



# Field Operations Handbook

This handbook provides information on the field organization and operations of the Order of the Arrow at the national, region, and section levels.



SCOUTING AMERICA®  
ORDER OF THE ARROW



Scouts and their parents expect all Boy Scouts of America activities to be conducted safely. To ensure the safety of participants, the Boy Scouts of America expects leaders to use the four points of **SAFE** when delivering the Scouting program.

## SUPERVISION

Youth are supervised by qualified and trustworthy adults who set the example for safety.

- Accepting responsibility for the well-being and safety of youth under their care.
- Ensuring that adults are adequately trained, experienced, and skilled to lead the activity, including the ability to prevent and respond to likely problems and potential emergencies.
- Knowing and delivering the program of the Boy Scouts of America with integrity.
- Using qualified instructors, guides, or safety personnel as needed to provide additional guidance.
- Maintaining engagement with participants during activities to ensure compliance with established rules and procedures.

## ASSESSMENT

Activities are assessed for risks during planning. Leaders have reviewed applicable program guidance or standards and have verified the activity is not prohibited. Risk avoidance or mitigation is incorporated into the activity.

- Predetermining what guidance and standards are typically applied to the activity, including those specific to the Boy Scouts of America program.
- Planning for safe travel to and from the activity site.
- Validating the activity is age-appropriate for the Boy Scouts of America program level.
- Determining whether the unit has sufficient training, resources, and experience to meet the identified standards and, if not, modifying the activity accordingly.
- Developing contingency plans for changes in weather and environment and arranging for communication with participants, parents, and emergency services.

## FITNESS AND SKILL

Participants' Annual Health and Medical Records are reviewed, and leaders have confirmed that prerequisite fitness and skill levels exist for participants to take part safely.

- Confirming the activity is right for the age, maturity, and physical abilities of participants.
- Considering as risk factors temporary or chronic health conditions of participants.
- Validating minimum skill requirements identified during planning and ensuring participants stay within the limits of their abilities.
- Providing training to participants with limited skills and assessing their skills before they attempt more advanced skills.

## EQUIPMENT AND ENVIRONMENT

Safe and appropriately sized equipment, courses, camps, campsites, trails, or playing fields are used properly. Leaders periodically check gear use and the environment for changing conditions that could affect safety.

- Confirming participants' clothing is appropriate for expected temperatures, sun exposure, weather events, and terrain.
- Providing equipment that is appropriately sized for participants, is in good repair, and is used properly.
- Ensuring personal and group safety equipment is available, properly fitted, and used consistently and in accordance with training.
- Reviewing the activity area for suitability during planning and immediately before use, and monitoring the area during the activity through supervision.
- Adjusting the activity for changing conditions or ending it if safety cannot be maintained.

# Contents

## Field Operations Handbook

<b>Preface: Introduction</b> .....	<b>1</b>
<b>Chapter 1: National Organization</b> .....	<b>3</b>
National Order of the Arrow Committee .....	3
National Program .....	4
National Planning Meeting .....	5
Responsibilities of the National Chief .....	5
Responsibilities of the National Vice Chief .....	6
Region Organization .....	7
Responsibilities of the Region Chief .....	7
Youth Subcommittee Leadership .....	8
<b>Chapter 2: Section Rules</b> .....	<b>11</b>
Name, Affiliation and Purpose .....	11
Conclave Date and Location .....	12
Officers and Administration .....	12
Section Chief .....	12
Section Vice Chief .....	13
Section Secretary .....	13
Section Adviser .....	14
Section Staff Adviser .....	15
Associate Section Adviser .....	16
Eligibility, Nomination, Selection of Officers and Appointees .....	17
Responsibilities for Conclave Program and Administration .....	18
Section Finances .....	19
Conclave Finances .....	20
Conclave Participation and Registration .....	21
Amendments to Section Rules .....	22
<b>Chapter 3: Section Conclave</b> .....	<b>23</b>
Introduction .....	23
Conclave Planning .....	23
Conclave Program .....	24
Training .....	24
Workshops .....	24
Demonstrations .....	25
Displays .....	25
Open Forums – “Meet the Leader” .....	25
Special Features .....	25
Recreation .....	25
Fellowship .....	26
Keynote Speaker .....	26
Conclave Agenda .....	27



<b>Chapter 3: Section Conclave (continued)</b>	
Conclave Business Meeting . . . . .	27
American Indian Events . . . . .	27
Fire Dancing Policy . . . . .	27
Protected Species Policy . . . . .	27
Flag Policy . . . . .	28
Face Paint Policy . . . . .	28
Ceremony Team Evaluation . . . . .	28
National Financial Support . . . . .	28
Accident and Sickness Insurance . . . . .	28
National Activity Surcharge . . . . .	29
Leadership Policy for all Order of the Arrow Trips and Outings . . . . .	29
Sample Council of Chiefs Meeting Agenda . . . . .	30
Conclave Agenda Worksheet . . . . .	31
<b>Chapter 4: Section Training . . . . .</b>	<b>33</b>
Introduction . . . . .	33
Council of Chiefs Roundtable Discussions . . . . .	33
Council of Chiefs Training . . . . .	34
Conclave Training . . . . .	34
Training Preparation . . . . .	36
Train the Trainer Meeting . . . . .	36
Conclave Training Planning Calendar . . . . .	37
Training Evaluation . . . . .	38
<b>Appendix 1: American Indian Dance and Singing Competitions . . . . .</b>	<b>39</b>
Individual Dance Competition . . . . .	39
Historical Group Dance Competition . . . . .	40
Northern and Southern Singing Competitions . . . . .	42
<b>Appendix 2: Conclave Financial Report . . . . .</b>	<b>45</b>
<b>Appendix 3: Council Mergers . . . . .</b>	<b>46</b>
<b>Appendix 4: Region Realignment . . . . .</b>	<b>48</b>
<b>Appendix 5: Section Officer Performance . . . . .</b>	<b>49</b>
<b>Appendix 6: National Officer Election Procedure . . . . .</b>	<b>50</b>
<b>Appendix 7: Program of Emphasis Committee Vice Chief     Election Procedure . . . . .</b>	<b>55</b>



# Field Operations Handbook

## Preface: Introduction

The *Field Operations Handbook* (formerly the *Field Operations Guide*) provides information on the field organization and operations of the Order of the Arrow at the national, region, and section levels. The *Field Operations Handbook* is available at the Order's official website, [oa-scouting.org](http://oa-scouting.org), and should be used by all section officers and advisers.

[Chapter 1](#) covers the national and region organizations, National Order of the Arrow Committee, national program, and national planning meeting. The procedures for electing the national officers and their responsibilities are also provided.

[Chapter 2](#) contains the section rules that govern all aspects of OA section operations. These are national policies and as such, govern the development, organization, and operation of the inter-council activities of the Order of the Arrow. This publication supersedes all previous editions, previous section rules and any other instruments governing, or in use, by the section for inter-council organizations or activities. This handbook is revised as needed, and should be reviewed periodically for changes.

[Chapter 3](#) is devoted to the section conclave. It has useful tips on planning which, when combined with the Appendix, provide a wealth of ideas and information on the "how to" of the section conclave.

[Chapter 4](#) discusses the various types, venues, and methods by which the section may provide training for its lodges. This includes, for example, offerings at council of chiefs meet-

ings, at the section conclave, and at special training events.

Additional resource materials are available for guidance.

- The OA training portal provides tips for trainers and training outlines at [oa-scouting.org/training/conclave-training-initiative-cti](http://oa-scouting.org/training/conclave-training-initiative-cti).
- The [Inductions Handbook](#) contains guidelines for ceremony team evaluation.
- [Appendix 1](#) has suggested guidelines for American Indian dance and singing competitions.
- [Appendix 2](#) has a sample conclave financial report.
- [Appendix 3](#) contains valuable information regarding council mergers and the role of the Order of the Arrow.
- [Appendix 4](#) presents the process to be followed in a region realignment of the areas and councils that make up the sections.
- [Appendix 5](#) addresses section officer performance issues.
- [Appendix 6](#) has the procedure for the annual election of the national officers.
- [Appendix 7](#) has the procedure for electing the committee vice chiefs for each year's national program of emphasis.





## Chapter 1: National Organization

### National Order of the Arrow Committee

The National Order of the Arrow Committee, a support committee of the national council, sets policy and directs the program of the OA. The Order of the Arrow has one lodge per Scouting America council; the lodges are grouped into sections within two regions, Eastern and Gateway.

The volunteer leader is the chair of the national OA committee. The chair is appointed annually by the Chief Scout Executive.

The staff advisers to the national committee are the director and associate director of the Order of the Arrow. These individuals are national professional Scouters.

The national officers (national chief, national vice chief and region chiefs) serve as youth members on the national committee along with other Arrowmen who are appointed annually to one-year terms by the chair. The immediate past national officers may also serve on the national committee.

To implement and manage the program of the Order of the Arrow, the national committee is organized as follows:

- Lodge Impact
- Operations
- National Programs
- Mission and Reputation
- Financial Stewardship

Vice chairs of the national committee are appointed annually by the chair to manage and administer each of these areas.

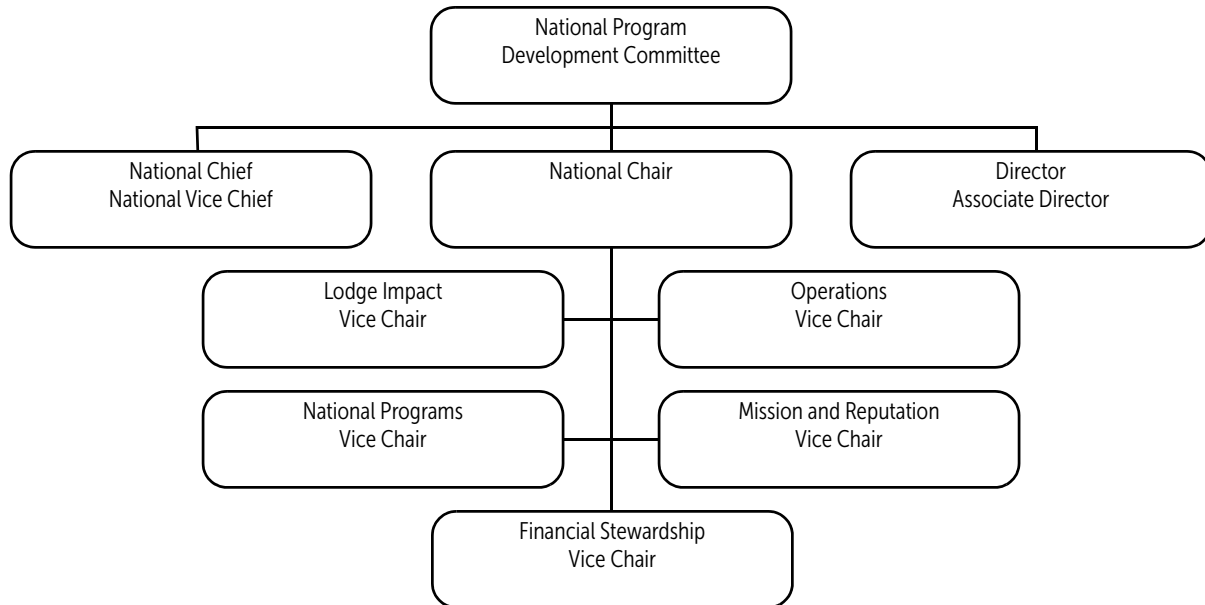
The national organization is governed by a business plan, which is intended to outline the areas of growth for the national OA committee. The plan's design is intended to address the unique benefits and challenges of the OA by emphasizing support to our lodges while helping all levels of the Order of the Arrow to adopt and implement our Vision, Mission, and Purpose. The plan is designed with short-term, defined action items that will lead to a desired outcome, while providing flexibility for Scouting America's ever evolving membership. Each action item presented in the plan is organized into one of four "strategies" identified by the Order's leadership as being critical to the organization's growth to have greater focus on local lodge program and administration.

Because of the size and complexity of the program and the number of people who serve on the committee to deliver the program across the country, a steering committee has been created to manage the day-to-day affairs of the program. The national committee meets at least semiannually; the steering committee meets more frequently throughout the year. Members of the steering committee are in constant contact with one another to handle the OA's day-to-day work. Members of the steering committee are the national chair, national vice chairs, national chief, and national vice chief. The director and associate director serve as nonvoting members.

The Order is a self-funded program of Scouting America and pays all costs associated with its operation through its own revenue sources,

which include annual lodge charter fees and recognition sales.

## National Order of the Arrow Committee



The national committee may be contacted through:

Scouting America  
 Order of the Arrow, S325  
 1325 West Walnut Hill Lane  
 P.O. Box 152079  
 Irving, TX 75015-2079  
 Phone: 972-580-2438  
[national.director@oa-scouting.org](mailto:national.director@oa-scouting.org)  
[www.aa-scouting.org](http://www.aa-scouting.org)

## National Program

Every two or three years, during July or August, the Order of the Arrow holds a six-day national conference on the campus of a major university. Thousands of Arrowmen participate, coming from throughout the United States and its territories, and some from overseas. The conference program includes innovative leadership development programs, fellowship opportunities, inspirational gatherings (shows), ceremony team development, and opportunities to hear from and talk with national leaders

of the Order of the Arrow and Scouting America.

In addition to national conferences, other national events and activities are conducted. These include:

- The Philmont OA Trail Crew, OA Wilderness Voyage, OA Canadian Odyssey, OA Ocean Adventure and OA Summit Experience programs bring together outstanding Arrowmen from throughout the country for a one- to two-week period of service, inspiration, team building, and personal development.
- The National Leadership Seminar and Developing Youth Leadership Conference are premier leadership development programs of Scouting America for both youth and adults.
- The Order of the Arrow organizes a staff to support the National Jamboree. This normally consists of a service corps and support of other needs identified by Jamboree leadership.



## National Planning Meeting

In late December or mid-January each year, the section chiefs from across the nation gather to participate in planning the program of emphasis for the next calendar year. As their first order of business, the section chiefs elect a national chief, national vice chief, and two region chiefs.

To be eligible to hold a national office as national chief, national vice chief or region chief, a section chief must be younger than 21 years old during their entire term of office. No person who has ever held a national OA office can ever again be eligible to hold any national OA office. No national officer may concurrently hold another council service territory or national Scouting America office in Venturing or Sea Scouts. To be eligible for election, each section chief desiring to run for office is required to have on file with the national director, by an announced date prior to the planning meeting, written approval to run for office from their council Scout executive.

The election of the national chief and vice chief will be conducted using the procedure specified in [Appendix 6](#). Following the election of the national chief and national vice chief, the section chiefs will caucus by region to elect the two region chiefs. The current region chief will preside at the election of their successor, using the procedure specified in [Appendix 6](#). These officers will serve until their successors are elected at the next national planning meeting.

The national chief and national vice chief organize subcommittees and direct planning for the program of emphasis for the next calendar year. Members of the national OA committee serve as advisers.

Following the elections, the remaining section chiefs are assigned to subcommittees based on preference. Each subcommittee will meet and the members will elect their subcommittee vice chief. While the subcommittees' responsibilities are definite, it must be remembered that at each level of the Order of the Arrow, the three leaders – youth, volunteer, and professional – must work in close harmony to ensure an effective program.

