2012b JOURNEY TO EXCELLENCE

Session Length: 50 Minutes

Learning Objectives:
- To showcase the new scorecard for the Order of the Arrow in an easy to understand format
- Offer the tools and resources for organizational leadership to be successful

Required Materials:
- Journey to Excellence Scorecard (copies as needed)

TRAINER PREPARATION

Introduction   3-5 Minutes

Welcome to the Journey to Excellence, or JTE, presentation! This will be a new subject for many of us; however, it will provide a fresh outlook on the future of our organization. The JTE is the new scoring system to replace Quality Lodge. The primary reason for the change is for us to remain consistent with the new Boy Scout's approach to a metrics system. Generally, we do not like to assume certain lodges or councils do not qualify as "quality" simply because they did not achieve particular requirements. Therefore, in order to align ourselves with the Boy Scout's new scoring method, we created this scoring system that acts more like a scorecard, or rubric. This session will be completely devoted to rolling out this OA scorecard and giving everyone a chance to ask questions and seek clarification.

> ***Trainer Tip:*** Please note that many people are reluctant to accept change, so as the trainer, you should cater to their needs and guide them through this transition. By answering their questions and being patient/understanding the process will be much easier for them.

The JTE offers us a chance to have continuous improvement based on a number of metrics. As opposed to its predecessor program (Quality Lodge), it will be able to recognize a wide range of talents throughout our organization. Every lodge is different; therefore, we need to have a balanced approach that is consistent and fair for all. In addition, JTE will be able to align our achievements even more successfully with the achievement of our councils. As a support arm for the BSA, this is an added benefit for the Order of the Arrow.

SESSION NARRATIVE

The Scorecard   15-20 Minutes

The easiest way to present this information is to thoroughly walk through each of the five categories, explain their respective contents, and then discuss scoring and other logistics. The Five Categories include: Finance, Membership, Program, Council Service, and Leadership & Governance.

CATEGORY ONE: Finance

1. **Fiscal Management**- Develop and successfully execute a lodge annual budget.

   - **NOTES:** A budget is a wonderful way to manage your programs while learning to allocate the appropriate amount of money to certain events. Staying organized financially creates a strong foundation to be successful.

   - **LEVELS:**

       - **Bronze**- Complete and follow budget approved by LEC
       - **Silver**- Close the year in the black (positive)
       - **Gold**- Close the year at least as great as your projected budget

2. **Contribution to Council**: Contribute cash, materials, or both to the Council.

   - **NOTES**: This is similar to requirements in the old Quality Lodge petition, where lodges were asked to contribute a certain amount per member to the council. It is good practice to support the council financially in addition to offering a quality program and leadership development. Furthermore, it helps us achieve our vision outlined in the Strategic Plan.

   - **LEVELS:**

       - **Bronze**- Contribute average of $2.00 per lodge member
       - **Silver**- Contribute $3.50 per lodge member
       - **Gold**- Contribute $5.00 per lodge member

CATEGORY TWO: Membership

3. **Membership Impact**: Experience positive growth in membership over the previous year (REQUIRED)

   - **NOTES:** This requirement remains the same from the old Quality Lodge petition. Positive growth allows lodges to maintain a consistent increase in membership that is relative to them.

   - **LEVELS:**

       - **Bronze**- Grow membership by at least one person
       - **Silver**- Grow membership by at least 1%
       - **Gold**- Grow membership by at least 3%

4. **Ordeal Completion**: Complete induction of elected Ordeal candidates.

   - **NOTES:** This objective pushes lodges to thoroughly induct the candidates getting elected throughout the council.

   - **LEVELS:**

       - **Bronze**- Induct at least 60% of Ordeals or experience 5% increase
       - **Silver**- Induct at least 75% of Ordeals or experience 5% increase (above 60%)
       - **Gold**- Induct at least 90% of Ordeals or experience 5% increase (above 75%)

5. **Brotherhood Conversion**: Covert eligible Ordeal members to Brotherhood (REQUIRED)

   - **NOTES**: This should still look pretty similar to old requirements and that is primarily because of its importance to our Organization's future.

