October 1, 2019

SUBJECT: 2020 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 2020 charter renewal is due on or before December 31, 2019.

Contents of the kit:

- OA Lodge Year End Check List
- Instructions to complete your 2020 Lodge Charter Renewal Application and Lodge Performance Measurement Program (PMP) Petition.
- Lodge Program Reminders

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

- 2020 OA Matching Service Grant Application (Due October 31, 2019)
- Please note that beginning this year the E. Urner Goodman Camping Award, National Service Award and OA Innovation Award Petitions will be handled through the charter renewal wizard within OA Lodgemaster. No paper or scanned applications will be accepted.

PLEASE FORWARD THIS MATERIAL TO YOUR LODGE ADVISER FOR PROMPT ACTION
Lodge Year End Checklist – 2020

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

* Please note that annual OA charter fees will be billed directly to your council.
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](http://oa-bsa.org/resources/forms).

### Steps

<table>
<thead>
<tr>
<th>Step Description</th>
<th>Due By</th>
</tr>
</thead>
<tbody>
<tr>
<td>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.</td>
<td>November 1</td>
</tr>
<tr>
<td>2. Lodge adviser and staff adviser meet with lodge officers to gather charter renewal data. The 2020 Lodge Charter Renewal Application and Lodge Performance Measurement Program Petition must be submitted through OA Lodgemaster via <a href="http://lodgemaster.oa-bsa.org">lodgemaster.oa-bsa.org</a>. The instructions for completing this process are included in this kit.</td>
<td>November 30</td>
</tr>
<tr>
<td>3. The E. Urner Goodman Camping Award, National Service Award and Innovation Award Petitions will be completed through the charter renewal wizard.</td>
<td>November 30</td>
</tr>
<tr>
<td>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 2020 Lodge Charter Renewal Application.</td>
<td>December 10</td>
</tr>
<tr>
<td>5. Scan and Email, the signed 2020 Lodge Charter Renewal Application to the national OA office (<a href="http://oa-bsa.org/resources/forms">Do not send a check</a>. Your council will be billed for your Lodge’s Charter fees). Email scanned charter to <a href="mailto:charter@oa-bsa.org">charter@oa-bsa.org</a>.</td>
<td>December 31</td>
</tr>
</tbody>
</table>
Lodge Program Reminders

OA Merchandise

Visit tradingpost.oa-bsa.org to check out our Black Friday / Cyber Monday sale in November. Great deals on tons of OA merchandise as well as over 50% off on all NOAC 2018 items. NOAC 2020 pre-orders will open on April 1, 2020.

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, 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.

2021 Operation Arrow

Operation Arrow will return to expand its legacy of cheerful service during the 2021 National Jamboree at the Summit Bechtel Reserve. Service opportunities available to youth Arrowmen aged 16-20 include the return of Service Corps and the Trek Guides program, with other exciting new opportunities. Those aged 16-25 can attend the entire jamboree at a reduced fee of $450. To learn more and to apply for our staff, please visit oa-bsa.org/jamboree and follow us on Twitter and Instagram.

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, Michigan. For more information, visit NOAC2020.org.

NOAC Memorabilia Auction

A memorabilia auction will be at the 2020 NOAC for the benefit of the national Order of the Arrow Endowment. There will be both a live auction as well as two eBay “silent” auctions, one starting before NOAC and another starting at NOAC. Lodges, sections, and individuals are asked to send their donation of patches or memorabilia to Ray Capp, former chairman, at this address: 9 Warwick Lane, Nashville, TN 37205. Each donation will receive an OA letter of appreciation detailing the gift. The national endowment provides long-term financial support for programs such as the OA High Adventure, Lodge Service Grants, OA Technology projects and preservation of the Order’s history.
2019 Order of the Arrow National Committee

