



# Handbook for Staff Advisers

This handbook provides information on the Order of the Arrow for professional Scouters, especially those who have recently taken on a role related to the OA.



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.

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"The Order of the Arrow had a profound impact on my Scouting experience. When I became a teenager, as with many other young people, the countless distractions away from Scouting put me at risk of leaving the Scouting program. The Order of the Arrow gave me a new sense of purpose and reinvigorated my entire Scouting experience. Having an opportunity to serve in leadership capacities provided a foundation for many of the things that I was called to do as an adult Scouter. Like many of you, I credit the Order of the Arrow with not just enhancing my personal Scouting experience, but also with keeping me as an active member of my local troop throughout those years. The Order of the Arrow became my introduction to summer camp staff, which ultimately lead to an incredibly satisfying career in professional Scouting.



I want to thank each of you for the commitment you have made in providing the opportunity to the next generation of leadership that our Nation will call on in times of need. For many of you, this is an extra calling beyond that which you are giving at the local level, and for that, we are all truly appreciative.

Thank you for your inspirational leadership as together we forge a bright future for the Order of the Arrow and [Scouting] America.

— Michael B. Surbaugh, Chief Scout Executive, 2015-2019



## Preface: Introduction

This *Handbook for Staff Advisers* (formerly the *Guide for Staff Advisers*) provides information on the Order of the Arrow (OA) for professional Scouters, especially those who have recently taken on a role related to the OA. It also includes information for professional Scouters who appoint professional or volunteer Scouters to OA-related positions. The handbook is available at the OA's official website, [www.oa-scouting.org](http://www.oa-scouting.org).

[Chapter 1](#) provides introductory information on the Order of the Arrow and its mission, and how it fits into operations in local councils.

[Chapter 2](#) covers roles within a local Scouting America council, specifically the Scout Executive, lodge staff adviser and chapter staff adviser.

[Chapter 3](#) covers the Order of the Arrow at the section and region levels, especially the role of OA sections, and describes the OA-related duties of the section staff adviser.

[Chapter 4](#) covers the selection of volunteer and professional advisers at the chapter, lodge and section level.

[Chapter 5](#) covers the selection of the region Order of the Arrow chair.

This handbook includes excerpts from other OA documents, including the [Order of the Arrow Handbook \(OAHB\)](#), the [Handbook for Officers and Advisers \(HOA\)](#), the [Lodge Finance Handbook \(LFH\)](#), and the [Field Operations Handbook \(FOH\)](#). Throughout this handbook, text taken from these documents is shown in a condensed font.

"The *Handbook for Staff Advisers* is an excellent tool and resource; I hope you will refer to it regularly. Having served as a Scout executive in four councils, I have come to appreciate the value of having a strong working relationship between the council's camping operation and the Order of the Arrow lodge. I have seen first-hand the benefits of having the lodge chief and the lodge adviser be active members of the council executive board, in cementing that working relationship.



Further, as a past national chief of the Order of the Arrow (1979–1980) and now a seasoned Scout executive, I can think of no more powerful youth leadership development environment than that which is available through Order of the Arrow involvement."

— Jeffrie A. Herrmann, Scout Executive (retired), Orange County Council



## Chapter 1: The Role of the Order of the Arrow in Scouting

### Introduction – For a New OA Staff Adviser

The purpose of this document is to help a new OA staff adviser be successful in their role, whether their role is at the chapter or lodge level, within a local council or outside of a council. Being an OA staff adviser provides rewarding opportunities to work directly with talented youth members and adult Scouters and can broaden a professional's skills and knowledge of an important Scouting America program.

### Essential Resource Publications

There are several publications that all OA staff advisers should become familiar with:

- [Order of the Arrow Handbook](#)
- [Handbook for Officers and Advisers](#)
- [Lodge Finance Handbook](#)
- [Field Operations Handbook](#)<sup>1</sup>

The *OA Handbook* can be obtained from a Scout shop, and the other resources can be downloaded from [oa-scouting.org/resources/publications](http://oa-scouting.org/resources/publications). Many other helpful resources can also be found on the [national Order of the Arrow website](#).

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1. Text quoted from these documents is shown in a condensed font within this document.

### The Vision of the Order of the Arrow

To be why Scouts want to stay in Scouting.

### The Mission of the Order of the Arrow

To achieve the mission of Scouting America through transformative fellowship that ignites limitless Scouting journeys.

### The Purpose of the Order of the Arrow

As Scouting's National Honor Society, we forge lifelong bonds among the leaders in Scouting and:

- Recognize those who exemplify the Scout Oath and Law in their daily lives, and through that recognition, cause others to act in the same way.
- Reinforce a life purpose of leadership in cheerful service to others.
- Create and deliver peer-led, adult-guided, advanced leadership experiences for Scouts and Scouters that positively impact their unit, community, and ultimately our nation.
- Be an integral part of Scouting America and encourage participation in all it offers through units, outdoor adventures, and national events to further the Scouting experience.

## Councils Benefit by Having an Active Order of the Arrow Lodge

From its humble beginning, the Order of the Arrow was designed as a resource to Scouting. It is often credited with maintaining the interest of older youth in Scouting and retaining them as they reach adulthood, providing a pool of leaders to Scouting in the council. Arrowmen can best serve the movement through their personal example by upholding the spirit and traditions of the Order and Scouting. [*HOA*, p. 3]

The longer youth members stay active in their troop, crew or ship, the more they will receive the character development, citizenship training and personal fitness benefits of Scouting. Of course, the main thing that helps retain a youth member is a strong program in their unit. In many cases, youth members also get involved in activities outside their units, and this often helps increase retention as well. The Order of the Arrow is one of these activities; others include serving on summer camp staff, participating in a national high adventure program, and attending or staffing National Youth Leadership Training (NYLT). In many local councils, the great majority of camp staff members are Order of the Arrow members.

An Order of the Arrow lodge helps the council fulfill its mission by doing the following:

- Conducting elections for new members and publicly recognizing those elected
- Inducting members through an "Ordeal", a key element of which is providing service to the camp
- Promoting camping through visits to units
- Sponsoring youth leadership training programs such as NYLT and a Lodge Leader Development Conference, and promoting attendance at OA training outside the lodge, including section conclaves, National Leadership Seminars, and National OA Conferences
- Conducting service and camp improvement projects, either on weekends or during summer camp

In lodges that have chapters, some of these activities may be performed at the chapter level, as determined by the lodge executive committee (LEC), consisting of the youth serving as lodge officers (including the immediate past lodge chief), lodge operating committee chairs and their advisers, the staff adviser, the lodge adviser, and the Scout executive.

