

Link 2018: Link Focus Area Presentations for Lodges

Unit Election Rate

Session Length: Recommended 30-60 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 Unit Election 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 2018 Unit Election 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. 2017 Link Presentation, Part One: Unit Election Rate – 30-60 Minutes
 - a. Introduction: Link History, Purpose, and 2017 Program (5 Minutes)
 - i. Link History
 - ii. Link Purpose
 - iii. 2017 Program
 - b. Focus Area #1: What is the Unit Election Rate? (10 Minutes)
 - i. Why is Unit Election Rate Important?
 - ii. How is Unit Election Rate Calculated? With data on national performance
 - c. What Makes Good Unit Elections? Strategies for Improving Your Unit Election Rate (15-45 Minutes)
 - i. Convince units that currently do not hold elections to request an election.
 - ii. A Note on the Membership Update
 - iii. Conduct high-quality elections in all units, thereby increasing the chance units will be requested next year

Session Narrative: Unit Election Rate

Introduction: Link History, Purpose, and 2017 Program

5 minutes

Link History

Hello everyone and welcome to our section training event! Today, I'm going to take some time to introduce to you the 2018 Link program. Now, recognizing that Link is still

a relatively new program, let's take some time to review what this program is, and talk a little bit about the program's history and purpose.

Flip to Slide 2: Link History

Beginning in 2012, the Order of the Arrow, spearheaded by the national committee's Unit, Chapter, Lodge Support Subcommittee, began collecting data from lodges on a number of key performance indicators that gave us an insight into how well our lodges across the country were performing in a number of areas: membership, program, unit service, finance, council support, and leadership and governance. The new Order of the Arrow Journey to Excellence (JTE) program gave us very powerful insights into what we do well as an organization, and where we can improve.

By 2015 and 2016, our centennial year had passed, and we had just hosted an event, NEXT, focused on fostering innovation and creativity as we look to deliver the Order of the Arrow's program into its second century. Conversations were taking place among key national leaders about how we could put these powerful insights, given to us by the yearly JTE program, to work and use them to help improve our lodges. Out of those conversations came Link.

New for 2018 is the concept of a "high performing lodge." Essentially, the national Order of the Arrow committee noticed that a group of lodges consistently outperformed peers on JTE metrics, and endeavored to understand why. High performing lodges exhibit consistently solid performance in three areas: unit election rate, induction rate, and activation rate. As you will see, these are the exact three focus areas that Link is attempting to help lodges improve in. Link gives section leaders a part in cultivating high performing lodges: through Link, you will be empowered to provide support to your lodges in these key areas.

Flip to Slide 3: Why a Metric is Chosen

Link Purpose

Link works according to a very simple workflow. Each year, the UCLS subcommittee of the national Order of the Arrow committee chooses two or three Journey to Excellence metrics as "focus areas" for the year. There are two main reasons why a metric can be chosen as a focus area:

- Improving in the chosen metric is important to the Order of the Arrow's membership growth
- Focusing on the chosen metric can help improve key Order of the Arrow programs in some way

From there, the national, regional, and section levels of the Order of the Arrow *link* together in a collaborative effort to deliver training, best practices, and other resources to lodges to help them improve in these focus areas.

Flip to Slide 4: Link Purpose

Simply put, Link is a data-driven, collaborative training program designed to help lodges grow in membership and improve their programs. Link's formal purpose statement is as follows:

Trainer Tip: The power point slide only shows the three phrases bolded. The trainer should read the full purpose but emphasize these three points as the key planks of the program's purpose.

*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.*

Let's discuss what the 2018 Link Program looks like.

Flip to Slide 5: 2018 Link Program

2018 Link Program

Two current JTE metrics have been chosen as "focus areas" for this year. They are:

- Membership Item #3: Conduct unit elections in all troops and teams within the council
- Membership Item #4: Induct youth Ordeal Candidates

Trainer Tip: Refer to the 2018 [JTE scorecard](#) for updated metrics. The metric numbers as listed in the guide will be different from the scorecard, since the scorecard is updated yearly and the guide was last updated in 2016.

