

November 3, 2020

SUBJECT: 2021 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 2021 charter renewal is due on or before December 31, 2020. Please pay special attention to the 2020 Membership Retention Incentives. During these difficult times we have asked lodges 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. **Please note once we receive your Charter Renewal Application, we will bill your council through the Certain registration system so you can pay via ACH. The invoice will be sent to the Scout Executive's email.**

Contents of the kit:

- OA Lodge Year End Check List
- 2020 Membership Retention Incentives
- Instructions to complete your 2021 Lodge Charter Renewal Application and Lodge Performance Measurement Program (PMP) Petition.
- Lodge Program Reminders
- Please note that the E. Urner Goodman Camping Award, and National Service Award 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**



BOY SCOUTS OF AMERICA®

ORDER OF THE ARROW

2021
Lodge Charter
Renewal Kit



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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 2021 Lodge Charter Renewal Application and Lodge Performance Measurement Program Petition must be submitted through OA Lodgemaster via 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 will be completed through the charter renewal wizard. | 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 2021 Lodge Charter Renewal Application. | December 10 |
| 5. Scan and Email, the signed 2021 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 31 |



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Lodge Program Reminders

OA Merchandise

Visit tradingpost.oa-bsa.org to check out our new OA merchandise as well as keep an eye out for our Black Friday / Cyber Monday sale in November. Also make sure to browse our "Clearance Items" tab for great deals on almost out of stock items.

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 <https://oa-bsa.org/uploads/resources/forms/unitexcellenceaward-2019.pdf>.

Annual Report Template

This template can be downloaded from <https://oa-bsa.org/resources/ucl-support/annual-report-template> 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 <https://oa-bsa.org/training> and make use of the resources that will help your lodge plan for success.

Momentum Virtual Events

Throughout 2021, Arrowmen will be able to participate in national OA programming through a series of virtual events called Momentum. Each event will have a different theme and focus and will include training, competitions, and other fun programming. These events and additional details will be announced throughout the calendar year. For up-to-date information, please visit momentum.oa-bsa.org

Short-term Camp Authorization

On January 1, 2021, a new BSA National Camp Accreditation Program classification, Short-Term Camp, will be introduced that will impact all overnight Order of the Arrow Lodge events. A short-term camp is any council-organized overnight camping program, whether one-time or continuing, that is one, two or three nights in length where the council or its agents provide the staffing and program and may provide food services, and includes camps conducted off council properties. Each lodge will need to work with their council leadership to have a Council Short-term Camp Administrator approve overnight events. More information will be available in late fall 2020 on <https://www.scouting.org/outdoor-programs/camp-accreditation/>.



2020 Order of the Arrow National Committee

National Chief

Zachary A. Schonfeld (Y)

OA Director

Matthew W. Dukeman (P)

National Vice Chief

Noah J. Smith (Y)

OA Associate Director

Joseph D. Quick (P)

National Chairman

Michael G. Hoffman

(Y) – Youth (P) – Professional

Vice Chairmen

Communications
Anthony J. Fiori

Project 2023
Christopher A. Grove

Council Relations
Edward A. Pease

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

Development
N. Anthony Steinhardt, III

Region and Section Operations
Robert C. Black

Diversity
Hector A. "Tico" Perez

Special Projects
Scott W. Beckett
Ray T. Capp

Financial Operations
Glenn T. Ault

Strategic Performance
Edward T. Lynes

National Advisory Group
Billy W. Walley

Technology
Thomas S. Bain

National Events
Clint E. Takeshita

Training
David W. Garrett

Outdoor Adventures
Jeffery Q. Jonasen

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
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
Eric S. Harrison (Y)
Jason P. Hood
Carl M. Marchetti
Carey J. Mignerey
Alyx J. Parker
Matthew L. Parsons (Y)
Sid J. Salazar (Y)
Max T. Sasseen, Jr.
Daniel T. Segersin

William H. Topkis
Kaylene D. Trick
Scott A. Valcourt
Russell D. Votava
Michael F. White
Jason A. Wolz
MacKinley J. Zewalk



Lodge Year End Checklist – 2020

_____ Complete Charter Renewal Application and PMP 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.**

Reemerging from COVID-19

Membership Retention Incentives

A major focus of our Reemerging from COVID-19 initiatives centers on membership. Our priority has been to concentrate on ensuring elections are conducted and inductions are completed. This effort will continue, but it only addresses the new member side of the membership equation. The greater opportunity and challenge we face is in ensuring we retain the members we already have inducted. This becomes critically important as we approach the end of the calendar year.

