



2018 National Order of the Arrow Conference

Cell Name: Advisers' Roundtable
Session Name: Council Relations/Mergers and Fundraising

Session Length: 45 Minutes

Through this session, you will:

Explain The issues Lodge Advisers encounter in their positions

Demonstrate Effective methods and best practices of handling challenges

Guide Advisers through scenarios that allow them to grow in knowledge

Enable Advisers to become better leaders through shared knowledge and experience

Learning Outcomes:

- Outcome 1: The importance of creating an environment of collaboration and mutual respect when working toward a lodge merger.
- Outcome 2: Developing fundraising mechanisms that successfully allow lodges to increase attendance at national programs and training weekends.

Theme Connection:

The theme of NOAC 2018 is "Decide Your Destiny," emphasizing the message that today's decisions shape tomorrow's reality. This session will relay this theme in the following ways:

- As adult leaders we should all make a decision to commit to continual betterment of skills and knowledge. This knowledge included preparing for the unexpected circumstances that can arise including lodge mergers. We also have a responsibility to our youth to limit barriers to national event and training participation. As advisers we should work to ensure that all youth have the opportunity to attend events.

This session will help the Lodge/Chapter with the Journey to Excellence Requirement(s): # 2, #8, # 12, and # 17.

Required Materials:

- Computer with ability to access powerpoint
- Projector and projector screen to display powerpoint presentation



TRAINER PREPARATION

This session should be taught by an experienced trainer who has held key youth leadership positions in the Unit, Lodge, or Section. Understanding of the role and responsibilities of Lodge Advisers, the Lodge Key Three and Council Key Three is helpful. The trainer should have experience working with Lodge officers, Advisers, Scout Executives, and Council Officers.

Prior to the course, review of successful fundraising methods and lodge merger protocol is recommended. Familiarity with lodge operations best practices will prepare you to answer the questions or concerns of the participants.

1. Review the syllabus and powerpoint presentations in order to become familiar with the hypothetical situations and small group breakout sessions.

Session Narrative

Introduction

5 minutes

Being a lodge adviser is a rewarding but challenging experience. Many lodges across the country encounter similar challenges. One of the challenges facing lodges is how to effectively raise funds to allow a maximum number of youth attend national events and training courses. Sharing of knowledge of successful fundraising experiences can help advisers be better prepared to utilize these methods to fundraise effectively.

Another challenge that has increased over time is lodge merger. Mergers are often difficult situations to manage. This cell and session will facilitate knowledge sharing of merger best practices.

Trainer Instructions: If the group of participants is small enough ask them to introduce themselves as well. [Be aware of the participant's Lodge/Section roles as this will inform your later discussions]

Lodge Merger

12 minutes

Lodge mergers are often difficult situations that require careful management. We will discuss these unique challenges today.

Trainer Instructions: Break the group into small groups of 5-10 participants. Have the group discuss among themselves how they would approach the hypothetical situation given to them. Then have one group member present the groups answer to the larger group.

Hypothetical situation: Two Councils with long histories have to merge. The two Lodges both have storied histories and recent success. Recent years have been unkind to both Councils and Lodges as they have struggled for membership and financing. Long tenured time OA adult members fondly



remember the old days and wish a merger was not necessary. They fear that their unique traditions will be lost in a merger. The pre-merger talks have been complicated as leadership from each lodge wants to protect its own traditions and practices. While both Councils did vote for merger, it was not the desired result.

The Lodge Chiefs and Advisers of the two lodges know that their merger takes place following the Council merger. First the Councils will merge and then 9 months to a year later the Lodges will merge. Being in the same Section, the Lodges are somewhat familiar with each other but contact has been limited.

Although National has overseen now dozens of mergers, the individual circumstances of each Council or Lodge means that each merger has its own special conditions to deal with. We cannot rely solely on National Council guidance. It is crucial that each council and lodge invest in tailoring the merger of cultures to best meet their specific situation. Both youth and adult leaders are in uncharted territory and are nervous and uncertain about the future merger.

