

# **Session 1:**

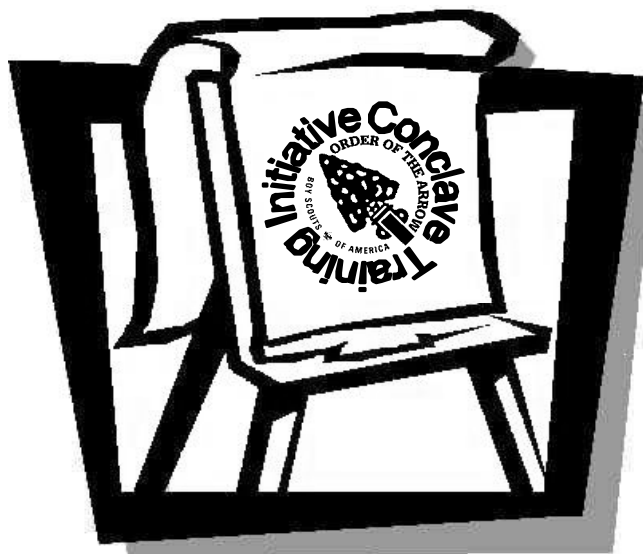
## ***The 2003-2007 OA Strategic Plan A Legacy of Servant Leadership***

### ***Conclave Training Initiative***

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**2003 - 2007**

# **Resource Materials**

# Read This First!

**Congratulations and thank you for volunteering to serve as a Conclave Training Initiative trainer at your section conclave. You are one of nearly fifty trainers from around the country who will be delivering a CTI session to participants at section conclaves this year.**

**The purpose of the Conclave Training Initiative is to provide at least one training session each year for section conclaves to use to augment their own conclave training. It was created based on a goal from the 2003-2007 OA Strategic Plan calling for “...an *initiative to enhance learning opportunities at section conclaves*”.**

**Each year, the national OA committee will provide a syllabus and training support material that will be distributed to each section chief at the December national planning meeting. This process provides training support to our sections and also serves as a vehicle to deliver consistent messages on specific training topics across the nation.**

**Included in this packet is the material you will need to prepare and deliver this year’s session\*:**

- Implementation Instructions
- Session Syllabus
- Sample Participant Evaluation Form
- Sample Participant Handout(s)
- CTI Marketing Plan

**Please take the time to review the contents of this package. Your role as a Conclave Training Initiative trainer is critical to help ensure that your section conclave has outstanding training.**

**Finally, the Conclave Training Initiative is a long-term program that will continue to be developed and enhanced over time. If you have comments regarding the Conclave Training Initiative or suggestions for future topics, please contact your section chief or adviser.**

**Thanks again and good luck!**

\* All CTI Sessions have accompanying PowerPoint presentations as well as PDF versions of the syllabus and all other reference material. This data can be accessed from the Official National Order of the Arrow Web Site: <http://www.oa-bsa.org/>



This worksheet provides an inventory and explanation of resources, a backdating schedule and suggested instructions for the implementation of a successful 2003-2007 Strategic Plan session at your next section conclave. Use this worksheet to help with your planning activities.

**Resource Contents** (at the Official Order of the Arrow Web Site: <http://www.oa-bsa.org/>):

- ❑ **Session Syllabus:** Contains Session narrative, recommendations for flipcharts (if not using PowerPoint), frequently asked questions and an appendix.
- ❑ **Participant Handout:** *2003-2007 OA Strategic Plan*. This is a two-page summary of the strategic plan to be distributed to all session participants.
- ❑ **Strategic Plan Poster:** This is an optional visual aid that graphically represents the strategic plan. Suggestions for use include creating a 20"x30" poster print, overhead transparency or use as a secondary handout. In order to make a poster-size print, you will need access to a plotter (large printer) or you can have it printed at a printer/copier store.
- ❑ **Participant Evaluation:** This is a one-page handout to be distributed to at least three Arrowmen at the conclusion of your session. Completed evaluations are to be reviewed for feedback.
- ❑ **PowerPoint Presentation:** (*CTI Session 1 Strategic Plan – Presentation.ppt*). This is optional to use if you have access to a computer and projector. An alternative is to make transparencies of slides prior to the conclave if you will have access to an overhead projector.

**Backdating Calendar**

TASK		DAYS FROM TARGET	COMMENTS
1	Review syllabus	-60	
2	Review support materials	-60	
3	Choose audio/visual delivery method	-60	
4	Obtain lodge annual plans	-30	For reference only
5	Recruit Training Assistant	-30	
6	Copies of participant handouts	-7	Enough for one per participant
7	Copies of participant evaluation	-7	At least three
8	Prepare Audio/Visual materials	-7	
9	Practice and time your session	-7	
10	Conduct Training Session	0	
11	Review Evaluations	+7	



# Conclave Training Initiative Marketing Plan

## How to Market

The promotion of Conclave Training Initiative sessions should be consistent with any promotion that occurs for conclave training. Some successful methods of training promotion:

- **Conclave Training Summary/Booklet.** This publication is often part of a conclave booklet/schedule provided to participants. Conclave participants should receive a summary of training sessions with accurate descriptions so they can choose topics that are relevant and interesting to them.
- **Training Show/Training Skit.** Many sections use portions of Friday evening conclave show or assembly to promote and encourage training.
- **On-Site Newsletter.** If your section provides an on-site newsletter at the conclave, be sure to announce any training updates and/or schedule changes.
- **Table Tents.** Table tents are 'fliers' that are often found on each table in the dining area of the conclave. Table tents might have conclave announcements or can be utilized to promote aspects of the conclave (especially training). It gives participants something to read during the meal and can serve as a focal point of discussion.

