

Session Objectives

- Introduce the three areas of lodge operations and the concept of High Performing Lodges (HPL).
- Explain the basics of an Order of the Arrow unit visit and election
- Explain the role of a Unit Elections Committee in managing elections teams and organizing unit visits
- Discuss how to reach out to different audiences within Scouting: professional staff, unit leaders with OA exposure, and unit leaders unfamiliar with the OA.
- Encourage participants to share best practices and obstacles to conducting elections and maintaining an Unit Elections Committee
- Share #ChooseOA resources targeted to units

Session Length: 50 minutes

Appendix Resources

- #ChooseOA Unit Election Info Sheet
- #ChooseOA Unit Election Presentation
- Conducting Unit Elections Video
- Order of the Arrow *Guide to Unit Elections*

Required Materials

- Projector and screen
- Flip chart and markers

Trainer Preparation

Review the resources that you are sharing with participants so that you can be prepared to answer questions that may arise. Many of these topics are recommendations so be prepared to tailor your content and have recommendations based on the size of lodges that participate. If you are collecting participant email addresses at the start of this training cell, or as a part of conclave training registration, offer to provide the link to #ChooseOA materials to participants as well.



Session Narrative

Introduction & High Performing Lodge Overview

5 minutes

Welcome, everyone. Today we will be discussing the concept of a High Performing Lodge, and the importance of the unit election process to a lodge becoming high-performing.

Our overall goal in this session is to help each of you develop an understanding of the unit election process, and to discuss some best practices with regard to conducting unit elections that you can take back to your home lodges. Now, can anyone tell me what the characteristics of a High Performing Lodge are? What areas do these lodges excel in?

Trainer Instructions: Write responses from the participants on a flip chart or white board. Have a separate page on your flip chart with the three High Performing Lodge benchmarks written on it.

A High Performing Lodge (HPL) is a lodge that excels in three areas of lodge operation, namely: election rate; induction rate; and activation rate. Lodges should always strive to increase their performance in these three areas. With the updated membership policy allowing Scouts of all genders, along with Venturers and Sea Scouts, to have the opportunity to be inducted into our Order, there is a strong possibility for a lodge to increase the number of unit elections they perform.

In order to be considered high performing, lodges need to visit 90% of units with members eligible for election in their council, have an induction rate of at least 90%, and have an activation rate of 50%. By focusing on these three aspects of election rate, induction rate, and activation rate, lodges can essentially create a "funnel effect." When you visit more units and conduct elections, you create more interest in the OA and have the opportunity to induct more members, which in turn can lead to more active participation within your lodge.

The focus of this training cell is to how to optimize the upper section of this funnel by educating and discussing how to conduct successful unit elections. There will be an increased focus on how to make "first contact" with units, since many may be unfamiliar with the Order of the Arrow and our mission, given the number of



new Scouts BSA Troops, as well as existing Venturing Crews and Sea Scout Ships, which can now take advantage of the OA program.

Unit Elections Overview

15 minutes

The ultimate goal of any lodge should be to visit 100% of the eligible units within its council to conduct unit elections. Now, while 100% is the goal, we all understand that – when striving to meet a goal – it is important for that goal to be attainable. When starting your unit election process, analyze your current performance. If your lodge is only visiting 75% of units, perhaps your goal for this year should to bump this to 85%, while making first contact with non-participating units to begin a positive trend in visitation as the years go by. Know that it may take time to reach a 100% election rate, and that is okay!

For almost every lodge across the country, the number of units that are eligible for a unit election has increased since February 2019. Before February 2019, the majority of unit elections came from Boy Scout troops, the youth members of which were ages 17 and below, with 18 to 20-year-old troop leaders also eligible for election. With the OA's updated unit election requirements, Scouts BSA Troops, Venturing Crews, & Sea Scout Ships can elect anyone under the age of 21, given they meet the requirements for election as determined by the national Order of the Arrow committee.

Why do we conduct unit elections? Part of the OA's stated purpose is to recognize those who best exemplify the Scout Oath and Law in their daily lives and through that recognition cause others to conduct themselves in a way that warrants similar recognition." We want to honor Scouting program members who live out our ideals, and to acknowledge them in front of their peers for doing so.

Trainer Tip: A small discussion within the cell may be useful to discuss the election experience. Though you were chosen by your fellows, what ultimately made you "choose" to become a member of the OA?

Let us quickly review the basics of a unit election. I know that this will be a review for many of you, but the we will build on this knowledge later. I am going to distribute these #ChooseOA unit election sheets. Take a moment to look them over. [After an appropriate pause to allow review] Does anyone have any questions with regards to the basics of the unit election?



For many of us, the most difficult portion of this process will be “Meet the Unit.” This specifically means going out and conducting the election with the unit at their weekly meeting, but also includes the process of getting to that point (making initial contact, setting up a time, etc). This can be difficult because much of it lies outside our control.

Creating a Unit Election Committee

10 minutes

The job of conducting unit elections is an important and time-consuming one. Because of this, it is recommended that lodges create a Unit Elections Committee to better delegate this task. This can be done at a lodge or chapter level, depending on resources, manpower, and size of the council and lodge.

