



# Lodge Merger Handbook for Councils



**Scouts and their parents expect all Scouting America activities to be conducted safely. To ensure the safety of participants, Scouting 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 Scouting 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 Scouting America program.
- Planning for safe travel to and from the activity site.
- Validating the activity is age appropriate for the Scouting 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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## Preface: Introduction

Welcome to the official *Lodge Merger Handbook for Councils* conducting the Order of the Arrow program. Scouting America has entered a major transition period as an organization. As a result of this, the OA must also change and adapt to fit what will best serve Scouting's mission and purpose. As we embark on this age of growth, all across the country we will see lodges merge together. This handbook was created for that purpose. It seeks to provide a basic detailed framework on how to go about the process of merging two or more lodges into one. This process is no small feat, but with the help of this handbook and the processes established by it, we hope that all lodges will be able to have confidence and elasticity when merging.

It is important to remember that the official national policy is that only one lodge may exist in each council. If councils vote to merge, then their lodges must merge with them. This policy was first established by the Scouting America national executive board in September 1948 and published in the first edition of the Order of the Arrow Handbook; it is carried forward in the [Handbook for Officers and Advisers](#) and the [Field Operations Handbook](#). The purpose of the lodge is to serve the council. With multiple lodges in a council, each lodge would potentially focus on their respective legacy areas and not the council program as a whole. It would also create unfairness in section elections and council of chiefs votes. The united mission of the lodge is to serve and support its individual council. We can best achieve this goal working together in brotherhood as one lodge, not divided as separate lodges from the legacy councils.

Going through a merger is an opportunity for all parties involved; it is an opportunity for growth as leaders and as an organization. Those taking the lead in the process will experience something that very few get to and learn valuable communication and problem-solving skills. Members of the new council and lodge will benefit from the valuable practices and points of view of both legacy lodges. It is important as you go through this process that leadership focuses on combining best practices. The best mindset for a merger is that of collaboration and mixing of best practices to form an even greater and more successful lodge than before.

It is also an opportunity to clearly define on paper how your lodge will operate. It can sometimes be difficult to communicate exactly what is done for each part of a lodge and what each position's responsibility is in every single process. A key part of the merger process is writing down all of these decisions and procedures for the lodge's reference in the future.

As you establish lodge positions, their responsibilities, and processes, please reference and follow the [Field Operations Handbook](#), [Inductions Handbook](#), [Handbook for Officers and Advisers](#), and all other national policies.

Each chapter found in this handbook includes information on how to begin each process at the lodge level, who should be involved in each step, the importance of merging and the actions described, and how to apply each part of the merger process to the committee and chapter levels.





## Chapter 1: Phases of the Merger Process

Merging and consolidating Order of the Arrow lodges is not a simple process, nor one that can be completed quickly, especially if the goal of the process is to form a cohesive, effective lodge. From the beginnings of council merger discussions to the finalization of a lodge merger, the process can take several months.

### Phase 1: Pre-merger

The first phase of a lodge merger comes before the lodge merger proceedings themselves begin. This pre-merger phase can be the period during which the two (or more) councils the lodges serve are undergoing active discussions regarding what the outcome of their mergers will look like, or it can come after that council merger is finalized. While this period is ongoing, each lodge executive committee should continue its normal operations to best serve their members. During the pre-merger phase, officers and LEC members should take the opportunity to review the events and practices of all lodges involved in the merger to build an understanding of the cultures that will be consolidated.

The decision on what the exact steps and timeline for the merger will be is ultimately up to the Scout executive of the merged council. If the Scout executives of the merging councils decide that the lodge merger timeline and the council merger timeline should be synchronous, then the merger process will generally proceed more quickly; however, this was not always the case in past mergers, and it is not suggested that this timeline be adopted. It is most common for lodge mergers to formally begin once council mergers take effect; it's up to the new Scout executive to determine the

timing of the lodge merger period, but the lodge merger must be effective within one year of the council merger taking effect (with a shorter timeline being highly preferable). When the council merger is completed, one of the tasks that the new Scout executive must undertake is naming the lodge adult leadership, especially the lodge adviser and staff adviser who will ultimately oversee the finalization of the merger and transition to a single lodge, as well as determine whether and how the new lodge will utilize the chapter system. Also, the new lodge adviser and staff adviser should [inform the national OA LodgeMaster team](#) of the merger and its details at least three months before it becomes effective to ensure that the newly merged lodge will appear correctly in the OA LodgeMaster system.

### Phase 2: Planning

The second phase of the merger process is when the merger process itself will actually begin and will contain much of the heavy lifting in what is a fairly involved process. During this portion of the merger process, officers and advisers from the merging lodges should collaborate to determine many of the key aspects and identifying characteristics of what will be the newly merged lodge.

The number of individuals who are part of this working team may vary but should generally include between three to five youth and two to three advisers from each lodge. Be careful not to include too many people on this working team, as it may bog the team down and slow down the process. One important thing to note is that all the conversations in this phase should be guided by an impartial facilitator

who is appointed by the region chairperson. The role of this facilitator is to help the lodges through the merger process and demonstrate to the merger task force (see [Chapter 11, "The Lodge Merger Task Force"](#) for more information on this team) how to have these important conversations. This will prove helpful when the merger task force has to guide similar conversations at the chapter level.

There are two key parts to this second phase. The first is establishing the new identity of the lodge. This process is discussed further in [Chapter 3, "Creating Your New Identity"](#), but it should consist of determining the lodge name, totem, and general culture and identity. The next part is establishing how the lodge will operate. The merger task force will, over the course of this phase, restructure lodge leadership and committees, build the lodge calendar and program, and formally write everything that is decided into lodge documents and bylaws. This phase will take up the majority of your transition time. It will consist of many in-depth discussions within the merger task force and with the leaders of all legacy lodges.

### **Phase 3: Transition**

The phase that begins after most things are figured out is the operating transition. This is when the new lodge will operate under the leadership of the co-officers from each respective legacy lodge. Lodge events will be held with a focus on fellowship and collaboration, the lodge leadership will walk chapters through their identity formation, and the lodge will continue to grow in its culture and spirit. Additionally, the lodge leadership will be

focused on experimenting with the new systems and seeking feedback from members as lodge functions progress.

### **Phase 4: The First Lodge Year**

Finally, there will be the beginning of the first full lodge year. The lodge leadership will hold its first full lodge executive committee meeting, consisting of the elected chapter chiefs and all lodge co-officers. At this meeting of the LEC, the bylaws that were developed in [Phase 2: Planning](#), as well as the entire process, will be approved. After this LEC, lodge elections can take place. The elections will be facilitated by an impartial party from the section and each legacy lodge will have ten votes to distribute proportionally to its popular vote. After the officers are elected and receive training, they will become the sole officers of the new lodge. It is then their responsibility to present the approved bylaws for approval by the Scout executive. Then all committee chairpersons and associate advisers will be appointed to carry out the various operations of the new fully merged lodge.

### **Fluidity**

It is important to keep in mind that though the phases have different titles, it is normal for them to overlap and each one leads into the other. You do not have to restrict yourself to just one set of actions at a time, these are simply a layout of the general order of the process. You should go through each of these in whatever way works best for your lodge.



## Chapter 2: Roles of the Youth and Adults

The specific roles of each person in the merger will be discussed throughout this handbook, especially in [Chapter 11](#), which outlines the merger task force. It is important, however, that we distinguish the ideal actions and influence of youth members and adult members.

### The People in Charge

Scouting America's and the Order of the Arrow's programs are dominantly youth-run. This holds true for the merger process as well. The youth lodge leadership should be at the forefront of the entire process and have the primary voice in all decisions. The only person who should override the decision of the youth is the Scout executive of the new council.

The decisions that are not mandated by the [Scouting America Rules and Regulations](#), [Guide to Safe Scouting](#), Declaration of Religious Principle, [Field Operations Handbook](#), and [Handbook for Officers and Advisers](#) are left for the youth to make in consultation with adult advisers. Adults should keep in mind that while their input is valuable, anything not nationally mandated is up to the youth to decide.

Some may believe that due to the complexity of a lodge merger, adults should have a larger role than in standard lodge operations. It is this complexity, however, that warrants quite the opposite.

The mission of Scouting America is to prepare young people to make ethical and moral choices over their lifetimes by instilling in them the values of the Scout Oath and Law.