Given the range of challenges faced by our council and lodges this year as a result of the COVID-19 pandemic (cancelled camping seasons, units not meeting, virtual meeting fatigue, etc.), it should not surprise anyone that we will face a more challenging retention year this year than we likely have in our lifetimes.

Given that reality, the National Committee has developed a three-tiered incentive program to assist lodges in maximizing membership retention for the remainder of 2020. These incentives go into effect immediately and will remain in effect through December 31, 2020. They are summarized below:

1. **Member Incentive:** Any member registered by the end of this year will receive a code for 30% off any single order (with limited exceptions) from the OA trading post as a "thank you" for sticking with us this year. To qualify for this incentive, a member must pay their 2020 dues no later than December 31, 2020, and the lodge must submit their 2021 recharter package no later than December 31, 2020.

Discount codes will be provided directly to qualifying individuals through their currently registered LodgeMaster primary email address during January 2021 following receipt of the lodge's 2021 recharter package at the national OA office. Individuals will have up to 30 days following receipt of their code to place an order, after which the code will expire. The discount can only be used once during this period and will apply to most items.

2. **Leadership Incentive:** Any lodge leadership that can beat the current membership projection for their lodge by 50% will earn the OA "Covid-19" limited edition recognition membership retention patch for its leadership (i.e., the entire LEC and its chapter officers at the discretion of the Lodge LEC). There will be no charge for these patches.
 - Each lodge's membership projection is now available as a new report in LodgeMaster called 'Activate 2020' and includes projections for a lodge's elections, inductions, and end of year membership.
 - To earn this incentive, lodges must beat the membership projection by 50%. If a lodge's previous year membership was 1,000, and their year-end projection is 700, the lodge must reach 850 members to qualify for this incentive.

Qualifying lodges will be determined in January based on data from their 2021 recharter package. Those lodges who qualify will be contacted by the national OA office staff in January to determine the number of recognition items to be provided. There will be no charge to lodges. Recognition items will be delivered to lodges in the spring for distribution.

3. **Growth Incentive:** For any lodge that recharterers at a number higher than their 2019 total lodge membership as reflected on their 2020 charter renewal package, all members of the lodge will earn the OA "Covid-19" limited edition recognition membership retention patch. Patches will be provided in the spring of 2021 with one patch being provided for each member registered on their 2021 charter renewal package. There will be no charge to the lodge for these patches. In addition,