The OA offers many opportunities to develop the leadership capabilities of its youth members. Leadership can be developed through elected positions such as chapter or lodge chief, appointed positions such as committee chair, event-related positions such as fellowship weekend chair, or simply through chapter and lodge activities, service projects, and election teams. Supporting the leadership development of its youth members is a key purpose of the OA's program.

## The Order of the Arrow Staff Adviser – A Unique Opportunity

One of the unique aspects of the Order of the Arrow staff adviser's role is that this position is one of the few opportunities (including Scout camp staff, and training assignments such as NYLT or den chief conferences) for a professional to have direct contact with our youth members. Whereas volunteers usually start out in Scouting working directly with youth and making a noticeable difference in their lives, most professionals spend a significant portion of their time with adults and do not often interact with youth members. The chance to personally contribute to and enhance the growth of our youth members through their Order of the Arrow leadership role is a major benefit of being a staff adviser, always understanding and appreciating that the lodge or chapter officer's immediate adviser is an OA adult volunteer who has been assigned to them.

A professional's contact with youth members and adult volunteers through an Order of the Arrow staff assignment can be an excellent way to identify future professional Scouters. Some Order of the Arrow members may want to discuss career choices or options. Sharing the benefits of being a professional may open up this opportunity to them. This can also be a



topic for a "staff adviser's minute" at the end of a chapter or lodge event.

"As a lodge chief and section chief, I had a great relationship with the Scout executive and professional staff adviser. They gave me many leadership opportunities. So, when I became a Scout executive, I understood the value of a great partnership; and because of that understanding, the lodge has supported our council's strategic plan.



I have had the pleasure of working with many outstanding young Arrowmen, including recent officers Bill San Filippo and Frank Caccavale who are pictured with me. I am proud today to say that several of their predecessors have joined our profession."

— Dennis J. Kohl, Scout Executive (retired), Patriots' Path Council



## Chapter 2: The Order of the Arrow in the Local Council

Within the council, the Scout executive is the final authority over the Order of the Arrow and, for this reason, holds the title of Supreme Chief of the Fire. It is the Scout executive's job to see that the lodge adheres to national policy.

Each year the Scout executive appoints an adult volunteer to serve as the lodge adviser. As Deputy Supreme Chief of the Fire, the lodge adviser acts on behalf of the Scout executive in guiding the day-to-day affairs of the lodge. This person normally serves as a member of the council's camping or program committee and is frequently selected to serve on the council executive board.

In some councils, the Scout executive serves as the lodge staff adviser, but in most cases appoints a member of the professional staff to that position. The staff adviser, as Chief of the Fire, acts on behalf of the Scout executive in giving guidance to the lodge adviser and the lodge leadership. With support and counsel from the Scout executive, it is the staff adviser's role to see that the lodge adheres to national policy. ...

Many lodges are broken down into smaller organizational groups called chapters. Chapter advisers and chapter staff advisers are appointed annually by the Scout executive, and act on behalf of the lodge adviser in guiding the day-to-day affairs of the chapter.

All lodge and chapter advisers should be Scouters with experience and tenure in the Order of the Arrow. They need to work closely with district and council volunteers and professional Scouters. It is the adviser's responsibility to see that the OA is working in close support of, and in harmony with, the council's strategic plan. *It must at all times be remembered that the Order is an extension of Scouting, an integral part*

*of it, rather than a separate program.* The lodge adviser and lodge chief normally serve as members of the council camping or program committee, while the chapter adviser and chapter chief normally serve on the district camping or program committee.

Optionally, with prior approval from the Scout executive, the lodge or chapter adviser may appoint an associate lodge adviser or associate chapter adviser annually to help fulfill the mission of the lodge. One associate at the chapter level should be enough; at the lodge level more than one position may be appropriate, depending on the size of the lodge and the duties assigned. If too many associates are appointed, they could interfere and cause confusion for the youth who are trying to lead. Service in any of these positions should not be considered an automatic pathway to the chapter or lodge adviser role. [HOA, pp. 4-5]

### Lodge Charter Renewal

The lodge Key 3 (lodge chief, adviser and staff adviser) has an important role to play in the annual lodge charter renewal process. All lodges operate under a charter granted by the National Council and must apply annually for renewal. A charter renewal kit is provided to the council Scout executive annually, usually in October.

Before November 30, the lodge Key 3 should meet with the lodge officers to prepare the information needed to complete the annual charter renewal. The lodge charter renewal application must be completed through the OA LodgeMaster membership management system. The instructions for completing and returning the application and Performance

Measurement Program (PMP) petition are included in the charter renewal kit and online. Completion of the PMP petition is a mandatory step in the lodge charter renewal process. It is also important in the charter renewal process that the lodge Key 3 meet with the Scout executive to establish plans and actions for the coming year.

One of the lodge staff adviser's responsibilities is to ensure the charter renewal and PMP petition are completed in OA LodgeMaster and one copy of the charter renewal form is signed by the Scout executive and emailed as instructed on the renewal form by December 31, before the current charter expires. The council will be billed for the charter fees. Orders for OA supplies, literature, and Founder's and Vigil Honor awards will not be processed for a lodge whose charter has expired.

## Lodge Performance Measurement Program

The Lodge Performance Measurement Program (PMP) program evaluates lodge performance and opportunities for continuous improvement in the Order of the Arrow. It provides a guide for good lodge administration and recognizes "thriving" and "high performing" levels of performance in program and operation. A similar, complementary program has been developed for sections.

To be considered for one of the two levels of recognition, the lodge must have filed its charter renewal on time by December 31, with appropriate signatures, and achieved the necessary point score on the Lodge Performance Measurement Program petition.

The Performance Measurement Program objectives provide for an overall plan and guide that will ensure a successful lodge program.

## Guiding The Lodge to Performance Measurement Program Recognition

The lodge PMP program helps keep a lodge active and strong. It should be the lodge's goal to attain PMP recognition each year.

## Council and Lodge Mergers

The Order of the Arrow lodge must be an integral part of the council and its operations. Because of this, it is imperative that there be only one OA lodge per council.

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. [FOH, p. 44]

More information on council mergers and how they impact OA lodges is in Appendix 3 (Council Mergers) of the [Field Operations Handbook](#) and in the [Lodge Merger Handbook for Councils](#).