## Responsibilities of the National Chief

1. Holds no other office in the Order of the Arrow, or at the council service territory or national level in any other Scouting program during their term. Within 30 days of their election as national chief and in accordance with the section rules, conducts the election of their replacement as section chief.
2. Presides over and leads the national planning meeting, starting immediately after their election.
3. Appoints section chiefs to the working committees for planning and carrying out the program of emphasis for the next calendar year.
4. Provides, with the assistance of the national vice chief and the region chiefs, general administrative leadership to the national program for the next calendar year, as determined by the national committee.
5. Becomes a voting member of the National Order of the Arrow Committee and its steering committee.
6. Attends all regularly scheduled meetings of the national OA committee and the steering committee and makes an oral "Chief's Report" at all such meetings.
7. Travels as a national officer with the prior approval and authorization of the national director.
8. Develops and maintains good rapport with the two region chiefs. Receives input from the region chiefs, section chiefs and Order's membership.
9. Keeps the national chair and national director of the Order of the Arrow fully informed of all their activities related to the Order of the Arrow. Shares copies of all correspondence pertaining to the business of the Order with these individuals and with others that are concerned.

10. Keeps a careful financial record, understanding that they will be reimbursed for only those activities approved by the national director. If a region, section or lodge requests the services or participation of the national chief, the costs will be borne by the group making such a request, or at their own expense.
11. Serves as a member of the Key 3 directly charged with the development and support of the program of the Order of the Arrow. The other members of the Key 3 are the chair of the national committee and the director of the Order of the Arrow, representing the volunteer policy making body and the professional staff of Scouting America, respectively, as the national chief represents the youth members of the Order.
12. Recommends to the national chair, the director, and the national OA committee, items of policy or other actions for the good of the Order.
13. Serves as a member of the national operations council of Scouting America, if appointed. The national chief understands that the appointment is as a youth representative and not as a representative of the Order of the Arrow. As a member of the national OA committee, which is a support committee of the national Program Development Committee, supports the official position of these organizations, as well as other national policies.
14. Serves as an example of the ideals of Scouting America and the Order of the Arrow.
15. Wears the Scout uniform correctly.
16. Presents a written report to the national OA committee at the conclusion of their term. The report is to be written from the youth's standpoint and will give an evaluation of the year's activities and positive recommendations for national committee consideration.

## **Responsibilities of the National Vice Chief**

1. Holds no other office in the Order of the Arrow or at the council service territory or national level in any other Scouting program during their term. Within 30 days of their election as national vice chief and in accordance with the section rules, conducts the election of their replacement as section chief.
2. Assists the national chief in the national planning meeting, starting immediately after their election.
3. Assumes the position of national chief, if the national chief resigns, is removed from office, or is otherwise unable to carry out their responsibilities before the completion of their term.
4. Gives administrative direction to specific assigned program areas.
5. Becomes a voting member of the National Order of the Arrow Committee and its steering committee.
6. Attends all regularly scheduled meetings of the national OA committee and the steering committee and makes an oral "Vice Chief's Report" at all such meetings.
7. Travels as a national officer with the prior approval and authorization of the national director.
8. In cooperation with the national chief develops and maintains good rapport with the two region chiefs. Receives input from the region chiefs, section chiefs and Order's membership.
9. Keeps the national chair and the national director of the Order of the Arrow fully informed of all of their activities related to the Order of the Arrow. Shares copies of all correspondence pertaining to the business of the Order with these individuals and with others that are concerned.
10. Keeps a careful financial record, understanding that they will be reimbursed for

only those activities approved by the national director. If a region, section or lodge requests the services or participation of the national vice chief, the costs will be borne by the group making such a request, or at their own expense.

11. Recommends to the national chair, the director, and the national OA committee, items of policy or other actions for the good of the Order.
12. Serves as a member of the national operations council of Scouting America, if appointed. The national vice chief understands that the appointment is as a youth representative and not as a representative of the Order of the Arrow. As a member of the national OA committee, which is a support committee of the national Program Development Committee, supports the official position of these organizations as well as other national policies.
13. Serves as an example of the ideals of Scouting America and the Order of the Arrow.
14. Wears the Scout uniform correctly.
15. Presents a written report to the national OA committee at the conclusion of their term. The report is to be written from the youth's standpoint and will give an evaluation of the year's activities and positive recommendations for national committee consideration.

**If the national vice chief resigns, is removed from office, or is otherwise unable to carry out their responsibilities before the completion of their term, the national chief will appoint a successor, within 30 days, with the advice and approval of the chair of the national OA committee.**

## Region Organization

The OA is organized into two geographical regions: Eastern and Gateway.

The region chief is the youth leader of the region elected by the section chiefs from that region at the national planning meeting. They

must be younger than 21 during the entire year of their term and will serve until a successor is elected. The election is held following the election of the national chief and national vice chief.

The adult volunteer leader in the region is the region Order of the Arrow chair. Appointed annually by the chair of the national OA committee, this person is responsible for administering and managing the program regionally, with a special emphasis placed on the role of adviser to the region chief.

The national director and associate director serve the shared duty of acting as staff adviser to the two OA regions. Duties of the staff adviser include regular communication and counsel with the region OA chairs. Each region is divided into geographical sections composed of several councils. The councils are grouped into one or more sections by the national chair.

Communication is a very important role for the region. To keep its own sections up-to-date, each region has its own website:

[oa-scouting.org/eastern](http://oa-scouting.org/eastern)

[oa-scouting.org/gateway](http://oa-scouting.org/gateway)

## Responsibilities of the Region Chief

1. Holds no other office in the Order of the Arrow or at the council service territory or national level in any other Scouting program during their term. Within 30 days of their election as region chief and in accordance with the section rules, conducts the election of their replacement as section chief.
2. Advises the national chief on all matters relating to the operation of the Order of the Arrow within the region. Serves as liaison between the national chief and the section chiefs in their region, encouraging and assisting them in their efforts to strengthen and improve the programs of each lodge.

3. Represents the national chief in the region on matters of national program promotion and other nationally oriented projects. The national chief will assign specific responsibilities for the national program of emphasis.
4. Organizes, coordinates, and conducts National Leadership Seminars, Developing Youth Leadership Conferences, and section officer seminars within the region, in consultation with the region Order of the Arrow chair and national director and in accordance with the policies of the National Order of the Arrow Committee.
5. Works closely with the region chair and national director, keeping them and the national chief informed of their activities related to the Order of the Arrow. Shares copies of all correspondence pertaining to the business of the Order with the region chair, national director, and others that are concerned.
6. Keeps a careful financial record, understanding that they will be reimbursed for only those activities approved by the region chair and the national director. If another region, a section or a lodge requests the services or participation of the region chief, the costs will be borne by the group making such a request, or at their own expense.
7. Supports all official positions of Scouting America and the national OA committee when acting as a youth member of a Scouting America committee or task force.
8. Serves as an example of the ideals of Scouting America and the Order of the Arrow.
9. Wears the Scout uniform correctly.
10. Presents a written report on the activities of the Order in the region to the national OA committee at the conclusion of their term. The report is to be written from the youth's standpoint and will give an evaluation of the year's activities and positive recommendations for national committee consideration.

If the region chief resigns, is removed from office, or is otherwise unable to carry out their responsibilities before the completion of their term, the national chief will appoint a successor within 30 days, in consultation with the section chiefs and region chair of the affected region, and with the advice and approval of the chair of the national OA committee.

## Youth Subcommittee Leadership

Leadership opportunities at the national level for youth who are not elected as national officers are available in select subcommittees of the national OA committee. Subcommittees which operate with youth subcommittee leads are designated at the discretion of the national chair based on input from national officers, vice chairs, committee members, and the national director.

Youth subcommittee leads are appointed, unlike national officers who are elected. The term length of a youth subcommittee lead is not defined in the same manner as the term of elected youth officers. Often, the term length of a youth subcommittee lead may exceed a one-year period and that term may start and end at any time of the year, not necessarily coinciding with a specific point in time or event.

The national chair will make the appointment of youth subcommittee lead. The process for recommending an appointment of a youth subcommittee lead will be as follows:

1. The subcommittee will be approved by the national chair to have a youth subcommittee lead.
2. The subcommittee chair, in consultation with the relevant vice chair, will publish a job description, required and preferred qualifications and skills, and time commitment for the position.
3. The subcommittee chair will solicit candidates for the lead position. This sourcing process should include seeking candidate suggestions from current and previous youth subcommittee leads (if any), current

national youth officers, subcommittee members, and national committee members, among others.

4. Once the subcommittee chair is satisfied that the applicant pool is sufficient to proceed with selecting a candidate to recommend for appointment, the subcommittee chair will select a candidate, in consultation with the relevant vice chair and the national youth officers. The subcommittee chair will base this decision on the candidate that best meets the needs outlined in the job description.
5. The subcommittee chair will provide the recommended candidate for the youth subcommittee lead position to the relevant vice chair for approval.
6. Upon approval by the relevant vice chair, the subcommittee chair will provide the recommended candidate for the youth subcommittee lead position to the national chair for approval. The national chair will seek final input from the national director, national chief and vice chief prior to making final approval.
7. Upon approval by the national chair, the youth subcommittee lead may begin their appointed role immediately. The length of the term will last until the youth subcommittee lead indicates their desire to step out of the position or the subcommittee chair, relevant vice chair, or national chair indicates a need for youth leadership change. If appropriate, the national chair, youth lead and subcommittee chair can set a term at the outset of the youth lead's term.





## Chapter 2: Section Rules

### Rule I. Name, Affiliation and Purpose

- A. The section is the recognized inter-council organizational structure of the Order of the Arrow, Scouting America, and shall consist of councils within a geographical area. The national chair establishes the section boundaries. Each section shall be identified by the region letter abbreviation and nationally assigned number (e.g., E10, G2).
- B. The councils referred to in these rules shall be those councils assigned to the section by the national chair, based on recommendations made by the region Order of the Arrow chair and national director.
- C. Only one lodge is recognized per council; therefore, any reference to lodges in these rules pertains to a single-lodge-per-council organization and in all business of the section (*i.e.*, council of chiefs meetings, conclaves, elections, business meetings, etc.), only one lodge and one lodge chief will represent a council.
- D. The section shall serve as an important communication link between councils, the region, and the National Order of the Arrow Committee.
- E. The section exists to support lodge leaders to produce High Performing Lodges, through a direct inter-council forum.
- F. The methods by which this purpose is achieved include:
  1. Supporting lodge leadership and programming in becoming a High Performing Lodge by continuously improving, as assessed by the Lodge Performance Measurement Program.
  2. Conducting an annual meeting for the delegates of the councils. This annual meeting shall be called the conclave. The conclave shall include training and inspirational experiences that will assist councils in creating and administering more effective programs that support the overall objectives of the Order of the Arrow.
  3. Assisting lodges toward greater service to their Scout councils and in achieving Performance Measurement Program recognition. Hold an annual Adapt, Collaborate, and Thrive (ACT) Conference in support of developing High Performing Lodges.
  4. Facilitating opportunities for sharing best practices and fostering ideation between member lodges.
  5. Continuously improving Section performance as assessed by the Section Performance Measurement Program.
  6. Providing leadership development opportunities for older Arrowmen (normally between the ages of 16 and 21).
  7. Fostering an understanding and adherence to national Order of the Arrow policies and procedures and providing opportunities for Arrowmen to bring forth their ideas into the national Order of the Arrow decision-making process.

8. Coordinating Order of the Arrow administrative or program functions of mutual benefit to all lodges in the sec-

tion as directed by their council Scout executives.

## Rule II. Conclave Date and Location

- A. A conclave shall be held annually in each section. The dates of the conclave should be constant from year to year in relation to a given calendar point (e.g., first Saturday in October, first weekend following Easter, etc.) The date shall be selected by the council of chiefs upon recommendation of the section chief, in consultation with the section adviser and section staff adviser.
- B. The location of the conclave shall be selected by the service council and

approved by the council of chiefs before the close of the preceding conclave. The service council Scout executive must approve the conclave location. Section conclaves must be planned and located to assure that councils meet the travel policies of Scouting America stated in the [Guide to Safe Scouting](#). This includes the 10-hour per day driving restrictions.

- C. The region Order of the Arrow chair and national director may be helpful in coordinating dates and locations.

## Rule III. Officers and Administration

- A. Under the guidance and direction of the section adviser and section staff adviser, the section is organized and the conclave is planned and led by Arrowmen who are younger than 21 during their entire term of office.
- B. The officers of the section shall be the section chief, one section vice chief and one section secretary. The responsibilities of the respective officers shall be as follows:

### 1. Section Chief

- a. Organizes and gives positive leadership to achieve a successful annual conclave and fulfill section operations responsibilities.
- b. Holds no other elected position in the Order of the Arrow or council service territory or national leadership position within Scouting during their term. **Must resign** from all lodge and chapter offices within 30 days of their election as section chief.
- c. Presides over meetings of the council of chiefs and the conclave business meeting.

- d. Communicates with the region chief on a regular basis.
- e. Delegates duties to other section officers and members of the council of chiefs.
- f. Works closely with the section adviser and section staff adviser. Keeps the section adviser and section staff adviser fully informed of all their activities related to the Order of the Arrow. Shares copies of all correspondence pertaining to the business of the Order with these individuals and with others that are concerned.
- g. Assures that all aspects of section activity are conducted according to these Section Rules.
- h. Compiles the conclave reports within 45 days of the end of the conclave. The report and submission process are exclusively online and are available at [oa-scouting.org/resources/forms#section](https://oa-scouting.org/resources/forms#section). (This is the responsibility of the section chief completing their term of office at the conclave.)



- i. Distributes lodges among the elected section officers to provide a vehicle for regular contact of each lodge by section officers.
  - j. Responsible for influencing positive performance of lodges in the Lodge Performance Measurement Program by: (1) periodically following-up on assigned lodge PMP progress; (2) raising areas of performance concern to section leadership; and (3) providing a regular communication conduit between assigned lodges and the section.
  - k. Serves as an example of the ideals of Scouting America and the Order of the Arrow.
  - l. Wears the Scout uniform correctly.
  - m. Attends section officer seminars and, unless previously attended, a national leadership seminar.
  - n. Represents the section at region and national functions and activities of the Order of the Arrow, when invited.
  - o. Participates in an annual national planning meeting. The section will pay for the transportation and planning meeting fees to attend. The section chief will serve as a member of the committee planning the national program of emphasis for the coming year. Upon successful evaluation and timely completion of their responsibilities, their fees and transportation will be funded to fulfill any assigned Order of the Arrow duties at the program of emphasis.
  - p. Promotes participation in region and national events.
- b. Assures that the conclave is promoted in all councils.
  - c. Influences positive performance of lodges by planning an annual ACT conference.
  - d. Responsible for influencing positive performance of lodges in the Lodge Performance Measurement Program by: (1) periodically following-up on assigned lodge PMP progress; (2) raising areas of performance concern to section leadership; and (3) providing a regular communication conduit between assigned lodges and the section.
  - e. Assumes other responsibilities and duties as assigned by the section chief.
  - f. Promotes participation in region and national events.
  - g. If the section chief resigns or is unable to fulfill their term of office, assumes the responsibilities of the section chief until the council of chiefs elects a successor for the unexpired term.
  - h. Serves as an example of the ideals of Scouting America and the Order of the Arrow.
  - i. Wears the Scout uniform correctly.
  - j. Attends council of chiefs meetings, section officer seminars, additional region events, as invited, and, unless previously attended, a national leadership seminar.

## 2. Section Vice Chief

- a. Assists the section chief, as directed by them, to carry out the operations of the section.

