

BOY SCOUTS OF AMERICA®

ORDER OF THE ARROW

2018
Lodge Charter
Renewal Kit

Information and Application

Procedures for Lodge Charter Renewal

Each lodge operates under a charter granted by the national council and must apply annually for renewal. The charter renewal process provides a systematic opportunity for the lodge officers and advisers to review the accomplishments of the lodge during the previous 12-month period.

It is important that the charter review provide an opportunity for officers and advisers to meet with the Scout Executive to establish plans and actions for the coming year.

Proper use of the charter renewal process will produce positive results to benefit both the lodge and the council.

Lodge charters expire on December 31 of each year and the charter is to be renewed on or before that date for the coming year. Orders for supplies, awards and literature will not be processed for a lodge whose charter has not been renewed. Fillable Vigil and Founder's Award Petitions are available for download at: oa-bsa.org/resources/forms.

Steps

Due By

- | | |
|---|-------------|
| 1. The Scout Executive makes a formal announcement of the annual appointment of the lodge adviser and staff adviser for the next lodge charter year. | November 1 |
| 2. Lodge adviser and staff adviser meet with lodge officers to gather charter renewal data. The 2018 Lodge Charter Renewal Application and JTE Petition can be submitted through OA LodgeMaster by visiting lodgemaster.oa-bsa.org . The instructions for completing this process are included in this kit. | November 30 |
| 3. The E. Urner Goodman Camping Award, National Service Award and Innovation Award Petitions are fillable online forms that can be found at: oa-bsa.org/resources/forms . | November 30 |
| 4. Arrange an appointment with the Scout Executive, at which time the lodge officers and advisers will review the lodge accomplishments, discuss plans for the coming charter year (see the OA Game Plan Plan online), and secure the formal approval of the Scout Executive by affixing signatures to the 2018 Lodge Charter Renewal Application. | December 8 |
| 5. Scan and Email, the signed 2018 Lodge Charter Renewal Application to the national OA office (Do not send a check . Your council will be billed for your lodge's charter fees of \$5 per person). Email scanned completed Charter Renewal Application to charter@oa-bsa.org . | December 15 |



Lodge Program Reminders

OA Merchandise

Check out our special Combination Deal: Purchase 5 soft cover versions of the *Bound in Brotherhood* book for only \$75! It makes a great gift for outgoing and incoming lodge officers. Visit tradingpost.aa-bsa.org to order yours.

Unit of Excellence Award

The Order of the Arrow Unit of Excellence Award seeks to identify those units and the leaders within them, who excel at incorporating the OA into their annual planning. This award is intended to provide a tool for lodges to recognize, incentivize, and operationalize unit-level participation in Order of the Arrow programs. Look for more information at aa-bsa.org.

Annual Report Template

This template can be downloaded from aa-bsa.org and used to assist your lodge in presenting their own annual report to the council. It is intended to help lodges effectively communicate their accomplishments, and is a great way to market the service a lodge can provide to our councils.

Lodge Leadership Development

As your new program year begins and the transition among leadership occurs, be sure to take advantage of the Lodge Leadership Development (LLD) website to assist you with your training needs. The LLD syllabi has undergone significant improvements in providing lodges the tools to help them be successful. Go to lld.aa-bsa.org and make use of the resources that will help your lodge plan for success.

2018 National Order of the Arrow Conference

NOAC is the premier event of the OA, and Scouting's second-largest national event. During July 30 – August 4, 2018, several thousand Arrowmen from across our nation are expected to gather at Indiana University in Bloomington, Indiana for a week of fun and fellowship. More information regarding this event can be found at noac2018.org.

Developing Youth Leadership Conference

Join us June 17-23, for Developing Youth Leadership Conference. The Developing Youth Leadership Conference will deepen an adviser's capacity to develop youth leadership within the lodge and chapter. Conference topics will include fostering a growth mindset, promoting resilience, providing constructive feedback that leads to changes in youth behavior and creating a life-long coaching/mentoring relationship. Conference participants will gain insights necessary to successfully coach youth applying the leadership skills they gained during the National Leadership Seminar. This workshop targets OA advisers who have participated in the National Leadership Seminar. Visit philmontrainingcenter.org to sign up.