## The Role of Order of the Arrow Chapters

Order of the Arrow lodges vary in size from about 50 to several thousand members. In many lodges a chapter plan is necessary if the objectives of the OA are to be realized. In other lodges where there are few members, chapters would be of little value. For these reasons, the National Order of the Arrow Committee has purposely left the decision as to the need for chapters in the hands of the Scout executive in consultation with lodge leaders.

Before organizing chapters within a lodge, the council staff, lodge officers, and advisers should thoroughly study these factors:

- The active membership of the lodge
- The geography of the council

- Whether a chapter should include one or several districts (a district should never have more than one chapter in its geographical area)
- Whether sufficient potential members and leaders are available to support a chapter operation
- Whether the advantages of the chapter plan will offset the additional lodge administration that will be required
- Whether the best interests of Scouting and the OA will be served through a chapter plan
- Whether sufficient potential members exist to form effective ceremony teams

After a careful study of these factors, the Scout executive decides whether chapters are needed. If they are, the Scout executive annually appoints a chapter adviser and staff adviser for each chapter. The chapter adviser functions at chapter meetings and activities in the same way that the lodge adviser does with the entire lodge. The chapter adviser works in conjunction with the chapter chief, chapter staff adviser, lodge adviser, lodge chief, district camping chair, and lodge staff adviser. The chapter adviser should also become a member of the district camping or program committee. *[HOA, p. 15-16]*

While the Scout executive can decide at any time to change the number or boundaries of chapters, to institute the use of chapters, or to eliminate the use of chapters altogether, typically such decisions are made in response to events within the council, such as a realignment of districts or a merger with another council.

## Guiding the Leadership of the Lodge

The lodge staff adviser, as the eyes and ears of the Scout executive in the lodge, should always be alert to the direction the lodge is taking and that the lodge remains true to its mission and supportive of the council's strategic plan. The lodge Key 3 (lodge chief, adviser and staff adviser) is a collaborative body and each member of the Key 3 can provide important input, though it's important to always keep in mind that the role of any adult in the OA is to support the development of the youth members. Infor-

mal meetings of the Key 3 at OA functions should allow for free exchange of ideas, along with review of short-term needs, and progress towards achievement of goals. The lodge staff adviser must be familiar with national OA policy in order to help address issues that may arise.

The Scout executive will likely ask the staff adviser's opinion on who should be developed and/or appointed as the next lodge adviser; they will probably also seek suggestions from the council leadership, the camping committee chair, and the prior lodge leadership. Like all volunteer positions, the appointment of the adviser should be in writing and for a one-year term. While an adviser may be reappointed to serve for more than one year, it should be understood from the start that it is an annual appointment.

The staff adviser should get to know the volunteers who are involved in the OA. What else do they do for Scouting? If they are "retired" Scoutmasters who only attend OA events and nothing else, remind them of their servant leadership role and get them involved as commissioners, district committee members or in some other way. Look for new roles for past advisers, so they can stay active. For example, they may be good candidates for the council camping committee, merit badge counselors, or commissioner service.

Study the list of qualifications that will most likely produce a successful lodge adviser. Make a list of five or six candidates who best fit the criteria and narrow the list down to three finalists. These would be the prospects for the Scout executive's consideration. (Also see [Chapter 4, "Selecting Order of the Arrow Advisers" on page 19.](#)) If the lodge has chapters, ask the district executives for their input on potential chapter advisers. Like the lodge adviser, chapter advisers are appointed by the Scout executive, with the appointments being in writing and for one-year terms.

Youth taking on leadership roles can be observed at all Order of the Arrow events. Leadership training is another vital role of the lodge. As outstanding youth are recognized, the staff adviser should encourage them to run



for chapter, lodge or section office and to serve on council summer camp or Cub Scout day camp staff. In OA elections, whomever is elected is the right choice because the youth members made the decision. However, a quiet word from the staff adviser may encourage a strong candidate to run for election. Of course, developing the leadership skills of our youth is a core objective of Scouting; the improvement in leadership skills of an OA officer in the course of a year can be dramatic and is a major responsibility of the lodge adviser.

## Lodge Finances

### Finance Policy

#### The Local Council Accounting System

All Order of the Arrow Funds will be accounted for in the local Scouting America council "2371 Custodian Account – Order of the Arrow". The following quotation is reprinted from pages 8-31 and 8-32 of the *Scouting America Local Council Accounting Manual*, chapter 8, volume 4:

#### "2371 Custodian Account – Order of the Arrow"

This account records funds held on behalf of the Order of the Arrow. It is an established Scouting America policy that the local council acts as a banker for its Order of the Arrow lodge. It is against Scouting America policy for any Order of the Arrow lodge to have its own bank account. The local council should not maintain the books of the Order of the Arrow lodge.

Credits to this account will represent receipts from the cash receipts journal representing payment of Order of the Arrow dues, fees for Ordeals, etc. Debits to the account will represent disbursements from the accounts payable journal for invoices approved by the Order of the Arrow lodge for payment.

Supplies purchased by the Order of the Arrow are the property of the lodge and should not be included by the council in Account 1401, Inventory – Supplies for Sale – Council Service Center.

Any other accounting for various chapters, activities, etc. of the Order of the Arrow, if in use, are to be maintained by the Order of the Arrow lodge itself." [LFH, p. 3]

There is an important difference between the records (also called books or accounts) the council maintains and what the lodge should maintain. Quoting from above, the custodian account maintained by the council "records funds held on behalf of the Order of the Arrow." The council's books show income and expenses recorded on the council's ledgers, but with minimal detail, often just a brief description with a date and amount. By contrast, the "council should not maintain the books of the Order of the Arrow lodge" as this is the responsibility of the lodge. The lodge's records/books should have much more detail than the council's books. The OA's [Lodge Finance Handbook](#) contains more information about these records and how to maintain them. Though they are maintained separately, the council's and lodge's records should total accurately and the totals should be identical.

The first item of financial business for a lodge staff adviser is to get to know the status of the lodge's finances. Lodge treasurer reports can vary greatly in quality and detail. Talk to the council comptroller or accounting specialist and ask them to provide a printout of the current and past three years' OA income and expenses. As mentioned above, the printouts won't have much detail. The lodge will need to keep more detailed records to be able to make detailed budgets, and the lodge staff adviser often provides key guidance in this area. While important information will come from the council staff, developing youth members is a key goal as it is for any other OA function. For lodge finances, the key youth member to be developed is the lodge treasurer.