## 3. Section Secretary

- a. Assists the section chief in communicating with members of the council of chiefs and advisers. Provides written or email notification of all council of chiefs meeting at least 15 days in advance, including an agenda and preliminary budget with rationale for review, or a transaction report since the last council of

chiefs meeting (including account balance) and financial report of income/expenses compared to the council of chiefs established budget.

- b. Records the minutes of all meetings of the council of chiefs, and the conclave business meeting. Distributes copies of all minutes, including the approved budget or financial report and any amendments, to council of chiefs members within 15 days following each meeting.
- c. Maintains an up-to-date roster of names, addresses, telephone numbers, and email addresses of the council of chiefs members. The distribution of the roster, and all changes, shall be to: members of the council of chiefs, region chief, region chair, and national director.
- d. Communicates registration details of the annual ACT conference, ensuring each lodge has the opportunity to participate.
- e. Responsible for influencing positive performance of lodges in the Lodge Performance Measurement Program by: (1) periodically following-up on assigned lodge PMP progress; (2) raising areas of performance concern to section leadership; and (3) providing a regular communication conduit between assigned lodges and the section.
- f. Promotes participation in region and national events.
- g. Serves as an example of the ideals of Scouting America and the Order of the Arrow.
- h. Wears the Scout uniform correctly.
- i. Attends council of chiefs meetings, section officer seminars, and, unless previously attended, a national leadership seminar.

C. The advisers of the section shall be two Arrowmen who are 21 years of age or

older – one being a volunteer Scouter (section adviser) and the other, a professional Scouter (section staff adviser). If needed, the national chair may also appoint one or more associate section advisers to assist the section adviser. Section advisers and associate section advisers are appointed annually by the national chair with the concurrence of the region Order of the Arrow chair and the national director. The section staff adviser is appointed annually by the national director, with the concurrence of the region chair and national chair. These appointments require approval of the Scout executive of the council in which they are registered. Each adviser must be a member in good standing of the Order of the Arrow and Scouting America in a council within the geographical boundaries of the section served. The responsibilities of the advisers are as follows:

#### 1. Section Adviser

- a. Interprets Order of the Arrow policy in consultation with the region chair and national director, as needed.
- b. Holds no other primary or associate adviser position in the Order of the Arrow during their term.
- c. Advises the section officers and council of chiefs in planning and conducting the section conclave. Works with the staff adviser to ensure successful section events. Works "behind the scenes" through the section chief.
- d. Aids in the reorganization of merged, dropped or inactive lodges within the section as requested by council Scout executives or the national director.
- e. Assures that the section is operating according to these Section Rules which are approved by the national committee.
- f. Brings to the attention of the region chair and the national director mat-

ters of policy or procedures that should be considered by the national committee.

- g. Ensures all section activities (council of chiefs meetings, conclaves, ACT conferences, etc.) comply with Scouting America health and safety requirements (Youth Protection, NCAP short-term camps, etc.).
- h. Meets and communicates with the section chief and section staff adviser on a regular basis.
- i. Meets and communicates with each lodge adviser in the section on a regular basis.
- j. Encourages and assists the participation of each council in region and national Order of the Arrow functions.
- k. Coordinates transportation to region and national events through the council of chiefs.
- l. Encourages and assists in the on-time charter renewal process.
- m. Reviews an annual report from each lodge, in addition to receiving a copy of the lodge's charter renewal application and Performance Measurement Program petition.
- n. Encourages councils to improve performance and meet the standards of the lodge and chapter Performance Measurement Programs.
- o. Reports to the region Order of the Arrow chair on a regular basis. Reports annually to the region chair and national director on the significant accomplishments and challenges of the section.
- p. Represents the section at region and national functions and activities of the Order of the Arrow, when invited.
- q. Serves as an example of the ideals of Scouting America and the Order of the Arrow.
- r. Wears the Scout uniform correctly.
- s. Attends council of chiefs meetings, section conclaves, section officer seminars, additional council service territory events, as invited, and, if invited, the national annual planning meeting.

## 2. Section Staff Adviser

- a. Advises the national director on possible nominees for section adviser.
- b. Serves as liaison between the section council of chiefs and lodge staff advisers.
- c. Maintains a close working relationship with the section officers and advisers.
- d. Oversees the section finances and coordinates the section financial operations with the appropriate councils. Ensures Scouting America accounting and auditing procedures are followed.
- e. Assists in establishing the date of the conclave, coordinating with the region and council calendars. Communicates to councils the conclave dates and encourages their participation and non-scheduling of conflicting activities.
- f. Ensures all section activities (council of chiefs meetings, conclaves, ACT conferences, etc.) comply with Scouting America health and safety requirements (Youth Protection, NCAP short-term camps, etc.).
- g. Encourages participation in section, region, and national events.
- h. Participates in conclave and other OA training as requested and available.

- i. Meets and communicates with the section chief and section adviser on a regular basis.
- j. Represents the Order of the Arrow and Scouting America at section, region, and national OA functions.
- k. Serves as an example of the ideals of Scouting America and the Order of the Arrow.
- l. Wears the Scout uniform correctly.
- m. Attends council of chiefs meetings, section conclaves, section officer seminars, and additional council service territory events, as invited.
- n. Ensures that the section conclave is covered by accident and sickness insurance and the proper forms and fees are submitted to the national service center for both the insurance and national activity surcharge.

### 3. Associate Section Adviser

- a. Supports and assists the section adviser to carry out the operations of the section.
- b. Assumes other responsibilities and duties as assigned by the section adviser.
- c. Promotes participation in section, region, and national events.
- d. Interprets OA policy in consultation with the section adviser.
- e. Serves as an example of the ideals of Scouting America and the Order of the Arrow.
- f. Wears the Scout uniform correctly.
- g. Attends meetings, as directed by the section adviser.
- h. Functions as an adviser to the youth members, as assigned, in consultation with the section adviser.

D. The council of chiefs will consist of the section chief, the section vice chief and

section secretary; the immediate past section chief; one designated youth representative of each council in the section; other Arrowmen as duly appointed, but without a vote; and the section advisers. The lodge adviser and council Scout executive, or their designee, of each council in the section shall serve as *ex officio* members of the council of chiefs.

1. The council of chiefs shall plan, host and execute the section conclave.
2. The council of chiefs shall meet no more than four times prior to the annual conclave to plan the program and divide responsibilities for its execution among member councils. The section chief, after consulting with the section advisers, shall designate the time and place of each meeting and the section secretary shall provide written or email notice to all council of chiefs members at least 15 days prior to the meeting. While in-person meetings are preferred, sections may conduct fully or partially virtual council of chiefs meetings.
  - a. The first such meeting should be held about nine months prior to the conclave. At this meeting, the program shall be planned and responsibilities assigned. Any limitations in the number of delegates attending the next conclave shall be determined and the conclave budget and fee shall be established and approved, along with registration deadlines.
  - b. A subsequent meeting shall be held one to two months prior to the conclave. At this meeting, each council shall report on its progress in meeting assigned responsibilities. Any necessary changes in the conclave program or budget shall be made at this time.
3. The voting members of the council of chiefs shall be the three section officers; the immediate past section chief

(if younger than 21); and one designated youth representative of each council in the section. A vote shall not be extended to anyone 21 years of age or older. Each member may cast only one vote on any question.

4. The non-voting members of the council of chiefs shall include the section advisers, *ex officio* members, and all other Arrowmen duly appointed.

#### Rule IV. Eligibility, Nomination, Selection of Officers and Appointees

A. All section officers must meet the following eligibility requirements:

1. Be a registered member, in good standing, of the Order of the Arrow and Scouting America in a council within the section who has the approval, **in writing and in advance of being nominated**, of their council Scout executive or council Scout executive's designee. The member's council must be in good standing with a current charter for its Order of the Arrow lodge on file with the national service center.
2. Be younger than 21 during their entire term of office.
3. Should a candidate hold another council service territory or national position within Scouting and be elected section chief they will need to resign from the other position.

B. Nominations for section officers may be made by one of the designated council youth representatives when nominations are declared open at any meeting of the council of chiefs or at the conclave business meeting. Nominations shall require no second, but the nominee must accept the nomination. Nominations for each office shall be closed only once – just before balloting for that office.

C. A business meeting shall be held at the conclave to elect section officers. The newly elected officers shall take office at the end of the conclave; and their terms shall expire at the end of the next annual conclave. The following election procedures shall be used:

1. After the nominations for a given office are declared closed, the designated

council youth representative, shall poll their delegates who are younger than 21 to determine how they will cast their votes. Such a poll shall be taken before each ballot.

2. Each council in the section, in good standing (renewed its OA charter) with the national service center, may cast one vote per youth member present at the time of the election, up to a maximum of 10 votes, for each office on all ballots. The designated council youth representative must cast their votes in proportion to the poll of the delegates (in whole votes, not fractions). The section chief, in consultation with the section adviser and section staff adviser, has final authority to determine any questions about whether a delegation is officially representing a council at the conclave. Such judgments shall be based on written or verbal certification by the lodge adviser, lodge staff adviser, or council Scout executive of the council in question. In no case shall adults vote. Telephone, email, or other electronic votes are not permitted.

3. A nominee must receive a majority (one vote more than fifty percent) of the votes cast on a given ballot to be elected (abstentions do not count as votes cast). Where a majority is not achieved, the nominee(s) receiving the least number of votes is (are) dropped and another ballot is taken. This procedure continues until one nominee achieves a majority and is declared elected, or until two ballots in succession result in tie votes and the balloting is declared deadlocked.

4. When balloting is declared deadlocked, the youth conducting the election (Note: This is the section chief or a youth appointed by the section chief and approved by the section adviser) will announce to the voting delegates that one more ballot will be taken to break the tie and, if another tie results, they shall cast sufficient votes for the nominee of their choice to achieve a majority and declare them elected.
- D. The section chief may make appointments to special positions with the approval of the council of chiefs. Such appointments shall have no vote in the council of chiefs. An appointee must be a registered member in good standing of the Order of the Arrow and Scouting America in a council within the section and younger than 21 during the entire term of their appointment.
  - E. Vacancies in unexpired terms of section officers shall be filled by majority vote (as defined above) of the council of chiefs (one vote per council's lodge in good standing, voting). Elected officers and the immediate past section chief shall not vote. Deadlocks, as defined above, will be decided by the youth conducting the election, after one additional tie. Replacement section officers must meet the same eligibility and approval requirements defined in paragraph A, above.
  - F. Sections may conduct fully or partially virtual section officer elections in certain extraordinary circumstances as determined at the discretion of the national director. In-person elections are the preferred method of conducting section elections; a section which requests a fully or partially virtual section election must have exhausted all reasonable efforts to conduct in-person section elections and provide in writing those efforts made to hold an in-person election to the national director. If a section's request for a fully or partially virtual election is approved, these guidelines must be followed to conduct the election:
    1. The national director must approve, in advance and in writing, the section conducting a fully or partially virtual section election.
    2. The section must follow the rules outlined in the *Field Operations Handbook* to conduct the election.
    3. To the extent possible, the procedures used during a fully or partially virtual election should mimic those used in a section's in-person election. This includes speeches, audience questions, and other standard practices of a section election. Whenever possible, procedures should neither be taken away nor added unless necessary for the needs of a fully or partially virtual election.
    4. The section adviser should continue to validate the eligibility of candidates for election.
    5. A means to confidentially collect votes for eligible section officers must be available and used. **No open vote counting is to be allowed.**

### **Rule V. Responsibilities for Conclave Program and Administration**

- A. All councils shall share the responsibilities of all phases of the section program and administration. The council of chiefs shall host the conclave.
- B. One council will be designated the service council each year. This responsibility should be on a rotation schedule including all councils in the section wherein each council shall have the opportunity to serve as service council once before including any council a second time. A published schedule defining one complete rotation should be distributed to delegates at each conclave.
  1. Councils should prepare to accept their service responsibility according to the rotation schedule. However, consenting council Scout executives may

exchange positions in the rotation schedule if they feel it would be in the best interest of the section or councils. The section staff adviser shall participate in all such discussions.

2. The service council shall be responsible for all physical, administrative, and appropriate assigned financial arrangements for the section conclave. This shall include NCAP short-term camp compliance, the provision of meals, adequate sleeping and meeting facili-

ties, trading post, pre-conclave printing services, first aid and medical arrangements, religious services, and so forth.

3. Any necessary contractual agreements shall be made by the service council and signed by the council Scout executive or their designee.
- C. The responsibilities for program development for the conclave shall be divided among councils as determined by the council of chiefs.

## Rule VI. Section Finances

- A. The section is authorized to establish a section operating account that is maintained as a custodial account by a council within the section. The custodial council is designated by the section adviser and section staff adviser, with the approval of the custodial council Scout executive. The custodial council may be the service council of the next conclave, or preferably, the council of the section staff adviser. Regardless of the custodial option selected, the section funds must be clearly identified, reserved for the purpose intended, accounted for, and reported on at every council of chiefs meeting.
- B. All section revenues and expenses shall be processed through the established financial accounting system of the custodial council, in accordance with national policy.
- C. The section staff adviser shall be responsible for authorizing all disbursements from the section operating account.
- D. At the start of a new section year, the section key 3 should review the section operating budget funded by the immediate past conclave. This is the basis for the section operating expenses for the year. In order to address changing needs, the council of chiefs may amend the section operating budget at any scheduled meeting. Any amended budget must take into consideration the availability of funds and/or funding resources.

- E. The section key 3 should then prepare a proposed section operating budget to cover the section operating expenses following the next conclave. This budget should be prepared and submitted with rationale at least 15 days in advance of the council of chiefs meeting where it will be considered for approval as the upcoming conclave budget is drafted and approved. These expenses may include, but are not limited to: officer printing, postage, telephone, and transportation expenses; chief's national planning/key leader summit transportation and registration fees; region training event fees; and year-end recognitions not included in the overall conclave budget. Since section advisers are expected to support their own service financially and pay their own expenses for travel and participation in events, none of these funds may be used for this purpose. The proposed budget shall be presented for approval at the first council of chiefs meeting following the conclave.
- F. The primary source of section income will be the conclave budget item titled "Next Year's Section Budget". These funds shall be remitted to the custodial council by the service council within 90 days following the conclave.
- G. The council of chiefs may elect to pursue a secondary source of income (e.g., sale of section memorabilia), subject to the approval of the section adviser and section staff adviser, provided that such activity

does not infringe upon the fundraising efforts of local councils.

- H. The section may accumulate and maintain a monetary reserve in an amount not to exceed 1.5 times the average of the last three years' section operating budgets. The purpose of this reserve shall be to cover unusual, but necessary expenses such as those incurred by the section chief attending an unexpected key leadership summit.
- I. Should the council of chiefs fail to adequately control the section operating budget or for any other reason expenditures

exceed revenue and there are insufficient funds in the monetary reserve, the council of chiefs, with the approval of the section adviser and section staff adviser, may assess and bill councils in the section for their share of the shortfall in proportion to their most recent lodge charter renewal membership.

- J. Sections are not required to have a section website, but, if they choose to have one, they must use the website-hosting infrastructure provided by the national OA committee.

