



# **Guide for Lodge Staff Advisers**

## **Southern Region Order of the Arrow**

## Introduction:

*Many of you may be wondering what your duties are as OA Staff Adviser. You may be concerned that the time and effort you spend with ordeals, fellowship weekends and conclaves tax your family and your own sanity with no returns to your future in Scouting. Hopefully this document will help you get a grip on this “other duties as assigned” and make those weekends more fun and rewarding to you personally and professionally.*

*There are three publications you should become familiar with. They are the OA Handbook, the Guide for Officers and Advisers and the Field Operations Guide. You can purchase an OA Handbook from your lodge and the others can be downloaded from [www.main.oa-bsa.org/resources/pubs/#goa](http://www.main.oa-bsa.org/resources/pubs/#goa). (control-click) Many other good resources can be found from this same link to the National Order of the Arrow website.*



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## **Lodge Staff Adviser Responsibilities**

1. Appointed annually by the Scout executive. If not a member when appointed, participates in the first available Ordeal. Consults with the Scout Executive on the annual performance and appointment of the lodge adviser.
2. Understands the policies and principles of the Boy Scouts of America and the Order of the Arrow. Communicates and ensures their application to OA functions.
3. Ensures funds are properly budgeted, receipted, disbursed, and transmitted according to council procedures and the accounting manual of the BSA. Attends all lodge functions and other appropriate OA activities.
4. Provides council, regional, and national information, literature, and correspondence to lodge advisers and appropriate committees. Orders materials and supplies from the national office and Supply Division.
5. Works with the lodge adviser to help the lodge chief conduct lodge executive committee meetings. Attends and sits with the lodge adviser and lodge chief.
6. Recommends and attains Scout executive approval of prospective adult advisers.
7. Encourages appropriate adult participation and support to committees and activities. Informs professional staff associates of OA activities, program, and correspondence.
8. Works with the lodge adviser to ensure appropriate adult participation in meetings of lodge operating committees related to their assignments. With the lodge adviser, ensures the lodge charter renewal application is processed and mailed on time.
9. Recommends agenda items. Ensures that financial and activity reports required from the council office are printed with timely information. Works

with advisers to the lodge treasurer and other committees concerning the information in the reports.

10. Represents the OA at the council annual planning conference, coordinating dates with council, region, section, and national dates. Makes appropriate reservations for council facilities. Works with office staff to ensure timely communications to the membership and units, as well as accurate member records and mailing list. Involves the OA in council programs. Ensures lodge representation at national and section OA functions.

11. Monitors the delegation of responsibilities and assists the lodge adviser and lodge chief in evaluation, assignments, and follow-up.

12. Recommends to the Scout executive the appointment of chapter staff advisers. Communicates with chapter staff advisers and ensures appropriate council services to the chapter system. Evaluates and makes suggestions for chapter programs.

13. Keeps the Scout executive informed on all OA projects. Recommends potential service projects for OA consideration. Coordinates with the camp ranger on Ordeal and other OA projects at camp.

14. Administratively supports the functions of the Vigil Honor nominating committee.

15. Sets the example for youth and adult Arrowmen by correctly wearing the Scout uniform with proper badges and insignia correctly placed.

16. Secures rosters and reports required by the OA in a timely manner for their use.

## **Guiding the Leadership of the Lodge:**

You, as the eyes and ears of the Scout Executive in the lodge, should always be alert to the direction the lodge is taking and should be “nudging” it in the right direction. You should never attempt to be a dictator, that isn’t your role. However, informal meetings of the key-3 at OA functions should allow you to guide the lodge in the right direction. You must be familiar with the rules and regulations so that you can handle any “end-run” that is tried on you. They will come, so be ready.

Your Scout Executive will ask your opinion on who should be the next lodge adviser. The rule for adviser tenure is “one year” for a very good reason. You may opt for an adviser serving for more than one year but it should be understood from the start that it is an “annual” appointment. Get to know the volunteers who are involved in the OA. What else do they do for Scouting? If they are the “retired” scoutmasters who only attend OA events and nothing else, remind them of their servant leadership role and get them involved as commissioners, committee members or something else. If the past adviser is positive and pro-council he needs to stay active. Find something for him to do. He may be a good resource for the council camping committee. Remember, camp promotion is a vital part of the OA function.