Allowing youth members to take charge in complex situations like a merger will do just that. This process will help them become stronger leaders as they learn logical processes, compromise, communication, and in-depth reasoning skills. All of these and the process itself apply to day-to-day life as well as careers in America. Youth that have the opportunity to lead their lodges through a merger will get to learn and be prepared for something most youth do not. They must be an integral part of the process.

Advisers should be present throughout the process, but they are there to simply do as their name states: advise. As with traditional lodge operations, youth are to consider the advice of adults prior to their decisions and actions.

### The Mindset

Everyone involved should be looking toward the future of the new lodge. The key to this process is to think about what will have the best outcome for the lodge in the long run. It can be thought about as the development of a long-term strategic plan.

It is natural for some people to want to continue to do things the way their legacy lodge had always done it. This process provides an opportunity for a fresh look at lodge operations: to build on the best practices of the former lodges and develop an optimized solution to support the newly merged councils. Collaboration, compromise, and innovation should all take place to produce the strongest new lodge possible.

## Merger Responsibilities

All of the actions detailed throughout this handbook, unless explicitly stated otherwise, should be done by the youth. They initiate the creation of the task force, lead the task force, make decisions, and communicate the decisions across the lodge.

As is detailed later in [Chapter 11](#), the merger task force should include three to five youth members from each legacy lodge, as well as a youth third-party facilitator. The members of this task force must thoroughly read, review, and reference this handbook to be prepared for and best complete the merger process. They can then all work together to plan the path of the merger, combine lodge processes, create the new lodge identity, and write and dictate these decisions. They should do this through intentional conversations guided by the third-party facilitator as detailed in [Chapter 4, "Restructuring"](#).

Throughout these conversations and decisions, advisers can provide insight on possible results of choices. They are a resource of prior knowledge and experience for the youth to go to for help. Advisers should not state which

choice should be made, but rather help the youth see different points of view regarding every issue. Advisers should also play a role in ensuring the decisions made follow national policy and Safeguarding Youth standards. They can also remind youth of certain items this handbook recommends if it is with the intent of helping keep them on the right track.

As with all of Scouting, the primary role of the adult is to help and support the youth. Adults are an integral tool in support of the youth, but as stated previously, the youth take the lead in this process. The third-party facilitator should be the main person guiding conversations. It is important for adults to remember that this facilitator is a strong and trained youth leader who is well versed in the merger process. Their actions are intended to follow this handbook and allow the best possible merger outcome. Since their choices are dictated by this handbook, they generally do not require adviser input. In the event they do require advice, it will come from their adviser or someone beyond the lodge level. In regards to decisions, however, the Scout executive of the merged council always has the final say and can overrule the facilitator.



## Chapter 3: Creating Your New Identity

You have the opportunity to establish a new organization and identity that incorporates your combined lodge histories.

### The Basics

The first item to create is the new lodge name. Consider where each legacy lodge came from and try to find similarities. Research local features, events with historical significance, or geography that can contribute to the selection of a new name for your lodge. The biggest thing to consider is what you want your lodge to stand for; make sure your name conveys this.

After selecting your new lodge name, decide on a totem that will communicate your new name and identity. Research local animals, plants, and cultural elements that span the area of the entire new lodge. Consider the totems of the legacy lodges and their individual predecessors. Consider totems related to the lodge name you chose. Look to select something with relevance that can easily communicate who you are and where you are from.

### Your Lodge Flap

Translate your lodge name and totem into a new lodge flap. Utilize local artists, Scouting America licensed patch companies, or host a contest for your youth membership. Once you have a finalized design for the new lodge flap submit it to the LEC for approval. Consult your lodge staff adviser on how to place patch orders for your council. Once approved, order your patches and provide them for sale at events, at your Scout shops, or service centers.

If your budget allows, provide a lodge flap for all members that renew their membership for the upcoming year. Nothing brings unity like having the same lodge flap on your uniform.

### Branding

Build a new lodge website; work with your council's webmaster or marketing team for assistance. You can model your website after your council's webpage, national or regional OA websites, or be creative matching your new branding. Create social media accounts for the new lodge being consistent across all platforms. This will maintain your identity and keep a consistent association with who you are for your new membership. Once the website and all of your accounts are created develop a plan to announce the new lodge name and totem. Unveil the new lodge identity at an event, meeting, or virtually with excitement. Take pride in what you have created. Be professional and follow the Scout Oath and Law with everything you do online. Compile all of your new designs into a branding guide to be utilized on all lodge materials. You can use the [Order of the Arrow National Branding Guide](#) as an example.

### Lodge Spirit

Developing lodge spirit takes time and will evolve while attending fellowships, conclaves, and National Order of the Arrow Conferences. Start with positivity and high energy. Host a competition for cheers, slogans, or mottos online. At your first events, you can dedicate time for working on cheers and lodge spirit building exercises. Use a submission portal,

survey, or social media hashtag for chapters or individuals to submit new lodge spirit ideas.

Promote your new identity to your members and the new council. Present updates at council executive board meetings in person or through a report provided to the board mem-

ber who works most closely with the Order of the Arrow for your council. Get members excited about what is coming. Make sure you are responding to posts on social media to engage your youth membership.



## Chapter 4: Restructuring

During the transition process, there will inevitably be questions about the organizational structure of the merged lodge. This chapter aims to guide merging lodges in answering those questions and developing a new structure for their merged lodge.

The merged lodge will not have to make all the decisions themselves. As restructuring decisions are made, it is important to remember that the Scout executive of the new council will appoint a lodge adviser and lodge staff adviser for the merged lodge.

### Decisions to be Made

While the lodge adviser and lodge staff adviser will be appointed by the Scout executive, there are still several remaining decisions that need to be made about the structure of the merged lodge. Importantly, the merged lodge will need to create lodge rules and bylaws to be approved by their Scout executive. This process is discussed more thoroughly in [Chapter 7, "Writing it All Down"](#), but it is important to note that the decisions regarding the lodge structure that will be made in this chapter will be later codified in the lodge rules and bylaws. Since decisions about the structure of the merged lodge are included in the lodge bylaws, the decisions are final and can only be amended by the lodge executive committee as specified in the bylaws. Therefore, everyone involved should think carefully about the structure of the merged lodge. When defining the structure of the merged lodge, it is important to consider and decide upon the officer positions, committees, and chapter structure of the merged lodge.

### Legacy Lodge Preparation

To ensure that the restructuring process is efficient and effective, all legacy lodges must prepare for discussions surrounding the structure of the merged lodge. Legacy lodges should prepare by knowing the exact responsibilities of each officer and committee within their lodge. Each legacy lodge should provide their current rules and bylaws to be included in discussions of the structure of the merged lodge. If the lodge rules and bylaws do not contain all lodge officer and committee positions, these positions must be explicitly recorded in writing for inclusion in decisions on the structure of the merged lodge. While this preparation may seem like a minor detail in the overall restructuring of the merged lodge, it is a crucial step in ensuring that the resulting lodge structure effectively incorporates the positions of each legacy lodge. Proper preparation will make the entire process much easier for everyone involved.

### Lodge Officers

Once each legacy lodge has provided their bylaws, and written responsibilities for any other lodge positions, discussions can begin, and decisions can be made, about the structure of the merged lodge. The process should begin by establishing lodge officer counterparts for each legacy lodge. Lodges may have lodge officers with different titles but that fulfill similar duties, such as a lodge secretary and a lodge vice chief of communications. Once these counterparts have been established, an official title for the resulting position in the merged lodge should be decided upon. Once

these titles have been decided upon, each of these counterparts shall become co-officers. As in the secretary example, if the merged lodge decided upon the title of secretary, the legacy lodge secretary and legacy lodge vice chief of communications shall both become co-secretaries of the merged lodge. The responsibilities of each lodge officer position should be clearly defined and recorded in a manner that they can be conveniently included in the lodge rules and bylaws. Current lodge officers should continue to fulfill their responsibilities jointly until the election of new officers. There is nothing wrong with having co-secretaries, for example, throughout the transition period (one year maximum).

If an officer of a legacy lodge does not have a lodge officer counterpart in another legacy lodge, then a collective decision must be made as to whether that position should be an officer or committee role following the merging of the lodges. For example, one lodge may have a vice chief of inductions, while another may have committee chairpersons for the various phases of the induction, a collective decision is to be made on whether the merged lodge will have a vice chief of inductions or if their duties will be delegated across committees.

If there is a lodge officer vacancy in a legacy lodge, a youth representative from that legacy lodge should be appointed who has expertise in the relevant duties. This individual will serve as a co-lodge officer of their respective position until the election of a new officer.

