Link 2018: Link Focus Area Presentations for Lodges
Activation Rate

Session Length: Recommended 30 Minutes

Link Program Purpose Statement:

The purpose of the OA's Link program is to strengthen local OA programs across the country and improve the Order of the Arrow's membership position nationally. This will be achieved through the national, regional, section, and lodge level of the organization working together to create, share, and implement training material and best practices informed by annual JTE data and sourced from top-performing lodges.

Learning Objectives:

At the end of this session, each participant will be able to:

- Calculate the Activation Rate metric
- Understand the importance of this metric as it pertains to growing active membership in the Order of the Arrow
- Use creative and innovative strategies to improve in this metric

Required Materials:

- Link 2017 Activation Rate Power Point Presentation
- Flipchart and Marker

Trainer Preparation:

- Become familiar with the JTE program: Refer to the JTE guide to learn more about two of the three focus areas discussed in this presentation. Information on unit election rate can be found on pages 19-22. Information on induction rate can be found on pages 23-25. The guide can be accessed here: https://oa-bsa.org/uploads/publications/jteguide-2016.pdf. Additionally, review this year's JTE scorecard to familiarize yourself with current JTE requirements. The scorecard can be accessed here: https://oa-bsa.org/uploads/resources/forms/2018_JTE_points.pdf
- Know your audience: This syllabus is intended to help section leaders train lodge leaders in strategies that they can employ to improve in the Link metrics. The key question lodge leaders should be asking as they hear this presentation is: "how can we, as lodge leaders, innovate and improve in these areas?"

- Review best practices: many of the best practices contained within this presentation are sourced from the Order of the Arrow's best practice repository. Review the repository here: https://oa-bsa.org/resources/ucl-support/lodge-ideas/best-practices
- Practice, Practice, Practice: This syllabus walks you through the narrative of the presentation, matching key points to the slides of the accompanying power point presentation. Take some time to practice delivering this narrative with the power point presentation
- Ask any questions: E-mail link@oa-bsa.org with any questions you may have. This e-mail forwards to the writers of this syllabus who can answer any of your questions.

Session Outline:

I. Link Presentation at SOS, Part Three: Activation Rate – 30 Minutes
   a. Activation Rate (10 Minutes)
      i. What is Activation Rate?
      ii. Why is Activation Rate Important? With data on national performance
   b. How Can Lodges Improve Their Activation Rate? With a discussion on the term "Sash and Dash" (15 Minutes)
   c. Closing Challenge (5 Minutes)

Session Narrative: Link Presentation Part Three

Flip to Slide 2: Focus Area #3

Focus Area #3: Activation Rate   **10 Minutes**

We've seen with our last two focus areas that it takes a lot of work just to get Scouts into the door in the Order of the Arrow. But the work doesn't stop there. Now, we must encourage our newly inducted brothers to become active in the lodge. Last year, the UCLS subcommittee, which governs JTE and analyzes the data we collect from it, had just begun to measure how well we do with this. UCLS started measuring a new metric called "activation rate" by pulling data on lodge event participants from a lodge's event management module on OA LodgeMaster. This metric has become so important that it will be included as a requirement on the 2019 JTE scorecard, as we've discussed. While discussing this focus area, we'll talk about what activation rate is, why it's important, and how lodges can improve in this brand-new metric.

Flip to Slide 3: What is Activation Rate?

What is Activation Rate?

Activation rate encourages action in an important area: we must act quickly to involve a newly elected Arrowman in lodge/chapter activities, or we may miss the opportunity to do so. Activation rate measures how successful we are at getting newly elected Arrowman to go to their first lodge event, and how quickly they do so. To arrive at the metric, we pull the percentage of new members inducted in a year that return for their first lodge event within six months of their induction from a lodge's LodgeMaster portal. The point at which a member becomes "activated" can actually be a pivotal point in his membership in the Order of the Arrow. Let's take a look at the journey that an Arrowman follows on his way to membership to understand why.

Flip to Slide 4: The Journey of a New Member

- Awareness – we'll call the first stage in the process of becoming a new OA member "awareness." This is the point at which a Scout learns what the Order of the Arrow is, and becomes aware of the fact that he must be elected in order to join.
- Election – the next step is the unit election. We've discussed all that a lodge must do to ensure that as many units as possible experience high-quality elections.
- Call-Out – After a Scout is elected, but before he is inducted, he may be formally "called out." We discussed that this is a very meaningful part of the process.
- Induction – An elected candidate must then go through an induction weekend. We discussed strategies for lodges to employ to ensure that they induct as many elected candidates as possible.