Take a long look at the list of qualifications for a lodge adviser. Who fits those criteria? Who fits best? Make a list of five or six candidates and narrow it down to about three. These should comprise your prospect list for the Scout Executive. If you have chapters, ask the district executive for his input for chapter adviser. Remember, however, chapter advisers are appointed by the Scout Executive as well.

You will see youth at all the events of the Order of the Arrow taking on leadership roles. Leadership training is another vital role of the lodge. As you recognize outstanding young men, encourage them to run for chapter, lodge or section office and to serve on council summer camp staffs or day camp staffs. You cannot vote or control the outcome of the election and may have to work with less than the ideal chief. However, your guidance will help insure the right leadership is elected.

## Guiding the Finances of your Lodge:

The first item of financial business for you as the lodge staff adviser is to know what the status of the lodge's finances really is. Forget about the lodge treasurer's report. You need to talk to the council comptroller or accounting specialist. The Order of the Arrow finances should be in a custodial account with your council. There should never be a separate lodge-held checking account or volunteers in charge of the OA account.

Ask your accounting specialist to give you a printout of the current and past three years OA income and expenses. Very likely your account won't have much detail. You will probably need to begin keeping more detailed records to be able to make detailed budgets. There are cost centers that can be used for food, recognition, trading post inventory and sales, dues, and so on. There is a budget template on page 12.

Plan your OA budget just as you would a camporee, district banquet or day camp budget. Get a handle on the average attendance, average sales, average food costs, etc. to help you in preparing the preliminary budget. Once you have these figures for each OA event (ordeals, fellowships, training events) you can put together the overall annual budget. Budget the liability insurance and accident insurance as a part of each event budget and include a 15% net and 15% contingency.

Next, sit down with the adviser and chief to review any out of the ordinary income or expense items to include in the budget. Be sure to include a nice contribution to the council FOS campaign and budget an improvement to camp or the council headquarters. It is best to budget an amount and not a specific project until your key-3 meets with the council Scout Executive to discuss the annual OA plan. As you build your budgets, you will need to start with the expenses that you know you will incur. Include the cost of copies made in the office, postage and so on. Once you have all your costs listed, you can work on income. How much is your normal trading post sale for each event? Include that in the income section but don't forget to include the cost of sales right below it. Now, look at your net at the bottom of the budget form. It should be a negative number. Divide that number by the average attendance at

the event and you have your event cost per person. Don't forget to add an expense line for guests if you won't charge everyone for some reason.

Now, how can you make the weekend cost less, since your budget says it will cost each participant a lot the way you have it figured? What can you do to increase trading post sales? Every event in the OA should have an event patch. Patch trading is a lot of fun and can be extremely profitable to the lodge. Don't order too many, though. Just order enough for your expected attendance plus a few to sell in the trading post. Suggest that the lodge produce additional lodge patches and memorabilia from time to time as appropriate. The selling of these new and distinctive lodge items are often good opportunities to raise funds as well as to encourage OA participation and camaraderie. Try to allow all active lodge members an opportunity to buy these lodge items. Make recommendations, but always allow the youth to decide what lodge memorabilia will be produced. Get your adviser and chief to buy into some of these things and have them get a member of the LEC to put them into the agenda for the LEC meeting. These should be their ideas; you just need to help them hatch.

Do all your members pay their dues annually? Many lodges pay for members who seldom attend a function. If you are going to do that, and many of these folks are good to keep on your membership list for "when you need them", then do it wisely. Some lodges sell an Annual Pass for all their events. This "pass" is nothing more than a fancy patch that is ordered at the fall fellowship and delivered at the spring fellowship. You only order the number you need to meet the demand so there are no leftovers. Figure the cost of all the events for the year and make that the cost of the Annual Pass. Say you have a spring and fall fellowship at \$25 each and two ordeals at \$15 each. The annual events then would cost \$80 if paid for separately. The lodge charges \$80 (plus the cost of the patch). Everyone likes this! The member can attend events without paying "at the door" and the lodge has the money up front. A good part of this is only about 60% of the Annual Pass holders will attend any one event (other than fall fellowship). Perhaps you will want to increase the cost of the Annual Pass to include next year's dues. These special OA patches will normally bring a premium at patch trades and can help the bottom line on your budget.