**National Chief**
Matthew L. Parsons (Y)

**National Vice Chief**
Eric S. Harrison (Y)

**National Chairman**
Michael G. Hoffman

**OA Director**
Matthew W. Dukeman (P)

**OA Associate Director**
Vacant

(Y) – Youth   (P) – Professional

**Vice Chairmen**
Communications
Anthony J. Fiori

Council Relations
Edward A. Pease

Development
N. Anthony Steinhardt, III

Diversity
Hector A. “Tico” Perez

Financial Operations
Glenn T. Ault

National Advisory Group
Billy W. Walley

National Events
Clint E. Takeshita

Outdoor Adventures
Jeffery Q. Jonasen

**Project 2023**
Christopher A. Grove

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

**Region and Section Operations**
Robert C. Black

**Special Projects**
Scott W. Beckett
Ray T. Capp

**Strategic Performance**
Edward T. Lynes

**Technology**
Thomas S. Bain

**Training**
David W. Garrett

**Unit, Chapter and Lodge Support**
J. Dan McCarthy

**Committee Members**
Jeremiah J. Arnold
Tracy A. Atherton
L. Ron Bell
Rodger D. Billica
Steven D. Bradley
Bradley C. Bowersox (P)
Toby D. Capps
Michael R. Card
Robert Chaballa
Mark J. Chilutti
William B. Chin

Gary D. Christiansen
R. Craig Davis
Devang B. Desai
Darrell W. Donahue
Stephen F. Gaines
Clyde “Bud” Harrelson, III
Jason P. Hood
Michael T. Kipp (Y)
Carl M. Marchetti
Carey J. Mignerey
Alyx J. Parker
Anthony T. Peluso (Y)
Joey D. Quick (P)

Max T. Sasseen, Jr.
Daniel T. Segersin
Justin D. St. Louis (Y)
Jeffery C. Stout (P)
William H. Topkis
Kaylene D. Trick
Scott A. Valcourt
Russell D. Votava
Michael F. White
Jason A. Wolz
MacKinley J. Zewalk
This document describes how to use the OA LodgeMaster program to review and submit your lodge’s annual charter and Lodge Performance Measurement Program (PMP) petition.

**Step #1**
Login to OA Lodgemaster and from the Applications menu on the left select **Charter & PMP**. This opens the Charter & PMP module.

**Step #2**
The Charter & PMP module shows a grid of the overall status of both the current year and previous years’ PMP results. It also contains two major components: the **Charter Renewal & PMP Wizard** and the **Submit To National** function.

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

The **Submit To National** function sends your lodge’s completed Charter Renewal and PMP petition to the national service center. This function is designed to be used at the end of the year after all PMP data has been entered and checked.

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

**Previous year PMP:**
Previous years’ PMP 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 PMP data, select the year of interest and click **PMP Petition** on the reports menu. 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 PMP status at any time without completing the final national submission process. Use the **Charter Renewal & PMP Wizard** frequently to stay abreast of your lodge’s Performance Measurement Program progress throughout the year.
**Step #3**
Select the current year and click Charter Renewal & PMP 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 PMP 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 & PMP Wizard will then review all of the PMP information beginning with a review of the general membership data from the previous and current years and then proceeding through each of the PMP requirements. The wizard will show one page per requirement.

**PMP Wizard – general membership statistics review:**
The first three pages of the PMP Wizard reviews 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 PMP 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.

**PMP Wizard – review of each PMP objective:**
The next 10 pages of the Charter Renewal & PMP Wizard display your lodge’s progress on each objective in the lodge PMP petition. Your lodge’s current performance, the number of points earned and Thriving/High Performing 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 OA LodgeMaster and need to be entered. If accurate information is not available in OA LodgeMaster, use the green override fields to manually enter the corrected statistics.

Review each of the 10 PMP 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 OA 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 PMP petition to the national service center, follow these steps:

- Perform a final review of all of the pages of the **Charter Renewal & PMP Wizard**
- Click **Reports** then **PMP Petition** and print a copy of your PMP petition and review it for accuracy
- Click the **Submit To National** button.
- Note, the **Charter Renewal Form** is not available until after the submit to national process is complete.

**Submit To National:**
This procedure electronically sends your lodge’s charter renewal and PMP petition to the national service center. 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 PMP petition cannot be changed once it is submitted.

After review the warning message, select **Submit to National** to send the petition to the national service center.

**Step #6**

Once submission is complete click **Reports** then **Charter Renewal Form** and print a copy of your recharter form.

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 PMP 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](https://docs.oa-bsa.org/display/OALMLC) where you will find documentation, frequently asked questions, and training resources.

For more information on PMP review the PMP Petiton with notes: [https://oa-bsa.org/resources/ucl-support/performance-measurement-program](https://oa-bsa.org/resources/ucl-support/performance-measurement-program) or send email to pmp@oa-bsa.org.