It is important to decide and clearly communicate whether each position will be a voting or non-voting member of the lodge executive committee under the structure of the merged lodge. Additionally, an organizational chart should be created to clearly depict the structure of the merged lodge and delineate which committees fall under each lodge officer.

Finally, the merged lodge should have a clearly defined timeline of when they will elect their lodge officers. Remember that the transition period is limited to one year and it is recommended that the transition period be shorter than that, ideally six to eight months. Therefore, a timeline and plan for electing officers of

the merged lodge is an important decision to make and announce to the members of the legacy lodges.

## Lodge Committees

The process for structuring the committees of the merged lodge is similar to that of structuring the lodge officer positions. The committees of each legacy lodge and their roles should be compared to identify counterparts and any outliers. Discrepancies will likely arise out of the variation in the structure and type of committees that each lodge has. In the likely event that a legacy lodge does not have a committee that another legacy lodge does, there are three options. The first possibility is the committee that the legacy lodge has but another legacy lodge does not, can be included under another committee that has already been identified to have a counterpart in each legacy lodge. For example, one legacy lodge may have a social media committee that another legacy lodge does not but all legacy lodges have a communications committee. The social media committee can then be added as a subcommittee of the merged lodge's overall communications committee.

Another possibility is two related committees that a legacy lodge has but another legacy lodge does not can be combined to form a new committee. Similar to the social media committee example, a legacy lodge may have both a social media committee and a newsletter committee, but no other legacy lodges have these committees. The social media and newsletter committees can be combined to form a communications committee in the structure of the merged lodge.

The final option is the committee can remain as its own committee in the structure of the merged lodge. In our example of the social media committee, it may be decided that an individual social media committee is necessary to be included in the structure of the merged lodge and the social media committee could be left as its own committee. This decision should be made on a case-by-case basis for each uncommon committee between the legacy lodges by considering the responsibilities

of the committee and the planned structure for the merged lodge.

Once the committees of the merged lodge have been decided on, allocate which lodge officer will oversee each committee and ensure that the organizational chart of the merged lodge reflects this. Co-chairpersons of the counterpart committees will serve similarly to co-lodge officers during the transition period. If multiple committees were merged, a co-chairperson should be selected from each legacy lodge for each committee. In the example of a legacy lodge's social media and newsletter committees being combined to form a communications committee, one of these legacy chairpersons will serve as the co-chairperson of the communications committee while the other will continue to oversee the responsibilities of their past committee within the new structure, possibly serving as a chairperson for a subcommittee. Next, clearly record the roles and responsibilities of each committee for inclusion in the merged lodge's rules and bylaws. The co-officers should guide the process of recording the responsibilities of their respective roles in the lodge bylaws. These roles and responsibilities can likely be transferred from the legacy lodges' rules and bylaws with minor edits to reflect any changes.

Then, consider whether the merged lodge's committees warrant subcommittees. For instance, the lodge's Training committee may include separate subcommittees for Lodge Leadership Development, unit election training, and national training promotion. These decisions should be made by comparing the structure of each legacy lodge and determining how to best combine them under the structure of the merged lodge's agreed upon committees.

## Chapters

Once the merged lodge's officers and committees have been established, attention turns to the structure of the chapters. The new Scout executive is responsible for deciding if the

lodge will use chapters and if so, the lodge executive committee is responsible for making a recommendation to the Scout executive regarding chapter boundaries, specifically if the chapters will follow district lines or some other method of delineation.

There are two options for developing the structure of the merged lodge's chapters. The first is to write into the merged lodge bylaws that chapters will have the same policies and officers as the lodge level. The second is for lodge officers to guide chapters through the same process they underwent in determining the lodge structure. The second option involves comparing counterpart positions, deciding on titles, and clarifying any discrepancies between the structure of the chapters of the legacy lodges. The primary concern should be electing a chapter chief for each chapter to serve on the merged lodge's LEC, even if all chapter positions have not been fully decided upon yet.

As with the merged lodge, names and totems will need to be decided upon for each chapter. There are three ways of accomplishing this. One way is for co-chapter officers to collaborate. This option is similar to the process for collaborating on the identity of the merged lodge as discussed in [Chapter 3, "Creating Your New Identity"](#). Another potential method is for the chapter to elect officers who are then tasked with researching and selecting a chapter name and totem. Finally, the chapter members can suggest and vote on the chapter name and totem.

It is important that the leadership of the merged lodge guide chapters through the restructuring and merging process and use their experience in designing the structure of the merged lodge to help chapter leaders through the same process on the chapter level. The role of the lodge in the chapter restructuring is similar to that of the region and section in guiding the lodge through the restructuring process, except that the lodge leaders will have a more recent and direct merger experience to draw upon when assisting the chapters.





## Chapter 5: Establishing Processes

Think back to times where you attended a council of chiefs within your section, a Lodge Leadership Development, or section conclave. At each of those events, there was probably a training session (or multiple sessions) that encouraged Arrowmen to share their ideas about whatever that session was about. Whether it was talking about how lodge fellowships are run or induction processes, nobody's idea was shot down. Everyone politely listened to what others had to say, they took notes on the ideas they felt would benefit their lodge and shared their own ideas and practices openly. The goal of the session wasn't to pick one lodge's practices to apply for the entire section but to take the best from each lodge to help each other grow. That is how establishing processes like inductions, officer duties, and committees for a new lodge should be.

### The Basic Steps

When it comes time to make these new processes, it's common that people will bump heads. Especially when it comes to inductions, everyone is passionate about what their legacy lodge did. But, everyone must recognize that each person in the room feels just as strongly about the topic as they do, and compromise will be a must to develop an outline for the way this new lodge will function and keep the merger process moving forward. At the end of the day, the goal for everyone should be to do what's best for the lodge members, and all decisions made should reflect that.

For whatever lodge process is being planned out, it's important to first lay out the steps of what each legacy lodge did previously. After

that compare the notes made, and find all of the similarities. Use these similarities as a groundwork. Unless the group disputes over whether these similarities are a practice worth continuing, it should be easy to use these as groundwork and move through them quickly.

Once that groundwork is laid, the real work begins. Once the operational areas that differ are identified, rather than instantly defending one idea for why it has merit, each Arrowman should sit down individually and write out the pros and cons for each idea presented. It may be difficult, but try to also come up with some cons for whatever your legacy lodge did—no plan is perfect and recognizing this will only bring you one step closer to having your new lodge's structure complete, and hopefully, an even better structure than your legacy lodges had.

When comparing the pros and cons lists, before making a decision, it's important to keep in mind that the best solution may be something completely different than what any legacy lodge did in the past. Remember, your new lodge not only covers a larger geographical area but will also have more members than any of your legacy lodges did. Because of this, what worked for your legacy lodges may not work for your new lodge. Thinking outside of the box is essential during this stage to ensure that the processes decided on are the best possible solutions to any problems your new lodge may face. It will also be important to consider which option best fits with the phases and general lodge operations that you have already established. Even if one way may seem better overall, the other may pair better with the specific choices you made for the rest of the process.

When suggesting an idea, making a process decision, or having conflict through this stage of the merger it may be helpful to think about the action you are suggesting or what your legacy lodge did and ask yourself “Why?” five times to get to the core root of the merit and reason for that idea.

For example, the idea proposed may be to hold the ordeal in conjunction with fellowships. The team would then ask why that was suggested. It could then be answered with the fact that one legacy lodge always did it that way. The next thing to consider is why that lodge always did it that way. The answer to that may be “It was so that current brothers were more likely to attend.” The “Why?” to that would be “Why did they want current brothers to attend?” and the reason could be so that they could be present after the completion of the induction. The next question to arise could be “Why is it important for them to be present at the end of the induction?” and the answer may be that it was in order for them to interact with and get to know other brothers. Finally, the thing to consider that stems from that is why new members interacting with other brothers is beneficial. The response to that final question could then be the fact that it allows the new members and current members of the lodge to bond in brotherhood.

The process of asking “Why?” five times to the idea of having the ordeal ceremony before sunset revealed that the true purpose of that idea is to help the lodge bond in brotherhood. It would then be up to the task force to compare the subjective value of that core reason to that of the core reasons of the other ideas suggested in regards to that particular issue.

## The Inductions Process

An example of an important process to figure out is the inductions process. Everyone knows there isn’t a one-size-fits-all solution to inducting new members to the Order of the Arrow, but as a national organization, we’ve certainly tried to make one. As you go through this process of deciding what inductions will look like for your new lodge, the [Inductions Handbook](#) should be your best friend. Read it,

re-read it, and highlight the parts of it you think will be most beneficial for your new lodge to keep in mind throughout this part of the restructuring.