## **Guiding the Training of the Lodge:**

Once you have the right leadership in place and a proper budget for them to work with you can begin to move the lodge toward other areas where they can help their council be successful.

Probably the first activity any lodge should put as a priority is proper training of the leadership of the lodge. The first is the lodge LLDC. LLDC (Lodge Leadership Development Conference) is a locally produced training event for all leadership positions in the lodge. You should help make sure this is an annual training event and that it is of high quality.

Secondly, all current lodge chiefs and those aspiring to lodge leadership positions should attend NLS (National Leadership Seminar). The Southern Region hosts four of these each year around the region. You and the lodge adviser should also attend if you have not. NLS is organized by the region but is staffed and put on by the Region Chief and Section youth leadership. NLS has been called the very best training in the Boy Scouts.

Next, Adult lodge leadership, you, the adviser and chapter advisers, should attend NLATS (National Lodge Adviser Training Seminar). NLATS is the basic training for OA adult leadership.

Finally, Youth and adults should attend NOAC (National Order of the Arrow Conference). Your lodge key-3 should make arrangements to attend. Additionally, your lodge should send several adult volunteers (over 18 years old) and youth to learn new skills, meet new friends and enjoy OA fellowship with brothers from around the nation. Go to our OA website to learn more about NOAC.

## **Guiding the Programs of the Lodge:**

What does your lodge do for the council? Most lodges have at least one ordeal weekend where they do some work at camp and when they host a conclave they usually do a lot of clean-up and dress-up at camp. But what else do they do for the council? Your job is to guide them to do those other things they should be doing anyway.

Every lodge has camp promotion as a part of their Quality Lodge requirements. But do they do promotions just to get by or do they really take pride in contacting every troop and making a good job of it? You should insure it is the latter. Help the adviser and chief come up with an “innovative” way to encourage camp promotion teams to be successful. (A patch?) What about Cub Scouts? Does your lodge do any Cub camp promotion? Do they help with Blue & Gold banquets, Arrow of Light ceremonies or Cross-Over ceremonies? If not, then they should. Cubs are future Boy Scouts and future OA members. Review the new publication “OA Lodge Cub Scout Service Guide”. It has many helpful tips on how your lodge can help the council by promoting the exciting opportunities that await Cubs in Boy Scouts. It can be downloaded from the Southern Region OA website at <http://www.southern.oa-bsa.org/>.

Many lodges think they ”own” the council camp and in many ways they do. However, you need to help them develop their plans to coincide with the council’s plans. Help the adviser and chief come up with three or four good service projects for the lodge to accomplish at camp each year. Arrange a meeting with the Scout Executive and ask for his input and to present the projects the lodge has suggested. With the Scout Executive, the Key-3 of the lodge should decide what projects would best fit with the long-range plans of the council and present them to the lodge for approval at the lodge annual meeting.

Encourage youth that are between 18 and 21 to register with the council in a youth capacity such as a venturing crew. An OA lodge has many active members between the ages of 18 and 21 who are registered only as Assistant Scoutmasters; they can be a source of youth for Venturing.

## **Guiding your lodge to be a National Quality Lodge:**

Just like Quality District designation says that a district is active and doing the right things, being a quality lodge indicates that the lodge is active and well. It should be your goal to always have a Quality Lodge. Perhaps that could be a Critical Achievement for you. If you are going to do this anyway, why not get some credit for doing it!

“The Southern Region Quality Lodge Guidebook” is very helpful for you in guiding the lodge in the right direction. It spells out each requirement and how to get there. You can download it from the Southern Region OA website at <http://www.southern.oa-bsa.org/>.

Once your lodge is designated a Quality Lodge, make sure they order the QL pin from national supply. It should be worn on the OA pocket flap patch.