   - **LEVELS:**

        - **Bronze**- Convert at least 30% or 5% increase over prior year
        - **Silver**- Convert at least 40% or 3% increase over 30%
        - **Gold**- Convert at least 50% or 3% increase over 40%

6. **Membership Retention**: Improve retention rate of lodge members.

   - **NOTES**: This is a popular subject within our organization, and for good reason. We all want to prevent the "Sash and Dash," and this is a step in the right direction. To see the equation for calculating, please refer the last page of JTE Scorecard.

   - **LEVELS:**

        - **Bronze**- Achieve 50% or a 4% increase over prior year
        - **Silver**- Achieve 60% or a 4% increase over 50%
        - **Gold**- Achieve 70% or a 5% increase over 60%

CATEGORY THREE: Program

7. **Unit Elections**: Conduct unit elections in Council troops and teams desiring them.

   - **NOTES**: As a means to increase our membership, unit elections provides us with an opportunity. Always bettering our numbers in this objective will help us achieve other criteria and goals. And, throughout the three levels, you can see there is a progressive plan for improvement in this area.

   - **LEVELS:**

        - **Bronze**- Complete elections for at least 90% of requesting units
        - **Silver**- Complete elections for at least 95% of requesting units
        - **Gold**- Complete elections for at least 100% of requesting units

8. **Section and National Event Attendance**: Attend section and national events.

   - **NOTES**: Representation at all national events is not required by lodges, however it is certainly encouraged. Also, lodges can meet this objective if members attend and OA High Adventure base. Therefore, when compared to the old Quality Lodge program, this requirement allows for more flexibility and personalized goals within each lodge.

   - **LEVELS**:

        - **Bronze**- Achieve Lodge attendance goal at section & national events
        - **Silver**- Exceed Lodge attendance goal by 10%
        - **Gold**- Exceed Lodge attendance goal by 20%

9. **Lodge Communications**: Maintain active communications within the lodge.

    - **NOTES**: Communication is a vital part to running a successful and popular program, which is why it has a place on our JTE Scorecard.

    - **LEVELS**:

        - **Bronze**- Follow a written Lodge communication plan
        - **Silver**- Publish Lodge newsletter or update website at least quarterly
        - **Gold**- Contribute to Council newsletter or website

10. **Lodge Event Participation**: Improve lodge membership participation at full lodge events.

    - **NOTES**: What is the point of having a lodge event if no one shows up? Well, if we all work to achieve this objective we will not have to worry about answering that type of question. By giving ourselves numbers to achieve, we can work towards the goal in little segments. To see the equation for calculation, please refer to the last page on the JTE Scorecard.

    - **LEVELS**:

        - **Bronze**- Average at least 10% of lodge membership at all events
        - **Silver**- Average at least 20% of lodge membership at all events
        - **Gold**- Average at least 30% of lodge membership at all events

11. **Lodge Planning**: Maintain an active planning process that guides the lodge program and supports the Council Strategic Plan.

    - **NOTES**: Planning is a key element within the sequential leadership process and by aligning our plans with the Council; we will again achieve a portion of the OA Strategic Plan.

    - **LEVELS**:

        - **Bronze**- Have a written annual plan approved by the Scout Executive
        - **Silver**- Conduct an annual review & update of your plan along side the Council's
        - **Gold**- Have an annual meeting with the Scout Executive to review your plan

CATEGORY FOUR: Council Service

12. **Council Service Projects**: Complete Scout Executive approved service project(s) on Council property and in the community.

    - **NOTES**: This objective is similar to the Quality Lodge requirement of community service. Being an active member in the community is a crucial part of "Cheerful Service." Therefore, at least one council and one community project with an annual written report are required for this objective.

    - **LEVELS**:

        - **Bronze**- Complete project(s) equal to at least 2 hours of service per member
        - **Silver**- Complete project(s) equal to at least 2.5 hours of service per member
        - **Gold**- Complete project(s) equal to at least 3 hours of service per member

13. **Council Camping Support**: Conduct camp promotion contacts to Council troops and teams.