It is after a new member is inducted that he then must be "activated." All lodges should strive to make the induction experience so meaningful that new members want to keep coming back for more. Or, in other words, lodges should strive to make new members want to become "active." This is the next step in the lifecycle of a new member:

- Activation – a new member becomes "activated" when he attends his first lodge event following his induction. This new metric, the "activation rate," seeks to measure how successful we are with this. A lodge's activation rate is the percentage of new members inducted in a calendar year that return for their first lodge event within six months of their induction. Why six months? Well, data that

we'll see in just a minute shows that beyond six months after induction, the chances that a new member will activate becomes decreases significantly.

- Engagement – once a new member is active, they may choose to return for additional events and, ideally, they are encouraged to take up a leadership position within the lodge.
- Renewal – once the new member's first dues payment expires, they must renew their membership by paying dues for the upcoming year. Active, engaged members will often be the first ones to do this.

Flip to Slide 5: Activation

Put another way, activation should happen while the candidate is a new Ordeal member, at exactly the time the OA emphasized service to the home unit. The unit should always come first, but emphasis should be put on getting the new Arrowman to come out to their first event during this time as well. It should be viewed as an essential step to becoming a Brotherhood member.

Why is Activation Rate Important?

We see with this progression that activation rate is a pivotal point in the journey of a new member. Once the new member is elected and inducted, "activation" within the lodge will often determine if they continue to engage with the lodge and renew their membership year over year. "Activation" is critical to ensuring high lodge event participation and membership retention rates. Activation is helpful in broader ways, too: we want to ensure that as many new members as possible become active so that our lodges, and the Order of the Arrow, can continue to have a vibrant body of members that are contributing to the success of the organization and, most importantly, benefitting from our program. Remember: we must act quickly (within the first six months of induction) to get all new Arrowmen to come to an event, or we may miss the opportunity.

Flip to Slide 6 then Slide 7: 2016 Activation and 2016 Activation Percentages

So how do we do nationally with activation? We have two years' worth of data to look at. A note on data quality: the data used to record activation comes from the event management module of OA LodgeMaster. It is not collected from every lodge as with the other data we looked at today, which is collected annually during the JTE/rechartering process. As a result, these activation percentages reflect a sampling of lodges since we're restricted to just those that use this feature in OA LodgeMaster. Despite this, we think these figures are still a fairly accurate representation of how we perform in this metric. We encourage you all to encourage your lodges to use and

frequently update the event management module in OA LodgeMaster so that our data can continue to improve in this metric year over year.

This chart shows activation in the year 2016, which is the most complete look we have. Remember that these figures show youth captured in a lodge's event management module on OALM. It is not total youth. As we can see, activation started to steadily drop off after the first six months. In fact, our data show *zero* activations 18+ months after induction. More to the point about getting members to activate early being of the utmost importance. The more troubling trend, though, is the fact that 23,000 Arrowmen inducted in 2016, or 69% of the total number inducted, *never* activated.

> Flip to Slide 8 then Slide 9: 2017 Activation and 2017 Activation Percentages

We have a similar picture with 2017. We should note that we are just leaving the 6-11 months phase as of the writing of this training, so we don't have a full look yet. That said, we can see how we're doing thus far. Again we see a stark drop off, and that we're on pace to see a whopping 90% of new inductees that never activated. There's still time, though, for us to both gather more complete data and improve these numbers overall!

This data shows us that, after all the work we do each year to schedule unit elections, to convince elected candidates to go through with their induction, and to put on a high-quality induction experience, roughly 10-20% of those new members choose to become active and engage with our program. Clearly, there's some room for improvement.

How Can Lodges Improve Their Activation Rate?   15 Minutes

We've only started measuring activation, so we don't yet have solid insights into the lodges around the country that perform best in this metric, so we couldn't source best practice from them. That said, it may require a change in thinking on our part to start reversing our downward trend in this metric.

> Flip to Slide 10: How Can Lodges Improve Their Activation Rate?

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We have a common term in the Order of the Arrow for a new Arrowman that never becomes activated, and I'm sure you've been thinking of this term as we've been

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discussing this metric. We call this phenomenon, when a new member doesn't activate, the "Sash and Dash." Let's take a close look at this phrase.

