

BOY SCOUTS OF AMERICA®

ORDER OF THE ARROW

2019
Lodge Charter
Renewal Kit

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 2019 Lodge Charter Renewal Application and JTE Petition must 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, and secure the formal approval of the Scout Executive by affixing signatures to the 2019 Lodge Charter Renewal Application. December 10
5. Scan and Email, the signed 2019 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). Email scanned charter to charter@oa-bsa.org. December 15

Lodge Program Reminders

OA Merchandise

Check out our special \$25 Combination Deal: Purchase the combination of a Centennial Chenille and the Bound in Brotherhood paperback for only \$25! This is a great way to honor your current or past lodge officers. Visit tradingpost.oa-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 oa-bsa.org.

Annual Report Template

This template can be downloaded from oa-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.oa-bsa.org and make use of the resources that will help your lodge plan for success.

National Scouting Historian Summit

The first-ever week long summit for Scouting Historians, jointly sponsored by the the Order of the Arrow and the National Scouting Museum will immerse participants in the Rules, Tools, & Strategies for capturing and preserving Scouting's rich heritage. Scouting Historian experts will guide Scouts and Scouters in a variety of essential topics including:

- Archival & Preservation best practices
- Preservation and strategic practices
- Developing Scouting history websites
- Conducting living histories and interviews
- Historical narrative story telling
- Preserving your Council and Lodge history
- Scouting art detectives
- Advanced management of collections

June 9-15, 2019

Register at www.philmonttrainingcenter.org

2020 National Order of the Arrow Conference

The National Order of the Arrow Committee is pleased to announce that the 2020 National Order of the Arrow Conference will be held at Michigan State University from August 3-8, 2020, in East Lansing, MI. MSU is home to three past NOACs including 2006, 2012, and the 2015 centennial conference. We'll see you at MSU in 2020!



BOY SCOUTS OF AMERICA®

ORDER OF THE ARROW

2018 Order of the Arrow National Committee

National Chief

Anthony Peluso (Y)

National Vice Chief

Michael Kipp (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
Tony Steinhardt, III

Financial Operations & Strategic Planning
Glenn T. Ault

National Events
Clint E. Takeshita

Outdoor Adventures
Jeffery Q. Jonasen

Project 2023
Chris Grove

Partnerships
Bradley E. Haddock

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

Region and Section Operations
Robert C. Black

Special Projects
Scott W. Beckett

Technology
Thomas S. Bain

Training
David W. Garrett

Unit, Chapter and Lodge Support
J. Dan McCarthy

Youth Protection
Hector A. "Tico" Perez

Committee Members

Jeremiah "JJ" Arnold
L. Ron Bell
Steven D. Bradley
Bradley C. "Brad" Bowersox (P)
Jack S. Butler, II
Ray T. Capp
Toby D. Capps
Michael R. Card
Robert Chaballa
E. Andrew Chapman
Mark J. Chilutti
William "Bill" Chin
Gary Christiansen
Donald J. Cunningham
Craig Davis
Kenneth P. Davis

Devang Desai
Darrell W. Donahue
Harrison Fry (Y)
Stephen F. Gaines
Forrest J. Gertin (Y)
Clyde "Bud" Harrelson, III
John W. Hess
Jason P. Hood
Dabney Kennedy
Wendy Kurten (P)
Delbert W. Loder
William D. "Bill" Loeble
Ed Lynes
Carl M. Marchetti, M.D.
Carey J. Mignerey
Alyx J. Parker
Talon B. Parker (Y)

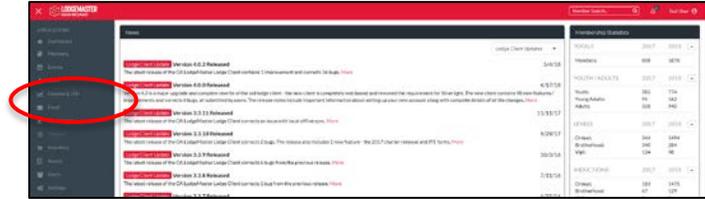
Joey Quick (P)
Max Sasseen, Jr.
Daniel T. Segersin
Jeffery C. Stout (P)
William H. (Bill) Topkis
Kaylene D. Trick
Scott A. Valcourt
Russell D. Votava
Matthew M. Walker
Billy W. Walley
Mike White
Jason A. Wolz
Mack J. Zewalk

OA LODGEMASTER – CHARTER RENEWAL & JTE 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 Applications menu on the left select **Charter & JTE**. This opens the Charter & JTE module.