2017 Order of the Arrow National Committee

National Chief
Forrest Gertin (Y)

National Vice Chief
Talon Parker (Y)

National Chairman
Michael G. Hoffman

OA Director
Matthew W. Dukeman (P)

OA Associate Director
Travis M. Rubelee (P)

(Y) – Youth (P) – Professional

Vice chairmen

Communications
Anthony J. Fiori

Council Relations
Edward A. Pease

Development
N. Anthony Steinhardt, III

Financial Operations and Strategic Planning
Glenn T. Ault

National Events
Clint E. Takeshita

Outdoor Adventures
Christopher A. Grove

Partnerships
Bradley E. Haddock

Recognition, Awards, History, and Preservation
Michael L. Thompson

Region and Section Operations
Steven D. Bradley

Special Projects
Scott W. Beckett

Technology
Thomas S. Bain

Training
David W. Garrett

Unit, Chapter and Lodge Support
Jeffery Q. Jonasen

Diversity
Hector A. (Tico) Perez

Committee members

Larry Abbott (P)
L. Ronald Bell
Robert Black
Bradley Bowersox (P)
Christopher J. Boyle (Y)
Jack S. Butler II
Ray T. Capp
Toby D. Capps
Michael R. Card
E. Andrew Chapman
Mark J. Chilutti
Gary Christensen
Donald J. Cunningham
Kenneth P. Davis

Devang Desai
Darrell W. Donahue
Stephen F. Gaines
Clyde (Bud) Harrelson III
John W. (Jack) Hess
Jason P. Hood
Tyler J. Inberg (Y)
Hunter N. Jones (Y)
Dabney Kennedy
Wendy Kurten (P)
Delbert W. Loder
William D. (Bill) Loeble
Edward T. Lynes
Carl M. Marchetti
Carey J. Mignerey
Alyx J. Parker

John R. Rotruck
Max Sasseen Jr.
Steve Sawyer (P)
Jeffrey M. Sedlacek (Y)
Daniel T. Segersin
Jeffery C. Stout (P)
William H. (Bill) Topkis
Kaylene D. Dorothy Trick
Scott Valcourt
Russell D. Votava
Matthew M. Walker
Billy W. Walley
Michael F. White
Jason A. Wolz
MacKinley J. Zewalk

Lodge Year End Checklist – 2017

- _____ Complete Charter Renewal Application and JTE Petition process through OA LodgeMaster
- _____ Print Charter Renewal Application
- _____ Gather needed signatures:
 - _____ Lodge Chief
 - _____ Lodge Adviser
 - _____ Scout Executive
- _____ Email signed Charter Renewal Application to **charter@oa-bsa.org**

If lodge qualifies:

- _____ Complete 2017 E. Urner Goodman Camping Award (online)
- _____ Complete 2017 National Service Award Petition (online)
- _____ Complete 2017 OA Innovation Award Petition (online)

If you have questions about how to complete any of these steps email **charter@oa-bsa.org**.

*** Please note that annual OA charter fees are now \$5.00 per person and your council will be billed accordingly.**



Charter Renewal and Journey To Excellence

Instructions and Guidelines

Lodges must submit their Charter Renewal and JTE petitions through OA LodgeMaster (OALM). Journey to Excellence (JTE) is a program for lodges, administered by the National Order of the Arrow Committee, which encourages constant improvement in lodges. Each lodge must submit both their JTE and charter renewal petitions together, prior to December 31, 2017.

For a lodge to complete their JTE petition and charter renewal they will need to do two things:

1. Submit JTE petition and charter renewal via OA LodgeMaster.
2. Scan and email a signed charter renewal application (not the JTE petition). **DO NOT SEND A CHECK.**

All petitions must be complete and submitted through OA LodgeMaster **before midnight on December 31. The signed charter renewal application must be received by December 31.**

Submitting a 2017 JTE petition is REQUIRED to receive a 2018 lodge charter.