## Description of Sessions

Listed below is an example 'description' for each training session topic for inclusion with conclave training documentation provided to conclave participants.

### **2003-2007 OA Strategic Plan - "A Legacy of Servant Leadership"**

This session provides participants the opportunity to learn about the 2003-2007 OA Strategic Plan, the importance of the lodge's annual plan and the role that Arrowmen play to help the lodge achieve its annual goals as they relate to the strategic plan.

### **Brotherhood Conversion – Understanding and Meeting Quality Lodge Requirements**

This session provides a background of the Brotherhood honor, why Brotherhood conversion is important and methods to improve Brotherhood conversion. This session is ideal for ALL arrowmen, regardless of honor.

### **OA Troop/Team Representative – A Guide to Effective Local Program**

This session provides an overview of the OA Troop/Team Representative Program, a discussion of the challenges that chapters and lodges face in implementing this program and ideas to build a successful program in the chapter and/or lodge. This session is ideal for OA Troop/Team representatives, chairman of OA Troop/Team representative committees, advisers and anyone interested in the program.

# 1

## The 2003-2007 OA Strategic Plan

*"A Legacy of Servant Leadership"*

**Session Length: 50 Minutes**

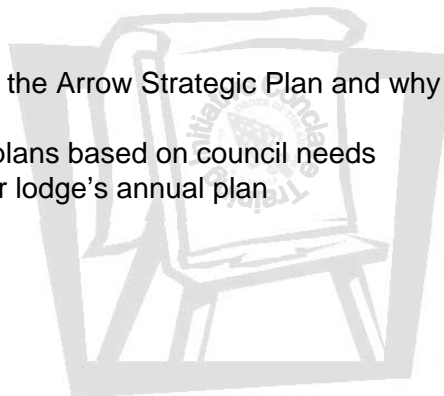
### Learning Objectives:

At the end of this session, participants will:

- Understand the purpose of the 2003-2007 Order of the Arrow Strategic Plan and why it is important
- Understand the process for creating lodge annual plans based on council needs
- Discuss creative ideas for possible inclusion in your lodge's annual plan

### Materials Needed:

- Flipchart w/easel
- Markers
- Roll of masking tape
- Post-It Notes (3"x3")
- Overhead projector (optional)
- Computer w/projection machine (optional)
- Handouts and evaluation forms



## TRAINER PREPARATION

### Type of Trainer

This session was designed to provide conclave participants with background and information on the 2003-2007 OA Strategic Plan. Due to the nature of the topic, it is critical for the session trainer to be well versed in national Order of the Arrow policy and procedures. This is a critical point as many questions about policy may arise. Please refer to the Frequently Asked Questions page in the appendix of this syllabus for assistance. The trainer should also be highly energetic, enthusiastic and leverage his past training experiences in order to create enthusiasm among the participants.

One assistant may also be recruited to assist during the group activity. The assistant should participate in the entire session and be familiar with both the syllabus and the OA Strategic Plan.

### Audience

It is anticipated that the audience for this session will consist of your typical conclave participant: youth and adult members who are not necessarily chapter or lodge officers. The purpose of this session is to build awareness of the OA Strategic Plan and the role of each lodge. Obviously, this topic may not be as exciting for younger arrowmen and so care and consideration should be taken when promoting this particular session at conclaves.

**Follow the Syllabus**

The syllabus has been written to provide maximum delivery flexibility for trainers but care should be taken to follow the contents of the syllabus in order to ensure consistency. It is understood that delivery methods will vary based on the training venues available at each individual conclave site.

**Use of Resource Materials**

The authors of this session have provided varied resources to enhance the presentation. Constraints in conclave facilities are recognized and so a number of the resources available may not be able to be used at a given site (e.g. a PowerPoint presentation in an outdoor training venue). Each presentation should strive to utilize provided resources and at a minimum use a flip chart with easel. Flip charts should be pre-prepared based on samples provided with the resource materials.

A good trainer understands that PowerPoint presentations can be a very powerful and effective tool to use during a training session. However, trainers should remember that PowerPoint presentations are meant to complement prepared training and not be the crux of the session. Slides are meant to emphasize and illustrate points - care should be taken to not read directly or verbatim from PowerPoint slides.

**Physical Arrangements**

Physical arrangements and set up of the training room or location are at the discretion of the session trainer. The session will consist of some lecture and group discussion. Effort should be made to ensure that participants have a place to take notes (e.g. desks or tables) even in outdoor venues.