Where do you start on a successful merger? What are the most important aspects of a successful merger? Answers should include mutual respect, communication and collaboration.

Fundraising- National Events

12 minutes

It is our responsibility as adult leaders to ensure that youth have the opportunity to take part in national events and training sessions. We as advisers should always work to best support the youth vision and attendance goals.

Trainer Instructions: Break the group into small groups of 5-10 participants. Have the group discuss among themselves how they would approach the hypothetical situation given to them. Then have one group member present the groups answer to the larger group.

Hypothetical situation: Lodge A represents a mix of urban and suburban troops with a family income range to match. Activity and participation in the lodge has been growing under new youth leadership and a lodge adviser who is well respected by both youth and adults in the Council. The Lodge Chief would like to significantly increase lodge participation at the NOAC taking place in two years. In order to achieve his goal, the Lodge Chief must overcome poses two challenges. Past NOAC travel itineraries have included a 2-3 days bus trip to NOAC with activities along the way. The resulting NOAC fee is about two-and-a-half times the National OA NOAC fee. For lodge members from well to do families, the resulting fee is not an obstacle, but for other families the fee is high.

The resulting NOAC contingent will be small and not representative of the lodge if action is not taken. The obvious solution would be to remove the tourism component and reduce the overall fee accordingly. This option denies Arrowmen the opportunity to take advantage of the additive experience of visiting scenic stops on the way to NOAC. Another possible solution would be to subsidize the travel budget from general lodge funds, but this option would make every Arrowman pay for the proportionately small number of lodge members that will attend NOAC.

What other options are feasible that will allow Lodge A to send as large and as representative a contingent to NOAC as possible?



Answers should include local NOAC endowment funds, special NOAC fundraisers and individual fundraisers.

Fundraising- Training Events

12 minutes

Attending training activities is crucial to effective lodge leadership. Cost should not be a barrier to attendance.

Trainer Instructions: Break the group into small groups of 5-10 participants. Have the group discuss among themselves how they would approach the hypothetical situation given to them. Then have one group member present the groups answer to the larger group.

Hypothetical situation: At a recent NLS session the adult participants discussed lodge practices regarding funding for NLS and other training fees. One adult adviser shared that they had not been asked to pay for the session. Chatting with fellow participants they realized that practices differed considerably among the lodges. Some lodges fully paid for training activities while some partially paid while others provided no financial support. Given the \$ 100 session cost, the adult adviser thought that this was a very modest fee and that that they would have been quite willing to pay had they been asked. The lodge adviser understood that this may not be true for everyone especially youth leaders.

The adviser wondered about the best method to raise funds to offset the cost of attending national training. How should the adviser work with the youth leadership to create this program? What are the options?

Answers should include local training endowment funds, special fundraisers and individual fundraisers.

Takeaway Challenge

4 minutes

Thank the group for their input and hard work during the session. I encourage you to reflect on our session today. What did you learn today that will help you in your role in the Order? I encourage each of you to write down two to three ideas learned during this session on council mergers and fundraising. Make the decision today to share what you have learned with others in your lodge contingent.

Appendix: Resources and Source Material

- 2012 Lodge Adviser's Handbook, available online at:
<https://oa-bsa.org/uploads/publications/lodgeadviserhandbook-2012.pdf>



- 2012 Guide for Officers and Advisers, available online at: <https://oa-bsa.org/uploads/publications/GOA-2012.pdf>
- 2018 Field Operations Guide, available online at: <https://oa-bsa.org/uploads/publications/FOG-2018.pdf>
- 2012 Chapter Operations Guide, available online at: <https://oa-bsa.org/uploads/publications/cog-2012.pdf>
- 2008 Lodge Finance Manual, available online at: <http://www.oa-bsa.org/pages/content/publications#lfm>
- Chapter Journey to Excellence Workbook, available online at: <http://www.oa-bsa.org/pages/content/printable-forms>