Getting Started:

1. Visit lodgemaster.oa-bsa.org and then click Online Lodge Client
2. Login using your lodges credentials (if you don't have credentials email support@lodgemaster.oa-bsa.org)
3. Select the Charter and JTE option from the modules menu in OALM
4. On the next screen, select the Charter Renewal & JTE Wizard option, which will provide a step-by-step walkthrough on applying information from OALM to the charter renewal and JTE petitions.
5. Once the wizard is complete and all data is finalized, the data can be submitted – select the Submit Charter Renewal & JTE Petition option and then select Print Charter Renewal.
6. After you have printed, select Submit to National (this can only be done once).
7. **To complete their charter renewal, the lodge must send a copy of the charter renewal application via email, signed by the lodge chief, lodge adviser, and Scout Executive to the national service center. Send a copy of the charter renewal via email to charter@oa-bsa.org.**

After completing the wizard and submission, a lodge may print both a completed JTE petition and charter renewal application for their own records.

Do not send any monies for your charter renewal to the national service center. The signed charter renewal application is the only thing that should be emailed to the national service center for processing. **Your council will be billed for your lodge's charter fees.**



Charter Renewal and Journey To Excellence

Instructions and Guidelines

Support and Help

The Unit, Lodge and Chapter subcommittee of the National OA Committee has created a JTE team to support lodges in completing their JTE petition accurately, and providing useful information on their petition. Lodges that are having difficulty completing their petition, or have questions, should email jte@oa-bsa.org. We are happy to help you!

The JTE team has a regional coordinator to provide lodges in each region with helpful feedback. These individuals will contact any lodge regarding discrepancies in their petition. They will also provide a report to every lodge Key-3 and Scout Executive that identifies areas of improvement for each lodge, and provides relative standings to other lodges in the region and nationally.

Awards

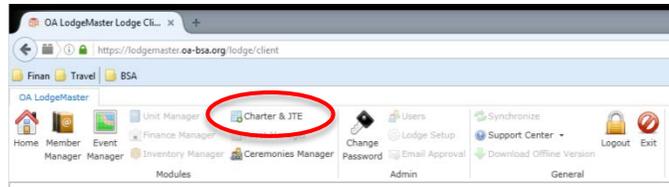
JTE awards will be announced in the first quarter of 2018. Lodges that achieve bronze, silver or gold recognition will be sent a sticker to affix to their 2017 lodge charter, and members of the lodge will be eligible to wear the corresponding JTE award pin on their lodge flap. Award levels will also be published in the *Lodge Ledger*, on oa-bsa.org and in the 2017 annual report.

OA LODGEMASTER – JTE AND RECHARTER PROCESS

This document describes how to use the OA LodgeMaster program to review and submit your lodge’s annual OA Lodge Journey to Excellence petition.

Step #1

Login to OA Lodgemaster and from the Home screen select **“Charter & JTE”**. This opens a new tab entitled Charter & JTE Manager.



Charter & JTE Manager

The Charter & JTE Manager contains two major components: the **“Charter Renewal & JTE Wizard”** and the **“Submit Charter Renewal & JTE Petition”**.

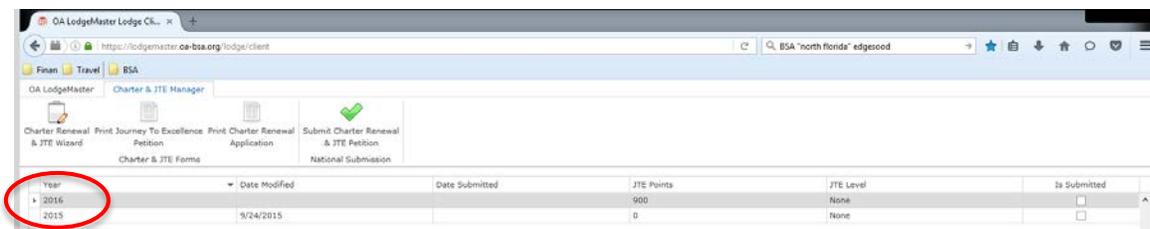
The **“Charter Renewal & JTE Wizard”** serves as the primary tool that can be used at anytime to view or print a lodge’s detailed JTE progress. The program also allows not only a detailed review of your lodge’s JTE statistics for the current year but also for previous years’ JTE data which has already been submitted to the national office.



The **“Submit Charter Renewal & JTE Petition”** component sends your lodge’s completed JTE petition to the national office. This program is designed to be used at the end of the year after all JTE data has been entered and checked.