**Evaluation Process**

Each trainer should provide all participants the opportunity to complete an evaluation form. However, a minimum of three (mix of youth and adult) per session should be completed. The forms should be given to the individuals at the conclusion of the session. Participant evaluation forms should be collected and reviewed by the trainer and conclave training staff. Evaluations are meant purely to provide immediate feedback to the trainer.

**Trainer Checklist – prior to the conclave**

- Study this syllabus
- Review support materials provided
- Choose Audio/Visual delivery method and prepare accordingly
- Obtain lodge annual plans (if they exist) for reference and discussion
- Recruit a training assistant
- Prepare copies of the *Strategic Plan handout* (enough for one per participant)
- Prepare copies of *Participant Evaluation* (three per session)

**Trainer Checklist – after the conclave**

- Review evaluations from all presentations

- ❑ Provide any suggestions or recommendations for changes to the section adviser and/or individuals responsible for conclave training

## SESSION NARRATIVE

### Introduction

5 Minutes

Begin Powerpoint/Flipchart Presentation	Slide1/Page1
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**Trainer Tip:** The session trainer should introduce himself and the topic. He should provide information on his Order of the Arrow experience, what lodge and city he is from and any other relevant items of interest. Although this session narrative is written in the first person, trainers should not read directly from the syllabus and work to develop their own style of delivery while maintaining the integrity of the content.

I'd like to begin our session today by asking some key questions (seek feedback and discussion through guided discovery):

- **What is a Strategic Plan?**

A strategic plan clearly defines the purpose of the organization. It establishes realistic goals and objectives consistent with that purpose in a defined time frame within the organization's capacity for implementation.

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Page <b>2</b>

What that means is that a strategic plan helps to answer the 'what', 'when', 'why', and 'how' of the organization's actions for the next several years. It is basically the long-term (often five-year) goals of the organization.

- **Why is a Strategic Plan important?**

Members of an organization generally already know the purpose of the organization and why it exists. However, development of a strategic plan helps to clarify the organization's plans and ensure that the leadership and the membership of the organization are on the same page.

Slide <b>3</b>
Page <b>2</b>

At the same time, it should be noted that the process of creating and implementing a strategic plan is much more important than the actual document itself.

The process of creating a strategic plan forces an organization's leadership to determine what is important. The process of implementing a strategic plan requires organization to communicate those goals to its membership.

- **What are the benefits of a Strategic Plan?**

- Communicates the goals and objectives to the organization's membership.
- Membership develops a sense of ownership of the plan.
- Ensures the most effective use is made of the organization's resources by focusing the resources on key priorities.
- Provides a base from which progress can be measured.

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Page <b>2</b>

**Overview of the 2003-2007 Order of the Arrow Strategic Plan:**

**15 Minutes**

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**5**

Now that we know what a strategic plan is, why it is important and reviewed an example of a strategic plan at work, let's take this opportunity to discuss the 2003-2007 Order of the Arrow Strategic Plan.

Distribute Handout	"2003–2007 OA Strategic Plan Reference Guide"
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This strategic plan was developed after receiving considerable feedback from scout executives, members of the national OA committee and other arrowmen from across the country. In addition, this plan was developed after a thorough review of the BSA's current strategic plan.

The current BSA strategic plan focuses on five areas of emphasis:

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- Traditional Membership and Unit Growth
- Scoutreach
- Leadership
- Marketing and Strategic Positioning
- Financial Development

Based on feedback and the BSA strategic plan, the Order of the Arrow Strategic Plan includes the following areas of emphasis:

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- Leadership
- Service
- Financial Support

Each area of emphasis is divided into national and local council (lodge) initiatives. Key priorities in the OA strategic plan focus on these three areas of emphasis for the next five years. Let's take a look at them in more detail.

**Trainer Tip:** The following portion of the session is where the majority of questions may arise. There may be questions about why the Order of the Arrow is focusing on a specific area and/or the rationale behind decisions. Refer to the Frequently Asked Questions section in the appendix of this syllabus. In some cases, you may not be able to answer a question. In those instances, be sure to refer the individual to your section chief, adviser, national officers or members of the national OA committee.

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**5**

- The first area of emphasis is **Leadership**  
As you can see from the first sentence in the leadership section of the handout, the Order of the Arrow "*has a proud heritage of youth leadership supported by adult advisers*". The Order of the Arrow recognizes the large number of opportunities for youth members to develop leadership skills. Our youth leaders



are constantly challenged at the chapter, lodge, section, region and national levels to develop leadership skills through organization, management and event-planning activities.

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Nationally, the OA will continue its support of training programs that emphasize leadership: LLD, NLATS and NLS. At the section level, there will also be a greater emphasis on the Lodge Assistance program.

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Locally, lodges are encouraged to focus on adventurous programs for units, support council Scoutreach efforts, effectively use the Troop/Team Representative program and develop a plan to strengthen overall lodge support of council operations.

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**6**

- The second area of emphasis is **Service**  
The Order has always emphasized its role as a service organization. The Strategic Plan continues to recognize the importance of service in the OA and has included it as a key point of emphasis.