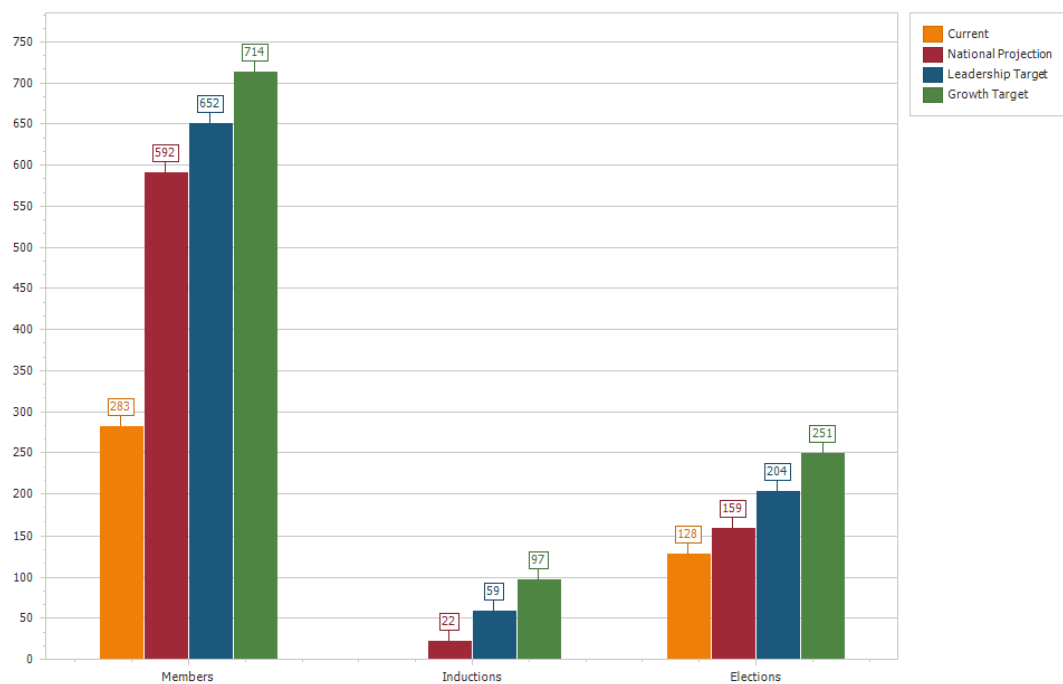
we will provide members of lodges that experience membership growth with a 50% discount on the premium delegate package for the May 2021 Momentum event.

Suggested Campaign Plan

- Utilize all communication channels employed by the lodge to announce the OA Trading Post Member Incentive.
 - Members who have already paid 2020 dues are already qualified
 - Members whose dues are received by the lodge prior to January 1, 2021 are qualified
- Circulate a campaign flier (sample attached)
- Organize a calling committee to contact active members whose dues are not yet paid and start making individual calls
- Use the new LodgeMaster 'Activate 2020' report for the LEC to monitor the progress of the campaign.
 - Post the progress chart you develop on your lodge website and ensure the LEC reviews progress each time the chart is updated
 - Provide weekly updates through October, twice-weekly in November and early December, daily updates the last two weeks of December
 - Export this approach to the chapter level if applicable
- Add a lodge level incentive to supplement the national incentive – examples include:
 - A specially designed lodge patch
 - Free admission to the next lodge fellowship
 - Waiver of fees for 2020 dues
 - Discounts in the lodge trading post
- Get the word out to parents who may want to provide a "gift certificate" to the OA Trading Post as a Christmas gift

Activate 2020 report in LodgeMaster

- The Activate 2020 report is available LodgeMaster:
 - Click Members on the main left menu.
 - Click Static Reports from the top menu.
 - Choose the 'Activate 2020' report.
 - The report will open in a new window and run automatically.
- An example of the Activate 2020 report is shown below.



Sample Member Incentive Lodge/Chapter flier

Special Opportunity for Members whose 2021 Lodge Dues are paid by December 31st!

30% Discount at the



- How do you qualify? 2020 dues must be received by the lodge before January 1, 2021
- What's included? All items in stock items in the trading post other than:
 - Items listed under the Personalized Items and Awards tab
 - The OA Summit Circle Barnwood Relief
- Discount codes will be provided directly to qualifying individuals
 - LodgeMaster primary email addresses will be used
 - Discount codes will be issued in January 2021
 - Discount codes must be used within 30 days of issue

Don't miss out on this unique opportunity to get OA Trading Post items at a substantial discount!

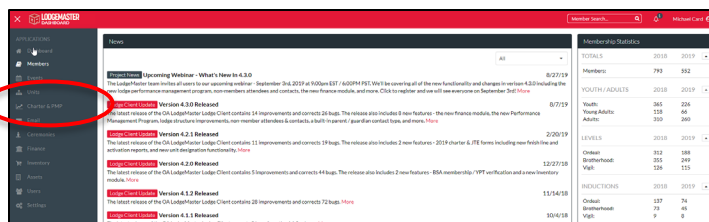
Ensure your 2021 lodge dues are paid now!

OA LODGEMASTER – CHARTER RENEWAL & PMP PROCESS

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.