All Order of the Arrow funds must be held in a council custodian account. The typical account number is 1-2371-PCN-00, where PCN is a project code number assigned by the comptroller. There should never be a separate lodge-held or chapter-held bank account outside the council as all OA funds must be administered by the council and handled through standard council accounting procedures.

In some local councils, activity accounts are used for OA events. This is contrary to national policy, as stated in the quote from the *Lodge*

*Finance Handbook* at the beginning of this section. Lodges are required to maintain their own records and keep all funds in the 2371 custodian account maintained by the council. As a practical matter, this helps make it clear to all involved that all OA-related funds are being held by the council for the benefit of the lodge. Also, at the end of the fiscal year, any surplus in an activity account goes into the council's general funds, rather than into the lodge's custodian account. If this happens, the lodge will be rightfully upset. To prevent this, run all OA activity budgets as sub-accounts of the lodge 2371 custodian account.

In councils with chapters, it is important that the lodge executive committee (LEC) approve all proposed sources of income, and also determine which chapter expenses will be covered by the lodge budget. All chapter finances must be handled through the council's financial system and deposited into the council's OA custodian account. It is important that the LEC establish procedures for how the chapter accounts are to be included in the lodge financial records and reports.

## The Lodge Annual Budget

The first step to developing the lodge's annual budget is to develop budgets for each scheduled event, such as Ordeals, fellowships, and training events. OA event budgets should be planned like a camporee, district banquet, or day camp budget. It's important to have the lodge treasurer and lodge financial adviser involved in the planning of the OA budget. The lodge staff adviser can help by getting historical records of average attendance, trading post sales, and food costs to help in the preparation of preliminary event budgets; and whether to include the national activity surcharge, accident insurance, and the contingency percentage used by the council for activity budgets. As with all Scouting America events, a primary goal of event budgets is to cover all anticipated expenses, with enough of a contingency cushion that it is highly unlikely that there will be a financial loss (deficit) on the event. Look at the total expenses at the bottom of the budget form. Divide that number by the average attendance for the event to yield a tentative event

cost per person. Don't forget to include expenses for any invited guests who won't be asked to pay the activity fee.

Next, sit down with the lodge chief, treasurer, adviser, and financial adviser to review any extraordinary income or expense items to include in the annual budget. Be sure to suggest a contribution to the council's FOS campaign or some other council financial need such as a camp or council headquarters capital expenditure. Many lodges also include an annual contribution to the council endowment fund by funding a James E. West Fellowship in recognition for one of its key youth or adult leaders. As the group builds the budget, start with the known expenses that will be incurred. Include the cost of copies made in the office, postage and so on, as expenses such as these should be borne by the lodge, not by the council. Other expenses to include are the annual national OA charter fee, ceremonial outfit repair and maintenance, and awards and recognitions. Once all the expenses are listed, begin work on the income. The main source is the annual lodge dues; however, other sources of income could include lodge trading post sales, event fees and donations, and money earning projects (if approved by the Scout executive). Don't forget to include the cost of sales right below the lodge trading post sales. Chapter event income and expenses and chapter expenses subsidized by the lodge must be included in the lodge budget.

An excellent resource for lodges to use in developing their annual budget is the [Lodge Finance Handbook](#), which is available at [oa-scouting.org/resources/publications](http://oa-scouting.org/resources/publications). The manual provides information on the roles of lodge members related to finance, financial record-keeping, inventory control, financial reports, and money-earning projects. Using this manual will help the OA lodge develop proper financial procedures that will strengthen its position as a responsible part of the council program.

## Creative Funding Ideas

What can be done to increase OA trading post sales? Almost every OA event should have an

event patch. Patch sales can be extremely profitable to the lodge, but don't order too many patches. Order just enough for the expected attendance plus a few to sell in the trading post. The lodge can produce additional lodge patches and memorabilia from time to time, as appropriate. Selling these new and distinctive lodge items is often a good opportunity to raise funds as well as encouraging participation and camaraderie. Try to allow all active lodge members an opportunity to buy these items. With the lodge and staff advisers' assistance, help the lodge chief develop ideas and options and support them as they lead the LEC in deciding what lodge memorabilia will be produced. Make sure all patches meet the requirements in the [Handbook for Officers and Advisers](#) and the "Guidelines for Custom Patches and Emblems" chapter in the *Scouting America Guide to Awards and Insignia* (Supply #33066).

Some lodges sell an annual pass to all their events. This pass is nothing more than a fancy patch or wallet card that is ordered in the fall for early distribution the following calendar year. Order only the number needed to meet the demand so there are no leftovers. Figure the cost of all the events for the year and make that the cost of the annual pass. For example, say there is a spring and fall fellowship at \$25 each and two Ordeals at \$15 each. The annual events pass then would cost \$80 if paid separately. The lodge charges \$80 (plus the cost of the patch and perhaps next year's dues). The member can attend events without paying at the door and the lodge has the money up front and since not all annual pass holders will attend every event, this can help lower event-related expenses.

## Lodge Leadership Development

Training is important to help the lodge be successful. In all lodges, the annual training priority is to train the lodge leadership. The Lodge Leadership Development Conference (LLDC) is held annually right after lodge elections. LLDC is a locally produced training event for all leadership positions in the lodge. (LLDC materials are available at [lld.oa-scouting.org](http://lld.oa-scouting.org).) Make sure

that the LLDC is conducted in a quality manner with a good attendance of current lodge and chapter officers, LEC members, and advisers.

All current lodge and chapter chiefs and those aspiring to lodge and chapter leadership positions should attend a National Leadership Seminar (NLS). Each region hosts several of these each year. The lodge adviser and staff adviser are also encouraged to attend. The seminars are led by the region chief and are staffed by section youth leadership and national OA officers. They are considered the very best leadership training in Scouting America.

The Developing Youth Leadership Conference (DYLC) was created to deepen an adviser's capacity to develop youth leadership within the lodge and chapter. Conference topics include fostering a growth mindset, promoting resilience, providing constructive feedback that leads to changes in youth behavior, and creating a life-long coaching/mentoring relationship. Conference participants gain insights necessary to successfully coach youth applying the leadership skills they gained during the NLS. Prior participation in the NLS is encouraged, but not required.