### Rule VII. Conclave Finances

- A. The service council shall be responsible for handling all financial matters of the conclave. All conclave revenues and expenses shall be processed through the established financial accounting system of the service council, according to national policy. At the option of the council of chiefs, with the concurrence of the service council, section adviser, and section staff adviser, the financial matters of the conclave may be processed through the council responsible for the section operating account. If this option is used, the conclave funds will be accounted for in a separate custodial account from the section operating account.
- B. The service council shall present a written, preliminary conclave budget for all conclave administrative expenses (food, housing fee, patch, etc.) at the first council of chiefs meeting. The council of chiefs shall add into the budget all necessary and reasonable program costs including section operating expenses. Agreements shall be reached on all adjustments, and the conclave budget shall be established and approved along with the resulting cost per delegate, or conclave fee.
- C. Accident and sickness insurance is to be obtained for all Order of the Arrow events and included as part of the conclave budget and fee. See ["Accident and Sickness Insurance" on page 28](#) for details.

- D. Sections are required to collect a national activity surcharge established annually by Scouting America at a per person, per calendar day rate for any event where a fee is charged to participate, including conclaves. See ["National Activity Surcharge" on page 29](#) for details.
- E. Once the conclave budget is approved by the council of chiefs, the service council shall be fully responsible for the financial well-being of the conclave and shall exercise all prudent controls to assure that all budgeted revenues are collected and that all expenses are proper, are accounted for, and do not exceed revenues.
- F. The council of chiefs shall decide what items may be sold during the conclave, who may sell them, and to whom any resulting revenue accrues.
- G. All claims against conclave finances shall be made to the service council **by the end of the conclave**.
- H. All surplus revenues (available revenues after all authorized conclave expenditures and those budgeted as section operating expenses until the next conclave) shall be refunded within 90 days following the conclave to councils in proportion to their conclave fees paid.

However, prior to any refunds being made, the council of chiefs may direct that up to



\$300 per council or \$2,000 in total, whichever is greater, be set aside from the available surplus (as defined above). These monies will be forwarded to the service council of the next conclave once their conclave account has been established at their council headquarters. Said monies will be treated as income to the next conclave. This advance funding for next year's conclave is in addition to any monies required to fund the section operating budget until the next conclave.

- I. Should the service council fail to adequately control the conclave budget or if

for any other reason expenditures exceed revenues, the service council, with the approval of the section advisers, may assess and bill the councils in the section, within 90 days following the conclave, for the excess costs in proportion to the total of the conclave fees paid and owed.

- J. Within 60 days following the conclave, the service council shall prepare and send to the section key 3 and the outgoing section chief the final financial statement detailing all revenues and expenses for the conclave.

### **Rule VIII. Conclave Participation and Registration**

- A. All who attend the conclave must register in one of the following categories:

1. **Conclave Delegates.** Currently registered members representing councils, including section officers and advisers, who pay the conclave fee and whose participation is approved in advance by their respective council Scout executive or their designated representative.

2. **Conclave Staff.** Non-delegate members of the service council whose attendance is necessary to staff the conclave and whose participation is approved in advance by the service council Scout executive or their designated representative. These individuals' conclave fees are determined by the budget.

3. **Guests.** Guests of the conclave whose attendance is desirable for the implementation of the program, whose conclave fee and expenses may be funded or subsidized by the conclave budget, and whose participation is approved in advance by the council of chiefs. Similar to a conclave delegate, an individual registered within one of the councils of the section requires approval in advance by their respective council Scout executive if they are attending as a guest.

- B. The service council shall provide each council with appropriate registration materials at least two months prior to the conclave.

- C. There are two options for handling conclave registration:

1. For distributed registration by councils, adhering to the deadlines established by the council of chiefs, conclave fees shall be collected by each council and transmitted to the service council or other council designated by the council of chiefs.

2. For on-line unified registration approved by the section staff adviser and section adviser, adhering to the same deadlines, fees will be transmitted by the hosting organization to the service council. If the conclave funds are held at a Scouting America council that uses a supported credit card payment processor (currently [authorize.net](https://authorize.net)), the National OA Event Registration System (NOAERS) can be used for conclave registration; income is credited directly to the council. (For more information, email a request to [support@registration.oa-scouting.org](mailto:support@registration.oa-scouting.org).)

- D. The section leadership must ensure that a process is in place to verify the Scouting America registration status and, for those at least 18 years old, current completion of

Youth Protection training for all conclave delegates, conclave staff and, for those who are Scouting America members or leaders, guests. People whose Scouting America registrations have expired may not attend a conclave, unless their council Scout executive or their designated representative gives explicit approval; this is typically appropriate if a unit's charter has recently expired and is in the process of being renewed. Except for those under

age 18 and guests who are not Scouting America members or leaders, people whose Youth Protection Training is not current must successfully complete the training upon arrival at the conclave, in the registration area. If used for conclave registration, NOAERS can facilitate checks of Scouting America registration and Youth Protection Training status, both before a conclave and during on-site check-in.

### **Rule IX. Amendments to Section Rules**

- A. Only the National Order of the Arrow Committee shall amend the Section Rules.
- B. The council of chiefs, the section, or the conclave may adopt temporary procedures, guidelines, deadlines, and so forth, to assist in the execution of the conclave. However, such temporary procedures shall not in any way conflict with or be in violation of the Section Rules and shall terminate upon completion of the conclave. The council of chiefs, the section, or the conclave shall take no action that in any way violates the letter or the spirit of the Section Rules or the policies of the represented councils, the Order of the Arrow, or Scouting America.



## Chapter 3: Section Conclave

### Introduction

Next to a national jamboree and a National Order of the Arrow Conference, a section conclave is probably the largest inter-council event in Scouting America. What happens at a National Order of the Arrow Conference and a section conclave can make a big difference in the effectiveness of lodge and chapter programs of the Order of the Arrow and in the dedication of an individual Arrowman's first responsibility – their unit.

### Conclave Planning

The potential program elements of a conclave are provided in this chapter. Other items such as the date and location of the next conclave, service council rotation schedule, financing, and lodge responsibilities are set forth in [Chapter 2, Section Rules](#). By following the section rules, the council of chiefs will have completed some of its necessary planning.

Soon after the section chief is elected, they should start preparing for the initial council of chiefs meeting. In consultation with the section adviser and section staff adviser, they should select a meeting date, time, and location, and prepare a detailed agenda. A sample council of chiefs meeting agenda is provided later in this chapter. This information should be given to the section secretary for distribution to the members at least 15 days prior to the meeting date in accordance with the [Section Rules](#).

The initial meeting should last no more than one day with the goal of accomplishing as much as possible so that no more than one or

two additional pre-conclave meetings will be necessary. This is important because of the travel time that the council of chiefs must invest to attend the meetings. If the initial meeting is planned and run well, it will be easy to keep detailed planning on schedule through telephone, or email reports.

All persons attending the council of chiefs meeting should understand that its purpose is to:

- Plan the conclave to include activities, training and events that will be of maximum benefit to the member lodges.
- Give each lodge responsibility for carrying out its fair share of the plan, assign definite responsibilities to named individuals, and commit them to specific completion dates.
- Approve specific local arrangements and financial requirements as proposed by the service council.

At the initial council of chiefs meeting a special effort should be made to get down **in writing** the main ideas, schedules, outlines, and above all, the responsible individuals, along with their deadline dates. This should be part of the section secretary's minutes that should be distributed to all councils of chiefs members within 15 days following the planning meeting.

A very wise Frenchman (Henri Fayol) once said: "Plan your work, then work your plan." After the initial council of chiefs meeting, all basic planning for the conclave should be complete. The next step is to make the plan work. Some members of the council of chiefs will wrap up their assigned responsibilities right away and send the section chief a note to let them know

what they have done, but others will put things off.

The section chief's biggest job after a council of chiefs meeting is to follow up. They must make sure the people who are committed to doing each job are doing it in the time allotted. The section chief may establish a regular reporting routine or may do things less formally through an occasional letter, email, or phone call asking for a status report. If things start falling behind, the immediate priority is to figure out how things are going to get back on track and who is going to do the "back-on-tracking".

## Conclave Program

The conclave program should increase the knowledge and understanding of the delegates in all aspects of Order of the Arrow program. Arrowmen should be inspired to set and commit themselves to higher goals of performance for themselves and their lodges, and should provide the training necessary to achieve these goals.

It is important that all aspects of the program be directed by leaders younger than 21. Adults should stay in the background, serving in advisory capacities only. Some sections have established separate adult activities and leave the youth free to participate. Such adult program should never become a focus or detract from the youth program.

Inspiration is the key ingredient of the conclave. The conclave should kick off with a welcome from the service council and a short opening ceremony. It is equally important that the conclave close with an inspirational challenge that will create a lasting impression on every Arrowman who attends. Youth leaders, such as the national chief, national vice chief, or region chief, might be invited to give an inspirational message during the conclave.

Opening and closing ceremonies always have played a vital role in Order of the Arrow traditions, and experience teaches that good ones:

- Are well-planned, adequately rehearsed, and properly presented;

- Focus on rededication to the Scouting ideals;
- Focus on rededication to the principles of the Order of the Arrow;
- Are impressive, dignified, simple, and brief;
- Are dramatic, inspiring, colorful, and sincere;
- Exclude horseplay and initiation-type activities;
- Avoid fraternal, religious, and military rituals; and
- Show proper respect for American Indian traditions.

## Training

Training is the most beneficial aspect of the conclave. It is one of the main reasons lodges come together as a section. Conclave trainers must be top-notch; guest trainers from other areas can help bring new ideas. Displays from various state and federal agencies, local colleges, wildlife experts, and camping merchandisers always draw a crowd. Training should be kept to a reasonable length per session, and there should be new topics every year, with a "slate" of standard topics for new participants.

Information necessary to organize and provide outstanding conclave training has been concentrated in [Chapter 4, Section Training](#). The philosophy of training, preparation, and a host of topics, ideas, and outlines are presented. The Conclave Training Initiative (CTI) should be included annually as part of conclave training.

## Workshops

A special period is often set aside at the section conclave for workshops or skill sessions. Usually these sessions are most successful if they are aimed at providing basic information rather than highly technical knowledge. Workshops could include some of the following:

- Campfire planning
- Camping promotion

- Lodge newsletters and/or web pages
- American Indian dancing
- Making American Indian attire
- American Indian drumming and singing
- Headdress construction
- Beadwork
- American Indian games
- Ceremony team preparation
- Inductions
- Lodge record keeping
- Video production

## Demonstrations

Several lodges may participate in various demonstrations that will be of value or interest to those attending the conclave. These might include:

- Unit election team in action
- Camping promotions
- A well-planned campfire
- Scouting or American Indian pageants
- American Indian dancing
- Ordeal, Brotherhood, and Vigil Honor ceremonies demonstrated by well prepared and rehearsed teams showing proper ceremonial attire, movements, and speech inflection of memorized parts
- Call-out ceremonies featuring local camp traditions
- Meeting management

## Displays

Lodges should be encouraged to plan and exhibit attractive displays. Some possibilities include:

- Conclave theme

- Lodge publications
- Order of the Arrow supplies and literature
- Ceremonial attire
- American Indian attire and headdress kits
- Pictures, slides or videos of lodge events and service projects
- Ecology
- Local insignia
- Pictures, slides or videos of past conclaves and national jamborees or National Order of the Arrow Conferences

## Open Forums – “Meet the Leader”

This type of activity provides the delegates with the opportunity to direct specific questions to the section officers and advisers, and visiting regional or national Arrowmen. It is also a time when delegates may wish to recommend consideration of new or changed policy or programs.

## Special Features

Presentations from persons with specialized backgrounds, skills or unusual experiences may add variety to the program. A professional Scouter could give a brief talk on the opportunities available in professional Scouting. Alpha Phi Omega and the National Eagle Scout Association could also be featured. Reports of prior world or national jamborees and National Order of the Arrow Conferences, given by youth and illustrated with slides or film, are always well received.

## Recreation

Time should be provided in the program for recreational activities. Activities must meet the standards outlined in the [Guide to Safe Scouting](#) or other camp standards. Each lodge might be assigned the responsibility for a particular

recreational event. Some suggested activities are:

- Sports events with inter-council competition (e.g., volleyball, Frisbee football, etc.)
- Games that test camping skills
- Aquatic events (e.g., swimming, boating, canoeing, etc.)
- Movies
- Archery and rifle contests

## Fellowship

Good fellowship is an important element of any conclave. A special committee could be appointed to plan events that will encourage good fellowship and high morale:

- Select capable young song leaders to direct songfests after meals or at other appropriate times.
- Have a fellowship campfire.
- Designate a different youth to preside at each meal, arrange for grace, make announcements, etc.
- Conduct a get-acquainted game before the cracker barrel on the opening night of the conclave.
- Consider an outdoor barbecue, perhaps with a theme, including music.
- Schedule free time for rap sessions and trading of memorabilia. (This period should not encroach upon scheduled activities.)
- Encourage conclave participation through an award (e.g., pin, patch, etc.), similar to a National Order of the Arrow Conference participation award

## Keynote Speaker

If the council of chiefs determines that a keynote speaker will be featured during the conclave, it will be wise to follow these steps:

- Make sure the speaker is cleared for scouting appropriateness by the section adviser and section staff adviser for their appearance. Have arrangements been made between all parties?
- Advise the speaker of the conclave theme and any emphasis that you would like presented.
- Tell the speaker the time and how long they should speak.
- Make sure the speaker is the focal point during their presentation:
  - In sight of all the audience,
  - Public address system is set up and functioning so all can hear, and
  - No distractions such as dishes rattling in a kitchen, ceremonial or dance teams preparing to “go on,” etc.

Plan to use the keynote speaker at additional times during the conclave such as serving as a member of a panel discussion or in a meeting with lodge chiefs and/or advisers.

Make sure travel arrangements are understood in advance and that local transportation and lodging arrangements are made and satisfactory. Are you furnishing bedding, towels, and washcloths? It is standard to provide these items for any guest attending from out of town. Discuss these issues openly with the speaker to ensure both parties understand who will cover each item.

Introduce the speaker properly, using Scouting background and Order of the Arrow responsibilities held where applicable. If the information covers more than one side of an index card, the introduction is probably too long.

Some available keynote speakers are the national chief, national vice chief, region chief, national OA committee members, the director of the Order of the Arrow, or public figures such as an astronaut, business or civic leader, entertainment personality, etc. The following details how to request their services:

- **National Chief, Vice Chief, or Region Chief**

Attendance by the national chief, national vice chief, and region chiefs must all be cleared using the National Officer Request Form available on the national website at [oa-scouting.org/resources/forms](http://oa-scouting.org/resources/forms). The event budget must cover all travel costs involved, including transportation, meals, airport parking, and lodging. National guests cannot be required to drive more than four hours each way.

- **National Committee members**

Work directly with individual national committee members. The committee member might be able to cover their transportation expenses. Be sure to verify this, however. Offer to cover the conclave registration fee and provide on-site food and lodging.

- **National Staff Professionals**

The service council Scout executive requests the attendance of the director of the Order of the Arrow and other national staff professionals through the National Professional Staff Request Form available on the national website at [oa-scouting.org/resources/forms](http://oa-scouting.org/resources/forms). The director and other national staff professionals participate at no expense to the conclave.

## Conclave Agenda

Each conclave should be conducted from an agenda, prepared by the council of chiefs, which incorporates in an orderly schedule, the events of current interest to the lodges in the section. A conclave agenda worksheet is included later in this chapter.

## Conclave Business Meeting

A business meeting must be held during the conclave. The section chief presides at this meeting. The agenda should be planned in advance in consultation with the section adviser. The business meeting agenda should include:

- Election of section officers for the coming year.
- Location and date of the next conclave.
- Special recognition: Lodge Performance Measurement Program performance recognition; lodge with the greatest attendance at the conclave; best display, demonstration, American Indian dancing, camping promotion exhibit, or training leadership; ceremony team evaluation, etc.
- Promotion of national programs (e.g., OA Trail Crew, OA Wilderness Voyage, OA Ocean Adventure, OA Summit Experience, National Leadership Seminars, Developing Youth Leadership Conferences, national jamboree, National Order of the Arrow Conference, etc.)