Additionally, we've chosen a third focus area, which the Unit, Chapter, Lodge Support (UCLS) Subcommittee has only just begun to measure last year. That new metric is called "Activation Rate." Although it is not measured on the 2018 JTE Scorecard that lodges will have to submit during this year's re-chartering process, it is a metric that is becoming increasingly important for us to understand.

In fact, the three Link focus areas for this year – Unit Election Rate, Induction Rate, Activation Rate – are so important that they will be categorized as a new section on the

JTE criteria for 2019, called “growth.” They will be Growth items #1, 2, and 3, respectively.

Trainer Tip: The trainer should become familiar with the 2019 criteria that will take effect next year, in addition to the 2018 criteria that is currently in effect. The 2019 criteria can be viewed here: https://oa-bsa.org/uploads/resources/forms/2019_JTE_points.pdf

Together, this year’s three focus areas make up a progression: they examine the path a Scout takes from their election into the Order of the Arrow through the point at which they become active, event-going members. This is where the potential lies in this new Link program: if each of us, the lodge, section, region, and national leaders of the Order of the Arrow, work in a concerted effort to target just a few key performance metrics, we can ensure that the Order of the Arrow continues to grow and strengthen well into its second century.

Why is this important? Why should we put so much effort into improving our local programs and growing the Order of the Arrow’s membership? Surveys conducted by the OA’s national leadership show us that young people today seek mentorship, want a space where they can develop their leadership skills, and desire interaction with their peers in fun settings. Through its focus on leadership and the outdoors, the Order of the Arrow seeks to deliver just that. The impact that the OA can have by striving to deliver a high-quality program to as many young people as possible is immense. Moreover, the opportunities that the OA offers is often cited as the reason that youth in their later teens choose to stay in Scouting. If improving our own programs and growing our own membership means that we can strengthen Scouting as a whole, we should seek to do so.

Over the next three 30-minute segments, we’re going to deep dive into these three metrics. With each deep dive, we will discuss why each metric is important, how each metric is calculated, and strategies that you, as lodge leaders, can employ to improve in each metric. These strategies come from a variety of sources: many have been adopted from the lodges who perform best in each of these focus areas. Some also come from the Order of the Arrow’s best practice repository and training portal. The goal of the Link program is for you—the local leaders of the Order of the Arrow—to innovate, share best practices with one another, and ultimately implement some of the strategies we’ll discuss today, so that you may improve in the three Link focus metrics. Your section leadership has been trained in this material already, and is ready to help you along the way.

Flip to Slide 6: Focus Area #1

Focus Area #1: Unit Election Rate

10 minutes

Our first JTE metric is the unit election rate. A lodge's unit election rate measures the percentage of troops and teams in a council that hold OA elections. Let's take some time to discuss why unit elections are important, how a lodge's unit election rate is calculated, and what makes a good unit election.

Why are Unit Elections Important?

Unit elections can be beneficial to both the lodge and the unit. As for the unit: unit elections give Scouts the chance to recognize their peers who best exemplify Scouting's principles. OA Election can also be an interesting and exciting date in the unit's program calendar. As for the lodge: unit elections are new members' first gateway into the lodge. Elections give lodges a chance to make a good impression to the troops and convey the message that there are endless opportunities for adventure and leadership within Scouting. A good unit election is essential to maintaining healthy unit-lodge relationships, which is essential to the health of a lodge.

Flip to Slide 7: The Unit Elections Process

Lodges typically schedule and plan unit elections using a standard process:

- Unit elections teams are trained by lodge leadership and/or youth in charge of unit elections
- Chapter chief, or other designee, requests unit leader contact information
- Youth in charge of elections contacts unit leaders (at least three attempts)
- Youth coordinates date and time of election with unit leader
- Election team carries out the election on specified date and time
- Chapter chief or other designee follows up to ensure contact information for elected Scouts is properly recorded

Flip to Slide 8: What is the Unit Election Rate?

What is the Unit Election Rate?

The unit election rate tells us what percentage of *eligible* units held OA unit elections during a calendar year. For the remainder of this year and until February 1, 2019, "eligible units" are defined as Boy Scout troops and teams. Starting February 1, 2019, any registered member of a Scouts BSA, Venturing, or Sea Scout unit is eligible for election

into the Order of the Arrow as long as they meet the eligibility requirements. Cub Scout packs, for example, are not considered an “eligible unit” because Cub Scouts cannot be inducted into the OA.

