LA150 - Conducting a Lodge Needs Assessment

National OA Adviser Training

Session Length: 25 Minutes

Slide 2 - Overview

- This session will describe what a Lodge Needs Assessment is, explore the reasons for conducting one, and show a Lodge Adviser how to conduct a Lodge Needs Assessment.
- Also covered is how to analyze and prioritize the results of a Lodge Needs Assessment and how to put those results into action.

Slide 3 - Learning Objectives

- To answer the following:
    - What is a Lodge Needs Assessment?
    - Why conduct a Lodge Needs Assessment?
    - What are the barriers to conducting a Lodge Needs Assessment?
- Learn how a Lodge Needs Assessment is conducted

Detailed Outline of the Session:

Slide 4 - What is a Lodge Needs Assessment?

The definition of a "need" is a gap or discrepancy between the current condition of an organization or situation and the way things should be. A "Lodge Needs Assessment" is an analysis whereby the "needs" of the lodge are examined and identified in order to set future priorities and direction. Simply put, the assessment is a formal way of finding out what the most important needs or your Lodge are and what direction you and the lodge leadership should take. Just like any good Scout starting out on a journey, you need a map to begin your journey as a Lodge Adviser and the lodge leadership.

Your map exists in the Journey to Excellence criteria and national publications such as the *Guide to Officers and Advisers*. The Lodge Needs Assessment helps you orient yourself to your Lodge's current position as compared to those criteria and suggestions. You are then able to examine your position and compare it to where you would like to be, and formulate a plan on how to get there. Once you have the results of your Lodge Needs Assessment, you are able to work with your Lodge Chief, your Lodge Executive

Committee, your Scout Executive and other key stakeholders to set meaningful goals and objectives for the lodge.

Slide 5 - Why Conduct an Assessment?

There are a number of reasons to conduct an assessment. First as a leadership team it gives a place to start. For the youth, they will learn a useful and systematic process for identifying improvement needs and the development of action plans to meet these needs. Having as many involved in the process creates buy-in for improvement. Among other reasons for an assessment include:

- It gives measurable data on which to base goals and objectives
- It helps identify acceptable practices
- It is takes the basic *Start, Stop, and Continue* evaluation to the next level
- It identifies what the "sacred cows" might be and which might become "sacrificial cows"
- It is a great framework to use to help promote "adult association" in the lodge
- It is a great way to help garner support from lodge membership
- If action is taken, it can result in actual improvment

Using both the Key-3 and especially the Membership surveys will set the stage for improvement. It also signals to the membership that lodge leadership wants and needs help in this improvement. That's because if people have stated a need for a particular course of action, they are more likely to support it. It can get more people actually involved in the subsequent actions.

Slide 6 - Barriers

There will be many barriers to conducting a Lodge Needs Assessment. All the barriers deal with time and the people involved. The objections and concerns usually fall into four categories: I already know, let’s go anyway, we’re too busy, don’t know how to do it.

Already Know

Maybe you and the leadership already know the needs of the Lodge are already known. Maybe everyone knows what the Lodge’s needs are, and there's no doubt about it. In other words, if the building is burning, put out the fire. You don't need a needs assessment to tell you that. Remember, however, that many times people tend to focus on what they feel the needs are, and that these needs are merely symptoms of a true need. An assessment can discern this.

Many times the needs are not quite so clear. You (and everyone else) have opinions and biases, but does everyone feel the same way? Wouldn't it be worth checking what other people think, just to clarify whether others share your point of view? Does the data support the opinions out there? After an assessment, you might or might not revise your opinions a little, but it's worth it to find out.

Let's Go Anyway

We're busy people. We want to get going. Fine...but you wouldn't usually want to get involved in something that most of the Lodge doesn't really care about. If you do a Needs Assessment, you will feel more comfortable knowing that what you want to do meets a real need. Otherwise, you might be wasting your time.