As mentioned previously, the first step that should be taken is for each legacy lodge to list out what they did for the induction process in great detail. Rather than just thinking about it through the lens of an ordeal candidate, also think about it from the lens of a lodge chief. Any good lodge chief will be concerned about far more than just the ordeal candidate’s experience. They’ll be thinking about who will cook and serve the food, what the ceremonialists will be doing, what other lodge members attending the induction weekend will do, etc. But it doesn’t stop there. A lodge chief also has to consider how the event will be advertised, how candidates will be informed they should attend, and what needs to happen after the event to ensure that the newly inducted members become active members of the lodge. By considering both what would be impactful for a new member and what makes sense operationally for the lodge, you can plan the best induction experience possible.

Although many think of the inductions process as only being the weekend-long time-frame of inducting an ordeal candidate into the lodge, it’s much more than that. In the sense of this handbook, it actually starts at the time a unit election is held and lasts all the way through inducting new members, educating them on what the OA is and activating them, and ends when they go through their brotherhood conversion.

One can only imagine the number of tasks that are included in this at the minimum six-month time-frame for a new member, and with that are sure to come disagreements. It won’t be easy, but by following the ideas presented in this handbook, you can ensure that this process goes as smoothly as possible.

By breaking down each part of the inductions process, from unit election to brotherhood, and outlining the agreed-upon process for each of these aspects, strong membership retention in your new lodge will be ensured. Every part of the induction process, not just the

induction itself, is vital to ensuring that members want to stay involved in the OA.

In addition to simply comparing what people like and dislike about the induction process, it's important to compare the three key performance indicators of each legacy lodge: unit elections rate, inductions rate, and activation rate. There may be an idea that you may not prefer but is proven to be the option that will bring the most success. Your votes in all decisions should be in favor of what is objectively better for the lodge. After all, you and everyone else involved surely want the best for your new lodge and its future.

## Roles and Responsibilities

Finally, be sure to reference [Chapter 4, "Restructuring"](#) of this handbook throughout this process. The responsibilities of each committee or position in your new lodge may be completely different than they were for the legacy lodge. After examining those new committees and roles established in [Chapter 4, "Restructuring"](#), be sure to make it clear who is responsible for what throughout each step of the process.

You should also work to establish lodge officer responsibilities. At the time of the merger, there will be at least two, but possibly more youth that are in officer positions for their legacy lodge, such as lodge chief, lodge vice chief, secretary, treasurer, etc. To start defining these new officer roles for your new lodge, the co-officers for each position (determined by the legacy lodges) should meet along with their respective adviser, and outline the responsibilities that each of them had, in the similar fashion of having an intentional conversation, as outlined at the beginning of this chapter.

## Figuring Out the How

In going through this process, the resources used for the duties of each officer position should be discussed as well. For example, for a lodge secretary, one of their main responsibilities is communicating information to the lodge in an effective manner. Decide if your new

lodge will do this through OA LodgeMaster or a third-party email service. By making these decisions during this stage of the merger, you'll be able to fully evaluate which key officer positions your lodge needs to have, which types of roles may not be necessary, and what the scope of each role should be.

Although the [Handbook for Officers and Advisers](#) specifies that the elected youth officers for a lodge should be the lodge chief, lodge vice chief, lodge secretary, and lodge treasurer, it's important to remember there is no specified number of elected officers that any lodge should have. The number of officers needed is entirely dependent on the size of the lodge, how many youth are available to fill the elected positions, and how many adults are available to advise these positions.

Any increase in the number of officers a lodge has is usually seen in the form of adding additional vice chiefs. For example, a lodge may have two vice chiefs: one responsible for overseeing chapter operations, and another responsible for overseeing the operations of the lodge's committees.

As you define roles for each officer in your new lodge, the discussion may shift towards what the committees in your lodge should be, and what their responsibilities should be. This is natural. Discussing officer responsibilities and individual committee responsibilities at the same time is not only common but beneficial to fully flesh out every aspect of lodge operations that needs to be planned.

## Committee Processes

After the lodge co-officers have started (or completed) their process of identifying what the officer roles for the new lodge should be, they should start to contact any committee chairs from the legacy lodges and bring them into the discussion so that the committee structure for the new lodge can be decided on.

Just as intentional conversations have been cited for each part of establishing processes, these are the types of conversations that committee co-chairs should be having. Before they

start, however, the co-officers must define which committees from legacy lodges will stay as they are and which will be combined to create another committee with a wider scope of responsibilities. Again, remembering that this new lodge will have a larger membership than any of the legacy lodges did, it's important to also remember that some committees may need to be split up into several smaller ones so that the workload this larger lodge requires is not overwhelming for any one youth to take on.

Once these definitions of new committee responsibilities are made, they should be clearly communicated to the committee co-chairs to keep in mind as they continue to plan out the finer details of each committee using what worked the best for each legacy lodge's operations.

If any committee's process was defined or changed based on restructuring, they should be clearly stated and defined to the co-chairs before they start their work. The last thing you want is for these co-chairs to put in hours of

work just to find out the plans they made contradict the lodge's overall structure and operations. This would likely demoralize them, lead to conflicts, and possibly lead to these co-chairs no longer wanting to be involved in the merger process. The steps and importance of this transparency are discussed in more detail in [Chapter 9, "Transparency"](#).

If this process was not discussed during lodge restructuring, more intentional conversations should be had so that each specific committee can outline their operations in further detail.

Finally, the committee co-chairs, with the guidance of their respective overseeing officers, will meet to more clearly outline and write the new processes as a committee for each area of responsibility. Although for a different lodge function, the techniques discussed in this chapter for creating a new lodge inductions process are just as beneficial to follow for this part of the planning process. It might take a while and lead to some frustrations, but this will ensure the best possible structure for your new lodge.



## Chapter 6: Your Lodge Program

Deciding upon your merged lodge's program is an important aspect of the transition process that deserves careful attention to ensure that members of all legacy lodges remain engaged and that new candidates continue to be inducted. The program the lodge puts on for its members is one of the core reasons that the lodge exists and therefore careful attention should be given to deciding upon your lodge program.

### The Calendar

It is important that your merged lodge has a calendar to communicate to lodge members about the dates and purposes for different lodge events. To construct the calendar of your merged lodge, you should compare the calendar of each legacy lodge and compile them into one overall calendar. In doing so, you can find "counterpart" events between the legacy lodges. These "counterparts" should consider both the date and the purpose of each legacy lodge event. For example, if all legacy lodges have an event the second weekend of October, but one lodge has an induction that weekend while another has a banquet, then we can establish the second weekend of October as a matching date. Then attention should turn to when the other legacy lodges hold their banquets or inductions weekend to establish counterparts based on the purpose of the event. In doing so, an informed decision can be made as to whether the second weekend in October should contain the merged lodge's banquet, induction weekend, or possibly even both. Three situations will typically arise for every "counterpart" date: One is the purpose of the event aligns for all legacy lodge calendars

and therefore should be kept, another is the purpose of the event differs between legacy lodges but all legacy lodges have an event with that same purpose, and the final possibility is the purpose of the event differs between legacy lodges and not all legacy lodges have an event with that same purpose. In the case of the second option, a decision should be made as to whether the purposes can be combined into one event on that date, and if not when each event should occur. For the banquet and induction weekend, the events could likely be combined but, if not, a decision must be made as to whether the second weekend of October will be a banquet or induction. If, for example, it is selected to be an induction weekend, a decision on the date of the merged lodge banquet must also be made. In the case of the final possibility, a decision should be made as to whether the differing purposes of legacy lodge events can be combined into one event or if separate events need to be held.

As the legacy lodge calendars are compared many different decisions will need to be made. Lodge leaders should be prepared to have intentional conversations about why certain events are held at certain times of the year. For example, it may be important to have an induction in the autumn or spring when the weather is nicer, while a banquet will need to be held soon after electing new officers. It is also important to note that some lodges will hold inductions as part of a fellowship or other event, while other lodges hold their inductions separately. You should consider how each legacy lodge approached this decision and then make an informed decision for the induction events of the merged lodge.

These decisions don't have to be one hundred percent in one direction either. Like the rest of this process, it is important to make compromises that reach a common ground. For example, if one lodge has an induction in March and another has one in May, then the common ground is having an induction sometime in the spring. In this situation, you could also choose to add a different kind of event at the time the induction used to be held. In doing this, it is important to keep track of the give and take of each lodge as each event is scheduled so that the change can be spread evenly across the lodges and one legacy lodge isn't having to change and adapt more severely than the other legacy lodges.