## American Indian Events

If the conclave program includes American Indian dancing, the criteria formerly used at National Order of the Arrow Conferences might be helpful. See [Appendix 1](#) for rules and details. A drum, singers, and judges will be needed. American Indian events require a large space. Be sure to have adequate room for dancing, drum, singers, ready area, and spectators.

## Fire Dancing Policy

Fire dancing of any type is not condoned by the Order of the Arrow as part of its shows, displays or ceremonies. In some cases, fire dancing is ceremonial to American Indian people. Respect for American Indian culture, tradition, and heritage is a key component of Order of the Arrow programs.

## Protected Species Policy

Feathers, talons, or other parts from protected species of birds cannot be worn in Order of the Arrow dance competition, or utilized in demonstrations, displays, workshops, or ceremonies. Just about every species of bird is protected except resident state game birds and

domestic fowl such as turkey and chicken. The same may be true regarding animal or reptile parts; if so they are equally forbidden. Check with the U.S. Department of Interior, Fish and Wildlife Service, and state conservation authorities for details.

## Flag Policy

Within the guidelines found in [the U. S. Code pertaining to the American Flag](#), flags are not to be used as wearing apparel. With this in mind, no type of U. S. flag can be worn as a part of ceremony or dance attire. Flag motifs in quillwork and beadwork are acceptable.

## Face Paint Policy

The use of face paint, body paint and wigs by non-American Indians may be offensive to some groups of American Indian people. Therefore, Order of the Arrow conclaves and other events conducted beyond the individual lodge will not permit face paint, body paint, or wigs to be used in social or competition dancing or in ceremonies or ceremony team evaluation.

## Ceremony Team Evaluation

If ceremony team evaluations are to be conducted at a conclave, the process to be followed can be found in the [Inductions Handbook](#).

## National Financial Support

The national OA committee encourages sections to collect funds during a conclave to support programs that benefit youth engagement in national OA events, such as the National Leadership Seminar, OA High Adventure, National OA Conference, or other national OA programs provided for youth participation. The funds may be collected at religious services during the conclave or through similar appropriate efforts.

A check for the amount of funds collected should be sent to the national director along

with the "Event Donation – Expendable Endowment Transmittal" form available at [oa-scouting.org/resources/forms#section](http://oa-scouting.org/resources/forms#section). The form includes wording that specifies that the funds should be used in accordance with the stated purposes of the fund which include financial support for the OA including, but not limited to, programs, events, operations, travel, lodging, training, recognition items, museum initiatives, meetings, scholarships, and lodge grants.

## Accident and Sickness Insurance

Sections are required to collect appropriate fees for accident and sickness insurance for all conclave participants not covered by council year-round accident and sickness policies. At least three months before a conclave, the service council and section staff adviser should contact the section's councils to determine which councils purchase accident and sickness insurance for all of their youth members and adult volunteers. The section must collect and submit accident and sickness insurance fees for all councils that do not that provide written confirmation of this coverage.

The national premium is based on a per-calendar-day rate; therefore, the cost to most conclaves will be three times the daily rate per participant. These costs must be included in the budget and be part of the conclave fee. The national director can provide the daily rate and coverage limits as well as the process for transmitting these fees to the national council. Insurance is available through the Scouting America national Risk Management Service. In order to obtain national premiums, all communication and funds for accident and sickness insurance must pass through the national director.

Attendance estimates are due one month prior to the conclave and the final attendance count is due with the conclave report. This is a responsibility of the service council and section staff adviser.



## National Activity Surcharge

Sections are required to collect a national activity surcharge established annually by Scouting America at a per person, per calendar day rate for any event where a fee is charged to participate. This surcharge helps cover liability insurance that is provided through the national council. For example, if the surcharge is \$4.00 per person, per day, for an event that starts on Friday and ends on Sunday, every participant would be assessed \$12.00 to cover the three calendar days of the event. The surcharge must be budgeted and included in the event fee. Once the completed conclave insurance transmittal form is submitted to the national director at the national service center, the council handling the conclave custodial account will be billed for payment. The service council and the section staff adviser are jointly responsible for ensuring compliance with these requirements.

Annually, the national director will communicate the amount of the national activity surcharge so sections can include this amount as they develop their conclave budgets.

## Leadership Policy for all Order of the Arrow Trips and Outings

In accordance with the [Guide to Safe Scouting](#), it is the policy of Scouting America that trips and outings may never be led by only one adult. **Two registered adult leaders 21 years of age or older must be present for all Order of the Arrow trips and outings. In cases where female youth are participating, at least one of the over 21 adults must be female.**

It is the responsibility of every council to assure that sufficient qualified adult leadership is provided for all chapter, lodge, section, region and national Order of the Arrow outings, conclaves, training events and conferences. The interpretation of "adult" leadership and "adult" membership, as opposed to youth membership, in the Order of the Arrow continues to be one determined by age, not Scouting America registration. An individual who is at least 21 years old holds adult membership in the Order of the

Arrow, while an individual younger than 21 holds youth membership, regardless of what type of Scouting America registration is held.

## Sample Council of Chiefs Meeting Agenda

- 10:00 a.m. **Call to Order** – Section Chief  
Obligation  
Introductions  
Preview today’s meeting
- 10:10 **Secretary’s Report**  
Minutes of the conclave business meeting  
Verification of mail/email addresses for all council of chiefs members
- 10:20 **Service Council Report**  
Preview of facilities, special program potential, and discussion of any limitations on attendance or facility usage  
Presentation of initial budget
- 10:40 **Conclave Goals and Objectives**  
What each lodge wants to do  
Suggested major program features and desired time blocks
- 11:15 **Conclave Theme** – Section Vice Chief  
Submit ideas for theme
- 11:25 **Finalize Program Features and Schedule**
- 12:15 **Lunch**  
Meal  
Songs  
Brief remarks from section adviser or VIP
- 1:00 p.m. **Select Conclave Theme** – Section Vice Chief
- 1:15 **Lodges Assigned Program Responsibilities**
- 1:45 **Prepare Outline of Specific Responsibilities**  
Lodges prepare their specific responsibilities, including reporting and completion deadlines, all required financing. Service council and section officers and advisers review preliminary budget, menus, and recommendations for souvenirs, and establish registration and other deadlines.
- 2:45 **Lodges Report on Plans**  
Each lodge gives its report to the group.  
Section vice chief reports on promotion plans.
- 3:15 **Finalize Deadlines and Approve Budget**
- 3:30 **Establish Next Meeting Date and Location**
- 3:40 **Council of Chiefs Training or Roundtable Discussion**
- 4:25 **Sing Order of the Arrow Song**
- 4:30 **Adjourn**

## Conclave Agenda Worksheet

Time	Event	Who is Responsible?
<b>Friday</b>		
_____	Service council and council of chiefs arrive	_____
_____	Registration, assignment to quarters	_____
_____	Colors	_____
_____	Opening meeting – fellowship campfire	_____
_____	Ceremony team evaluators’ meeting	_____
_____	Trainers’ meeting	_____
_____	Snack and songfest	_____
_____	Council of chiefs meeting	_____
_____	Taps and lights out	_____
<b>Saturday</b>		
_____	Reveille	_____
_____	Rededication ceremony	_____
_____	Assembly	_____
_____	Breakfast	_____
_____	Training/discussion groups	_____
_____	Lunch	_____
_____	Open forum/“meet the man”	_____
_____	Lodge competitions/evaluations	_____
_____	Recreation (swimming, sports, etc.)	_____
_____	Appropriate religious services	_____
_____	Colors	_____
_____	Dinner	_____
_____	Section officer candidates’ forum	_____
_____	Advisers’ forum	_____
_____	American Indian dance competition	_____
_____	Theme show or pageant	_____
_____	Snack and lodge fellowship/feast/carnival	_____
_____	Taps and lights out	_____
<b>Sunday</b>		
_____	Reveille	_____
_____	Assembly	_____
_____	Breakfast	_____
_____	Conclave business meeting	_____
_____	Recognition	_____
_____	Final challenge	_____
_____	Closing ceremony	_____





## Chapter 4: Section Training

### Introduction

Nowhere else in the Order does the leadership of so many lodges congregate more often than at the section conclave or at council of chiefs meetings leading up to the conclave. Anytime an opportunity arises for lodges to share ideas and discover new resources, it should be taken. The gathering of experienced lodge leaders holds just such an opportunity and training is the best way to share knowledge.

Training should be challenging and fun. Training at a council of chiefs meeting or at the conclave will achieve a high level of usefulness if the section officers give it emphasis. Quality training occurs as a result of timely, adequate planning, supervision, and preparation.

Decide what training the Arrowmen in the section need and the ways to effectively communicate that information to them. Assessing the results of the Performance Measurement Program petitions from each of the lodges in the section can provide valuable input to planning section training.

No matter what topics are presented or which way they are presented, all training will be successful if it:

- Explores each topic by comprehensive, challenging presentations, discussions, questions, demonstrations, etc.;
- Delivers new and/or helpful information, methods, or procedures;
- Discusses ideas in new and exciting ways;
- Draws conclusions and arrives at practical ways of applying them;

- Maintains an atmosphere of total audience participation and involvement;
- Assists the section or lodge accomplish its mission;
- Prepares Arrowmen to better fulfill their roles and responsibilities in their lodge, chapter, or unit;
- Supports the vision, mission, and values of Scouting America and the Order of the Arrow; and
- Incorporates and exemplifies the spirit of the Order of the Arrow.

### Council of Chiefs Roundtable Discussions

An open forum should be held at each council of chiefs meeting to address important issues facing the lodges. The section chief, or their appointed training coordinator, should facilitate regular discussions of these issues. The facilitator should choose discussion topics that are most useful, and must be able to adapt the schedule of topics as the year progresses.

The following are some suggested discussion topics for council of chiefs meetings:

- Lodge and council relationships
- Brotherhood conversion
- Effective lodge executive committees
- Inductions
- Lodge Leadership Development Conference

- Lodge program
- Lodge Performance Measurement Program

## Council of Chiefs Training

Council of chiefs meetings can often include a mini-presentation of a subject to provide lodges additional program resources to take back for their use. The section should ensure that all lodges are provided the best resources, trainers and information available. Initially, sections will want to see that national and region programs are promoted. Then, the section should provide lodge assistance through training sessions and programs to address any weaknesses in lodge programs. It is in this part of the meeting where a section can really support its lodges with the extensive resources available.

The following are topics the section may wish to cover to aid lodges in providing the most effective programs to their councils:

### 1. Promotions

The section promotes national and region programs such as the National Order of the Arrow Conferences, Philmont OA Trail Crew, Northern Tier OA Wilderness Voyage and OA Canadian Odyssey, OA Ocean Adventure, OA Summit Experience and the National Leadership Seminars. To best promote these programs, a presenter who has participated in these events should be recruited to give an inspirational and formal presentation to the council of chiefs. These presentations work best when the presenter shares personal stories and anecdotes with stunning pictures.

### 2. Lodge Focused Training

The section leadership may discover that further development in one particular program area may be of benefit to some, many, or all of its member lodges. As a remedy, the section might provide training to all lodge leaders. For example, if many lodges do not use the extended elangomat program, the section might present a

focused training seminar on this program, pulling in the resources from a lodge which runs the program well. Waiting for the conclave would miss an entire Ordeal season.

### 3. New Programs

New programs are of interest to all Arrowmen, especially those lodge leaders who attend council of chiefs meetings. These include new high-adventure opportunities, community service ideas, council assistance programs and new lodge program adventure opportunities. New programs being initiated by the Order of the Arrow require the assistance of sections for implementation.

### 4. Orientations

Often lodges have very young leadership. The section may find it best to run a "lodge chief training conference", or equivalent. This will acquaint lodge chiefs with their role in the Order of the Arrow.

## Conclave Training

The section conclave is a time for unique and exceptional inspiration, training, and fellowship. Care must be taken to secure the best resources for each training topic. It is expected that each conclave training session will be of the highest quality. Timely decisions on topics, lodge assignments, presenter recruitment, communication of topic titles and learning points, outlines, arrangements for audio-visual aids and backup help ensure the best presentations. The Conclave Training Initiative (CTI) provides nationally developed focus training that should be included in the annual training plan. Details may be found at [oa-scouting.org/training/conclave-training-initiative-cti](http://oa-scouting.org/training/conclave-training-initiative-cti).

One popular training mode that has proven highly successful is small discussion groups. Discussion leaders should be younger than 21. Adults should serve as advisers. The discussion leaders should be selected in the early planning stage of the upcoming conclave, so that they have ample time to prepare their presentations.

It has proven successful for the discussion leader to present a brief talk on the topic before the actual discussion begins. If you can make this a “rap session” – you’ve made it! A youth attending the session should be appointed recorder to take notes of important points raised during the discussion.

Here are several topics that have proven successful for discussion groups:

**Lodge/Chapter Administration.** Relationship of advisers to youth officers; responsibilities of officers and advisers; standing committees and their functions; operation of the lodge executive committee; general policies; lodge rules; election procedures; chapter organization; and program.

**Lodge/Chapter Activities.** Importance of a well-balanced, well-planned annual program; social activities; annual banquet; specific ideas for events; distribution of responsibilities in planning events; scheduling and coordination with council/district calendars.

**Arrow-Scouting Relationships.** Arrowmen and the unit; the Order and camp; authority and role of the council Scout executive; relationship to the council.

**Service Projects.** Promotion of year-round camping; service to local units; council wide service projects; service to the camp; campmaster corps; inner-city; world brotherhood; council fund raising; coordination of service program with council plans, etc.

**Camping/High Adventure Promotion.** Promotion of camping in the member’s own unit by the individual; types and preparation of visual aids: chapter and lodge promotion in cooperation with the district and council promotion efforts.

**Unit Elections.** Election information for unit leaders; scheduling elections; election ceremony; records and forms used, etc.

**Ceremonies.** Training of teams; costuming; staging; physical setting; timing; properties; call-out ceremonies.

**Conducting the Ordeal.** Using *Spirit of the Arrow* pamphlets; the [Inductions Handbook](#);

duties of the Ordealmaster; the Elangomat Crew System; relationship of candidates to campers; discussion period for candidates; health and safety concerns and safeguards; handling flagrant violations of the Ordeal; summer camp Ordeals versus weekend Ordeals.

**Orientation of New Members.** Developing an effective orientation program before, during and after the Ordeal for newly inducted members; techniques of orientation; Spirit of the Arrow pamphlets; Elangomat Crew System; effect on tenure and service of members.

**Lodge Publications.** Newsletters; yearbooks; costs involved; frequency; distribution; techniques of publication; Scouting on the Internet.

**Brotherhood Membership.** Purpose; requirements; procedures; notification of eligible members; techniques to enhance Brotherhood conversion/retention.

**Personal Development.** Public speaking; time management; running for office; etc.

**Lodge Records.** Membership; financial; minutes; registration procedures; lodge financial record book; use of OA LodgeMaster.

**Vigil Honor.** Purpose; requirements; procedures; relationship of Vigil Honor members to the lodge.

**Advisers’ Session.** The section advisers may wish to hold a special session(s) for advisers to discuss the adult role in the Order; answer questions; share techniques of advising, etc.