Trainer Tip: The trainer should become familiar with the membership update announced by the Order of the Arrow in May, 2018. Before presenting this session, read the following announcement in full: <https://oa-bsa.org/article/2018-membership-update>

To understand this metric conceptually, let’s start with the total number of units in the council. Of that number, some or many (but hopefully ALL) units will request and hold an OA election. The ratio of units that hold the election to the total number of units is the unit election rate.

Flip to Slide 9: How is Unit Election Rate Calculated?

This percentage is calculated using a simple formula: divide the number of eligible units in a council that held unit elections by the total number of eligible units in the council. Then multiple that number by 100 to reach the percentage.

Flip to Slide 10: Unit Election Rate Averages

Let’s take a look at how we’re doing, nationally, at unit elections. The chart on this slide plots the national average of unit election completion from 2013 to 2017.

As we can see, the national averages were 55, 61, 52, 49, and 49 percent, respectively, over the past four years. This yields a five-year average of 53.2%. In other words, over the past five years, our lodges have, on average, conducted unit elections in just over half of all eligible units. Imagine the power in improving this trend: if we aim for 100% of units completing elections in the next several years, we could potentially see a **doubling** of the number of candidates we elect in a year. This is a sure-fire engine for membership growth.

A note on data quality: As with most things, the JTE program has been working to improve over time. Previously, lodges used to submit both the numerator and denominator in the unit election formula when compiling their JTE scorecard. We noticed that a number of lodges were reporting incorrect denominators (number of units in their council), which was yielding data quality issues with this metric. Beginning in 2016, the JTE committee began inputting denominators automatically, so all the lodge has to do is record the number of units in which they hold elections. As a result, this chart is a fairly close, but not entirely precise, look at national unit election performance.

What Makes Good Unit Elections? Strategies for Improving Your Unit Election Rate

15 Minutes

Flip to Slide 11: What Makes a Good Unit Election Rate?

In order to improve in this metric, we have to help our lodges do two things:

- Convince units that currently do not hold elections to request an election.
- Conduct high-quality elections in all units, thereby increasing the chance units will request elections.

Let's take a look at some strategies that will help us improve our unit elections according to this two-pronged approach: reaching units that don't currently hold elections and conduct high-quality elections in the ones that do.

Flip to Slide 12: Units that Don't Currently Hold Elections

Strategies for Reaching Units that Don't Currently Hold Elections:

- Leverage captive audiences
- Resource units with valuable information
- Form relationships with commissioners
- Hold calling parties
- Maintain positive lodge presence in the district and council
- For outreach to LDS units, use SURGE

Let's dive into each of these a bit deeper.

Flip to Slide 13: Leverage Captive Audiences & Resource Units

Leverage Captive Audiences and Resource Them with Information

Leverage captive audiences: There are two settings in which the lodge can directly reach unit leaders: summer camps and roundtables. Lodges should have youth leaders visit in-council unit leaders during their week at summer camp and present to unit leaders at district and council roundtables.

One lodge that performs well in the unit election rate metric leverages the "Order of the Arrow day" during their local summer camp's season to reach unit leaders. The lodge appoints a "summer camp coordinator"—or a youth member of the lodge who is also serving on camp staff—to oversee the OA day program each week at camp, which includes a service project, rededication ceremony, fellowship event, and unit visitations.

During the unit visitation, the camp coordinator and an assistant visit each of the in-council unit leaders in their respective camp sites, offer them an information packet, and discuss the contents with them. This can also be done at a district roundtable. This leads us to our next strategy, which is resourcing unit leadership with valuable information.

Resource units with valuable information: the information folders that the summer camp coordinator presents to the in-council unit leaders during the visitation contains a number of useful items:

- A cover letter from the lodge chief overviewing the lodge goals and programs for the year
- A lodge event calendar
- Lodge event and induction weekend registration forms
- Lists of members of that unit who are eligible for brotherhood conversion (can be sourced from OA LodgeMaster and filtered for each unit)
- Lists of members of that unit who have been elected into the lodge that year but have not yet completed their induction weekend
- And, most importantly, a form to request a unit election for the following year

This information can go a long way to ensure that your unit leaders are aware of the happenings in the lodge, encouraging OA members in their units to be active, and requesting elections.