Step #2

The first screen of the **“Charter Renewal & JTE Wizard”** shows the overall status of both the current year and previous years’ JTE program.



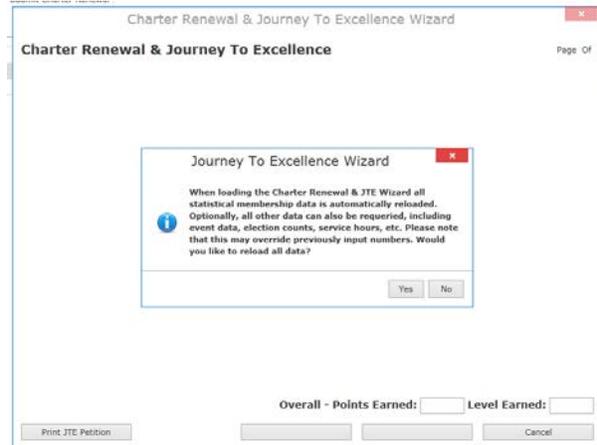
Current year JTE: For the current year, the total number points earned and JTE level earned so far by your lodge are shown. To review or edit the detailed JTE statistics, select the current year and open the **“Charter Renewal and JTE Wizard”** from the menu. The date JTE data was last modified by a user is displayed.

Previous year JTE: Previous years JTE petitions already submitted are marked as “submitted” and the number of points earned and level achieved are shown. To review the detail for a previous year’s JTE data, select the year of interest and click **“Print Journey To Excellence Petition”**. No data can be changed for a year already submitted, but the petition can always be reviewed.

NOTE: You can review all detail for the current year’s JTE status at any time without completing the final national submission process. Use the **“Charter Renewal and JTE Wizard”** frequently to stay abreast of your lodge’s progress on the Journey to Excellence throughout the year.

Step #3

When the **“Charter Renewal and JTE Wizard”** opens, you are prompted to choose whether or not the program recalculates all statistics or simply the membership related statistics. For your initial reviews of your JTE data throughout the year, choose **“Yes”**. Once you approach the final submission process and some data has been changed manually by the override fields, choose **“No”**. If you are uncertain, simply choose **“No”**.

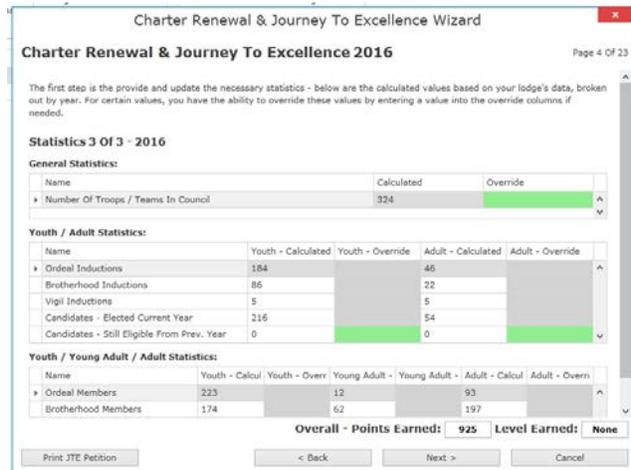


Step #4

The **“Charter Renewal and JTE Wizard”** will then review 23 pages of JTE information beginning with a review of the general membership data from the previous and current year and then proceeding through each of the 17 JTE requirements. The wizard will show one page per requirement.

JTE Wizard – general membership statistics review

The first three pages of the JTE wizard review membership statistics from the current year and previous years.



On some pages the data cannot be modified (for example, the current year’s Ordeal inductions). Other pages present current data calculated from your lodge’s JTE database but offer the opportunity to override the data with manually-entered data if necessary. Fields that cannot be modified are shown in dark grey, and fields that can be changed are shown in bright green.