The NLS and DYLC schedules are available on the region OA websites:

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

If the other region offers an NLS or DYLC that fits the lodge's calendar and the travel distances are reasonable, additional attendance from the other region is welcome within space limitations. DYLC is usually offered at the same time as NLS to make it easier for youth members to get transportation to NLS while adults from the lodge attend DYLC.

Finally, youth and adults should attend the National Order of the Arrow Conference (NOAC), which is held every second or third summer. The lodge Key 3 should make NOAC a priority and the lodge should send a delegation of youth Arrowmen and selected adult Arrowmen (over 21) to learn new skills, meet new friends and enjoy OA fellowship with

brothers from around the nation. (NOAC is primarily intended for youth members; often, more adult Arrowmen want to attend than are needed to support the event. For this reason, the lodge adviser and staff adviser may have to limit the number of adults who can participate as part of the lodge contingent.) Go to [oa-scouting.org/program/events](https://oa-scouting.org/program/events) to learn more about the national OA conference.

## The Lodge Program

What does the lodge do for the council? Most lodges have at least one Ordeal weekend where they induct new members and do some meaningful service at camp. But what else does it do for the council?

Every lodge has camping promotion as an objective in their Performance Measurement Program requirements, but do they promote just to get by or do they really take pride in contacting every troop, crew and ship? The staff adviser should ensure it is the latter. Help the adviser and chief come up with innovative ways to ensure camping promotion teams are successful. What about Cub Scouts? Does the lodge promote and support Cub Scout outdoor programs? Do they help with blue and gold banquets, Arrow of Light ceremonies or cross-over ceremonies? If not, they should. Cub Scouts are future Scouts BSA and OA members. The OA lodge or chapter should also be available to assist with promotion at district roundtables, council program kick-offs, camp promotion rallies, and other appropriate venues.

Most lodges take pride in and provide strong support for their council camps. The staff adviser needs to help the lodge leadership develop plans that are in sync with the council's plans. After consulting with the council camping committee and the director of camping or lead camping staff member, help the chief and adviser come up with several good camp service projects for the lodge to accomplish each year which best fit with the long-range plans of the council. Then the lodge chief should present the projects to the LEC for approval.

It's important to coordinate lodge and chapter calendars with council and district calendars. In some local councils, there are scheduling patterns (e.g., first weekend set aside for units, second for districts, third for council events, etc.) that make it fairly easy to avoid conflicts. If a scheduling pattern is not in place, it may be appropriate for the staff adviser to recommend its consideration. In any case, as lodges and chapters are planning their OA calendars, it's important to remember that an Arrowman's primary obligation is to their unit.

OA lodges have active members between the ages of 18 and 21 who are only registered as assistant unit leaders. They could be a source of youth for outdoor-oriented Venturing programs.

## Enjoy Success as an OA Staff Adviser

Although the same amount of professional time is being spent at camp, the Scout executive is now smiling because the OA lodge is adding significantly to the FOS campaign and youth membership retention, the council camping committee chair is smiling because the lodge is helping the council fill up camp and providing staff and new programs, the council commissioner is smiling because additional commissioners are being recruited, and each OA staff adviser is smiling because they can directly see the impact they are making in the development of America's youth.

Keep up the good work. Continue making the lodge an integral and indispensable part of the council operation.







## Chapter 3: The Order of the Arrow at the Section, Region and National Levels (Organization, Activities, and Training in Support of Local Council Lodges)

For years, the Order of the Arrow has served and supported Scouting at the section, region and national levels.

The *Field Operations Handbook* is designed as a guide to administration and program pertaining to section, region, and national operations of the OA. It includes current information about the organizational structure and program, as well as the section rules.

Secondly, the *Field Operations Handbook* is dedicated to providing the necessary background, knowledge, and information about how to organize and run a successful section conclave. [HOA, p. 38]

### The OA in the Section

The section OA organization is led by a section chief who is supported by a section vice chief, secretary, adviser, staff adviser, and (optionally) one or more associate advisers. The two main functions of the section are to conduct an annual conclave and to support the lodges in the section. The three youth section officers are elected at the annual conclave and their terms of office expire at the next conclave. As should be the case for all lodges and chapters, the section Key 3 should communicate periodically in person, electronically or by phone to discuss short-term needs and progress toward accomplishment of the section goals it set for itself at the beginning of the year.

The section conclave is designed to provide training, fellowship, fun and activities for all of the lodges in the section. The conclave pro-

gram is developed by the section's council of chiefs (COC), which meets several times during the year. The COC consists of the section officers and the section's lodge chiefs and is supported and advised by the section and lodge advisers and their staff advisers. In addition to training courses, many conclaves have forums and contests/competitions that include ceremonies, newsletters, camping promotion, elections, and sports or games. The election of the section officers for a one-year term is another feature of the conclave. Normally, each lodge assumes part of the responsibilities for the conclave, and the conclave service council is usually rotated from year to year. Most conclaves are held at a service council's camp, but some are held on military bases, college campuses, or other settings chosen by the council of chiefs, as recommended by the service council.

**The major function of the section is to help lodges succeed.** In addition to formal and informal assistance at the council of chiefs meetings, the annual section conclave becomes another opportunity and forum to provide help and resources to meet many of the needs of their lodges. Throughout the year the section also provides guidance and counseling as required or requested. In support of the Lodge Performance Measurement Program program, sections can be a valuable resource for their lodges. The section assumes many of the qualities of a commissioner service directed towards the lodges in the section.

Sections have conducted or provided instructors for Lodge Leadership Development Conferences in order to help train new lodge and chapter officers and advisers, using experienced Arrowmen from the section to supplement and complement the lodge LLD training team.

Another prime responsibility of the section is providing effective communication. The section is responsible for keeping its lodges informed of section, region and national events, and to promote attendance and participation. In some cases, when called upon, the section will assist in transportation, multi-council contingent coordination and cooperation, and leadership issues to help solve problems, which may prevent a lodge from participating. Section youth and adult leadership also become resources for lodge leadership to contact for encouragement, advice, interpretation and sharing of best methods to solve problems or enhance the quality of the lodge's programs. In addition to frequent communication with the section leadership, section staff advisers have an important role in keeping lodge staff advisers informed about section matters that could impact their councils.

Because the responsibility of serving as the service council is usually spread amongst the councils, the section staff adviser can be an important resource to helping the lodge staff adviser of each year's service council understand their role in supporting the conclave, especially in the area of conclave finances.

Sections may also be called upon to assist, make presentations at, or support council service territory leadership conferences or meetings.