**OA Representative.** Purpose, requirements, procedures, responsibilities, relationship to chapter and lodge.

**Note:** Tips for trainers and suggested outlines for several of these topics are included at the Order of the Arrow training portal at [oa-scouting.org/training/syllabi](http://oa-scouting.org/training/syllabi). Similar outlines should be prepared for all discussion sessions to be presented at the conclave.

## Training Preparation

Outstanding training will be both inspirational and uplifting for the delegates. Accurate information about the Order of the Arrow, lodge operations, and Arrowman responsibilities must be provided. Sections willing to put in the required time and effort will achieve training that will be highly successful and support the mission, vision, and values of Scouting America and the Order of the Arrow. To accomplish this:

- Plan well in advance,
- Plan in detail,
- Put one person in charge as training coordinator, and
- Provide a good adviser to the training coordinator.

If possible, both the training coordinator and their adviser should be training-oriented and experienced. Look for those with youth leader, Wood Badge, or previous Order of the Arrow

training experience – such as a National Order of the Arrow Conference or national leadership seminar.

The section chief must keep close watch over the training preparations, work closely with the training coordinator, and emphasize training to all lodges. The training opportunities will need to be publicized well in advance of the event.

Detailed training outlines, or lesson/session plans must be developed. These should not be just “outlines”, but should have an almost word-for-word listing of the material to be presented.

Each discussion leader must be trained prior to the conclave. The final step in the training process is to evaluate the discussion sessions and their leaders and use this to prepare for the next conclave.

A sample agenda for a “train-the-trainer” meeting, a calendar for carrying out effective conclave training planning, and a training evaluation form are included on the following pages.

## Train the Trainer Meeting

- 10:00 a.m. **Welcome and introductions**  
Purpose of meeting
- 10:10 “How to be a Good Trainer” (See [oa-scouting.org/training/syllabi/train-trainer](https://oa-scouting.org/training/syllabi/train-trainer))
- 11:15 **Break**
- 11:30 **Continue**
- 12:00 **Lunch**
- 1:30 p.m. **Brief Presentation of Each Training Topic by Trainers**  
Allow 15 minutes for each one, plus 5 minutes for evaluation and suggestions  
Break for 10 minutes at the end of each hour
- 4:30 **Go Over Conclave Training Evaluation Form**  
Discuss how and when to use it, who should receive them when completed
- 4:45 **Summary, Questions, Challenge, Closing**
- 5:00 **Adjourn**



## Conclave Training Planning Calendar

	<b>Days Prior to Conclave</b>	<b>Actual Date</b>
New section chief appoints training coordinator.	-300	_____
Section chief announces appointment of training coordinator to council of chiefs, announces their training adviser, and asks lodges for trainers and topics.	-300	_____
New training coordinator writes lodges setting deadline for lodges to submit suggestions for trainers and training topics.	-270	_____
Deadline for all lodges to submit suggested topics and trainers.	-240	_____
Training coordinator submits topics for clearance by section chief and section advisers, and submits to them a tentative schedule and listing of number of trainers needed.	-230	_____
After clearance, training coordinator appoints trainers and assigns training topics to them for development with set guidelines on format, length, etc.	-220	_____
Deadline for detailed session plans returned to training coordinator by trainers.	-150	_____
Training coordinator develops agenda for training meeting.	-150	_____
Training coordinator returns outlines to trainers with comments for improvement.	-120	_____
Training coordinator develops training evaluation form.	-90	_____
Training coordinator holds "train-the-trainer" meeting (could be at a council of chiefs meeting); develops list of equipment, aids, and items for copying and submits to service council.	-90 to 60	_____
Training coordinator checks on all trainers to be sure they will be at the conclave and have registered to attend the conclave as delegates, staff, or guests.	-20 or 30	_____
Training coordinator checks in all trainers at conclave.	-1	_____
Training accomplished, evaluations completed at last session.	0	_____
Thank you notes sent to all trainers, others involved.	+7	_____
Training coordinator prepares a report, including a summary of the evaluations and recommendations for next year, and sends it to the new section chief.	+30	_____

## Training Evaluation

***Training Participant: Please give us your thoughts and comments so that we may improve.***

1. Which of the training sessions was most useful to you? Why?
2. Which of the training sessions was least useful? Why?
3. What topics should you have been offered that were not offered?
4. What was good or bad about the training facilities and locations?
5. What else could have made the training more helpful to you?
6. What training/discussion techniques were used by the leaders of the sessions you attended?
7. How could the trainers have improved their presentations?
8. Please use this following space (and the reverse side or additional sheets, if necessary) to make any additional comments or suggestions you have which could help improve training at future conclaves.

# Appendix 1: American Indian Dance and Singing Competitions

Competitions, training, and other American Indian programs at the section and national level will conclude in 2025. For more information on this change, see [oa-scouting.org/article/policy-update-changes-regarding-american-indian-programming](https://oa-scouting.org/article/policy-update-changes-regarding-american-indian-programming).

The following guidelines and judging criteria were used at National Order of the Arrow Conferences and may be used by sections for their 2025 conclaves.

## Individual Dance Competition

Any number of contestants from a lodge may participate in the individual dance competition. The top dancers may be asked to demonstrate their skills at an evening show, where they will be recognized with their awards. The rules are:

1. Each contestant must confirm their registration and receive their contestant number upon arrival at the competition. If in doubt as to which category to dance, the dancer should bring a photograph of their dance outfit to registration. The judges will assist in placing the dancer in the proper category.
2. There are five styles of individual dance competition:
  - Fancy Feather,
  - Grass,
  - Straight,
  - Old Time Sioux, and
  - Contemporary Northern Traditional.
3. Dancers must wear appropriate authentic clothing. The judges are the final authority on what constitutes appropriate authentic clothing.
4. Dancers must dance in the style of their outfit. In preliminary competition, if the dancer is eliminated in one dance style,

they may change outfits and dance in another style, if time permits. The dancer must be registered in both styles. Dancers may not compete in the finals in more than one style.

5. Losing a major article from a dancer's outfit during the contest means automatic disqualification. Having the attire properly maintained and tightly secured eliminates this problem. The judges are the final authority on what constitutes a "major article".
6. Dancers must be under the age of 21 at the time of the competition, members of the Order of the Arrow, and registered participants at the event.
7. Dancers must visibly attach their contestant number to the front of their outfit.
8. Dancers must be prepared to dance either indoors or outdoors.
9. Dance practice and outfit construction should not take place after arriving at the competition.
10. Overstepping a song will lower a dancer's placement.
11. **No parts of any protected species are permitted on any outfit.** Violation of this rule will result in automatic disqualification. Please be aware of all state and federal laws regarding endangered species parts. (See [Chapter 4, Section Training](#).)
12. **Within the guidelines found in the [U.S. Code pertaining to the American Flag](#), flags are not to be used as wearing apparel. Therefore, no type of U.S. flag(s) will be permitted as part of a dancer's outfit.** Flag motifs in quillwork and beadwork are acceptable.
13. **National Order of the Arrow Face Paint Policy: National Order of the Arrow Conferences and activities conducted beyond**

**the individual lodge will not permit face paint, body paint or wigs to be used in social or competition dancing or in ceremonies.** (See [Chapter 4, Section Training](#).)

14. Scouting America policy regarding firearms and knives, as stated in the [Guide to Safe Scouting](#) will be followed.
15. The judges will determine the judging criteria and all decisions are final.

All dancers are required to participate in a critique of their American Indian clothing. This will take place immediately following the dance competition.

## Historical Group Dance Competition

Group dance teams shall be made up of four or more members (at least three of whom must be dancers). All members **must** be from the same lodge. All team members must be under the age of 21 at the time of the competition, members of the Order of the Arrow, and registered participants at the event.

### Acceptable Historical Group Dances

In choosing the dance(s) to perform, consider the following:

1. Dances must be **non-religious** and in good taste.
2. Society, clan, or family dances are acceptable **only** if written permission is granted by the tribal council, society, clan or family of the specific tribe from which the dance comes. **Such written permission must be included in the bound packet required for registration.** Therefore, permission must be requested far enough in advance to meet the registration packet deadline. Without this permission the dance will not be allowed.
3. The following dances are not acceptable for competition:
  - Masked dances of: Pueblos, Apache, Iroquois, Creek, Cherokee, or North-

west Coast tribes. A mask is defined as anything that covers the face of the wearer, hiding their identity.

- Ghost Dance, Pipe Ceremony, Pipe Dance, Sun Dance, Hopi Snake Dance, and the Peyote Ritual.
4. Dances that are kept so secret that information on them is incomplete should be avoided. The team must have accurate information.
  5. Synchronized line dancing, as done at modern day powwows is **not** appropriate for historical group dance competition.
  6. At the request of several gourd dance societies and their members, Gourd Dancing will not be allowed in historical group dance competition.
  7. **Time limit** is *fifteen minutes* total time on stage. Total time includes: prop/scenery set up (if any), narrative, dance(s), outfit/clothing changes (if any), and removal of any props/scenery. Timing begins when the first participant steps onto the competition floor. Note: Background scenery is not necessary or required.
  8. Teams are limited to a maximum of **two dances**. Performance of more than one dance is not required, but teams should ensure that judges are provided enough presentation time to fairly assess the team's knowledge and abilities.

### Rules Concerning Attire

1. **No parts of any protected species are permitted on any outfit.** Please be aware of all state and federal laws regarding endangered species parts. (See [Chapter 3, Section Conclave](#).)
2. **Within the guidelines found in the [U.S. Code pertaining to the American Flag](#), flags are not to be used as wearing apparel. Therefore, no type of U.S. flag(s) will be permitted as part of a dancer's outfit.** Flag motifs in quillwork and beadwork are acceptable.

3. **National Order of the Arrow Face Paint Policy: National Order of the Arrow Conferences and activities conducted beyond the individual lodge will not permit face paint, body paint or wigs to be used in social or competition dancing or in ceremonies.** (See [Chapter 4, Section Training.](#))
4. Scouting America policy regarding firearms and knives, as stated in the [Guide to Safe Scouting](#) will be followed.

## Registration Procedures

1. The team must submit seven copies of their required research material (defined below in Judging Criteria) by the assigned due date. Late submissions will result in an automatic 3-point deduction from each judge.
2. The team's chair and/or adviser must check in to confirm competition registration, receive a performance time, and receive up-to-date information on mandatory meetings, team roster requirements, etc.

## Judging Criteria

Competing teams will be judged and awarded a score by each judge on the judging panel in each of the seven areas discussed below. Each area may receive a point score ranging from 0 to 10. Some areas have mandatory point deductions associated with failure to comply with stated rules. Each judge in the affected area will take the mandatory point deductions. Team standing/placement is determined by totaling all points received from the judges. Actual scores/points given by the judges will not be provided to the teams; however, critique sheets from all judges will be provided to the team at the conclusion of its performance. Relative ranking of the teams will be available the day after the competition is finished.

1. **Authenticity** Maximum 10 Points
  - The dance(s) must be historical group dance(s) of specific tribes; therefore, Northern Plains or Pueblo are not appropriate because they are culture areas, not tribes. Inter-tribal is even less specific. The

dance(s) and outfit/attire should represent one particular tribe during a particular time in their history. The current and/or historic use of the dance(s) and the proper interpretation by the team will be considered.

- Group dancing is a coordinated effort. It is not a series of solo performances grouped under one title.
- Size of team: No preference is given to large or small teams; therefore, all teams will compete in one category. The judges are looking for quality of presentation and the selection of dance(s) suitable to a lodge dance team and the resources available to them.

### 2. **Research** Maximum 10 Points

In addition to the seven copies submitted before the event, two complete copies of the team's research material should be brought to the competition. **All research must be type-written and suitably bound.** Suitably bound means stapled with a cover and back sheet of at least 65-lb card stock. Three-ring binders, plastic comb binding, duo-tang style folders, etc. are not required. **Research submissions must include:**

- A description of the dance(s) as they will be performed;
- The historical background of the dance(s);
- The historical background of the song(s) used in the dance(s);
- A clear description of any props used, including pictures and/or drawings;
- A clear description of the outfits worn for the dance(s), including pictures and/or drawings;
- A description of the music and accompaniment used;
- A complete bibliography of references used to research the dance(s) (*i.e.*, books, publications, unpublished material, interviews, personal correspondence, websites, etc.);

- A copy of the letter or permission from the tribal council, society, clan, or family as required for certain dances; and
- Name, address, and phone number (email if available) of a contact person representing the team.

NOTE: Photocopied pages from any published work are **not** acceptable. Videotapes, video CDs, DVDs, memory sticks, and data discs are **not** acceptable. Research booklets should be a minimum of eight single-spaced typewritten pages, not to exceed fifteen typewritten pages; photos and drawings/diagrams are not part of this limit.

### 3. American Indian Attire

Maximum 10 Points

Teams will be judged on the authenticity and completeness of their outfits. If a particular dance does not call for special attire, teams will be judged on the quality and appropriateness of each participant's attire. In the event a team performs more than one dance, points will not be subtracted for using the same attire for both dances, if from the same culture area.

### 4. Performance of Dance

Maximum 10 Points

Teams will be judged on the quality of the interpretation and presentation of their dance(s). Good use of allotted dance time will be considered. Teams will lose one point from each judge for every minute, or part thereof, that they exceed their scheduled dance time. NOTE: If a team chooses to use the same dance(s) or outfits/attire at consecutive National Order of the Arrow Conferences, they can expect to have a more critical review from the judges. Specifically, the judges will look for additional research as well as improvements and refinements in attire, dance, and presentation.

### 5. Ability to Perform as a Team

Maximum 10 Points

Teams will be judged on their ability to perform their dance(s) so as to exhibit a true oneness and feeling for the dance(s). Teamwork and

perceptive interpretation of the dance(s) by the team as a whole will be considered.

### 6. Music

Maximum 10 Points

Teams will be judged on their use of drumming, singing and any other necessary musical accompaniment that should be used for their particular dance(s). As always, quality as well as authenticity of the musical aspect will be considered. The use of recorded music will be allowed, but it will cost the group a mandatory deduction of three points by each judge in this judging area.

### 7. General Effect and Impression

Maximum 10 Points

The general effect and impression of the overall presentation will also be evaluated. This somewhat subjective area will permit judges to evaluate the educational, entertainment and informational worth of the overall presentation.

### Recognition and Awards

Awards will be given to the top finishing teams according to the judges' discretion. Awards for authenticity may be given, if deemed appropriate. Certificates will be awarded to each competing team.

## Northern and Southern Singing Competitions

Drum members **MUST** be from the same lodge. All drum members must be under 21 years of age at the time of the competition, members of the Order of the Arrow, and registered participants at the event. Each lodge is allowed to enter one team. All singing must be done in a team fashion. Drums must furnish their own drum and drum stand, if used. Drum sticks are the responsibility of the singers. Chairs are provided.

### Acceptable Songs

1. Northern Drums must sing **two northern songs**. One of these must be a song that is sung for a special occasion, at a special time during the dance or for a special

dance. (e.g., Flag songs, Veterans songs, Sneak-up, Rabbit Dance song). The other song can be a Northern Plains powwow song.