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Nationally, the OA will support other divisions in the BSA including Scoutreach, Camping and Conversation Service and High Adventure. The OA will also support the Webelos to Scout transition program and Cub Scout camping.

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Locally, lodges are encouraged to support council camp promotions, camping programs and facilities. Implement the leadership in service program and develop programs to encourage campers to consistently return to local camps

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**7**

- The final area of emphasis is **Financial Support**  
The Order of the Arrow has benefited from a strong financial position, allowing us to support a number of programs within the Order of the Arrow and beyond. However, the Order also recognizes that financial needs at both the national and local level will increase in the future. The Order must be prepared to meet this challenge.

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Nationally, the Order will continue to fund its own operational expenses while continuing to build our endowment fund. The OA will continue to give support to selected lodges in support of council outdoor programs including the lodge service grant program.

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**16**

Locally, lodges are encouraged to support the council financially through service projects, donating to the council endowment with James E. West fellowships, Friends of Scouting campaigns and through other council programs.

**The Lodge Annual Plan – Breakout Group Activity:**

**20 Minutes**

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Just as the Order of the Arrow created their strategic plan to support the BSA, lodges are to develop their own annual plan – created to address council needs in a manner consistent with the Order of the Arrow strategic plan. The OA strategic plan should be integrated into the lodge’s plan in ways that support the specific needs of your council.

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**18**

Your lodge may already have a plan – many were developed after the last National Order of the Arrow Conference. Each lodge should develop an annual plan that is consistent with the OA strategic plan but based on the needs of their council. Working with the council is so important; meeting with council leadership is a requirement for Quality Lodge status.

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**Trainer Tip:** Prior to the conclave, you may want to determine if any lodges in your section have developed their annual plan and have copies or information available for reference and discussion.

At this time, we'd like to apply what we've learned so far. We're going to examine a fictional council and its respective lodge. You will need to determine how the lodge can help support the council's needs, using the strategic plan as a guide.

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We're going to divide you into three groups with a mix of youth and adults. Each group will focus on a couple of the council's needs and your goal will be to brainstorm as many ideas as possible in three to five minutes on what the lodge can do to help support the council.

For example, if the council is struggling to arrange training for its unit leadership, one idea might be to have the lodge organize and coordinate a junior leadership training weekend activity for the council. Feel free to use your handouts as reference.

**Trainer Tip:** At this point, you will want to divide the participants into three groups. You can use any method (count off, divide the class in thirds) but you should ensure there is a good mix of youth and adults from different lodges in each group.

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**20**

You are all members of Character Counts Council #213 and Servant Leadership Lodge #313. You are an averaged size council with approximately 100 units and a lodge with about 400 members. In order to develop the lodge's annual plan, the lodge and council leadership met to determine how the lodge could best serve the council's needs. Using the strategic plan as a guide, analyze the council's needs and brainstorm ideas of how the lodge can help support the council.

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- **Group #1 – Leadership**

The council would like to see increased unit participation at the council's annual camporee. They would also like to see more unit participation in the council's high adventure programs.

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**10**

- **Group #2 – Service**

Recently, the number of participants at the council's summer camps has decreased. The council is also having difficulty in recruiting quality camp staff members.

- **Group #3 – Financial Support**

The council board has a goal of increasing the council endowment over the next three years. In addition, the council is also promoting their capital campaign, which will raise money for the council's camp facilities.

Remember, in a brainstorming activity, no idea is wrong and all input should be considered. Your goal is to capture as many ideas as possible within the five-minute timeframe.

**Trainer Tip:** Depending on your facility, you should use one of the following methods for the Breakout Group Activity. If you are indoors, you can instruct groups to brainstorm ideas on post-it notes and place them on a wall or whiteboard. These post-it notes will later be moved and prioritized. If you are outdoors, a large flip chart page and marker should be provided to each group so they can list their brainstorm ideas. The trainer and assistant should monitor the groups during the Brainstorm and Prioritization activity to answer questions and encourage participation.

Five minutes

"Brainstorm Activity"

**Trainer Tip:** In order to help and encourage participation, you may choose to share a few possible brainstorming ideas for each group:

**Group #1 – Leadership:**

- Utilize and help support the council's Scoutreach program to help promote the camporee and high adventure programs among rural or inner city units.
- Utilize and expand the use of the Troop/Team Representative position to act as a communication link, promoting the camporee and high adventure programs among the units in the council.
- Have the lodge play a role in planning and staffing the camporee and high adventure programs.
- Promote the programs in lodge/chapter newsletters and at lodge/chapter activities.
- Promote the programs, as well as other council camping programs, during unit elections.

**Group #2 – Service:**

- Work with the council to determine how the lodge can help increase the number of campers at camp. (Increase financial support of the camps, provide more camping promotion, help improve the quality of the facilities, help build more facilities based on program needs of the camps, provide campership funds, etc.)
- Utilize Troop/Team Representation position to help promote summer camp and camp staff.
- Encourage lodge members, especially lodge leadership, to apply for camp staff.
- During lodge/chapter and/or council/district activities, promote applying for camp staff. (The more Scouts who apply, the better the staff will be.)