Don't Have the Time

We don't have the time to do a survey but you and others probably do. The actual amount of time needed can vary a great deal but you don't and shouldn't have to do it all yourself. If you really wanted to do a full-scale scientific survey, you could spend a year or more collecting, tabulating, and writing up the data. But we're not talking about that kind of time investment. You can collect useful data in hours, or even less. Short of a formal Membership or Key-3 Needs Assessment questionnaire, a quick meeting can be held with your key audience to ask them a few questions, either verbally or with a short printed questionnaire. All the forms come back to you in ten minutes. In about ten minutes more, you can get results that will be helpful. There are many different degrees of comprehensiveness. But any surveying is almost always better than no surveying at all. It's likely that whatever time you can afford will be worth it. Look at it this way: If you care about effective action, do you have the time not to find out about the Lodge's needs?

Don't Know How

The point of this session is to show you a process for assessment. It's not as difficult as it may sound.

Slide 7 - Needs Assessment Process

Conducting a Lodge Needs Assessment is a 3 step process: Collect Data, Analyze and Prioritize the Data, and Execute.

Collect Data

The very best Lodge Needs Assessment will consist of a 360-degree evaluation of the Lodge whereby all stakeholders are allowed the opportunity for input. A 360-degree evaluation will consist of the use of both the formal Lodge Assessment Tools (attached) and many Offline assessment activities.

The formal tools are the Lodge Assessment Tools (attached) for both the Lodge Key3/LEC and the general membership. At the beginning of a new chief's term, the Lodge Key 3 should take the time to complete the survey utilizing the Key-3 Lodge Assessment Tool. This survey is keyed to the seventeen Journey to Excellence criteria and when completed will highlight those areas that need improvement. The general membership survey can be completed at any lodge activity and will give the lodge leadership an idea of the needs of the membership.

There are many offline Lodge Assessment Activities that can be utilized. The following activities are suggested for a new Lodge Adviser and is adult focused. It will be at the new Lodge Adviser's discretion as to which offline activities are completed but it is recommended to complete them all for a true a 360-degree Needs Assessment of the Lodge.

- Self-Reflection: a new Lodge Adviser should ask themselves the following questions:
    - What do you want to accomplish as Lodge Adviser?
    - What are you good at / what do you like to do? (with respect to the responsibilities of Lodge Adviser)
    - What are you not so good at or don't want to mess with? (with respect to the responsibilities of Lodge Adviser)

  The answers to these questions can guide your focus as Lodge Adviser and the last two questions are especially important when it comes time to recruit other advisers.
- Meet with Scout Executive: the lodge exists to serve its council so it is critical that the lodge is on the same page as its council. Schedule a meeting with your Scout Executive and get his opinion of what the lodge should be doing and how it can best serve its council and what the lodge's priorities should be.
- Call a meeting of long time lodge adults: seek their opinion as to how the lodge is doing and where improvements are needed
- Meet with the previous Lodge Adviser: seek his opinion as to where the lodge needs to focus and ask what he would do differently if he had to do the job again. Seek out his experiences, concerns, etc.
- Meet with the previous Lodge Chief, seek his opinion as to where the lodge needs to focus and ask what he would do differently if he had to do the job again. This is not always an option, especially if the previous Lodge Adviser was removed from the position or has an axe to grind.
- Meet with the Section Adviser and seek his opinion. Ask him how the lodge stacks up to the other lodges within the section. If you know of any areas where the lodge needs to improve, ask the Section Adviser which lodges in the section perform these functions well.
- Review the Lodge Calendar and the Event Schedule of your lodge's major functions: Go through these items line-by-line to determine where

improvements (example: if meals at your functions are problematic, obviously a focus needs to be recruiting more and better kitchen staff).