The following items are some additional things to keep in mind when creating the calendar for your merged lodge. You should make your lodge calendar easy for your members to remember and this often results from consistency. Many lodges find it useful to have their events on a specific weekend of each month, so that lodge members know to expect an event during the second weekend of October, for example. Throughout the year, it is important to have a balance of fellowships, inductions, and service events. Two events that are important to decide upon quickly are the banquet and the lodge leadership development. The banquet will need to be announced soon and should occur sometime after the first lodge elections.

## **Individual Event Programming**

Once the calendar for the merged lodge has been decided upon, attention should turn to the programming for individual lodge events. It is important the purpose or theme for each event is clearly established and communicated to lodge members. The above process for deciding on events in your lodge calendar should help with this but ensure that the purpose of each event is clearly defined and communicated. The lodge's overall event calendar should have a balance of service, program, inductions opportunities, and fellowships.

However, each lodge event need not incorporate all of these elements.

Two best practices that can be implemented in deciding on merged lodge event programming are first to create a chart of the above event purposes and check off what you'd like for each event and secondly, discuss what unique things each legacy lodge did as a part of their program and try to incorporate some things from both into your new lodge events. For the chart, lodge leaders may find it helpful to visualize how these different event purposes are included in each of their lodge events and how often and where they are incorporated. This chart will provide lodge leaders a visual depiction of the flow of each event as well as how these events fit into the lodge's calendar as a whole. For the discussion, the spirit of collaboration and idea-sharing is echoed throughout the transition process. You never know what good ideas may come from leaders of a legacy lodge. Consider how the best practices of each legacy lodge can fit together and innovate to improve the events of your merged lodge.

## **Chapter Programming**

Chapters should also be encouraged to create a calendar, similar to that of the overall lodge. Emphasize to chapter leaders the importance of meeting regularly at an established time. Chapter leaders may need support in conducting chapter meetings and the lodge leadership should be ready to provide support and direct chapter leaders to resources on what to include in their chapter meetings.

The lodge leaders should guide the chapter through the process of creating their chapter calendar, utilizing a process similar to the one used to create the merged lodge's calendar. Chapters should consider the events and calendars of the legacy chapters and incorporate them into the events and calendars of chapters of the merged lodge. As with the programming for merged lodge events, the chapters will find that new ideas and innovative event programming can arise from collaborative idea-sharing. The input and best practices of each chapter should be considered.



## Chapter 7: Writing it All Down

The work to create a new lodge is not a singular event in the history of your lodges. It is the foundation upon which the future of your new lodge will rest. Now is the time to document all of the important decisions you have made which will result in a new lodge. This will be critical for your immediate and long-range success.

### The Importance of Detail

For the first few years, you will be re-evaluating almost every aspect of your lodge's operation. Each new approach to the daily operations of your lodge will be foreign to some members of your lodge's leadership and will probably require explanation and evaluation. Each time you take on a new task it is important to document your plans, procedures, and timelines. The more details you can record in these early days, the better equipped your lodge will be as you establish standard operating procedures over the next few years. It is important that everything is written down as you go through this process. This will not only allow for reference as the lodge begins to operate but will also allow for the previous designation to influence the rest of the decisions in the process to make sure all the parts work well together. As your standard operating procedures become established they can become formalized into your lodge rules or lodge operating guides.

There is no better time to begin to write your new lodge's history while the new history of your lodge is fresh in everyone's mind. The details that were lost in the early days of the Order or of your lodge are now at your fingertips. Document them now. Sentimentality and historical perspective may also become

heightened among your members. This may be the opportunity to recruit a group to flesh out the history of the lodges which are forming your new lodge.

### Lodge Rules and Bylaws

Lodge rules are a critical item for the success of your lodge. They give structure to its operation and provide a framework that future lodge leaders will follow in the governance of the lodge.

The [Handbook for Officers and Advisers](#) gives guidance on what should be included in your lodge rules. It also includes rules that must be included in all lodge rules as per the National Order of the Arrow Committee.

You may not have to reinvent the wheel in this process. Refer to the lodge rules of the lodges involved in the merger to see where there are similarities and where language already exists that supports the vision of the new lodge as set forth by the merger committee. The bylaws should not be copied and pasted from your notes from the decision-making process. They should be converted into a consistent and complete format that results in a comprehensive guideline for lodge operations.

### Officer Position Guides

It is important to remember that the leadership of your lodge will probably change annually. The Arrowmen who assume these roles will need support and guidance to best execute the duties of their office. Officer position guides should be written by those holding each lodge office and passed down annually. They should

align with the duties as outlined in the lodge rules for each office and describe how to perform each of the responsibilities of their office. Officer position guides often include back-daters, step-by-step guidelines, and relevant support materials. These are the fine details of who, what, when, where, and how for each individual responsibility of an officer. They should be updated by each officer from year to year as they adapt and innovate how things are done.

## **Committee Plan-Books**

The same goes for your committee chairpersons and membership. The lodge operating committees will fulfill the most basic lodge functions every year. Consistency from year to year will be critical for the successful operation of your lodge. Each committee chairperson and adviser should develop a plan-book of common practices and step-by-step guidelines of how the committee will execute its responsibilities. Plan-books should include back-daters, forms, relevant support materials, and guidelines on how other committees will collaborate. They as well should be updated by each committee from year to year as they adapt and innovate how things are done.



## Chapter 8: Operating While Transitioning

At this point in the process, you should be far enough along to begin hosting events together as the legacy lodges go through the merger process.

### Events

Utilize the calendar you established through the steps in [Chapter 6, "Your Lodge Program"](#). If you haven't finalized that, consider how your existing calendar of events could become joint events. Think about where there could be synergy to share resources like camp reservations, induction events, or activation and fun events. The co-officers should be leading these events as a team. Starting to come together sooner will allow for better camaraderie and idea sharing, and a review of how events need to be adjusted going forward. If for some reason there would be no lodge-wide events scheduled during your transition you should schedule a fellowship or an event to engage your membership.

### The Kickoff Event

Examine your schedule to host a kickoff for the new lodge incorporated into an existing event or as a stand-alone event. This event should be packed with fun, spirit, and opportunities to build connections.

There are of course many pieces to a kickoff event. To give you a base idea, here are some ideas to think of in your planning process.

- Host the event in a location that is easily accessible for all of your members whether it be a camp property, online, a forest

reserve, or even an indoor gymnasium. The location should also allow you to have activities spread out across it.

- Begin by introducing all the co-officers of the lodge.
- Provide an update on the new lodge by highlighting upcoming events, stating what has been accomplished, and advertising how to get involved in leadership.
- Hold icebreakers and activities throughout the day and emphasize that Arrowmen should use this opportunity to bond with new people. Potentially have a challenge with a prize that orients the members toward connecting with a variety of people.
- Sell your new lodge flaps at the event if they are available.

These are all just some of the ideas you may choose to use. When planning your kickoff event, it is important to consider what works best for your individual lodge. Lodge membership, area coverage, focuses, and finances should all be considered. Additionally, making your event unique to your lodge makes it even better because it reinforces your new identity and will unite you all under the culture you wish to see in the future.

Don't be afraid to plan other events as the need arises. This is a time of change and embracing new ideas. Look at creative ways of hosting activation events for new and existing Arrowmen. These events can also serve as listening sessions for members to learn about the new lodge as well as getting feedback from your members.

## Feedback

Feedback is a gift. It is very important during these first-time events that you survey your membership to see what does and doesn't work. Figure out how your events can be advanced. Utilize online survey platforms to engage the members that attended. Some good survey questions depending on the event could be:

- How did you hear about the event?
- Was the event easy to register for?
- How would you rate (insert each individual program portion of the event)?
- Did you feel welcomed and engaged by the lodge leadership and event staff?
- Would you be interested in getting involved at the lodge or chapter level?
- Was the quality of the food good?
- Was the quantity of food sufficient?

## Reflection

As a leadership team of co-officers, you should also reflect after each event on how things worked. Utilize simple reviews like "Start, Stop, Continue" or "Thorns, Roses, Rose Buds." Examine the logistics, promotional effort, program, schedule, and member experience. Things will need to change; you are not expected to get it right the first time. Make notes on possible changes for the next event so you improve each time.

During the transition, your goal should be to establish the identity of the new lodge through well-planned events for your membership and new Arrowmen taking into account their opinions. Your first events will be learning experiences but you should strive to set the standard for what members can expect from your events in the future.