Flip to Slide 14: Form Relationships with Commissioners

Form Relationships with Commissioners

Unit commissioners are a special group of people in Scouting. Unit commissioners are district and council leaders who help units succeed. They coach and consult with adult leaders of Cub Scout packs, Boy Scout troops, and Venturing crews. Commissioners help maintain the standards of the Boy Scouts of America.

Unit commissioners are expected to be directly connected to—and talk frequently with—unit leaders. As such, they can provide an essential communicative link to units with which your lodge may not have a relationship.

Consider forming relationships with unit commissioners in the following ways:

- Hold a dinner or special events for unit commissioners, where you recognize them for their service and explain to them what the OA is, what your lodge does, and the potential for a positive relationship between the lodge leadership and unit commissioners

- Invite unit commissioners to lodge events. Potentially hold a dinner or a lunch for the unit commissioners (as described above) during the event to which you've invited them
- Offer unit commissioners leadership positions within the lodge
- Encourage adult members of the lodge, and key lodge advisers, to serve as unit commissioners themselves

Flip to Slide 15: Calling Parties

Hold Calling Parties

Hearing from youth often leaves an impact on Scouting leaders. Adults in Scouting are often impressed with a youth who takes initiative to make things happen. You can leverage this by involving your lodge's youth leaders in reaching out to unit leaders across the council.

Another way to do this, in addition to the unit visitations at summer camp and presentations at roundtables that we've already discussed, is to host calling parties. Gather youth lodge officers and chairmen together for an afternoon during which you call unit leaders across the council, encouraging them to hold a unit election. Often times, the council can make unit leader contact information available to the lodge for this purpose.

Prepare a brief, friendly script that the youth can use to talk to unit leaders. Be sure to feed your callers at the calling party—a little bit of pizza can go a long way! Alternatively, mailers and e-mails that are personally addressed to unit leaders can have the same impact. If you'd rather not have youth call unit leaders on the phone, have them prepare e-mail messages or post cards that you send to unit leaders encouraging them to request an OA unit election.

Flip to Slide 16: The Power of Positive Presence

Maintain Positive Lodge Presence Around the District and Council

District and council camporees, fundraisers, dinners, and Cub Scouting events are a great way for a lodge to give service to the council and raise awareness about the OA to the broader Scouting community. Lodges can offer to help at these types of events via their staff adviser, council program director, or equivalent personnel. Here are some examples:

- Stocking and staffing the concession stand at a district or council event
- Running a program at a district or council camporee

- Conducting the flag ceremony and pledge at a council dinner
- Planning and conducting a capital project at a council property (building a pavilion, installing a campfire circle, renovating an existing building, etc.)
- Conducting a council den chief training or trail to Eagle seminar, trained by youth members of the lodge

Performing service to your districts and council in this form does more than just support Scouting locally. It brings a positive image to your lodges, heightens awareness of the OA, and proves to unit leaders that the Order of the Arrow can positively impact them and the members of their units. This attitude can encourage unit leaders to request elections and encourage their unit members to become active Arrowmen in your lodge.

Flip to Slide 17: SURGE

For LDS Unit Outreach, Use SURGE

SURGE is a program developed by Section W-2W that includes lodges in Utah, Idaho and Wyoming. SURGE is specifically designed for outreach to units that are chartered to wards of the Church of Jesus Christ of Latter-day Saints.

Why SURGE? LDS units have lower than normal participation in Scouting's National Honor Society, the Order of the Arrow. Every council and lodge has LDS units. 1 in 6 Scouts in the US are in an LDS unit but less than 1% of those LDS Scouts are Arrowmen. In most councils the OA has lost or never had a relationship with their LDS units. SURGE is a resource to help you develop a relationship with your LDS units and provide really great elections that will result in a large number of LDS Scouts participating in the Order of the Arrow's really great programs.