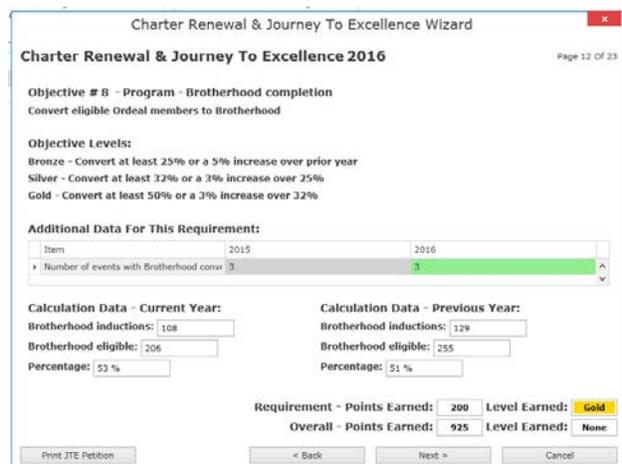
Navigate through these pages by using the **“Next”** and **“Back”** buttons at the bottom of each page. Scroll up and down using the scroll bar if necessary to see the entire page.

JTE Wizard –review of each JTE objective

The next 17 pages of the **“Charter Renewal and JTE Wizard”** display your lodge’s progress on each objective in the OA Lodge JTE program. Your lodge’s current performance, the number of points earned and Bronze/Silver/Gold level earned for this requirement, is shown at the bottom of the screen.

If any data are found to be incorrect, review the original data in OA LodgeMaster and correct the stored information. For example, if the number of Ordeal candidates is not correct, it may be that some candidate names were omitted from LodgeMaster and need to be entered. If accurate information is not available in LodgeMaster, use the green override fields to manually enter the corrected statistics.

Review each of the 17 JTE objectives entering information as required. Several objectives require information not stored in OA LodgeMaster. In this case, simply check the appropriate boxes or enter the

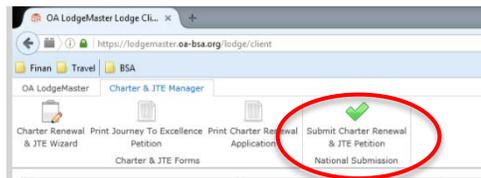


correct data. Leave fields blank if the information is not yet available. Most data entered in the override fields will be saved by LodgeMaster and displayed the next time you use the wizard. You may print the JTE petition at any time to show the current, up to the minute scores. Printing the JTE petition does not submit the petition to the national office.

Step #5

At the end of the year when all data in OA Lodgemaster is complete, all override data is entered, and your lodge is ready to submit your final JTE petition to the national office, follow these steps:

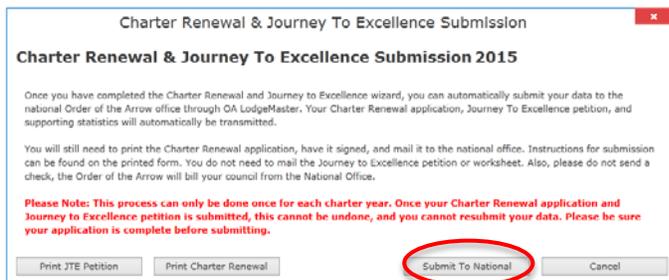
- Perform a final review of all 23 pages of the **“Charter Renewal and JTE Wizard”**
- Print a copy of your JTE petition and review it for accuracy
- Print a copy of your recharter form and review it for accuracy
- Select **“Submit Charter renewal and JTE petition”** from the menu.



Submit Charter Renewal & JTE Petition

This procedure electronically sends your lodge’s JTE petition to the national office. Only take this step when you are satisfied that all data is accurate and complete, for the process can only be done once for each year, and the

JTE petition cannot be changed once it is submitted.



After review the warning message, select **“Submit to National”** to send the petition to the national office.

Step #6

Obtain the signatures of the Lodge Chief, Lodge Adviser, and Scout Executive on the printed Charter Renewal application form and email the form to the national office at charter@oa-bsa.org. Do not send a check for the national fees; the Order of the Arrow will bill your council directly.

Your lodge JTE petition and charter renewal application have now been successfully submitted!

Questions:

If you have questions about OA LodgeMaster visit the support center <https://docs.oa-bsa.org/display/OALMLC> where you will find documentation, frequently asked questions, and training resources.

For more information on JTE review the JTE Guidebook: www.oa-bsa.org/pages/content/publications#jteq or send email to jte@oa-bsa.org.