## **Guideline for selecting a lodge adviser**

Selection and appointment of a high caliber, qualified individual to be the council's lodge adviser is critical to the success of the Order of the Arrow lodge operation as an integral part of the council program. A lodge adviser's role is much the same as a Scoutmaster of a very large troop of experienced Scouts and adult leaders, where all youth members are first class rank or higher and have considerable outdoor experience. All candidates should have over 2 years minimum experience as Boy Scout program volunteers and have an active interest in the Order of the Arrow.

The primary responsibility is to work with and through elected youth leaders and to give specific guidance and direction to members of the lodge over the age of 21. This is done through individual counseling and through group training efforts.

The lodge adviser's role is an important one and requires careful thought and consideration by the Scout Executive during the selection process. This is one of the few opportunities where a volunteer is personally appointed by the Scout Executive and the volunteer is directly responsible to the Scout Executive. The lodge adviser must be a person of good credentials and integrity.

### **CRITICAL STEPS IN SELECTION OF A LODGE ADVISER**

#### **Step One**

Review the current status of the lodge achievements as part of the council program. Determine the needs of the council in relation to the Order of the Arrow. Write down specific objectives to be achieved by the lodge and the type leadership needed for accomplishment.

#### **Step Two**

In consultation with staff and key volunteers, develop a list of persons who have the qualities needed to perform the responsibilities of a lodge adviser. Appraise each potential individual prospect on qualities.

**Step Three**

Make an appointment with the top-rated prospect. Personally visit with the individual and discuss the proposed appointment. Point out aspects and responsibilities of the lodge adviser functions. Sell the top prospect on the personal satisfaction that can be achieved in developing special Scouting leadership that can have positive and significant impact on the council program and the lives of hundreds of young people. Get the commitment!

**Step Four**

Provide personal counseling and instruction in the responsibilities to be accomplished. This can be done with staff assistance and “Personal Study” program assistance available from the national office of the Order of the Arrow.

**Step Five**

Recognize the one year term appointment through appropriate recognition at a council meeting (i.e. board meeting).

## **Enjoy your success:**

Now, you are still spending the same amount of time at camp but your Scout Executive is smiling because the OA lodge is adding significantly to the FOS campaign and youth membership retention, the camping committee chairman is smiling because the lodge is adding great program items to camp and filling up camp, the council commissioner is smiling because you have recruited additional commissioners and your family is smiling because you are a more valuable employee to the council and get the praise and recognition they know you deserve. Don't forget that you have additional resources and support available through other, more knowledgeable lodge staff advisers, section staff advisers and through the region office.

Keep up the good work: Make your OA lodge an indispensable part of your council.

# Budget Template:

## ORDER OF THE ARROW

Budget Form

Any Council, BSA

Any Council - Boy Scouts of America			
Activity Budget Planner			
Event Name	Cost Center #	Activity End Date	Responsible Person
OA Fall Fellowship			
Budget Prepared By:	Date:	Approved By:	Date:
Income Source	Account Number	Budget	Actual
Activity - Fees	1-6801-____-20		
Activity - Trading Post Sales	1-6811-____-20		
Activity - Trading Post Cost of Goods	1-6812-____-20		
Activity - Other Income	1-6831-____-20		
	1-____-____-20		
	1-____-____-20		
TOTAL INCOME (Less Cost of Goods)			
Expenses	Account Number	Budget	Actual
Program Supplies Expense	1-8103-____-20		
T-shirts	1-8103-____-20		
Patches	1-8103-____-20		
Food	1-8104-____-20		
Sanitation and Janitorial Supplies	1-8105-____-20		
Postage Expense	1-8301-____-20		
Site or Facilities Rental	1-8402-____-20		
Equipment Rentals Expense	1-8501-____-20		
Printing Expense	1-8601-____-20		
Outside Printing and Artwork	1-8609-____-20		
Recognition Awards - Volunteers	1-9152-____-20		
Recognition Awards - Youth Members	1-9153-____-20		
Recognition Awards - Units	1-9155-____-20		
Accident Insurance (.60 per person per day)			
Liability Insurance (1.00 per person per day)			
Other Supplies Expense	1-8131-____-20		
Net overhead (15%)			
Contingency (15%)			
TOTAL EXPENSES			
NET EXCESS (Deficit) Income over Expenses			