## The OA in the Region

The region Order of the Arrow organization is led by a region chief, supported by the region Order of the Arrow chair. The main function of the region is to train Order of the Arrow members by conducting the National Leadership Seminar (for youth and adults) and the Developing Youth Leadership Conference (for lodge and chapter advisers, professional staff advisers

and selected candidates who may take on these roles). In addition, each region conducts an annual training weekend for section officers and (optionally) section conclave leadership from designated service councils.

## The OA at the National Level

The national Order of the Arrow organization is led by a national chief and national vice chief, supported by the chair of the national OA committee and the director of the Order of the Arrow. The national chief and national vice chief are responsible for the national program of emphasis conducted annually by the Order of the Arrow, including the following:

- National Order of the Arrow Conference, held every two or three years
- Order of the Arrow support of the national jamboree, typically held every four years
- Order of the Arrow high adventure programs (up to a week of service followed by up to a week of high adventure activities at the four Scouting America high adventure bases)
- National service projects, such as *ArrowCorps*<sup>5</sup> (2008) and *SummitCorps* (2011)

Each year, the section chiefs from around the country are invited to the national Order of the Arrow planning meeting that is held in late December. From this group, the national chief, national vice chief and two region chiefs are elected for a one-year term. All youth officers of the Order of the Arrow, at whatever level (chapter, lodge, section, region or national), must be under the age of 21 for their entire term of office, and receive prior, written approval of their Scout executive to become candidates.

The Order of the Arrow was officially integrated into the Scouting America program in 1948. Since then, there has been an OA national director in the national service center. The salaries of the national director, OA associate national director and secretarial staff are funded from revenues raised by the Order of the Arrow.

## National OA Committee

The national OA committee's primary objective is to provide support to lodges and their councils. The national committee also establishes OA policy with the intent to ensure consistent operation from lodge to lodge, without dictating how everything should be done within the lodge. The Scout executive is expected to ensure compliance with these policies and does not have the authority to modify, waive or change national OA policy. If there is any question about how to interpret national OA policy, the OA national director or associate national director should be consulted.

## Section Adviser Appointments

The section adviser is the adult volunteer leader, and a professional Scouter serves as staff adviser. The section adviser is appointed annually by the national Order of the Arrow chair, with the concurrence of the region Order of the Arrow chair and the director of the Order of the Arrow. The section staff adviser is appointed annually by the national director, with the concurrence of the region chair and national chair. These adviser appointments require approval of the Scout executive of the council in which they are registered. *[HOA, p. 37]*

Position descriptions and responsibilities for the section adviser and staff adviser can be found in the appendix, "[Position Descriptions](#)" on page 25 of this handbook.

Section advisers are expected to personally fund expenses related to their role. This includes registration fees and travel expenses for section activities (conclaves, council of chiefs meetings, etc.) and travel expenses for their region's section officer seminar. Section advisers often serve on NLS or DYLC staff and are expected to cover related personal travel and incidental expenses. Every two or three years, section advisers may be invited to attend the national OA planning meeting, at their own expense.

## The Territory Director

The territory director is the professional Scouter responsible for the Scouting program and operations within an assigned council service territory (CST). There are 14 CSTs in Scouting America. The territory director works with the CST's volunteer chair, commissioner, and leads to give leadership and support to local councils as well as securing appropriate national support for specific council needs.

The territory director is not charged with any specific OA support or leadership responsibilities as a part of their job duties. The territory director can be a helpful resource to section, region, and national OA leadership when needs arise during council/lodge mergers, identification of potential OA section advisers and staff advisers, transfer of section funds between councils, and other administrative functions which may involve multiple OA lodges within or across sections.





## Chapter 4: Selecting Order of the Arrow Advisers

The Order of the Arrow is unique in Scouting because advisers at the chapter, lodge, section and region levels are appointed, rather than being selected through a nominating committee. At the chapter and lodge levels, all advisers, volunteer and professional, are appointed by the Scout executive. Section advisers and the two region chairs are appointed by the national chair. Section staff advisers are appointed by the national director. Prospects for section adviser and section staff adviser are approved by the Scout executive of the council in which that person is registered before being asked to serve in a section role. This chapter discusses criteria that should be considered in selecting these key OA positions. (Selection of the region OA chair is covered in [Chapter 5](#).)

### Guidelines for Selecting a Lodge Adviser

The lodge adviser's role is an important one and requires careful thought and consideration by the Scout executive during the selection process. Appointment of a high caliber, qualified individual to be the council's lodge adviser is critical to the success of the Order of the Arrow lodge operation, as an integral part of the council program. This is one of the few situations where an adult Scouting volunteer is personally appointed by the Scout executive and is directly responsible to them.

All lodge adviser candidates should have several years of experience as Scouting America program volunteers and have an active interest in the Order of the Arrow. Lodge adviser candidates must be persons of good credentials and integrity and supportive of the council, as they

will serve in a highly visible council-level leadership role. They should have the demonstrated ability to work with many constituencies. In many local councils, the lodge adviser is a member of the council's executive board and serves on the camping committee. Thus, lodge adviser candidates must be of board-level caliber, and the same considerations given to other prospective board members with program backgrounds should be used in selecting the lodge adviser.

The lodge adviser's primary responsibility is to work with and through elected youth leaders and to give guidance and direction to adult members of the lodge over the age of 21. This is done through individual counseling and through group training opportunities. Prior experience as a participant or staff member in National Youth Leadership Training, Wood Badge, OA National Leadership Seminar (NLS), or other leadership development training courses should also be a consideration in developing a list of lodge adviser candidates.

### Critical Steps in Selecting a Lodge Adviser

**Step One.** Review the current status of the lodge's achievements as part of the council program. Determine the needs of the council in relation to the Order of the Arrow. Write down specific objectives to be achieved by the lodge and the type of leadership needed for accomplishment. The most recent lodge charter renewal application and Performance Measurement Program petition may be helpful in getting started with this process.



**Step Two.** The Scout executive should develop a list of people who have the qualities needed to perform the responsibilities of a lodge adviser. In many cases, the Scout executive may choose to consult the council chair/president, appropriate vice chair(s)/president(s), council commissioner, staff adviser, camping committee chair, current and prior lodge advisers, camp directors and key OA adult or youth members to identify qualified lodge adviser prospects. Appraise each candidate's qualities and select the top two or three prospects.