2. Southern Drums must sing **two southern songs**. One of these must be a song that is sung for a special occasion, at a special time during the dance or for a special dance (e.g., Flag songs, Veterans songs, Trot songs, Snake and Buffalo). The other song can be a Southern Plains inter-tribal powwow song. Family songs should be avoided as well as songs of a religious nature, such as Sun Dance, Native American Church or Peyote songs.
3. Drums that sing northern-style songs in the southern competition, or vice versa, will receive a 5-point deduction from each judge.
4. Northern singing is a high falsetto voice with the honor beats in the melody of the song, normally in the second chorus.
5. Southern singing is a more nasal tone with the honor beats between the first and second chorus.
6. A list of two primary songs and four alternate songs may be submitted with proper documentation.
7. **Time limit** is *fifteen minutes*. Timing begins when the judges invite the team to sit at the drum. Any narrative is included in the time allotted. If teams wish to warm up, this should be done away from the competition. Any ceremonies or local rituals should take place privately away from the competition. Going over the allotted fifteen minutes will result in a 5-point deduction from each judge. All teams must be ready to perform fifteen minutes prior to their assigned times.

## Rules Concerning Attire

1. Northern Drums rightly wear dance outfits, long pants, short pants, and shirts while at the drum. No bare feet or open-toe shoes. Improper attire will result in a 5-point deduction from each judge.

2. Southern Drums are much more formal. Long pants are required. No bare feet or open-toe shoes. Improper attire will result in a 5-point deduction from each judge.

## Registration Procedures

1. The team must submit one copy of their required research material (defined below in Judging Criteria) by the assigned due date. Late submissions will result in an automatic 5-point deduction from each judge.
2. The team's chair and/or adviser must check in to confirm competition registration, receive a performance time, and receive up-to-date information on mandatory meetings, team roster requirements, etc.

## Judging Criteria

Drums will be judged and awarded a score by each judge on the judging panel in each of the eight areas discussed below. Some areas have mandatory point deductions associated with failure to comply with stated rules. Each judge in the affected area will take the mandatory point deductions. Team standing/placement is determined by totaling all points received from the judges. Actual scores/points given by judges will not be provided to the teams, however critique sheets from all judges will be provided to the team at the conclusion of the competition. Relative ranking of the teams will be available the day after the competition is finished. The judges will determine the judging criteria and all decisions are final.

### 1. Research Maximum 20 Points

In addition to the one copy submitted before the event, two additional copies of the team's research material should be brought to the competition. **All research must be typewritten and suitably bound.** Suitably bound means stapled with a cover and back sheet of at least 65-lb card stock. Three ring binders, plastic comb binding, duo-tang style folders, etc. are not required. Teams will be evaluated on the quality of the research they have done for the songs they have chosen to sing. **Research submissions must include:** origin of song (tribal

affiliation), meaning of song (if any), how the song is structured, and references (professional recordings, etc.). Historical background of the songs should also be included.

**2. Synchronization of Drum and Voice**  
Maximum 10 Points

All competition songs should be sung in the appropriate manner: lead, chorus, honor beats, and pickup beats. The singers should sing as a group instead of individuals, and the ending of the song should be definite with no over-beats.

**3. Sound Quality** Maximum 15 Points

The singers should match in pitch and harmony for the most part. The drum beat should not overpower, be louder than, the song. The second/chorus should not be lower in pitch/volume from the lead.

**4. Dance-ability** Maximum 10 Points

Songs should be sung at the appropriate tempo. If a song was composed as a slow, medium or fast song it should be presented that way for competition.

**5. Language and Pronunciation**  
Maximum 20 Points

Songs should be sung with the correct vocables and/or words.

**6. Teamwork** Maximum 15 Points

Teams will be judged on their ability to sing the songs as a group. The individual singers should work as one group instead on one or two "stars" pulling the weight for the entire group.

**7. General Effect and Impression**  
Maximum 10 Points

The overall general effect and impression of the songs will also be considered. Some of the factors that will be considered are: the teams' confidence, presentation and explanation of the songs, care of the drum and stick, timeliness, not going over the stated time limit, etc.

**8. Constructive Comments** Not Scored

**Recognition and Awards**

Awards will be given to the top three drums. Special Honorable Mention awards may be given, if deemed appropriate. Participation certificates will be awarded each drum.



# Appendix 2: Conclave Financial Report

## Format of the Conclave Final Financial Statement

	<u>Budget</u>		<u>Actual</u>	
<b><u>Income</u></b>				
Delegates & Staff	(205 @ \$28.00)	\$5,740.00	(212 @ \$28.00)	\$5,936.00
Excess Revenue from Prior Conclave		300.00		300.00
Patch Auction		350.00		894.50
Trading Post Sales				
Patches	(500 @ \$1.75)	875.00	(514 @ \$1.75)	899.50
Pins	(300 @ \$1.25)	375.00	(273 @ \$1.25)	341.25
Mugs	(220 @ \$2.75)	<u>605.00</u>	(216 @ \$3.00)	<u>648.00</u>
<b>Total Income</b>		<b>\$8,245.00</b>		<b>\$9,019.25</b>
<b><u>Expenses</u></b>				
Food	(205 @ \$17.00)	\$3,485.00	(212 @ \$16.77)	\$3,555.24
Printer & Paper		150.00		135.75
Coordinator Expenses		100.00		13.50
National Activity Surcharge	(205 @ \$6.00)	1,230.00	(212 @ \$6.00)	1,272.00
Accident & Sickness Insurance	(205 @ \$0.60)	123.00	(212 @ \$0.60)	127.20
Awards		150.00		151.26
Speaker		50.00		0.00
Training, Programs & Pageant		250.00		228.07
Trading Post Expenses				
Patches	(600 @ \$1.25)	750.00	(598 @ \$1.09)	651.82
Pins	(300 @ \$0.77)	231.00	(304 @ \$0.683)	207.63
Mugs	(244 @ \$2.15)	524.60	(241 @ \$2.30)	554.30
Shipping		50.00		30.24
Next Year's Section Budget		1,000.00		1,055.00
Contingency		<u>151.40</u>		<u>0.00</u>
<b>Total Expenses</b>		<b><u>\$8,245.00</u></b>		<b><u>\$7,982.01</u></b>
<b><u>Net Funds</u></b>		<b>0.00</b>		<b>\$1,037.24</b>

## Distribution of Net Funds

Transfer to service council for next year's conclave (7 councils x \$100.00) (NOTE: Transfer may be up to \$300 per council in the section, with a maximum of \$2,000)		<b>\$700.00</b>
<b>Refunds</b>		
Council A	(56 delegates)	91.68
Council B	(57 delegates)	93.31
Council C	(0 delegates)	0.00
Council D	(21 delegates)	34.38
Council E	(35 delegates)	57.30
Council F	(37 delegates)	60.57
Council G	(0 delegates)	<u>0.00</u>
		337.24
<b>Total Distribution of Net Funds</b>		<b>\$1,037.24</b>

## Appendix 3: Council Mergers

The Order of the Arrow is a national program of Scouting America. The Order of the Arrow program is used by each local council to recognize youth and adults as those individuals who exemplify and live the Scout Oath and Scout Law in their daily lives, to instill the values of servant leadership, provide service and program support to the local council, and further develop the values of Scouting within OA members.

To better provide the Scouting program to youth, councils conduct long-range or strategic plans using materials, guidebooks, benchmarks, and index of growth charts provided by Scouting America. As a part of its annual charter renewal process, the council is charged with keeping its long-range plan current, and its services within standards of Scouting America.

Changing demographics, economic factors, employment, and other items within local council territories create situations in which the expected quality and service to youth provided by the council can be accomplished more efficiently by a merger of councils. Many of these mergers are the result of the initial research and study incorporated in the strategic plan process which helped focus the council on its responsibilities and, in some cases, inability to fulfill its charter obligations through its current organization.

### What is the role of the Order of the Arrow in the merger study process?

As an integral part of the local council, the Order of the Arrow is affected by merger decisions and therefore, its members will follow the study with interest. Merger decisions are the province of the executive board of each council involved in the merger discussions. Lodge leadership should only participate in merger discussions and decisions if invited by the council leadership. Otherwise, the OA and lodge should allow the discussions and subsequent decisions to come about through an established orderly and legal process. During

merger discussions, the lodge should continue to fulfill its responsibilities to its members, units, candidates, and the council. The Order of the Arrow lodge or its leadership must not go on record as being for or against a merger and must support any decision made by the council executive board.

If two or more councils vote to merge, then the lodge leadership has a critical obligation to accomplish a smooth and quick transition of the existing lodges into a single, merged lodge in the new council. Since the lodge is an integral part of the council and its existence is solely based on the existence of the council, it is important to understand that once the councils merge, the lodges must also merge. **Not merging the lodges is not an option. The lodge merger must be accomplished within one year of the effective date of the council merger.** Delays in completing the lodge merger will be detrimental to the success of both the new council and the new lodge, so it's best if the lodge merger is completed within six months of the council merger. A charter application for the merged lodge may be submitted at any time during the merger period.

Items to consider in this process are:

1. The council Scout executive of the new council should appoint a lodge adviser and a lodge staff adviser for the new merged lodge.
2. Current lodge officers should fulfill their responsibilities jointly until the election of new officers. There is nothing wrong with having co-lodge chiefs or co-lodge vice chiefs during the one-year (maximum) transition period.
3. The name and totem of the new merged lodge should be determined. (Any combination of the former lodge names and totems may be considered, as well as new ones.)
4. An organizational plan should be developed to fulfill the responsibilities of the new merged lodge in the new council.

(Lodge Rules should be written and approved by the council Scout executive.)

5. Scheduled lodge meetings and activities should be completed while merging the calendars and establishing dates for officer elections and activities of the merged lodge. Lodges may use sections (and regions) as objective third parties to help facilitate conversations. Having someone neutral to facilitate the election of the first set of lodge officers may be beneficial.
6. Three months prior to the lodges merging, contact the OA LodgeMaster team for assistance in setting a timetable for and technical assistance to merge the OA LodgeMaster databases. Contact the OA LodgeMaster team at [lodgemaster@oa-scouting.org](mailto:lodgemaster@oa-scouting.org).
7. Encourage full transparency throughout the process.
8. Recommend the development of a joint lodge "merger task force" to develop a set of recommendations to the whole lodge for consideration in the new program.

The positive and supportive leadership of the lodge officers and advisers will make a tremendous difference in the successful transition to the new merged lodge.

The [Lodge Merger Handbook for Councils](#) provides additional information on the merger process and how to make it as cooperative and smooth as possible.

What is the process for determining which section/region the new lodge becomes a part of?

In situations where a merger straddles two or more OA sections within the same region, the region chair will make a recommendation to the national chair and national director based on what makes most sense for the local Arrowmen impacted and that balances regional and national operating needs. If a merger involves two or more OA sections across region boundaries, both region chairs will make a recommendation to the national chairman and

national director based on what makes most sense for the local Arrowmen impacted and that balances regional and national operating needs. Those recommendations may include considerations such as the new council's headquarters city, number of lodges within each affected section, youth leadership opportunities, and other factors.

## Appendix 4: Region Realignments

As council mergers occur, the number of councils served by a section will change. Periodically the national chair will effect a realignment of the councils within sections by redefining their geographical boundaries.

Whenever council service territory or OA region realignments occur, Order of the Arrow sections may be affected. Section boundaries, the councils assigned to the sections, and the section officers and advisers may change depending on the assignment of the councils within the new structure. It is important that the Order of the Arrow facilitate the realignment process and effect a smooth transition. The following procedure has been used with great success:

1. The region Order of the Arrow chair and national director will provide recommendations to the national chair on the number and boundaries of the sections, the section identifiers, the councils assigned to the new sections, and the section advisers to be appointed.
2. The national chair will decide the section composition, identification, and boundaries and select the section adviser(s) and section staff adviser(s), with the input of the region chair and national director. This information must be published. Councils must be notified and appointment letters must be issued.
3. The realignment of the Order of the Arrow sections should not be implemented until the next conclaves are held. Therefore, the next conclaves must occur as scheduled and involve the lodges in the old sections. The old sections will elect new section officers at these conclaves. Immediately following the conclaves, the new sections with their new compositions will be in effect.
4. There will be some sections that will have multiple officers for some positions, based on the new assignment of the home councils of the new officers. This condition will

exist until the next year's conclave. The guiding principle to be followed is that **no elected youth officer is to be hurt by the realignment.**

5. There may also be situations with officer vacancies in the new sections. In this event, a special, pre-announced council of chiefs meeting must be scheduled for the councils in the new sections. The procedures for filling such vacancies are detailed in [Chapter 2, Section Rules, Rule IV. E.](#) Written permission to run for office is still required before these special elections. The names, addresses, and telephone numbers of the newly elected section officers must be provided to the region chair and national director immediately following the election.
6. After the normal closeout of the old section conclave budget and the refunds to the participating councils, the section operating budget and any section monetary reserve must be divided and passed to the new sections. Divide the section operating budget according to the reassignment of the section officers; this will support them in the new sections. Divide the monetary reserve by the number of councils in the old section. Transfer a share of the reserve to the new sections for each council transferred.
7. The last step is for the new section to set its next year's section conclave date and location and to define a new conclave rotation schedule reflecting the new section composition.

## Appendix 5: Section Officer Performance

On occasion situations may arise where a section officer has engaged in wrongdoing or has not fulfilled the responsibilities of their position. These situations do not maintain good order or set a proper example for others and, if unaddressed, could endanger fulfillment of the purpose of the section.

If the section officer is not fulfilling the responsibilities of their position, the following recommended procedure should be implemented:

1. The section adviser should have a private talk with the youth outlining the deficiencies and the seriousness of the situation.
2. If the talk does not correct the situation and the section adviser, staff adviser, and national director all agree, the section adviser should give the officer a written notice, detailing the deficiencies, dates by which they must be corrected, and notice that failure to do so will result in their removal. The region OA chair should be informed at this time. All of this must occur within the first 10 months of their term.
3. At this point the officer has the option of correcting the situation, resigning, or face removal.
4. If they correct the situation, nothing more happens unless future deficiencies should result in reconsideration of their removal by the section adviser, section staff adviser, and national director.
5. If they resign, the council of chiefs will be notified and the vacancies created will be filled in accordance with the section rules.
6. If they fail to correct the situation or regresses, the section officer's Scout executive and lodge adviser will be notified of the planned removal and the steps that have been taken to correct the situation leading up to this. The section adviser will also follow up with the region chair for their thoughts and influence.

7. If nothing changes as a result of these interactions, the officer will be given a final opportunity to resign for the good of the Order. Failing to do so, they will be removed and the vacancies created will be filled by the council of chiefs in accordance with the section rules.

The following steps should be taken if a section officer has engaged in wrongdoing which, in the opinion of the section adviser, section staff adviser and national director, necessitates removal from office:

1. The section officer's Scout executive and lodge adviser must be notified of their removal, along with the region chair.
2. The officer will be given the opportunity to resign if they choose; failing that, they will be removed.
3. The council of chiefs will be notified and the vacancies created will be filled in accordance with the section rules.

The overall goal in this recommended performance process is to help the officer be successful in fulfilling their responsibilities, not to remove them. Failing that, however, they may be removed for the sake of the OA and for successful achievement of the section's purpose.

# Appendix 6: National Officer Election Procedure

This procedure defines the election process for the candidates and the electorate. They are designed to provide all candidates an equal opportunity for election. **All section chiefs should be aware of the process, whether or not they intend to run for national office.**

## General Election Procedures

- The section chiefs will be provided copies of all approval letters received by the director upon their arrival at the planning meeting.
- For the election of the national chief, national vice chief and region chiefs, the interpretation of the *Field Operations Handbook* and this procedure will be the responsibility of the current national chief, the current national vice chief, the national chair, the national director, and designees as appointed by the national chair, the national director, or, for region chief elections, a region chair.

