECHARTER:

In most circumstances, if the unit is locked, it is due to the email never being sent to the Key 3. If this happens, there is a Regenerate Email button (link) under the word Recharter when the unit logs into their Internet Advancement. The unit can log back into Internet Advancement without reopening the recharter and click the regenerate email.

After 4 days of inactivity from the emails, the roster will reset to submit and pay.

CHECK YOUR SPAM FOLDER AND ASK OTHER LEADERS TO WATCH FOR

If you get this message, tell your commissioner.
... GET DONE!

These tasks will be completed after submitting

• Registrar reviews the submitted roster for errors; alerts commissioners if any are found.

• Commissioners work with unit to submit additional required documents and take such other corrective actions as required by the council registrar.

• Must complete corrections by the last day of March/April or unit drops, regardless of when the error is found or when the unit is notified.

• Unit prints new unit charter and membership cards for presentation after council registrar completes processing the unit’s recharter, and it is accepted by the national database. This is called posted.

Your commissioner is an additional resource for questions, problem-solving and friendly advice.
BETA TEST RECHARTER “DEMO” SITE

• There is a test environment for the software, called the “DEMO”, where you can play in the software without making any mistakes in your own unit. Follow these instructions to access the site

METHODIST (UMC) UNITS

Every effort needs to be made by the remaining Methodist units to find a new charter partner. Your commissioners are here to help you in this process.
OTHER END OF YEAR REMINDERS

• Funds Held On Deposit (FHOD) forms
  • Units that are changing the people who have access to the unit funds held for them by the council need to provide an updated FHOD form showing who to remove from the account and who to add to the account.
  • [Link to Quivira FHOD Information Update form](https://quivira.org/advancement/)

• Journey to excellence is coming up.
  • [https://www.scouting.org/awards/journey-to-excellence/unit/](https://www.scouting.org/awards/journey-to-excellence/unit/)

• All merit badge counselors must have renewal paperwork to the council office before Dec. 15.
  • [https://quivira.org/advancement/](https://quivira.org/advancement/)
WRAP-UP

• Quivira Council Commissioner email, to ask questions and get help for recharter:

  Quivira.high.plains@gmail.com

• Thanks again for taking the time to make administration of Scouting more efficient!

• Many thanks to Sam Houston Council for creating this template.