**Step Three.** Make an appointment with the top-rated prospect. Personally visit with the individual and discuss the proposed appointment, including the specific responsibilities of the lodge adviser. Sell the top prospect on the personal satisfaction that can be achieved in developing special Scouting leadership that can have positive and significant impact on the council's program and the lives of hundreds of young people. Get the commitment!

**Step Four.** Provide personal counseling and instruction on the responsibilities to be accomplished. The best resource to use to prepare for this discussion is a professional with prior experience working with an OA lodge, such as a section staff adviser. Assistance is also available from the OA staff at the national service center. Encourage the new lodge adviser to attend an upcoming DYLC.

**Step Five.** Publicize the one-year appointment through appropriate recognition at a council event (e.g., council executive board meeting). If the new lodge adviser will be joining the board at the same time, recognition could be made during the new lodge adviser's first board meeting.

## **Guidelines for Selecting a Chapter Adviser**

Many of the same guidelines that apply to selecting a lodge adviser also apply to the selection of a chapter adviser. Chapter advisers have a very visible role and thus should be carefully selected by the Scout executive, usually with input from the lodge adviser, district

executive and chair. Chapter adviser candidates should have several years of experience as Scouting America program volunteers and have an active interest in the OA. Chapter adviser candidates must be persons of good credentials and integrity and supportive of their district(s) and the council. They should have the demonstrated ability to work with many constituencies as this is a key aspect of their role. As with the lodge adviser, prior experience as a participant or staff member in National Youth Leadership Training, Wood Badge, OA National Leadership Seminar (NLS), or other leadership development training should also be a consideration in developing a list of chapter adviser candidates.

## **Critical Steps in Selecting a Chapter Adviser**

**Step One.** Review the current status of the chapter's achievements as part of the lodge, district and council programs. Determine the needs of the district and council in relation to the OA. Write down specific objectives to be achieved by the chapter and the type of leadership needed for accomplishment. The most recent lodge charter renewal application and Performance Measurement Program petition may be helpful in getting started with this process.

**Step Two.** The Scout executive should develop a list of people who have the qualities needed to perform the responsibilities of a chapter adviser. In many cases, the Scout executive may choose to consult the district executive and chair, district commissioner, district camping committee chair, current and prior lodge and chapter advisers, camp directors and key OA adult or youth members to identify qualified chapter adviser prospects. Appraise each candidate's qualities and select the top two or three prospects.

**Step Three.** Determine who will "make the ask"; this could be the Scout executive or lodge staff adviser, and that person should personally visit with the top-rated prospect and discuss the proposed appointment, including the specific responsibilities of the chapter adviser. Sell the top prospect on the personal satisfaction

that can be achieved in developing special Scouting leadership that can have positive and significant impact on both the district(s) and council programs and the lives of hundreds of young people. Get the commitment!

**Step Four.** Provide personal counseling and instruction on the responsibilities to be accomplished. The best resource to use to prepare for this discussion is a professional with prior experience working with an OA lodge or chapter, such as a chapter or lodge staff adviser. Assistance is also available from the OA staff at the national service center. Encourage the new chapter adviser to attend an upcoming DYLC.

**Step Five.** Publicize the one-year appointment through appropriate recognition at a council, district or chapter event.

## Guidelines for Selecting a Section Adviser

The section adviser's role is an important one and requires careful thought and consideration by the chair of the national OA committee during the selection process. Appointment of a high caliber, qualified individual is critical to the success of the Order of the Arrow at the section level.

All section adviser candidates should have several years of experience as an Order of the Arrow adviser, typically as a successful lodge adviser. Section adviser candidates must be persons of good credentials and integrity and supportive of Scouting as they will have a highly visible leadership role. They should have the demonstrated ability to work with many constituencies as this is a key aspect of their role.

### Critical Steps in Selecting a Section Adviser

**Step One.** Review the current status of the section's achievements. Write down specific objectives to be achieved by the section and the type of leadership needed for accomplishment. The most recent section Performance

Measurement Program petition may be helpful in getting started with this process.

**Step Two.** The chair of the national OA committee should develop a list of people who have the qualities needed to perform the responsibilities of a section adviser. In many cases, the national chair may choose to consult the region OA chair, section staff advisers, and prior section advisers to identify qualified prospects. Appraise each candidate's qualities and select the top two or three prospects.

**Step Three.** Make an appointment with the top-rated prospect. Visit with the individual, in person or by video conference, and discuss the proposed appointment, including the specific responsibilities of the section adviser. Sell the top prospect on the personal satisfaction that can be achieved in developing special Scouting leadership that can have positive and significant impact on the area's program operations and the lives of thousands of young people. Get the commitment!

**Step Four.** Provide personal counseling and instruction on the responsibilities to be accomplished. The best resource to use to prepare for this discussion is a professional with prior experience working with an OA section, such as a section staff adviser. Assistance is also available from the OA staff at the national service center.

**Step Five.** Publicize the one-year appointment through appropriate recognition at a section conclave or council of chiefs meeting.

## Guidelines for Selecting a Staff Adviser

As is the case for volunteer OA advisers, the selection of an OA staff adviser requires careful thought and consideration by the person who makes the selection. All staff advisers take on their Order of the Arrow role in addition to their primary job function, so the ideal candidate is an employee who has demonstrated the ability to work well with volunteers and who can grow in their career through this additional responsibility.

A staff adviser's primary responsibilities are to give guidance and counsel to the chapter, lodge, or section adviser they advise, and ensure that all volunteer advisers work with and through elected youth leaders. This is done through individual mentoring and through group training opportunities. Prior experience as a participant or staff member in National Youth Leadership Training, Wood Badge or other leadership development training should also be considered when developing a list of staff adviser candidates.

## Critical Steps in Selecting a Staff Adviser

**Step One.** Review the current status of the OA's achievements in the chapter, lodge or section. Write down specific objectives to be achieved and the type of leadership needed for accomplishment. The most recent lodge or section Performance Measurement Program petition may be helpful in getting started with this process.

**Step Two.** Develop a list of people who have the qualities needed to perform the responsibilities of a staff adviser. In many cases, the professional (*i.e.*, Scout executives appoint lodge and chapter staff advisers, and the national OA director appoints section staff advisers) making the appointment may choose to consult with previous staff advisers to identify qualified prospects. Appraise each candidate's qualities and select the top two or three prospects.

**Step Three.** Personally discuss the appointment with the top-rated prospect, including the role's specific responsibilities. Sell the top prospect on the personal satisfaction that can be achieved in developing special Scouting leadership that can have positive and significant impact on the Scouting program and the lives of many young people. Get the commitment!