A Unit Election Committee is critical for lodges of any size. The Arrowmen on this committee should be diverse, and only become more so over time, especially with the increased diversity of our Order. Committee members do not need to be Vigil Honor members, or hold other positions on the LEC to join. Scouts, Venturers, and Sea Scouts who are familiar with a number of local troops are great additions to this committee. Think members of your council’s local summer camp staff.

The members of this committee should work with adult advisers to volunteer to conduct unit elections, inform units about the Order of the Arrow, and serve as a positive example of what it means to be an Arrowman. Adult advisers should work to help the committee maintain communication with developing units as well. Those adults who are highly active in the council or their district in other areas such as Venturing, roundtables, etc., can play important supportive roles in a successful Unit Election Committee.

With the critical role that the Unit Election Committee plays, it is important to maintain its health from the start. Make expectations of the committee and its members clear. Take a look at your current lodge unit election data (units visited, units contacted but not visited, etc) and begin making goals that you believe are attainable for the upcoming year. You should involve your Lodge Key 3 in this process. Ensure that the committee provides regular updates on areas such as units contacted and visited to help ensure you are on a correct path to meet your goals. Having a formalized online method to track progress through a group Excel document, Google Sheet, or Google Calendar can help with accurate record



keeping. It is also important to utilize the OA LodgeMaster program as well. In addition, have your committee work with Order of the Arrow unit representatives to serve as a further line of communication from the lodge to their unit, as well as to be an ambassador for our Order!

Trainer Instructions: Hold another best practices discussion about how the individual lodges represented at the training cell run and manage their respective Unit Election Committees.

Begin Reaching Out

10 minutes

Make it easy for units to contact your lodge by using resources like Google Forms or SurveyMonkey to create a contact form for units to submit when they would like to have a unit election. This is an effective way to have units contact you, but also to manage data such as dates of weekly unit meetings, location, contact information, etc. Many of these forms can transcribe responses directly into spreadsheets for easy management. However, it is important that Lodges don't rely in this as the only method for outreach. As time goes on and units become more familiar with this system it will become standard for units to use these tool for scheduling. When working with newly established units (such as Crews, Ships, or female Scouts BSA Troops), personal contact will always be best .

District roundtable meetings are a great way to get some face time with the leaders of these new units, or with the leaders of units who have never had a unit election before. Have your Unit Elections Committee adviser or chapter adviser ask the district's roundtable commissioner, district commissioner, or district chairperson if the Order of the Arrow could have 5-10 minutes time during a roundtable for a presentation. During this time, it is important to discuss the OA's newly updated membership policy, answer questions, and collect contact information to make further contact about setting up an election.

If you still have outlier units with which you are struggling to get in contact, ask your lodge staff adviser, district executives, and unit commissioners for help! They have contact information for every unit within your council, and can be the bridge between your lodge and that unit.



By building relationships with new units and reaching out to units which are not regularly having unit elections now, we can make it easier to maintain communication with them as the months and years go on. Once at a unit meeting, find opportunities to talk to existing Arrowmen about upcoming lodge events. If the unit leader and parents allow it, collect emails and add them to a lodge mailing list if they are not already a part of it. Encourage Arrowmen visiting units to talk to unit leaders about other units that may have been created since February 2019, and use them as a resource to spread knowledge about the mission and purpose of the OA, as well as information on your local lodge's program.

Sometimes units may not be reaching out because they do not have any members eligible for election. Although it would be impossible to conduct a unit election at this point, your lodge can still offer to conduct an informative visit with these units. These visits can be used to educate Scouts about the OA, talk about the services we provide to Scouting, how to work towards membership, and to answer questions from both members and parents. Provide contact information for the Unit Election Committee to the leaders of these units so that, if they end up having eligible members later in the year, they can still hold a unit election.

Trainer Instructions: Hold another best practices discussion about how to go about the process of meeting units, and discuss any best practices that individuals use to reach out to units.

Getting Organized & Share the Resources

10 minutes

Organization is imperative for unit elections in almost every capacity. Make sure to have a Google Calendar (or similar program) to keep scheduled and tentative visits viewable, along with confirmed lodge representatives and contact information for unit leaders. Keep a running list of units that have had elections within that calendar year, units that have an election scheduled but not yet completed, units that have been contacted but have yet to schedule an election, and units with which you have not yet made contact. LodgeMaster can be helpful for this. Remember, a unit may only have one election a year, so consistency and accurate record keeping is important!

After every unit election, have your lodge representative send a follow up email to the unit leaders thanking them for giving the lodge time to visit, and distributing



CTI #ChooseOA: Election Rate & Best Practices

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information about future induction opportunities for candidates. Finally, make sure that all elected candidates' information is complete and accurate so this information can be updated to LodgeMaster in a timely manner.

Trainer Instructions: Hold a final best practices discussion to discuss organization and give participants the opportunity to share any best practices that they have not had the opportunity to discuss yet.

Thank you for your time, and for sharing your lodge's best practices. Best of luck to you as you work towards High Performing Lodge status.