<div> Reports </div> <div> Member Search... Michael Card </div>						
<div> Charter Renewal & PMP Wizard Submit To National </div>						
Year	Date Modified	Date Submitted	Level	Points	Submitted	
2019	8/27/2019		None	2	No	
2018	12/31/2018	12/31/2018	Silver	2600	Yes	
2017	12/27/2017	12/27/2017	Silver	2425	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 & 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.

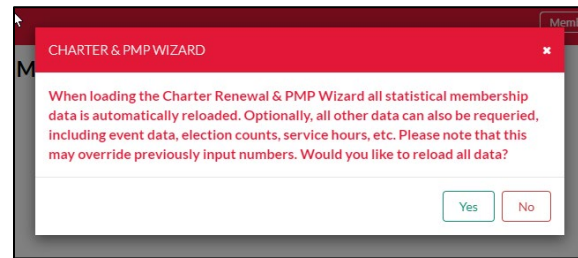
Previous year PMP:

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.

Name	Youth - Calculated	Youth - Override	Adult - Calculated	Adult - Override
Ordeal Inductions	64		10	
Brotherhood Inductions	34		11	
Vigil Inductions	4		4	
Candidates - Elected Current Year	130		14	
Candidates - Still Eligible From Prev. Year	0		0	

Name	Youth - Calculated	Youth - Override	Young Adult - Calculated	Young Adult - Override	Adult - Calculated	Adult - Override
Ordeal Members	127		20		41	
Brotherhood Members	97		36		116	
Vigil Members	2		10		103	

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.

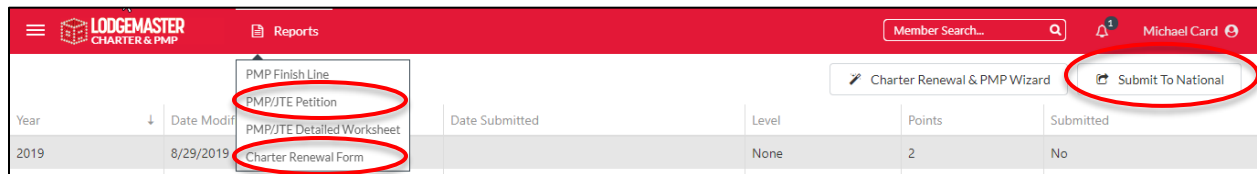
Review each of the 10 PMP objectives entering information as required. Several objectives require information not stored in OA LodgeMaster. In this case, simply check the appropriate boxes or enter the correct data. Leave fields blank if the information is not yet available. Most data entered in the override fields will be saved by OA LodgeMaster and displayed the next time you use the wizard.

Item	2018	2019
Lodge annual dues (per member)	25	25
Number of OA chapters in the lodge	6	7
Number of districts in the council	6	7

Current Year	Previous Year
Total youth members: 252	Total youth members: 453

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:

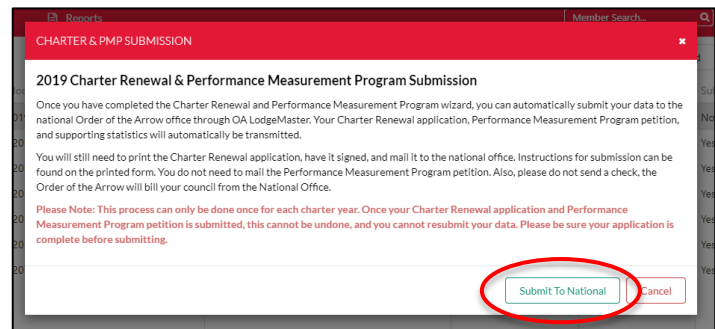


- Perform a final review of all of the pages of the **Charter Renewal & PMP Wizard**
- Click **Reports** then **PMP Petition** and print a copy of your PMP petition and review it for accuracy
- Click the **Submit To National** button.
- Note, the **Charter Renewal Form** is not available until after 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> where you will find documentation, frequently asked questions, and training resources.

For more information on PMP review the PMP Petition with notes: <https://oa-bsa.org/resources/ucl-support/performance-measurement-program> or send email to pmp@oa-bsa.org.