## Chapter 9: Transparency

The lodge merger process can seem confusing or overwhelming for lodge leaders as well as to lodge members. One way to ease the confusion and ensure that everyone involved understands the process is transparency. This chapter will discuss transparency with lodge committees, chapters, and members before reviewing different avenues that lodges can use to seek assistance in the merger process.

### Transparency with Committees

First, lodge leaders must be transparent with lodge committees throughout the transition process. Lodge leaders should involve committee chairpersons in discussions relevant to their respective committees before, during, and after they occur amongst the lodge leadership. Doing so will not only ensure that your chairpersons receive information about the transition process as it relates to their committee but can also provide valuable information for restructuring the merged lodge's committees, as discussed more thoroughly in [Chapter 4, "Restructuring"](#). Committee chairpersons know their respective committees' legacy role and how it functions best. They should be considered "experts" in their field and therefore should be consulted throughout the transition process.

As decisions are made regarding committees, the committee and its chairperson should be the first to know. This means that lodge leaders should reach out to the committee and share the decision with them before publicly announcing the decision to the lodge. Lodge leaders should give committees as much detailed information as possible and ask for their feedback on potential changes. It is

always better to over-communicate and over-include rather than under-communicate or leave people out of discussions.

### Transparency with Chapters

This principle is also important with chapters. Chapters are the closest organizational structure to the Order of the Arrow member and therefore any decisions regarding lodge structure should be immediately communicated with chapter leadership, before any public announcements to the lodge. Specifically, any decisions made on the operation of chapters must be clearly outlined to chapter leadership. If and when possible, lodge leaders should consult with chapter leadership on major decisions and policies for the merged lodge. Chapter leaders are directly connected with lodge members and can therefore provide important feedback and suggestions that lodge leaders should take into consideration. They will also be voting on the bylaws at the end of the process so including their feedback throughout the process will make approving the merged lodge's bylaws much smoother.

Before bringing the merged lodge's bylaws to the LEC for approval as outlined in [Chapter 10, "Setting Up Your First Lodge Year"](#), these bylaws should be reviewed by chapter leadership to ensure that lodge leaders are transparently providing chapter leaders with the relevant information regarding the merged lodge's structure. This will also preemptively set up a counterpart mentor relationship between lodge officers and chapter officers which improves function in many lodges and chapters outside of merging as well.

## Transparency with Members

Finally, lodge leaders must be transparent with lodge members throughout the transition process to ensure that members understand what is going on and do not feel confused or left out of the process. Importantly, you should use lodge communication channels to notify members of major decisions, such as the merged lodge's name, totem, and calendar of events. This can be done through legacy lodges' communications channels until the merged lodge has an established following on their communications platforms, but the messaging should be consistent across all legacy lodges' communications.

Social media is an important platform to utilize throughout the transition process and social media accounts should be developed for the merged lodge as soon as a name and totem have been decided upon. Legacy lodges should direct their members to follow the social media accounts of the merged lodge and should actively repost content from these accounts to the legacy lodges' pages.

Announcements and other communications to members about the lodge merger process should be enthusiastic. It is easy for members to become overwhelmed, confused, or discouraged by the lodge merger process, so it is important that lodge communications are positive. Themes should center on highlighting the great things to come from the merger and the shared identity of your collective new lodge. Every communication should promote brotherhood and fellowship within the merged lodge. Encourage members to become actively involved in new lodge activities and service. Additionally, encourage them to join the committees of the merged lodge as they become established. This will ensure that everyone feels included and has a part in the process.

It is also important to remember that communication goes both ways and the lodge should collect and honestly consider feedback from its members. Develop a method for collecting feedback after every event and utilize this feed-

back to guide the merger process and future lodge events. Lodge members will be more likely to have a positive opinion of the lodge merger process if they can provide feedback on the events and activities of their merged lodge.

## Ask For Help

The lodge merger process can be difficult, and it is important to be transparent in asking for help when you need it. It is okay to struggle at some points throughout the process and it is better to admit when you are struggling and ask for help, rather than try to struggle through alone and come out with poor results. There are several resources that lodge leaders can utilize to seek help in the lodge merger process.

Lodge leaders can seek assistance from the council. The Scout executive and the merged lodge's staff adviser are both great resources throughout the lodge merger process.

As with everything, it can also be valuable to seek help from your predecessors including past lodge chiefs, past LEC members, and past advisers.

Additionally, the section or region can provide guidance and serve as an objective third party throughout the transition process. The section or region leadership will likely have been involved in a lodge merger before or can connect you with someone who has. They will also have resources to assist in areas with which merging lodges have struggled in the past. Do not hesitate to reach out to one of these resources if you find that you need help.



## Chapter 10: Setting Up Your First Lodge Year

When it's finally time to execute your first full year as a new lodge, there will be a lot of firsts within that year: The first LEC meeting, the first lodge elections, the first lodge fellowship, etc. With each of these firsts, it's important to celebrate the progress made, no matter how big or small your first may be. You've made a lot of progress so far, and this is where you finally get to see all your hard work start to pay off.

### The First LEC

The first LEC meeting for your new lodge should occur before you have held the first officer election for your lodge. It should be attended by all co-officers and chapter chiefs, as well as any other interested party.

Being transparent throughout the process and allowing everyone's voice to be heard will only make the merger process go even smoother. Before the meeting starts, a parliamentary procedure should be established. This includes who gets to vote, how much discussion time is allowed before a vote, etc. There are many different ways to run a business meeting like this, however the most common and recommended is Robert's Rules of Order, which is what Congress uses for their meetings.

You can research the exact procedures in detail and decide what process works best for your lodge. Robert's Rules of Order is not required; however, its principles are highly encouraged to provide a fair and efficient meeting. There are a few additional things to keep in mind. Firstly, the secretary should keep the minutes of the meetings and write down all motions and votes made.

Once a procedure for the LEC is decided on, you can then have the meeting. There are several topics that should be discussed at this meeting and decisions that should be made.

The first point of business is to approve the lodge bylaws. At this point the bylaws for the new lodge are already written, edits have been made, etc. All that is left is to get approval from the LEC to make the proposed lodge bylaws, officially the bylaws of the lodge.

Because the bylaws were written before the start of the meeting, the chapter chiefs should already have been sent a copy for review before the meeting. This allows them to take all the time they need in reviewing the proposed bylaws, and hopefully enough time for any errors to be caught before the LEC meeting starts, as well as get feedback from the chapters. By doing this, the LEC meeting should be as smooth as possible, without any changes to the bylaws proposed during the meeting.

Before the meeting starts, the co-lodge chiefs should discuss how they want the bylaws to be presented. It is recommended that each co-chief presents part of the bylaws so that no one person is talking the entire time. This also helps people's view of the co-chiefs being co-chiefs, and not one Arrowman more important or having more authority than the others. No matter what is decided, the entire bylaws should be reviewed during the LEC before a vote is made. Remember, this will be the document that governs your lodge in the future.

During the process of reviewing the bylaws with the LEC members, chapter chiefs, etc. if any revisions need to be made, they can be made without getting approval from the LEC.

Approval from the LEC regarding changes to the bylaws is only required once the bylaws have been approved.

After the bylaws have been fully explained to the LEC, it is time for the vote to take place. Motions can be made to amend the bylaws after they are approved. After this point, any future revisions to the bylaws must be approved through the parliamentary procedure outlined earlier in this chapter.

After the bylaws have been approved, there are a few other topics that should be discussed and decided on before the meeting is adjourned. First off, it should be established what types of decisions need LEC approval, and which decisions can be made by the lodge chief and supporting lodge officers without consulting the rest of the LEC, such as if there is a certain amount of money the officers can spend without consulting the LEC.

It is recommended that the co-officers discuss the different possibilities in terms of what needs LEC approval and then present what they think the best option is at the LEC meeting. This will keep the meeting moving quickly while still fostering good discussion before the vote is taken. This will set a precedent for all LEC's throughout the future of the lodge and make it clear to LEC members how things will operate. Communicating approval requirements at the very first meeting will help to eliminate confusion in the first year as well as allow these requirements to be passed on to future lodge leadership.

Of course, if there are any other topics that the co-officers decide are worth discussing and voting on at the LEC meeting, they should be added to the agenda in addition to what was already discussed.