**Group #3 – Financial Support:**

- Participate in council endowment through James E. West fellowship awards
- Promote council endowment into the lodge’s annual operating budget
- Create fundraiser patches or other items to help raise funds for council endowment.
- Volunteer the lodge’s financial and service resources towards projects at council camps to assist the capital campaign.

Now that your brainstorming time is complete, each group should now prioritize their list. Your priorities should be based on what ideas are the most original, effective and realistic. Try to imagine if your actual lodge could actually perform this activity, ensuring that it is consistent with the needs of the council and goals of the Strategic Plan.

**Trainer Tip:** If you utilized the post-it note method, this is a great opportunity for participants to move about, placing the best ideas on top and moving the post-it notes around a whiteboard or wall. Those who provided their groups with flip chart paper should instruct them to number ideas by priority or re-list the ideas in order on another sheet.

Three minutes	“Prioritize Activity”
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Now that we’ve completed our prioritization activity, I’m sure there are a lot of great ideas out there. Let’s take a moment to share our ideas.

I’d like each group to choose a member to review the top three ideas from their prioritized list. We’d all like to hear your idea, why it is effective, why it is realistic and how it will support the council’s needs.

We’ll start with the Leadership group followed by Service and then Financial Support

**Trainer Tip:** This is a critical portion of the session where the goal is to generate thought and discussion among all participants. After each group presents its ideas, facilitate and encourage discussion. This conversation should be the most thought-provoking of the session. You should encourage youth members of each group to give their group report.

Presentation and Discussion	“Leadership”
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Presentation and Discussion	“Service”
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Presentation and Discussion	“Financial Support”
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Obviously, there are a lot of great ideas and different things we can do as individuals and as lodges, using the strategic plan as a guide, to help support our councils. The purpose of this activity was to show you the process that your lodge might have gone through or will be going through to develop their annual plan. Your lodge’s annual plan should focus the strengths of your lodge on assisting your council to help it achieve its objectives. Remember, not all of the ideas discussed today will be successful in your lodge’s goal to support the council, but I’d like to encourage you to take some or all of these ideas back to your lodge leadership, and in partnership with the council, they may be able to use some of these ideas. Working together with your lodge and council, perhaps there are some ideas here that you may want to take ownership of and work to implement in your chapters and lodges.

**Conclusion/Question and Answers/Evaluation:**

**5 Minutes**

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At this time, I’d like to ask you to perform an evaluation of this session. The feedback you provide will be returned to the national office for review and analysis. This session is being conducted at every conclave in the nation this year. With your feedback we can continue to provide quality sessions to help improve conclave training.

Distribute Handout to volunteers	“Session Evaluation”
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**Trainer Tip:** You may want to provide a small recognition item for those individuals who volunteer to complete the participant evaluation (e.g. patch, small token of appreciation, etc.)

Now is also a great opportunity to discuss any remaining open points or additional questions before closing the session.

We hope this session has helped to explain what the OA Strategic Plan is and why it is important. While you did not write the OA Strategic Plan, its success depends on you. If we assist our councils and help them achieve their goals in a manner consistent with the strategic plan, we will have truly lived up to the mission and purpose of the Order of the Arrow.

It is up to everyone to ensure that the OA Strategic Plan is more than words on paper, but a path that leads us towards a legacy of servant leadership.

Collect Session Evaluations from Participants	“Session Evaluation”
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## APPENDIX: FREQUENTLY ASKED QUESTIONS

### **What was the first OA Strategic Plan?**

The first OA Strategic Plan (1998 – 2002) was written in 1998 and introduced at the Key Three Summit in Colorado in 1999. Key focus areas included: New Vision, Image, Leadership Development, Quality, Membership, Adventure and Service.

### **What is the lodge annual plan?**

The lodge annual plan is actually a point from the Strategic Plan calling for all lodges to develop a plan to integrate the BSA and OA strategic plans in ways to support the needs of the council. The lodge in consultation with council leadership writes a new plan every year. Each lodge that attended the National Council of Chiefs at the last NOAC participated in an activity and committed themselves to developing this plan.

### **What is the Leadership in Service Program?**

The Leadership in Service program is in the process of being developed. Its purpose is to encourage service to the council and/or community and to provide leadership opportunities to lodge members. More details will be forthcoming as the program develops.

### **What does Cub Scout program have to do with the Order of the Arrow?**

Cub Scouting is the lifeblood of Boy Scout membership. A decline in Cub Scout membership and transition ultimately results in declining Boy Scout membership as the vast majority of Boy Scouts come from the Cub Scout program vs. joining at the Boy Scout age. The Order recognizes the importance of strong support for Cub Scout Camping programs.

### **How can the Order of the Arrow support the Scoutreach program?**

The Order of Arrow Scoutreach Mentoring Program is a joint effort of the national Scoutreach Division of the Boy Scouts of America and the Order of the Arrow. Its purpose is to identify and assist urban and rural Scout troops whose camping and advancement programs are below standard.