Step #2

The Charter & JTE module shows a grid of the overall status of both the current year and previous years' JTE program. It also contains two major components: the **Charter Renewal & JTE Wizard** and the **Submit To National** function.

Year	Date Modified	Date Submitted	JTE Level	JTE Points	Submitted
2017	9/5/2018	9/5/2018	Bronze	1750	Yes
2016	12/29/2016	12/29/2016	Silver	2125	Yes
2015	12/30/2015	12/30/2015	Bronze	1850	Yes
2014	12/30/2014	12/30/2014	Gold	1600	Yes
2013	12/27/2013	12/27/2013	Gold	1925	Yes

The **Charter Renewal & JTE Wizard** serves as the primary tool that can be used at anytime to view and update 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 To National** function sends your lodge's completed Charter Renewal and JTE petition to the national office. This function is designed to be used at the end of the year after all JTE data has been entered and checked.

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.

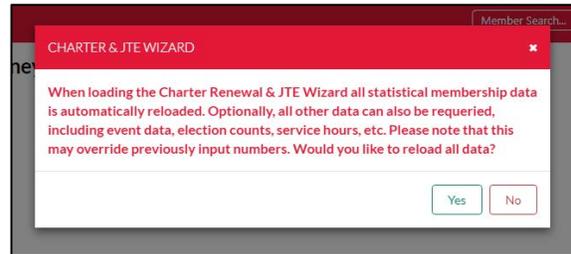
Previous year JTE:

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 **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

Select the current year and click *Charter Renewal and JTE Wizard* to open the wizard. 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*.

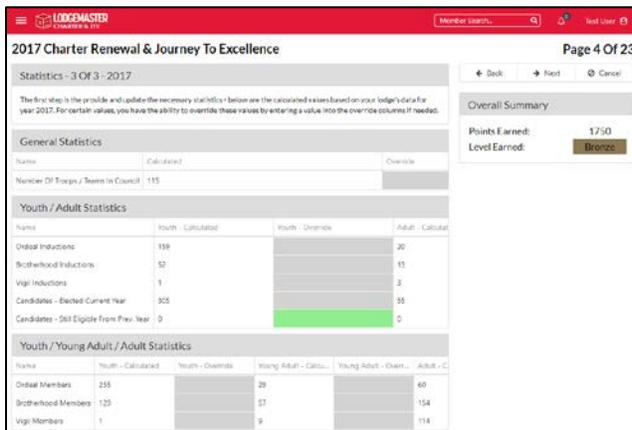


Step #4

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 years 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.

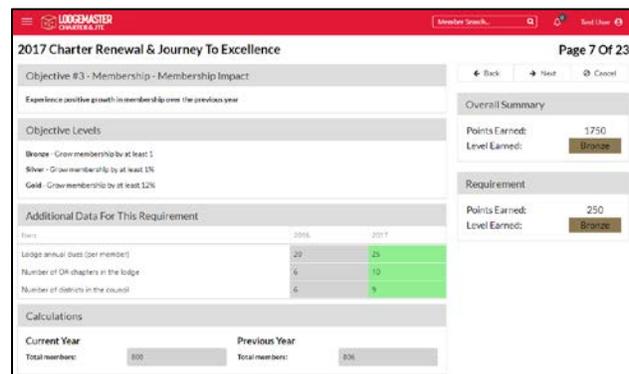
Navigate through these pages by using the **Next** and **Back** buttons at the top right of each page. Scroll up and down using the scroll bar if necessary to see the entire page.

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 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 right 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.