## **Bylaws Final Approval**

Once the lodge bylaws have been approved by the lodge, they must also be approved by the Scout executive. It's important to remember that the Scout executive has the final say regarding anything that the lodge does. Keeping this in mind, the newly elected lodge chief

and recently appointed lodge adviser should meet with the Scout executive in person to discuss the bylaws, and hopefully by the end of the meeting, receive the Scout executive's approval of the bylaws.

If the Scout executive suggests edits, it is up to the newly elected officers to revise them, get LEC approval on the revisions, and then schedule another meeting with the Scout executive to review the bylaws once again. This process may be frustrating, especially if the Scout executive does not see eye-to-eye with the lodge leadership and several rounds of revisions are required. It's important to remember that the Scout executive oversees Scouting operations for the entire council, so they are likely thinking of the council's operations as a whole, and may consider things you are not aware of. Trust that every Scout executive has the best interests in mind for the lodge, council, and Scouting as a whole.

## **First Lodge Election**

The next part of setting up your first lodge year is holding officer elections. The first election for your lodge will differ greatly from any other election your lodge may have in the future. Traditional lodge elections usually have the past lodge chief preside over them, lodge members know every candidate, etc. Obviously, none of this will be possible for a new lodge. This first election should take place no more than six months after the lodge merger. The date should be announced far ahead of time so that anyone wishing to run in the election has enough time to put it on their calendars and prepare accordingly.

To ensure the fairest election for everyone involved, the election should be run by section officers or another neutral third party. An electoral college should be used, where each legacy lodge gets ten votes. These ten votes should be an equal representation of what each legacy lodge member wants for the new lodge officers. For example, if there are 100 youth legacy lodge members gathered for the election, and 50 vote for candidate "A", 40 vote for candidate "B", and 10 vote for candidate "C", the lodge should cast 5 votes for "A", 4 votes

for "B", and 1 vote for "C". Unlike the process used by most states during presidential elections, lodges should not cast all votes to whichever candidate the majority of the lodge wishes to support. By following this process, smaller legacy lodges will have an equal say in their new lodge leadership as the larger legacy lodges do.

If there is an exact tie between two candidates, the candidates should be given one more opportunity to speak and win more votes. After this, a second round of voting should commence. If there is a second tie within the electoral college, then the election should be determined via a vote by the LEC including all of the outgoing co-officers, current chapter chiefs, and other current voting members.

## Position Appointment

After elections are held, the newly elected youth officers will need strong advisers to help guide them along the way. The Scout executive and lodge adviser should appoint all associate advisers needed for the new lodge. This should include members of all legacy lodges but also be based on the skills shown by them in the transition process and their legacy lodge.

Although not required, including the newly elected lodge chief in this process is a great strategy. Getting that youth perspective will go a long way to ensuring that the advisers picked are not just skilled at what they do, but also will be Arrowmen the youth can connect to on a personal level, and enjoy working with.

The newly elected lodge officers should also appoint committee chairs during this time. Just as was recommended for the new lodge advisers, these committee chair appointments should include Arrowmen from each legacy lodge, while still selecting individuals based on the skills they bring to the table.

Finally, the lodge adviser appoints committee advisers for each committee that a youth officer oversees. Again, this should include members of all legacy lodges, while still choosing Arrowmen based on their merit.

Nothing could be worse for a new lodge than having someone in a leadership position that does not put forth the time and effort required of the position. When reaching out to fill any of the position types outlined above, be sure to have a conversation with each Arrowman about what their responsibilities will be, the time commitment expected from them, etc. By doing this, you can ensure that your new lodge will have a consistent leadership base for the first year or more, so that it can truly start to build traditions and operate fully. Though it is important to have representation from each legacy lodge, do not get caught up in having an exact balance of those in positions. What is most important at the end of the day is that they are the best person for the job.

## Training

After all the positions are filled, it is important to train the new Arrowmen that were recently selected for their role. This is especially important if the Arrowman you selected had a completely different role in their legacy lodge or maybe has never had a formal role at all.

During this training, they should be educated on a wide variety of topics including lessons on becoming a better leader, how the LEC will function, the lodge's bylaws (including each officer reading them in full detail), and more.

A guidebook should also be utilized which outlines what is expected of each position so that the new lodge leaders can look back on it throughout the year and make sure that they are fulfilling all of their duties to the best of their ability.

In addition to holding this training day, their predecessors should make themselves as available as possible for advice, new ideas, and overall encouragement as a new trial is blazed for this lodge.

Additionally, the merger task force is a very valuable resource, especially in the first year of your new lodge's operations. It's likely that complications will develop during the first year due to the merger, and having the merger task

force available for the LEC as a resource will make solving these issues that much easier.



## Chapter 11: The Lodge Merger Task Force

The primary purpose of the merger task force is twofold—first is to guide and support the two legacy lodges as they merge into the new lodge, and second is to monitor the new lodge’s functions for the first two and a half years, giving guidance as needed. Task force members should study the entirety of this handbook to facilitate a smooth transition.

### Role

In the first phase, the merger task force will guide the LEC, committees, and chapters through the planning outlined in this handbook. The task force will lead the making of the processes and decisions for the new lodge and will take a big-picture perspective to ensure each individual decision fits into the overall lodge unity. The lodge merger task force will then provide input and guidance as the committees and chapters go through their process. This task force will also take on tasks related to the merger as assigned by the co-lodge chiefs.

After the legacy lodges merge into the new lodge, the task force will monitor the lodge for two and a half years. During this time, the task force will ensure that the transition is successful, following the transition plan as needed, or identifying areas where the transition plan may be improved. The lodge is a living organization; do not be afraid to alter the static document if changes are needed to accommodate unforeseen circumstances. If the task force identifies areas that warrant discussion, they shall bring up the topic to the LEC to discuss and decide.

The decisions made by the task force will lay the groundwork for many years to come. When lodge members come to say “our lodge

always does things this way,” they are the beginning of that “always.”

### Membership

The task force will consist of key youth leadership and adult advisers. Each lodge merger is different, so members of the merger task force should be picked to best represent the strength of the legacy lodges and be capable of weaving those strengths into new traditions. Each member should be willing to embrace fresh ideas. The size of the task force will depend on the size of the merging lodges but should strive to have equal representation between the legacy lodges.

There are a few key members to include. First, a section facilitator who is meant to be an impartial facilitator appointed by the region chairperson. This individual’s role is not to make decisions, but to guide the conversations as the legacy lodges transform into a single entity.

Next, current and past lodge chiefs, because of their experience running the legacy lodges, will provide the task force both familiarity with the current traditions as well as understanding the importance of having the lodge united in a single vision. Their insight will be valuable in unifying the new lodge.

You should also include members of the legacy lodges with expertise in key areas such as inductions, service, finance, etc.

Finally, include adult advisers. These adults should have some familiarity with the history and traditions of their lodge, and more importantly, a drive to enable and support youth

decision-making. When the new lodge selects its lodge chief, that person will be an *ex officio* member of the merger task force if not already a member.



## Chapter 12: Absorption of All or a Portion of a Dissolved Lodge

If, instead of a merging of multiple lodges, a lodge is instead split and absorbed by several neighboring lodges, or absorbed entirely by another council, many of the same steps in this handbook still apply. There will be many similarities in regards to the fusing of traditions, though the lodge structure may not go through as many changes and the absorbed lodge might not have co-officers for every position. It is important for the absorbing lodge to include the absorbed members as early as possible.

### Absorption Task Force

The lodge should still field a merger task force to facilitate the absorption—this will ensure that the traditions of the absorbed lodge may be included when the lodge borders are redrawn, and give the absorbing lodge opportunities to welcome the new members into the leadership structure. There may not be enough officers in the absorbed lodge to have co-officers in every position—that is okay. The absorbed lodge may appoint representatives for the co-chairs (e.g., a member of the service committee may be appointed to the co-chairperson role if the current chairperson will not be absorbed into the new lodge). The important thing is for the officer team to have representation and input from all lodges. The new lodge can take advantage of this opportunity to re-evaluate its committee structure and establish or consolidate positions to best serve the new membership.

### Integration

Even if no restructuring is done, it is important to invite the new members to get active in lodge leadership. Communicate to them the committees they can join. The leadership of the absorbing lodge should also, either through personal connections or mass surveys, find out how members of the absorbed lodge were active in the absorbed lodge and help them connect with those same areas in the new lodge.