## Election Facilities

- The election for each national office will be conducted in a meeting room of sufficient size and comfort for a well-focused election.
- Each meeting room must have chairs sufficient for all present, a digital projector, a rostrum or podium, and light refreshments.
- Each meeting room must provide privacy for the election proceedings.

## Exiting the Election Facilities

During the election of the national chief and national vice chief, all section chiefs will be required to stay inside of the election room barring any emergency. The national chair, director, current national chief, and current national vice chief may enter and exit as necessary. During the break between election of

the national chief and national vice chief, section chiefs are free to enter and exit the room.

During the elections of the region chiefs, all section chiefs will be required to stay inside of the election room barring any emergency. The national chair, the director, and the newly elected national chief and national vice chief may enter and exit as necessary.

## Approved Attendees

During the elections of the national chief and national vice chief, only the current national chief and national vice chief, section chiefs attending the national planning meeting, the national chair, the national director, and designees as appointed by the national chair or the national director may be present.

During the elections of the region chiefs, only the current region chief, the newly elected national chief and national vice chief, section chiefs from the region attending the national planning meeting, the national chair, the national director, and designees as appointed by the national chair, a region chair, or the national director may be present.

## Presiding Officers

The current national chief will preside over the election of the national chief and national vice chief.

If the national chief is not present at the time of the elections, the national vice chief will preside over the elections. Additionally, the national chief may delegate election duties to the national vice chief as appropriate. Thus, “presiding officers” will refer to the current national chief and the current national vice chief.

Each current region chief will preside over the election of the region chief for their region.

## Seating

Seating for the section chiefs will be assigned alphabetically by last name.

## Time Keeping

In the election of the national chief, the current national vice chief will keep time for all comments. The current national chief will keep time for all comments in the election of the national vice chief. In the elections of the region chiefs, the current region chief will keep time for all comments, though they may ask a section chief who is ineligible to run for national office to handle this. Candidates will be given 30 second and 5 second warnings. At the expiration of time, the timekeeper will state, "Time!" at which point the candidate must terminate their comments.

## Ballot Certifier

During the preliminary election procedures, a ballot certifier will be chosen to assist with the counting of the ballots. The ballot certifier will be a section chief who is ineligible to run for national office. A different ballot certifier will be chosen for the election of the national chief and national vice chief. The ballot certifier will be allowed to vote in all elections and will remain seated in alphabetical order when not performing duties. In the event of the absence of either the current national chief or the current national vice chief, the presiding officer will choose two ballot certifiers for each election.

## Late Arrivals

Should the national chief, national vice chief or a region chief arrive at the national planning meeting late, they will immediately assume their appropriate duties in the election procedures. If a second ballot certifier has been chosen, they will be relieved of their duties when the national chief or national vice chief arrives to replace them.

Should a section chief arrive at the national planning meeting late (due to extenuating circumstances, as determined by the national

chair), the current election will be halted. The section chief will immediately be admitted to the election room and be allowed to vote during the next ballot compilation. If the section chief is eligible for election, they may declare their intention to run in the current election. In this case, the presiding officers will entertain a motion to place them on the top of the list of nominees for the current round in the election. This motion requires a second and a two-thirds majority vote by the section chiefs. This is the only manner by which candidates may be placed on the ballot late. No one may be added to the list of nominees once final voting procedures have begun, as described below.

## Ballots and Voting

All section chiefs present at the national planning meeting will be entitled to vote in every round of both the national chief and national vice chief elections. Except for the newly elected national chief and national vice chief, all section chiefs present at the national planning meeting will be entitled to vote in every round of the region chief election for their region. The presiding officers will print ballots in advance of the national planning meeting. During all ballot compilations, the number of ballot sheets submitted must equal the number of section chiefs present.

**Abstentions:** *Section chiefs may abstain from voting by turning in a ballot with "ABSTAIN" written on it. During the election introduction, as described in paragraph (2) below, section chiefs will be advised not to abstain unless they feel unqualified to make an informed decision. In calculating a majority, the total number of abstentions are subtracted from the total number of submitted ballots.*

**No-vote:** *Turning in a blank ballot will be considered a no-vote. A no-vote is effectively a vote against all candidates. A no-vote is counted in the total number of ballots when calculating a majority.*

**Note:** *The difference between a no-vote and an abstention becomes relevant in the final*

round. However, they will be noted and accepted for all rounds.

## Behavior

All section chiefs are expected to maintain a Scout-like behavior throughout the entirety of the election process. Should a section chief act in a way that is inappropriate as deemed by the national chief and national vice chief, the national director and national chair will be contacted and a determination will be immediately made regarding the section chief's actions and whether they will be asked to leave the room immediately and not return, forfeiting their opportunity to vote and run for national office. The national director and national chair have final say as to what is deemed as inappropriate behavior.

## Specific Agenda for Election Proceedings

### Preliminary Election Procedures:

1. **Convene:** At an announced time at the national planning meeting, the approved attendees will convene in the specified meeting room and be seated appropriately.
  2. **Introduction:** The presiding officers will review and explain the election procedure.
  3. **Explanation of Job Descriptions:** The presiding officers will explain the job description of the national chief (national vice chief / region chief), citing the *FOH* and their own personal experience, if they so choose. They may also invite the national chair and/or the director to address the section chiefs.
  4. **Questions:** The presiding officers will answer any questions regarding the election process or job responsibilities.
  5. **Selection of Ballot Certifier:** The names of all section chiefs ineligible for national office will be placed on slips of paper to be drawn out of a bag. The national chief will then draw one name and announce it to the section chiefs. The selected person, upon their consent, will be designated the ballot certifier. This process will be repeated if it is necessary to select a second ballot certifier.
6. **Review Time:** The section chiefs will be given five minutes to silently review the approval letters they received upon arrival. The section chiefs will remain seated in alphabetical order.
  7. **Declarations of Intent:** The presiding officers will open the floor to candidate declarations to run for office. All section chiefs wishing to run for the office will raise their hand and be recognized. Upon being recognized, the section chiefs will declare their intention to run for office and confirm their eligibility. Nominations and seconds will not be required.
  8. **Closure of Declarations:** After all declarations have been heard, the presiding officers will entertain a motion to close the floor to declarations of intent. The motion must be seconded and approved by a majority of the section chiefs. The presiding officers will then randomly establish the order of speeches by drawing names of declared section chiefs individually out of a bag. The order of section chiefs will be displayed on a digital projector as it is established. Except for a late arrival, no further section chiefs will be allowed to run for the office at hand.
  9. **Round One:** The presiding officers will recognize each nominee, in the randomly assigned order. Each recognized candidate will be given one minute to make comments to the electorate. All section chiefs, except the commenting nominee, will remain seated during this process.
  10. **Balloting:** Section chiefs will then be given one minute to silently complete a ballot provided to them by the presiding officers.  
  
Section chiefs may vote for up to half of the nominated candidates, rounding up to the next whole number. *For example, if there are thirteen candidates, section chiefs may vote for up to seven candidates. If there are sixteen candidates, section*



*chiefs may vote for up to eight candidates, and so forth.*

The presiding officers will collect the ballots as they are completed. Section chiefs will remain seated and silent until all ballots have been collected.

11. **Compilation of Ballots:** Once all ballots have been collected, the presiding officers and the ballot certifier(s) will privately convene in the front of the room. The remaining section chiefs are free to move about until the compilation is completed, but may not approach the table where ballots are being counted.

The presiding officers and the ballot certifier(s) will privately and collectively count the votes. The number of votes received by each candidate will be recorded.

If, in the view of the presiding officers and the ballot certifier(s), any ballot contains more votes than the number allowed or any portion is deemed indiscernible, the entire ballot will be considered an abstention.

The section chiefs will be called to order and seated; the complete results of round one will then be displayed. The presiding officers will then display the names of the candidates (in the previously selected random order) who have qualified to advance to the next round.

The number of section chiefs advancing to the next round will be equal to the number of candidates for which a section chief could vote. (For example, if section chiefs could vote for eight candidates, the eight candidates receiving the most number of votes will advance.)

In the case of a two-way tie for the final advancement slot, both candidates tying for the final slot will advance.

In any cases where more than two candidates tie for the final slot, none of the said tied candidates will advance. This rule is excepted when removal of all tied candidates would leave only one candidate

remaining. In this case, the leading candidate and all candidates tied for the final advancement slot will advance and final voting procedures will begin.

Final voting procedures will take effect when the list of candidates has been narrowed to two individuals, or in the case of the above-mentioned exception, four or more people.

12. **Round Two and Three:** For the second and third rounds the presiding officers will recognize each nominee, in the randomly assigned order, for two minutes in each round to make comments to the electorate. All section chiefs, except the commenting nominee, will remain seated during this process.
13. **Balloting and Compilation of Ballots:** Proceed as previously described between each round.
14. **All Subsequent Rounds Prior to Final Voting Procedures:** After rounds two and three, no comments will be given between balloting rounds. Balloting rounds will continue until final voting procedures begin.

#### Final Voting Procedures:

15. **Removal of Final Candidates:** The remaining candidates will be asked to leave the room. A presiding officer will escort them to a waiting room just outside of the election room. The final candidates will not communicate with anyone, except each other, while outside of the election room.
16. **Question Selection:** Each section chief remaining in the room and each presiding officer will be issued a piece of paper on which they may choose to write down their name and one question. The presiding officers will then collect the slips and publicize the questions to the section chiefs. The presiding officers will guide the group in selecting three of the proposed questions.
17. **Questions:** In the randomly assigned order, a presiding officer will invite the remaining candidates back into the room one at a time. The submitting section chief will then

ask their approved question. The candidate will have unlimited time to answer each question. After answering the questions, the candidate will leave the room and the other candidate(s) will be brought into the room to answer the same questions.

18. **Final Balloting:** With the final candidates remaining outside of the room, the presiding officers will distribute ballots and allow one minute for the remaining section chiefs to complete the ballots. Section chiefs may vote for only one candidate.

One of the presiding officers and the ballot certifier will deliver a blank ballot to each of the removed final candidates. They will be given one minute to vote for one candidate. The presiding officer and the ballot certifier will then deliver the completed ballots back to the election room.

19. **Final Ballot Compilation:** The presiding officers will collect the ballots and publicly announce each vote. The section chiefs will remain seated during this process. If a candidate receives a majority of votes (more than half of the ballots submitted [minus abstentions]), the election will be declared final.

When there are more than two final candidates and when no majority is achieved, the candidate (or candidates tied) with the fewest number of votes will not advance and will be invited back into the room. Final balloting will then immediately proceed with the remaining candidates. If more than one candidate is tied for the fewest number of votes, **and** if dropping the tied candidates would result in only one remaining candidate, no one will be dropped.

If neither of the final two candidates receives a majority after final balloting, a second ballot will immediately be taken. If after this ballot no candidate has yet received a majority, the voting will be declared deadlocked and one final vote will be taken. If after this third and final vote no candidate has yet received a majority, the presiding officer will cast the necessary votes to give a candidate a majority. (In

resolving this deadlock, the third and final tabulation will be conducted in secret at the front of the room with the presiding officers and the ballot certifier so that only the presiding officers and the ballot certifier will know this was done.)

20. **Election of the Vice Chief:** After the election of the national chief, the presiding officers will allow for a short break. The procedure for election of the national vice chief will then begin. It will follow the same procedure as the election of the national chief, beginning with the explanation of job responsibilities (3) but omitting review time (6).

21. **Elections of the Region Chiefs:** The elections of the region chiefs will occur at the time and places specified in the schedule for the national planning meeting. The procedure for the elections of the region chiefs will follow the same procedure as the election of the national chief, beginning with the explanation of job responsibilities (3) but omitting review time (6).

22. **Recording and Reporting Election Results:** At the completion of each round the ballots will be sealed in a separate envelope and the envelope will be marked with the election and round number (e.g., NC 1). The presiding officers and the ballot certifier(s) will sign across the seal of each envelope. The ballot envelopes will then be kept in the possession of the national chief until the installation of the incoming national chief and national vice chief, at which time the ballots will be destroyed. The national chair or the director may request to inspect or review the ballots at any time prior to the installation of the new officers.

# Appendix 7: Program of Emphasis Committee Vice Chief Election Procedure

## Assignment to Committees

One of the two primary purposes for gathering the section chiefs at the national planning meeting is to plan the forthcoming national program of emphasis. Shortly after their election, the newly elected national chief and national vice chief will assign each eligible section chief to a committee for the upcoming national program of emphasis. Each national program of emphasis committee shall elect a committee vice chief to lead the committee's operations for the duration of the year. Committee vice chiefs shall be elected within the first 48 hours of the first convening meeting of the program committee, which is typically during the national planning meeting.

## Approved Attendees

Only the section chiefs assigned to the committee, the committee's lead adviser, the national chair, the national director, and designees as appointed by the national chair or the national director may be present during the election proceedings. In addition, the national chief and national vice chief may be present if there is a second tie (*q.v.*, election procedure 8 below).

## Eligibility

Any section chief who attends the national planning meeting and is not elected as a national officer is eligible to run for committee vice chief. No written petition or approval is required in advance.

## Behavior

All section chiefs are expected to maintain a Scout-like behavior throughout the entirety of the election process. Should a section chief act in a way that is inappropriate as deemed by the national chief and national vice chief, the national director and national chair will be contacted and a determination will be immedi-

ately made regarding the section chief's actions and whether they will be asked to leave the room immediately and not return, forfeiting their opportunity to vote and run for committee vice chief. The national director and national chair have final say as to what is deemed as inappropriate behavior.

## Election Procedures

1. All section chiefs wishing to run for committee vice chief will raise their hand. Nominations and seconds will not be required. At any point in the process of electing a committee vice chief these declarations may be rescinded without penalty.
2. If only one eligible youth section chief declares their intent to be the committee vice chief, they will become the committee vice chief. If more than one eligible youth section chief declares their intent to be the committee vice chief, then steps 3–7 will commence.
3. Each candidate will be given up to three minutes to directly address the committee before a vote is taken. They shall speak in the order in which they declared their candidacy.
4. The candidates *will depart the election room* to provide the remaining section chiefs with an opportunity to discuss their views on the comments. At any point in the discussion, a candidate may be asked back into the room to answer questions pertaining to their election as committee vice chief at the request of the non-candidate section chiefs. At any point in the discussion, the non-candidate section chiefs may ask all candidates to return to the election room.
5. Once discussion has concluded and all section chiefs are ready to begin voting, balloting will commence.

6. Voting shall be conducted by raising hands but, at the request of any section chief, shall be conducted by secret ballot. A committee vice chief will be elected upon receiving a majority of votes. A majority is attaining more than 50% of the number of section chiefs on the committee. If voting is to be done by secret ballot, the committee's lead adviser (or their adult [21+] designee) will collect the ballots and announce if any candidate received a majority of votes.
7. If no majority is reached, the candidate who received the lowest number of votes shall not advance. In the event of a tie for the lowest number of votes received, both candidates shall be dropped from consideration. If removing the candidate(s) with the least amount of votes would leave only one candidate, then no candidate(s) shall be removed. Proceed as previously described in steps 3–7 once more.
8. If no majority is reached after the second round of balloting, then the national chief will cast the necessary votes to give one candidate a majority. The national chief may delegate this responsibility to the national vice chief. In determining how to declare a majority for one candidate, the national chief or national vice chief may ask questions of the candidates to inform their decision.
9. Once a conference vice chief is selected, the national chief, national vice chief, national events chair, and lead adviser should be immediately notified.

# Notes



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