When we say "Sash and Dash," who are we focusing on when we use that term? In other words, who does the action of "dashing?" The answer to that is the new member. Therefore, on whom does the term "Sash and Dash" place the blame? Once again, the answer is the new member who doesn't activate. This leads us to ask: who bears the responsibility?

I think we can answer this question by asking ourselves: what are the barriers to activation? Why doesn't a new Arrowman activate?

> *Trainer Tip:* Ask this question to the audience and solicit responses. Accept several responses, and write them on the flipchart are they're offered. Then, compare your audience's answers to the answers that lodge advisers provided as shown on the next slide.

Flip to Slide 11: Barriers to Activation

We asked this same question of the lodge advisers across the country that assembled at Philmont in June, 2017 for the National Lodge and Section Adviser Symposium. They categorized barriers to activation across a number of areas: ceremonies, Ordeal projects, Ordeal atmosphere, educational issues, focus, administrative, and other.

> *Trainer Tip:* Flip through lists on slide 11. A new list will appear with each click. Talk about them briefly as they appear.

If you look at their lists, and you look at ours, you will see that most of these factors are within the control of the lodge. In other words, it is entirely within our lodges' power to eliminate the factors that cause many of our new members to never activate.

Flip to Slide 12: Strategies for Improving Activation

Perhaps it's time to rethink the "Sash and Dash" moniker for those new Arrowmen who don't activate. Instead, let's think of what we, the section leadership, can do to help our lodges lower barriers to activation. Let's talk about two ideas to start. Remember that later in this presentation, we will discuss how you can deliver some of these strategies to your lodges, and we'll provide you with training resources that go into much more detail. For now, we'll just do a brief overview.

- Hold a new member party during the induction weekend, and
- Hold a new member dinner

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Let's discuss these in depth.

Flip to Slide 13: New Member Party

Hold a New Member Party During the Induction Weekend

There is one theory out there that new members don't return to the OA because the induction experience isn't a very fun weekend. Think about it: we make the Scouts work, give them scant food, and throw them in the woods. Granted, there's a lot of meaningful symbolism behind these practices, but lodges should try to compensate for the tougher parts of the induction experience by planning a definitive point in the weekend where the program shifts from service, ceremony, and symbolism to fun and fellowship. After the ceremony, hold a new member party for all those new members who were just inducted. The new member party can model a lot of the same activities that a section conclave might have: inflatables, popcorn/cotton candy machines, music, games, SWAG giveaways, etc. Put some effort into showing your new members that the OA can be fun!

Flip to Slide 14: New Member Dinner

Hold a New Member Dinner

One lodge that has contributed to the OA's best practices repository holds a new member dinner each year that is separate from the induction experience. Think a lodge banquet, but just for new members. An event like this has several benefits: new members will not feel intimidated by not knowing anyone or being surrounded by more "experienced" Arrowmen; it's an opportunity to meet new Arrowmen that live near each other and can carpool to lodge events; it gives lodge leadership a chance to familiarize new members with opportunities in the OA, etc. You can access information about this new member dinner here: http://bit.ly/BestPracticesNewMemberDinner

Closing Challenge   5 Minutes

Flip to Slide 15: Closing Challenge

We have just about come to the end of our Link training. We've presented a number of tools and strategies to you today for improvement in three areas: your unit election rate, induction rate, and activation rate. Now, it's up to each of you to put some of these tools into practice.

Flip to Slide 16: Closing Challenge

Trainer Tip: This slide is left intentionally blank. You should use this slide to explain to your lodges how you will incentivize them to put these tools in the Link presentations into practice. Here are some recommendations:

- Start a Link ticket program – just like the Woodbadge ticket or NLS contract, encourage lodge leaders to set three goals, each aligned with improving one of the three focus areas
- Conclave recognition – tell lodges that if they reach their goals, they will be publicly recognized at the Conclave
- Offer an incentive – offer one high adventure scholarship (or a similar incentive) to the lodge that improves the most in one of the three Link focus areas year over year

Use this slide to discuss your incentive/method of tracking your lodges progess towards improving in these three areas.

Flip to Slide 17: Questions?

We are happy to answer any questions you may have about this presentation, and we also encourage you to send your questions to the writers of this presentation at link@oa-bsa.org. The writers of this session are also more than happy to offer assistance to you as you put some of the strategies discussed in the three Link presentations to work. This concludes the final Link presentation. Thank you for your attention, and good luck!

-End of Link Presentation Part Three: Activation Rate-

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