The absorbing lodge will need to integrate their new membership into their communications immediately. History has shown that the longer an entity waits for inclusion, the larger the wedge between the groups. During this time, the lodge should hold joint opportunities for fellowship and bonding to give all members opportunities to gather and get to know each other. This will also give a sense of understanding of the other traditions and build a common experience for the new unified lodge to draw. As covered in [Chapter 6, "Your Lodge Program"](#), it is important to find opportunities to celebrate the new lodge, together. Gather feedback from the membership—this will give valuable insight as to the traditions that are valuable to the membership. A great opportunity to both build fellowship and gain feedback is to hold a panel with the officers and leadership of both lodges for the Arrowmen of the absorbed lodge. Officers can detail opportunities within the lodge, highlight what they're doing to help them transition into the lodge, and ask for input from them on what they'd like to see, perhaps even see if they have a tradition

from their lodge that they may want to see added.

It is also vital that lodge leadership train their chapter officers on these same principles. The chapters are the Arrowmen's base connection to the lodge and the Order of the Arrow, so it is important that they are smoothly and warmly integrated into their respective new chapters.

The key to absorption is to make sure that members of the absorbed lodge become welcomed, heard, and active. Even small gestures

can go a long way, such as sending a welcome post card from your lodge chief, asking them their favorite things they experienced in their legacy lodge, providing an information guide to your lodge, giving the opportunity to request having an active Arrowman as a guide and resource for their transition, or even holding a small welcome event within the absorbed lodge's boundaries similar to the kickoff event described in [Chapter 8, "Operating While Transitioning"](#).

# Appendix: Back-Date Calendar

## Basic Six Month Back-Date Calendar (Steps in Order)

This is a basic outline to use if the Scout executive chooses to make the transition time the standard of six months. Individual lodges are welcome to expand it to fit an eight to twelve month timeline if the Scout executive sees fit.

### Month 1

1. Establish new lodge name and totem
2. Establish new lodge leadership structure at the officer and committee levels
3. Begin to write bylaws
4. Create new website, social media, and brand

### Month 2

1. Announce new lodge name, totem, website, social media, etc.
2. Establish calendar and program
3. Establish induction process
4. Announce new calendar

### Month 3

1. Start to work with committees to establish their processes
2. Begin to operate and hold events following new programs
3. Begin guiding chapters through their process

### Month 4

1. Committees create plan-books
2. Officers finalize position guides
3. Finalize bylaws from processes established

### Month 5

1. Send bylaws to chapter chiefs for review
2. First full LEC

### Month 6

1. First lodge elections
2. Scout executive approves bylaws
3. Appointment of all advisers and committee chairpersons
4. New leadership goes through training

## Appendix: Recognition Selection Policy for Lodge Mergers

This policy applies to selection of Vigil Honor candidates and Founder's Award recipients; both will be referred to as "recognitions" below. (It is possible that the first paragraph below will apply to a merging lodge's Vigil Honor nominations, and the second paragraph to a merging lodge's Founder's Award nominations, or *vice versa*.)

For some lodge mergers, none of the predecessor merging lodges will have submitted their recognition nominations before a merger is completed. In this scenario, the merged lodge may submit recognition nominations for two or more predecessor lodges after the merger takes place or may submit recognition nominations as the new lodge, however, they may not do both. As part of the lodge merger process, the merger committee should decide how they want to proceed with this process. If the newly merged lodge opts to submit recognition nominations as predecessor lodges, the newly merged lodge is not permitted to submit additional recognition nominations as that would represent a second selection for the pool of members affected in the lodge merger, and the newly merged lodge will submit their first set of recognition nominations in the calendar year after it has merged. If the newly merged lodge opts to submit recognition nominations as the new lodge, the predecessor lodges are not permitted to submit additional recognition nominations as that would represent a second selection for the pool of

members affected in the lodge merger, and the newly merged lodge will submit their first set of recognition nominations in the calendar year in which it merged.

In other cases, a scenario may exist in which one or more or all of the predecessor lodges have submitted recognition nominations prior to the lodge merger taking place. In this scenario, the newly formed lodge does not have the ability to choose how to proceed with this process as one or more lodges has completed their recognition selections during the calendar year. As such, the lodge(s) which have yet to submit recognition nominations are permitted to make their selections using their predecessor lodge membership numbers, and the newly formed lodge is not permitted to submit additional recognition nominations as that would represent a second selection for the pool of members affected in the lodge merger. If all the predecessor lodges have submitted recognition nominations prior to the lodge merger, the newly merged lodge is not permitted to submit additional recognition nominations as that would represent a second selection for the pool of members affected in the lodge merger. In any scenario in which at least one lodge has submitted recognition nominations prior to a lodge merger, the newly merged lodge will submit their first set of recognition nominations in the calendar year after it has merged.

## Appendix: Frequently Asked Questions

**Q: Who should make the decisions throughout the lodge merger process?**

A: The youth should be at the helm of all conversations and have the final say in all decisions not mandated by national policy ([Chapter 2](#)). More specifically, a merger task force should be formed of three to five key youth and adults from each legacy lodge to spearhead this process ([Chapter 11](#)). The region chair should also appoint a facilitator to guide them through the procedures and serve as a moderator.

**Q: How should restructuring and process decisions be made?**

A: Lodge leadership should prepare by specifically outlining their legacy lodge's structure and procedures ([Chapter 1](#)). The merger task force should then hold intentional conversations about the purpose, results, and comparisons between their legacy lodges' ways ([Chapter 5](#)). Specifically for restructuring, a balance should be found between the titles and responsibilities of legacy positions to create the new positions ([Chapter 4](#)). During process conversations, the merger task force should figure out the core reason of suggestions and analyze legacy lodge metrics ([Chapter 5](#)).

**Q: What principles are key to follow when merging lodges?**

A: There are a few important ideals to remember when going through this process. First, be sure to write down all decisions made as they happen and then formally dictate them in bylaws, planbooks, and position guides later on ([Chapter 7](#)). Second, transparency to all levels is of the utmost importance. All decisions should be communicated directly to committees, chapters, general membership, and anyone they may affect ([Chapter 9](#)). Finally, be sure to spread positivity and excitement regarding every decision and the progress that is made ([Chapter 3](#)).

**Q: In what organizational order should items be changed?**

A: Begin by establishing everything at the lodge level. Then, begin to consult committees on their specific responsibilities and tasks with members of the merger task force guiding the conversation. If a lodge level decision would affect a committee, they should be consulted in the beginning of that conversation. After that, members of the merger task force and lodge officers can guide chapters through their conversations and beginnings while ensuring consistency with new lodge policy.

**Q: How does the new lodge calendar get created?**

A: Compare the calendars of both legacy lodges and find consistencies in dates. Once date patterns are noticed, compare the purposes of the legacy lodge events around each consistent time and decide on what the new event will be intended for.

Be sure to have a balance throughout the year of inductions, service, fellowships, etc. ([Chapter 6](#)).

**Q: How should the lodge operate while transitioning?**

A: The lodge should be led by the officers of both legacy lodges serving as co-officers in the new titles established during restructuring. Events should be held following the new calendar that is created by the merger task force. This can also include a fun kick-off event bringing the lodge together in fellowship for the first time. Feedback should occur consistently and lodge leadership should regularly reflect on how things are going to improve for the future.

**Q: What should be the process for the lodge's first elections?**

A: To ensure the fairest election for everyone involved, the election should be run by section officers or another neutral third

party. An electoral college should be used, where each lodge gets ten votes. These ten votes should be an equal representation of what each legacy lodge member wants for the new lodge officers. In the event of an exact tie between two candidates, the candidates should be given one more opportunity to speak and win more votes. After this, a second round of voting should commence. In the event of a second tie within the electoral college, then the election should be determined via a vote by the LEC including all of the outgoing co-officers, current chapter chiefs, and other current voting members. It should occur no more than six months after the lodge merger is finalized ([Chapter 10](#)).

**Q: What should happen at the first lodge executive committee meeting?**

A: The first lodge executive committee meeting will set a precedent for all future meetings. Most importantly, a procedure for the meeting should be established and communicated. Secondly, final review and approval of the new lodge bylaws should be approved. Finally, it should be explained what will need LEC approval in the new lodge ([Chapter 10](#)).

**Q: What is the lodge merger task force?**

A: The primary purpose of the merger task force is twofold—first is to guide and support the two legacy lodges as they merge into the new lodge, and second is to moni-

tor the new lodge's functions for the first two and a half years, giving guidance as needed. They will make the key decisions for the creation of the new lodge and guide the committees and chapters through their decisions. Membership consists of former lodge officers, key adults, and youth from strong areas in each legacy lodge to make decisions and a section facilitator to guide conversations.

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

A: 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 chair 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.





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