**Step Four.** Provide personal counseling and instruction on the responsibilities to be accomplished. The best resource to use to prepare for this discussion is a professional with prior experience working with an OA

chapter, lodge or section, such as a section staff adviser, another Scout executive or a director of field service. Assistance is also available from the OA staff at the national service center. Encourage the new staff adviser to attend an upcoming region DYLC.

**Step Five.** Publicize the one-year appointment through appropriate recognition and recognize them in front of their peers.



## Chapter 5: Selecting the Region Order of the Arrow Chair

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. [FOH, p. 7]

The region OA chair is a member of the national OA committee during their term of office.

In making the selection of region OA chair candidates, the chair of the national OA committee may seek input from several sources, including:

- The national director of the Order of the Arrow
- The outgoing and previous region Order of the Arrow chairs

The region OA chair must have the experience and respect appropriate to this critical position. Regardless of the source of potential candidates, it is important to understand the nature of this role, in that the region OA chair must have strong knowledge of the OA and its operations and personnel beyond the lodge. The region OA chair's familiarity with and enthusiasm for the OA program is vital in helping the OA region chief to be successful. Prospects should have served in section or region Order of the Arrow roles and have previously served as a principal lodge or section adviser. Ideally, prospects have usually been identified for years prior to their appointment and have been placed in strategic positions to develop and equip them for this unique leadership role.

Key attributes include:

- In-depth knowledge of the Order of the Arrow and its operations and policies, especially its regionally-conducted training programs (*i.e.*, National Leadership Seminar, Developing Youth Leaders Conference, and Section Officer Seminar)
- Demonstrated ability to work with both youth and adults, including recruitment and management of the region OA committee, which exists to support the region OA Key 3 in accomplishing their objectives and responsibilities
- Strong programmatic and administrative skills
- Personal financial resources to cover their extensive activity and travel commitments:
  - The budgets for National Leadership Seminars (NLS), Developing Youth Leaders Conferences (DYLC) and Section Officer Seminars (SOS) typically include lodging, meals and related expenses for staff members, with adult staff members, including the region OA chair, covering their personal travel and incidental expenses; many OA events require air travel because of the distances involved
  - Attendance at the Scouting America National Annual Meeting, the Order of the Arrow national planning meeting, and *ad hoc* meetings (*e.g.*, NLS "train the trainer" weekends, etc.) are personally funded by the region Order of the Arrow

chair; this includes registration, lodging and travel costs

- Adequate time to spend helping the region chief succeed through personal, email and phone contacts
- Time to devote to region and national OA events and conferences (*i.e.*, section conclaves, NOAC, national jamborees, etc.)

The formal appointment of the region OA chair is made in writing for a one-year term by the chair of the national OA committee. Region chiefs are elected at the national OA planning meeting that is held in late December so the installation of a new region OA chair is normally done at year-end. Having the installation of a new region chair occur at year-end, at the same time as the election of a new region chief, provides continuity for the region chief, as they will work with the same chair throughout their entire term in office.

The national director and associate director serve as co-staff advisers to the regions. They work in partnership with each other and region leadership to support the regions' day-to-day administrative and operational needs and are available as needed to consult on region needs with the region chair and/or region chief.



# Appendix: Position Descriptions

## Duties of the Lodge Staff Adviser

1. Appointed annually by the Scout executive. If not a member when appointed, participates in the first available Ordeal. Consults with the Scout executive on annual performance and appointment of the lodge adviser.
2. Understands the policies and principles of Scouting America and the Order of the Arrow. Communicates and ensures their application to OA functions. Ensures funds are properly budgeted, receipted, disbursed, and transmitted according to council procedures and the Scouting America accounting manual. Attends all lodge functions and other appropriate OA activities.
3. Provides council, regional and national information, literature, and correspondence to lodge advisers and appropriate committees. Orders materials and supplies from the national service center and Supply Group.
4. Works with the lodge adviser to help the lodge chief conduct lodge executive committee meetings. Attends and sits with the lodge adviser and lodge chief.
5. Recommends and obtains Scout executive approval of prospective adult advisers.
6. Encourages appropriate adult participation and support to committees and activities. Informs professional staff associates of OA activities, program, and correspondence.
7. Works with the lodge adviser to ensure appropriate adult participation in meetings of lodge operating committees related to their assignments. With the lodge adviser, ensures the lodge charter renewal application is completed and submitted on time.
8. Recommends agenda items. Ensures that financial and activity reports required from the council office are printed with timely information. Works with advisers to the lodge treasurer and other committees concerning the information in the reports.
9. Represents the OA at the council annual planning conference, coordinating dates with council, section, region, and national dates. Makes appropriate reservations for council facilities. Works with office staff to ensure timely communication to the membership and units. Involves the OA in council programs. Ensures

lodge representation at national and section OA functions.

10. Monitors the delegation of responsibilities and assists the lodge adviser and lodge chief in evaluation, assignments, and follow-up.
11. Recommends to the Scout executive the appointment of chapter staff advisers. Communicates with chapter staff advisers and ensures appropriate council services to the chapter system. Evaluates and makes suggestions for chapter programs.
12. Keeps the Scout executive informed on all OA projects. Recommends potential service projects for OA consideration. Coordinates with the camp ranger on Ordeal and other OA projects at camp.
13. Administratively supports the functions of the Vigil Honor nominating committee.
14. Sets the example for youth and adult Arrowmen by correctly wearing the Scout uniform with proper badges and insignia correctly placed.
15. Secures rosters and reports required by the OA in a timely manner for their use. *[HOA, pp. 18-20]*

## Duties of the Chapter Staff Adviser

The chapter staff adviser's responsibilities are similar to those of the lodge staff adviser (*e.g.*, calendar development and coordination, budgets, meetings, service projects, training, etc.) that can change with each chapter's unique and specific duties which vary from council to council.

## Duties of Section Adviser and Section Staff Adviser

The advisers of the section shall be a volunteer Scouter (section adviser) and a professional Scouter (section staff adviser). If needed, the chair of the national OA committee may also appoint an associate section adviser to assist the section adviser. Advisers at the section level are appointed annually by the national chair. (Section staff advisers are appointed by the national director.) 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 the Section Rules which are approved by the national committee.
  - f. Brings to the attention of the region chair and the national director matters 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 Performance Measurement Program.
  - 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 the 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 appropriate 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. *[FOH, pp. 12-14]*



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December 2024