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:

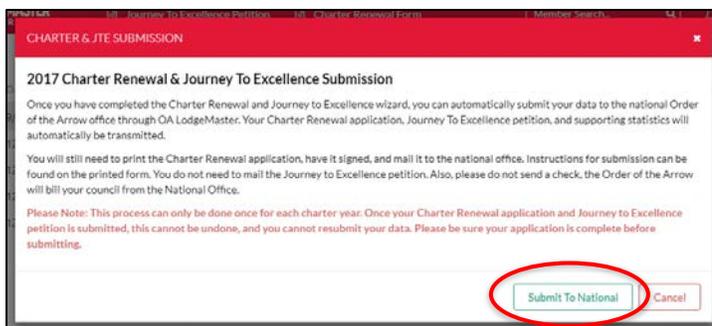


- Perform a final review of all 23 pages of the **Charter Renewal and JTE Wizard**
- Click **Journey To Excellence Petition** and print a copy of your JTE petition and review it for accuracy
- Click **Charter Renewal Form** and print a copy of your recharter form and review it for accuracy
- Click the **Submit To National** button.

Submit To National:

This procedure electronically sends your lodge's charter renewal and 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 at <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:

<https://www.oa-bsa.org/resources/publications#jteg> or send email to jte@oa-bsa.org.

October 1, 2018

SUBJECT: 2019 LODGE CHARTER RENEWAL KIT

FROM: Matt Dukeman, National OA Director

TO: Council Scout Executives, Lodge Advisers

The enclosed material contains all the necessary information to renew your lodge's charter. Your 2019 charter renewal is due on or before December 31, 2018.

Contents of the kit:

- OA Lodge Year End Check List
- Instructions to complete your 2019 Lodge Charter Renewal Application and JTE Petition.
- Lodge Program Reminders

Materials available ONLY ONLINE at www.oa-bsa.org:

- Unit of Excellence Award Information
- 2018 OA Matching Service Grant Application (**Due October 31, 2018**)
- 2018 E. Urner Goodman Camping Award Petition (**Due December 31, 2018**)
- 2018 National Service Award Petition (**Due December 31, 2018**)
- 2018 OA Innovation Award Petition (**Due December 31, 2018**)

**PLEASE FORWARD THIS MATERIAL TO YOUR LODGE ADVISER
FOR PROMPT ACTION**

OA LODGEMASTER – CHARTER RENEWAL & JTE 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 Applications menu on the left select **Charter & JTE**. This opens the Charter & JTE module.



Step #2

The Charter & JTE module shows a grid of the overall status of both the current year and previous years’ JTE program. It also contains two major components: the **Charter Renewal & JTE Wizard** and the **Submit To National** function.

Year	Date Modified	Date Submitted	JTE Level	JTE Points	Submitted
2017	9/5/2018	9/5/2018	Bronze	1750	Yes
2016	12/29/2016	12/29/2016	Silver	2125	Yes
2015	12/30/2015	12/30/2015	Bronze	1850	Yes
2014	12/30/2014	12/30/2014	Gold	1600	Yes
2013	12/27/2013	12/27/2013	Gold	1925	Yes

The **Charter Renewal & JTE Wizard** serves as the primary tool that can be used at anytime to view and update 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 To National** function sends your lodge’s completed Charter Renewal and JTE petition to the national office. This function is designed to be used at the end of the year after all JTE data has been entered and checked.

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.

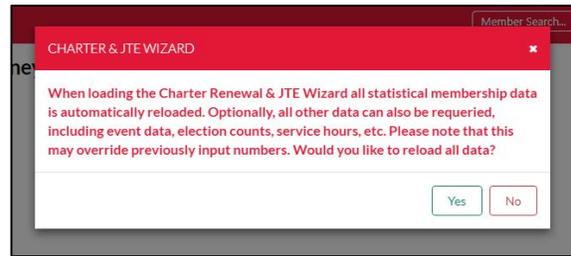
Previous year JTE:

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 **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

Select the current year and click **Charter Renewal and JTE Wizard** to open the wizard. 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**.