### **Why is the OA involved in financial support?**

A key factor in the success of the Boy Scout program is strong finances. A strong financial position ensures that councils will be able to provide quality services and program to units. The OA provides a great vehicle for mobilizing volunteers and consolidating resources in support of council financial efforts including Friends of Scouting Campaigns and council endowment programs.

### **How does the national OA committee fund lodges?**

The national OA committee provides matching grants to lodges through the lodge service grant program. Lodges can petition the national committee for matching funds for projects to improve their local camp facilities.

### **What is the OA endowment?**

The OA endowment is a fund that allows the national Order of the Arrow committee to pay for special projects and initiatives. It is financed primarily through revenue from trading post sales at national conferences.

# APPENDIX: SAMPLE FLIPCHART SUGGESTIONS

The following is a recommended list of flip chart pages that can be used for visual presentation.

**OA Strategic Plan  
2003-2007**

“A Legacy of Servant  
Leadership”

*Your Name*

Page  
**1**

**What is a Strategic  
Plan?**

**Why is a Strategic Plan  
important?**

**What are the benefits  
of a Strategic Plan?**

Page  
**2**

**Development of New  
Strategic Plan**

Based on BSA Strategic Plan:

- Traditional Membership and Unit Growth
- Scoutreach
- Leadership
- Marketing and Strategic
- Financial Development

Page  
**3**

**OA Strategic Plan**

**Key Areas of  
Emphasis:**

- \* **Leadership**
- \* **Service**
- \* **Financial Support**

Page  
**4**

**Leadership**

- Proud Heritage of Youth Leadership Supported by Adult Advisers
- Leaders base Actions on Ethical Decision-making
- Must Recruit Highly Capable, Motivated, and Caring Adults
- High Quality Leadership Development Programs
- Allow Youth Leaders to Actively Develop and Use Leadership Skills

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**Service**

- Heritage of Order of the Arrow is Service, especially in Support of the Outdoor Program
- OA Programs at All Levels will Focus on Opportunities to Serve Scouting and Instill Ethic of Servant Leadership in Every Arrowman
- Effective Communications is Essential
- Active Involvement in Recruitment and Retention of BSA Membership

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**Financial Support**

- Quality Program Requires Solid Financial Foundation
- Order of the Arrow must pay its way
- Endowment Development and Annual Financial Support are Essential to Support BSA Program Nationally and Locally

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**Lodge Annual Plan**

- \* Lodge develops its own annual plan based on council needs
- \* Integrate BSA and OA strategic plan into lodge annual plan
- \* Use OA Strategic Plan as model for lodge annual plan

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**Leadership**

The council would like to see increased unit participation at the council's annual camporee. They would also like to see more unit participation in the council's high adventure programs.

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**Service**

Recently, the number of participants at the council's summer camps has decreased. The council is also having difficulty in recruiting quality camp staff members.

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**Financial Support**

The council board has a goal of increasing the council endowment over the next three years. In addition, the council is also promoting their capital campaign, which will raise money for the council's camp facilities.

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**APPENDIX: SOURCE MATERIAL AND REFERENCES**

**2003 – 2007 Order of the Arrow Strategic Plan**

<http://www.oe-bsa.org/programs/splan/>

**2003-2007 Order of the Arrow Strategic Plan & Annual Lodge Plan Workbook**

Presented at the National Council of Chiefs at the 2002 National Order of the Arrow Conference



## 2003-2007 OA STRATEGIC PLAN - A LEGACY OF SERVANT LEADERSHIP

*We find in the work of E. Urner Goodman an enthusiasm for the aims of Scouting, an appreciation for the possibilities of a youth-led and adult-supported program, and an understanding of a life enriched through leadership in service. This is the legacy of the Order of the Arrow. As we see the future through the prism of our past, it is also the legacy we intend to leave to the next generation.*

### OUR VISION FOR THE ORDER OF THE ARROW

As Scouting's national honor society, the Order of the Arrow is an integral part of the council's program. Our service, activities, adventures, and training for youth and adults are models of quality leadership development and programming that enrich and help to extend Scouting to America's youth.

For nearly ninety years, their peers have honored those Scouts who "best exemplify the Scout Oath and Law in their daily lives" with membership in the Order of the Arrow. This recognition provides encouragement for others to live these ideals as well. We will provide ways and means for members of the Order of the Arrow to do more to assist their units and councils, and help them succeed in doing so.

In support of our vision as Scouting's national honor society and an integral part of every council, the Order of the Arrow will further increase its service to Scouting. As we do so, the Scout Oath and Law, and the Obligation of the Order of the Arrow will guide us as they are projected through the current Strategic Plan of the Boy Scouts of America. The areas of emphasis outlined in the BSA Strategic Plan are:

- Traditional Membership and Unit Growth
- Scoutreach
- Leadership
- Marketing and Strategic Positioning
- Financial Development

The National Order of the Arrow Committee, after review of the BSA Strategic Plan, has identified the following areas of emphasis through which we can assist the national council in meeting its goals:

- Leadership
- Service
- Financial Support

It is our intention that each lodge will develop its own annual plan, in consultation with and the approval of its council leadership. The BSA Strategic Plan and the Strategic Plan of the Order of the Arrow should be integrated into the lodge's plan in ways that support the particular needs of the local council. The Local Council Strategic Planning Workbook provides a system for doing so; lodges are encouraged to utilize it and the materials produced by the Order of the Arrow, including programs at the 2002 National Order of the Arrow Conference, as they begin this process.