- Review measurable indicators: Review all measurable JTE indicators. For instance:
  - How much money does the lodge have?
  - How was the budget handled for the last several lodge events?
  - Was the lodge's annual budget adhered to?
  - How many district events has the lodge assisted with?
  - How many council events has the lodge assisted with?
  - What is your lodge's donation level to the council?
- Other data sources: Review the following:
  - Review Council's General Ledger Account for the Lodge (not everyone would look at this)
  - Lodge Trading post inventory; accounting
  - Previous several years' Charter Renewal Documents
  - Chapter reports on their activities (if they don't exist, then maybe the new guy will read this and think it's a good idea.
  - Talk to Vigil and Founder's selection committees from previous years to review procedures for selection
  - Review last several years' Lodge Annual Report to Council

This set of personal off-line assessments are specifically for a new Lodge Adviser to give him or her a starting point (at the beginning of service) and potential direction for lodge improvement. Remember, however, the main responsibility of the Lodge Adviser is to guide and mentor the Lodge Chief and the lodge leadership in their journey of development in Scouting and the Order of the Arrow. To this end, sharing and guiding them through this off-line assessment process will help them in their development.

To keep it simple for the youth, the two formal Lodge Assessment Tools (attached), one for the Key-3/LEC and one for the general membership are highly recommended to begin the term for each new Chief or at the beginning of each lodge year. Collection of this data is simple and can be accomplished at a lodge event or at a LEC meeting. The results can be combined to provide direction and input on training emphasis for the Lodge Leadership Development (LLD) conference and direction for lodge improvement. This part of the process also gives the youth a sense of ownership of the information. Remember to let the Chief lead this activity.

Both the Key3/LEC Needs Assessment and the Membership Needs Assessment tools are similar in format. The lodge leadership should fill out the Key3/LEC form utilizing the 1-5 columns. These can be filled out at your annual planning meeting or at a lodge activity where most of the LEC are present. The Membership form can be filled out by general membership at that same lodge activity. Even though many advisers might know more about some of the items, the youth perceptions are more important and should be given priority during the analysis phase to follow.

Analyze/Prioritize

Now that the data has been gathered, it's time to analyze and prioritize it. For you as the Lodge Adviser doing the personal assessment, you can do this analysis on your own. The information from the formal tools should be looked at by the LEC. A good tool to use and teach the LEC is the SWOT technique (Strengths, Weaknesses, Opportunities, Threats; see attachment on SWOT). This exercise will begin to identify Lodge Needs.

The items on the two Assessment Tools that score high (4-Often or Well Informed; 5-Always or Expert) are your lodge's strengths. Those that scored low (1-Never or No Knowledge; 2-Seldom or Little Knowledge) are weaknesses. The LEC needs to also determine the Opportunities and "Threats" using the suggested questions contained in the SWOT attachment.

The next step is to review those items listed in the Weaknesses, Opportunities, and Threats categories. Now you can identify and analyze causes. It is not enough to just find problems - you must note the cause of the problem. Start asking WHY until you can identify the root cause. The main thing is to analyze what you think are concerns and make sure that they are not actually just symptoms of a bigger problem. You may have ten concerns, but if you find out that one is the main culprit and address it- then the other 9 just go away. To get to the root, continually ask "why": You state the problem and then ask the question "why". You repeat this process until a common theme emerges. This then is the root cause. Some cautions:

- Some concerns can't be quantified and this will most often come from your institutional knowledge in the lodge.
- Be wary of "we've never done it like this" and "we've always done it like this" statements.
- This is important to identify the sacred cows and to identify what cows need to become sacrificial.

Finally identify areas of concern and decide preliminary priorities. As you complete this task, some Needs may start to become evident. Avoid the temptation of trying to solve them at this stage. Gather all the data first to see if the Need is both real and a priority. For example, you may not have good ceremony teams, but if you're not having elections then the ceremony teams are not yet a priority - elections are. Begin looking at what is important and what is not important to the Lodge, the membership, the Council, the youth, the adults, etc. Be sure to look at the total picture. Look to those JTE items that have higher point values as these are more important to lodge improvement. Summarize your findings in writing. It needs to be documented so that you can refer to it later OR if someone asks "why did we change such and such" you have an answer for them.

