2023
Lodge Charter Renewal Kit
Memorandum

TO: Council Scout Executives and Lodge Advisers
FROM: Cortland Bolles, National Director, Order of the Arrow
DATE: 8 December 2022
RE: 2023 Lodge Charter Renewal Kit

Thank you for your patience as the Order prepared the recharter materials this year. With the change in professional staff in mid-August, the Order of the Arrow’s administrative support has worked closely with national OA committee volunteers to ensure the work of the Order moved forward. The materials for this packet were prepared, but the team chose to wait to send them until I assumed my role as National OA Director on 5 December.

The enclosed material contains all the necessary information to renew your lodge’s charter for the coming calendar year. Please know that your 2023 charter renewal is due on or before December 31, 2022. Please note we will bill your council in 2023 for the recharter fee.

The last several years have been challenging across Scouting. Lodges across the country have been asked to do their best to induct and retain as many members as possible. We have seen great results so far and we appreciate each lodge’s dedication to this project.

The contents of this recharter kit include:

- Instructions to complete your 2023 Lodge Charter Renewal Application and Lodge Performance Measurement Program (PMP) Petition.
- Lodge Program Updates and Reminders

PLEASE FORWARD THIS MATERIAL TO YOUR LODGE ADVISER FOR PROMPT ACTION
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).

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<th>Steps for the Recharter</th>
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<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>Nov 1</td>
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<td>2. Lodge adviser and staff adviser meet with lodge officers to gather charter renewal data. The 2023 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>
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<td>3. 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 signing the 2023 Lodge Charter Renewal Application.</td>
<td>Dec 20</td>
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<td>4. Scan and Email, the signed 2023 Lodge Charter Renewal Application to the national OA office (<a href="#">Do not send a check</a>). Your council will be billed for your Lodge’s Charter fees in 2023). Email scanned charter to <a href="mailto:charter@oa-bsa.org">charter@oa-bsa.org</a>.</td>
<td>Dec 31</td>
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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 recalcutes 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 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.
Lodge Program Updates

OA Merchandise
Visit https://tradingpost.oa-bsa.org to purchase OA merchandise and browse great deals on the “Clearance” page. Members of the Order are able to create an account in the new store to receive updates on the latest promotions and new product launches.

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. More information is available at https://oa-bsa.org/training

Update Lodge Master Records
OA LodgeMaster is the online system to help lodges track and manage membership. Also, LodgeMaster is the data source for contact information sent to lodge Key 3 for national updates. Please make sure to update any changes to the Key 3, including start date, during the year.

2022 Unit of Excellence Award
The requirements for the 2022 Unit of Excellence Award remain unchanged from 2021. Those requirements are as follows:

1. Leadership:
   a. Implement the Troop/Team OA Representative and Troop/Team OA Representative Adviser (Assistant Scoutmaster or Assistant Coach Designee) programs in your unit.
   b. Every six months, ensure that the senior youth leader in the unit appoints or reappoints one Scout to serve as OA Unit Representative and the Unit Leader appoints one adult to serve as OA Representative Adviser.
   c. Feature an annual presentation at a Court of Honor by the Troop/Team OA Representative on the Order of the Arrow with a focus on the accomplishments of unit members.
2. Participation: Promote lodge events and provide transportation to all Arrowmen wishing to participate. At least 50% of unit OA members attend at least one lodge event in addition to their Ordeal.
3. Elections:
   a. Schedule a unit election with the chapter election team annually.
   b. Hold the election and have 70% of elected Scouts complete their Ordeal.
4. Planning: Maintain an active planning process that prevents overlap between lodge and chapter events with unit events. Review the local OA calendar with the Youth Leadership during annual unit program planning and schedule unit events so that unit programs do not overlap with any full-lodge events.
5. Activation: Demonstrate the depth of your unit’s OA program through active participation in OA events. At least 33% of Unit's Arrowmen attend an OA event following their induction into the OA.

**Please note – Unit of Excellence Award will no longer be in effect after 2022.**