The SURGE training material and resources can be accessed here:

www.western.oa-bsa.org/surge

A Note About the Membership Update

Flip to Slide 18: The Membership Update

In May, 2018, the national Order of the Arrow committee voted to expand eligibility for candidacy into the Order of the Arrow to all registered members of Scouts BSA, Venturing, and Sea Scout units. This presents an exciting opportunity for the Order of the Arrow to expand our reach to audiences never before reached! Intentional efforts should be made to hold unit elections in the types of units that previously weren't able to elect Scouts into the OA, namely Venturing and Sea Scout units, AND to elect young females into the OA. Here are some strategies for outreach to these new audiences:

- The Venturing program has a similar council, area, region, and national organization as the Order of the Arrow. Just like a council has a lodge that provides the Order of the Arrow program in that council, a council may have a Venturing Officers Association (VOA), which is meant to serve as a forum for Venturing leaders across the council. Areas, regions, and the national organization also have VOAs. Try to contact your local VOA leadership to hold joint programs or present about the OA at a VOA meeting.
- Does your lodge have an event where you invite the general Scouting community to participate, like a banquet or a picnic? If so, invite leaders from Venturing and Sea Scout units to attend!

Once these new types of Arrowmen are members of the OA, be sure to intentionally include them in your lodge functions, particularly your unit elections, so that potential OA candidates see someone like themselves telling them of all the opportunity the OA has to offer.

Flip to Slide 19: Conducting High-Quality Elections

Strategies for Performing High-Quality Unit Elections:

- Resource your unit elections teams
- Standardize the election
- Own your message
- Visit units, even if no election

Let's also dive into each of these a bit deeper.

Flip to Slide 20: Resource Your Unit Elections Teams

Resource Your Election Teams

The best way to ensure quality unit elections is by properly equipping and training your elections teams. One lodge equips their elections teams with all of the resources they need to conduct quality elections by supplying them with a packet. The packet includes the following items, and can be accessed at <http://bit.ly/BestPracticesElectionPacket>:

- Election team worksheet
- Team checklist and procedures
- Eligibility requirements
- Eligibility form
- Election results form
- Election team script

- Contact information template
- Adult nomination form

Flip to Slide 21: Unit Election Training Video

Additionally, the Order of the Arrow provides resources to help train your elections teams. You can gather your elections teams for a training before the start of the elections season, and train them using this video: <http://bit.ly/OAUnitElectionTraining>

Trainer Tip: If you have time, you can play part of this video during the session. It is embedded directly into slide 21. The entire video is long and you may not be able to play the full video, but playing parts of it should suffice.

Flip to Slide 22: Standardize the Election

Standardize the Election

You want to make sure that each unit that requests an election receives the same high-quality election that every other unit gets during the election season—even though you may have many elections teams conducting them. One way to ensure this is to use the new unit elections video created by the Unit, Chapter, Lodge Support subcommittee of the national Order of the Arrow committee. It walks the team through the election and provides an interesting and innovative media to use during your visit to that unit that is sure to capture the Scout's attention. Access it here: <http://bit.ly/OAUnitElection>

Trainer Tip: If you have time, play this video during the session. It is embedded directly into slide 22.

Flip to Slide 23: Own Your Message

Own Your Message

While conducting the unit election, election teams should work in some time to present about the lodge and the Order of the Arrow. Prepare examples of how the Order of the Arrow supports units and Scouts. Explain the type of unit, district, and council service your lodge offers. Have youth that participated in the National Leadership Seminar, Order of the Arrow High Adventure, or an Order of the Arrow national events talk briefly about their experience. There is an opportunity to do this built directly into the unit election video discussed earlier, when it says "pause for discussion."

Flip to Slide 24: Visit Units, Even if No Election

Visit Units, Even if No Election

Sometimes, a unit may not request an election simply because no Scouts in that unit meet the eligibility requirements for induction into the Order of the Arrow. Lodges can still offer to visit a unit to present to them about the Order of the Arrow and your lodge even if they have no Scouts eligible to be elected.

Offer other services than the unit election. Coordinate with the Scoutmaster beforehand. Examples include:

- Teaching a skill, like lashing or building a stretcher
- Conducting an activity, like a game or an ice breaker
- Conduct a camping promotion. Present to the troop about opportunities at your council's summer camps or local camping venues in your area.
- Offer an informational session about the Order of the Arrow. Discuss the leadership and high adventure opportunities in the OA and encourage the Scouts to participate in the unit election next year

Flip to Slide 25: 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. Thank you for your attention! This concludes the first of three Link presentations.

-End of Link Presentation Part One: Unit Election Rate-