Lodge Needs Assessment: Execute

Prioritize the Needs. This can be done in a formal setting by the lodge Key 3 or Lodge Executive Committee. Have the Chief lead this effort by using a "top 3" vote technique of each member (use a flip chart page, list all needs, each vote for 3, most votes determine the priority) or by a consensus of the LEC. This will be one of the best ways to energize the youth leadership of the lodge. Decide on the top 5 needs that need to be addressed (with a possible next 5 listed as well). Identify solutions to the problems identified - these are things that can be delegated to committees, chapters or individuals (advisers, youth, other adults in your lodge) willing to work the need. Each youth or youth committee will need advisers to coach and mentor the youth. A great opportunity to get people involved. Keep it as simple as possible and don't attempt to solve ALL the issues at once. Again, look to the JTE point values to help prioritize the tasks for improvement.

Now the LEC needs to develop action plans. Here is where the solutions above are formalized by the LEC and with the Key 3 of the Lodge. Each committee or individual assigned needs to follow up with deadlines - review the progress with the LEC reporting at every LEC meeting and then taking the information on the success or failure of strategies - adjust them - report them - execute them - follow up on them and repeat again and again. The Lodge Chief should also follow up outside of the LEC to hold these committee chairs or individuals on task.

Conclusion

This session has covered the use and process of a Lodge Needs Assessment both for you as a new Lodge Adviser and for your Lodge leadership. Using the Lodge Assessment tools can make this process easy. From this, you can identify the most important needs for your Lodge and what direction you and the lodge leadership can take to improve the lodge. This process helps further engage the youth and gives the youth a sense of ownership both of the solutions and action plans. This process also supports the Purposes of the Order of the Arrow and the Mission of the Lodge in continuing to develop the youth.

Resources:

Lodge Adviser's Handbook: http://www.oa-bsa.org//uploads/publications/lodgeadviserhandbook-2012.pdf

Guide to Officers and Advisers: http://www.oa-bsa.org/pages/content/publications#goa

Lodge Finance Manual: http://www.oa-bsa.org//uploads/publications/LFM-2008.pdf

SWOT Tool

A SWOT analysis is a critical tool that identifies and analyzes the strengths, weaknesses, opportunities and threats of any project or the lodge. A SWOT analysis is prepared by first identifying the key points pertaining to the four parameters of the analysis and putting them in a 2-by-2 matrix form for further analyzing.

Prepare the 2-by-2 matrix and identify the four parameters on the matrix. Strengths are to be listed on the top left corner of the matrix, weaknesses on the top right corner, opportunities on the bottom left corner and threats on the bottom right corner. Mark the first column, which has strengths and opportunities listed under it, as "helpful" and the second column, which has weaknesses and threats listed under it, as "harmful." Additionally, identify the first row, which consists of strengths and weaknesses, as "internal factors" and the second row, which consists of opportunities and threats, as "external factors."

	Helpful	Harmful
Internal	Strengths • What are your strengths? • What do you do best? • What unique capabilities/resources do you have? • What do others perceive as your strengths?	Weaknesses • What are your weaknesses? • What's done better by other lodges? • What can you improve? • What do other lodges perceive as your weaknesses?
External	Opportunities • What trends or conditions may positively impact you? • What opportunities are available to you?	Threats • What trends or conditions may negatively impact you? • What are others doing that may impact you? • Do you have solid finances? • What impact do your weaknesses have on the threats to you?

Internal factors include: Finances, Physical resources, People resources, Local natural resources. Examples: Capabilities, Assets, Experience, Knowledge, Financial reserves, Location/geographical, Quality of Program, Communications, Partnerships

External factors include: Donations, Demographics, any local regulations. Examples: Gaps in capabilities, Time/deadlines, Cash flow, Morale, commitment, leadership, loss of key staff, weather.

Analyze the lists of strengths and weaknesses to identify the opportunities and threats. Strengths open up opportunities, while weaknesses expose the lodge to possible threats. Understand the opportunities and threats, and find out which strengths or weaknesses lead to which.

Strategies: How can use of strengths take advantage of opportunities? How can strengths be used to avoid threats? How can opportunities overcome weaknesses? How can weaknesses be minimized?