### LEADERSHIP

The Order of the Arrow has a proud heritage of youth leadership supported by adult advisers. We believe true leaders base their action on ethical decision-making. We understand that the nurturing of leadership skills begins with the recruitment of highly capable, motivated, and caring adult advisers. It is cultivated through high quality leadership development programs. Youth leadership flourishes when those advisers provide an environment where youth can actively practice the skills they have been taught. To insure the further development of quality leadership, we will:

#### *Nationally*

- Regularly review, revise, add to or delete from our leadership development programs to reflect current needs.
- Insure that the most effective teaching methods are employed in our programs. Consideration of distance learning options and an awareness of the systems used by today's youth will be included in this assessment.
- Develop an initiative to enhance learning opportunities at Section Conclaves.
- Enhance and extend programs to assist the lodge Key 3, through the National Lodge Adviser Training Seminar, the National Leadership Seminar, and the Lodge Leader Development Course, among others -
  - In the selection and training of Lodge Advisers qualified to serve on council executive boards;
  - In support to professional Scouters in their efforts to give direction to lodges; and
  - In the integration of youth leadership into appropriate council programs and structures.
- Further strengthen the Lodge Assistance program, which in turn strengthens Sections and lodges in their initiatives to support council program and operations.

#### *Locally, in the council*

- Inspire our members to provide their primary leadership in support of Scout troops and Varsity teams, assisting them with the development and implementation of adventurous programming and quality operations in their own units.
- Actively support council efforts to improve and extend Scouting through Scoutreach and related programs.
- Strengthen and expand the effective use of the Troop/Team Representative position in Scout troops and Varsity teams.
- Develop a plan that focuses the strengths of the lodge and its leadership on assisting the council in furtherance of its objectives.

## **SERVICE**

At the heart of the Order of the Arrow is its heritage of service, particularly in support of the outdoor program of the Boy Scouts of America. National, regional, section, and lodge service programs will enhance opportunities for service, both directly and as a means to foster the ethic of servant leadership in the unit and in the life of the individual Arrowman. Effective communication of our ideals and the means of implementing them are essential to the successful development of our members and programs. As we do, we assist the Boy Scouts of America in the recruitment and retention of its membership. Accordingly, we will:

#### *Nationally*

- Further strengthen our relationship with the Camping and Conservation Service, Scoutreach, and the High Adventure Division of the Boy Scouts of America. We will assist each in supporting and promoting their programs.
- Reinforce with program, materials, and training, quality inductions which will inspire members to seal their membership through the attainment of Brotherhood.
- Develop support systems for use by the lodge in furthering Webelos to Scout transition programs and Cub Scout camping.
- Regularly review, revise, add to or delete from our means of communication to reflect our current needs.
- Integrate council and lodge charter renewal and membership registration to insure both quality and consistency with council and lodge needs and objectives.
- Increase our financial and other support for Native American youth to participate in Boy Scout outdoor programs and encourage lodges to find ways to assist those with financial needs to attend their council camps.

#### *Locally, in the council*

- In cooperation with council leadership, thoroughly review the lodge program in support of camping to find ways to increase the number of youth who participate in camping, and the quality of the facilities and programs available within the council.
- Implement the Leadership in Service program.
- Develop and pilot progressive program features that encourage campers to return to local council camps year after year.

## **FINANCIAL SUPPORT**

Program support at both the national and local council levels requires a financial foundation. The Order of the Arrow must insure that it has adequate financial resources to meet its program goals in a quality fashion, both nationally and locally. The need for endowment development and annual financial support of Scouting at both the national and local council levels will increase in the years ahead. The Order of the Arrow must be prepared to meet this challenge, and to do so we will:

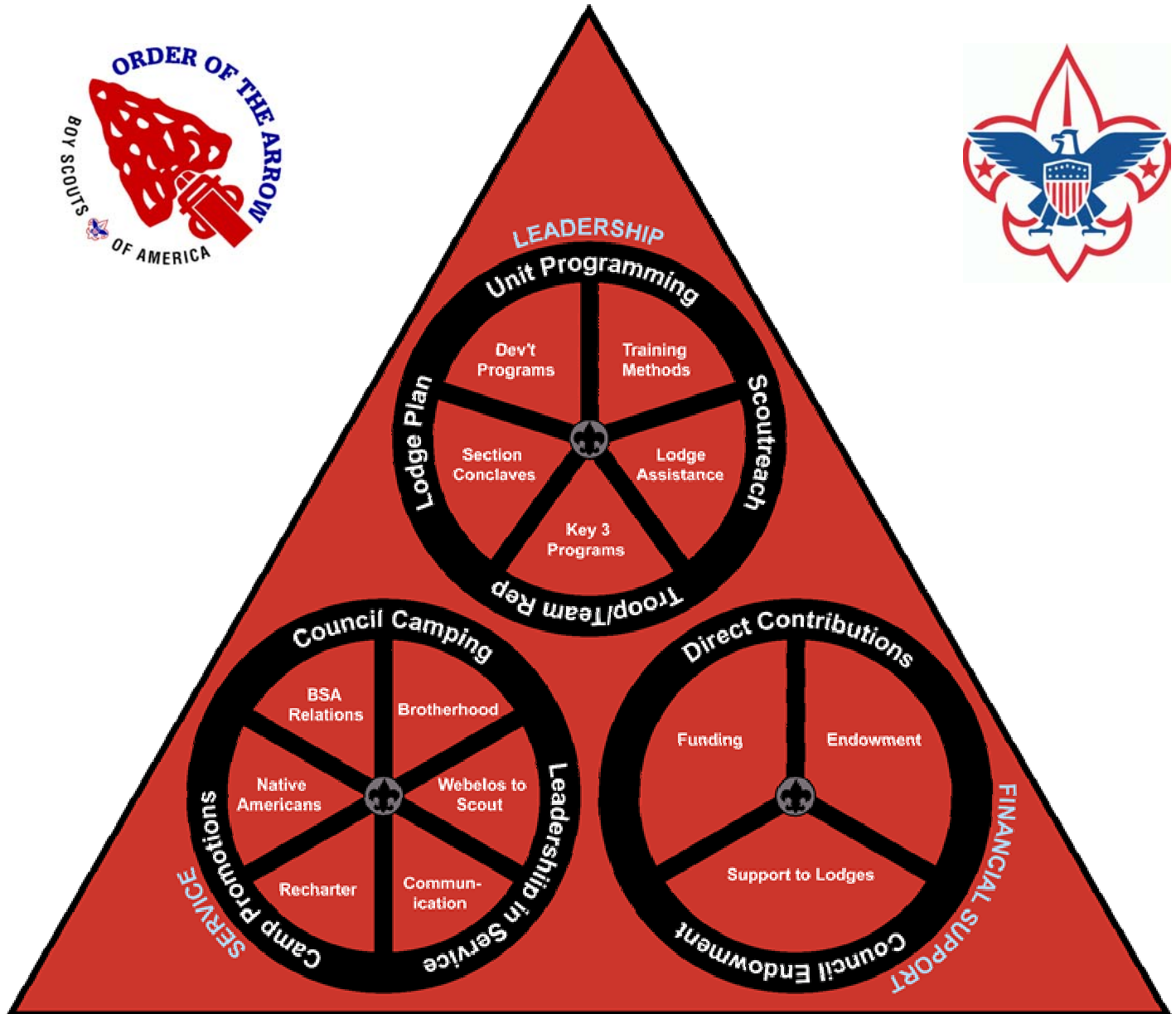
#### *Nationally*

- Maintain our practice of funding national operating expenses of the Order of the Arrow through charter fees, with all other programs financed through other sources of income.
- Build our endowment in support of program to \$5 million.
- Provide financial assistance to selected lodges in support of council outdoor program.

#### *Locally, in the council*

- Support council operating and outdoor program financial needs with direct contributions through in-kind commitments and service projects.
- Participate in council endowment through James E. West fellowships and other appropriate programs.

# 2002-2007 Order of the Arrow Strategic Plan



*The Strategic Plan is divided into three areas of emphasis: LEADERSHIP, SERVICE, and FINANCIAL SUPPORT. Each area is divided into national and local council (lodge) initiatives.*

*In this visual, the three areas of emphasis are divided into three wheels. The national initiatives are represented by the spokes within each wheel, signifying the support that the national organization provides to local lodges. The lodge initiatives, in turn, are represented by the outer wheel, where the "rubber meets the road." Both the lodge and national initiatives are inextricably linked, relying on each other for the ultimate success of the Order in its central endeavor: to serve Scouting.*

**CONCLAVE TRAINING INITIATIVE  
PARTICIPANT EVALUATION**



**ORDER OF THE ARROW  
BOY SCOUTS OF AMERICA**

Participant: please fill out this evaluation form and return to the session trainer. Your feedback will help to improve future sessions for conclave training.

1. Name of Session:

2. I am a Youth \_\_\_\_\_ Adult \_\_\_\_\_

3. How would you rate this session overall?

Low \_\_\_\_\_ High

4. List two important things you have learned as a result of this session:

5. What did you enjoy most about the session?

6. What would you improve?

7. Rate the following:

Trainer: Low \_\_\_\_\_ High

Audio/Visual: Low \_\_\_\_\_ High

Handouts: Low \_\_\_\_\_ High

Content: Low \_\_\_\_\_ High

8. Suggestions for future Conclave Training topics:

9. Please provide any additional comments on back:

Section: \_\_\_\_\_ Conclave Date: \_\_\_/\_\_\_/\_\_\_ Conclave Location: \_\_\_\_\_