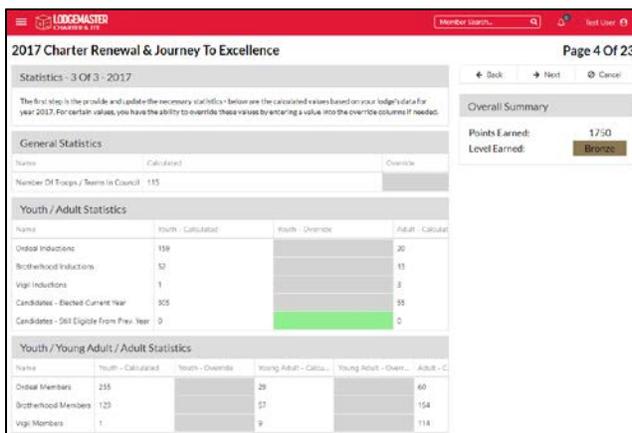


Step #4

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 years 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.

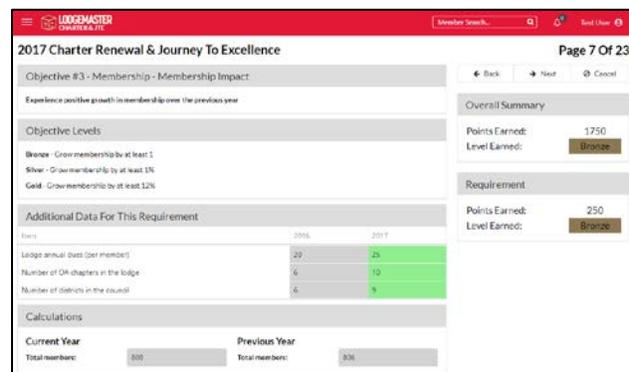
Navigate through these pages by using the **Next** and **Back** buttons at the top right of each page. Scroll up and down using the scroll bar if necessary to see the entire page.

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 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 right of the screen.

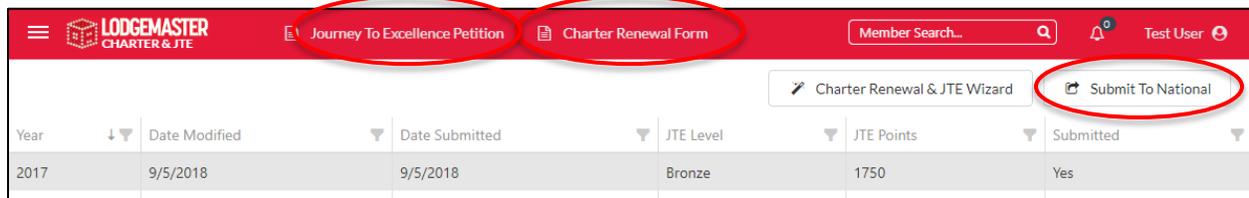
If any data are found to be incorrect, review the original data in OA LodgeMaster and correct the stored information. For example, if the number of Ordeal candidates is not correct, it may be that some candidate names were omitted from LodgeMaster and need to be entered. If accurate information is not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



Step #5

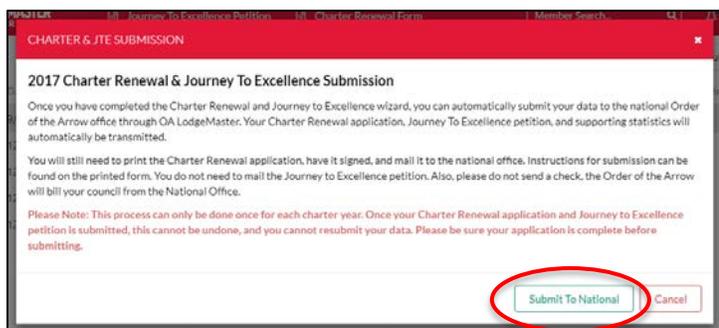
At the end of the year when all data in OA Lodgemaster is complete, all override data is entered, and your lodge is ready to submit your final JTE petition to the national office, follow these steps:



- Perform a final review of all 23 pages of the **Charter Renewal and JTE Wizard**
- Click **Journey To Excellence Petition** and print a copy of your JTE petition and review it for accuracy
- Click **Charter Renewal Form** and print a copy of your recharter form and review it for accuracy
- Click the **Submit To National** button.

Submit To National:

This procedure electronically sends your lodge's charter renewal and 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: <https://www.oa-bsa.org/resources/publications#jteg> or send email to jte@oa-bsa.org.