- **NOTES**: Contacts are to be determined by the Scout Executive or the Council Camping Committee (if delegated). Contacts could include: presentations, promotional meetings, etc.

- **LEVELS**:

  - **Bronze**- Complete contacts to at least 75% units or 3% increase
  - **Silver**- Complete contacts to at least 80% of unites or 3% increase (over 75%)
  - **Gold**- Complete contacts to at least 85% of unites or 3% increase (over 80%)

14. **Council Program Support**: Provide OA member staff support for council district program events.

- **NOTES:** To continue our role as a support arm for the council, we need to be involved in council and district programs. If we support the council and its members, they will do the same for us.

- **LEVELS:**

  - **Bronze**- Support 2 council or district events
  - **Silver**- Support 3 council or district events
  - **Gold**- Support 5 council or district events

15. **Council Designated Support**: Complete Scout Executive designated program support projects.

- **NOTES**: On the last page of the JTE Scorecard, you will find a list of ideas for these designated program support projects. To highlight just a few, you can participate in quarterly key 3 meetings with the Scout Executive, recruit a certain amount of members to work at council summer camp, or have at least one member attend an OA High Adventure program.

- **LEVELS**:

  - **Bronze**- Complete one project
  - **Silver**- Complete two projects
  - **Gold**- Complete three projects

CATEGORY FIVE: Leadership and Governance

16. **Lodge and Charter Leadership**: Conduct at least one LLD during the year with qualified instructors using current material.

- **NOTES**: Training is a huge part of what the OA represents and does well. So it makes sense for it to have a place on our scorecard moving forward. To better understand how to conduct a qualifying LLD course please see the last page of the JTE Scorecard and go online to www.oa-bsa.org and click on the LLD link. (*Eligible members can include*: lodge and chapter youth leaders and advisers)

- **LEVELS**:

  - **Bronze**- Achieve at least 75% of eligible members trained or 3% increase
  - **Silver**- Achieve at least 80% of eligible members trained or 3% (over 75%)
  - **Gold**- Achieve at least 85% of eligible members trained or 3% (over 80%)

17. **Annual Report**: Submit a written annual report of accomplishments to the Council Executive Board.

- **NOTES**: Communication on our lodges progress and achievements in an integral part of the Boy Scout of America.

- **LEVELS**:

  - **Bronze**- Written report submitted
  - **Silver**- Written report submitted and verbal report given to Executive Board
  - **Gold**- Written report submitted and verbal report given by the Lodge Chief

> **Trainer Tip:** A lot of material has been covered in the Scorecard section of this presentation. It may be a good point to pause and ask if there are any questions before moving into the scoring section.

The Scoring   **5-10 Minutes**

As we know, the scorecard is broken into three different levels: Bronze, Silver, and Gold. For each of the 17 criteria there is a correlating point value at the right side of the scorecard. Each point value can vary, but typically, they increase progressively from Bronze to Gold.

In addition to the individual criteria points, there are a total number of points lodges can earn in each category.

TOTAL POINTS	
Finance	400
Membership	600
Program	600
Council Service	800
Leadership & Governance	200

Now, in order for a lodge to achieve the Silver or Gold levels, they must complete the prior levels. (*Example*: To qualify for Silver level in item one, the lodge must have completed the Bronze level requirement for item one).

Another important note with regards to scoring individual criteria includes the percentage increases over a certain amount. It may seem confusing, but all it requires is the calculation of the prior year's numbers in that respective criteria. For example, if a lodge achieved a 50% membership retention rate in the previous year, they would need to achieve a 54% to qualify them in the current year for the Silver Level points. It would remain a 4% increase for all the following years, but you must make sure you use the prior year's percentage in your calculations (in this case 54%).

Grand Total Calculations-

- **Bronze Level**: At least 800 Grand Total points **PLUS** have completed at least bronze performance in 10 criteria, two of which <u>must</u> be objectives #3 & #5.

- **Silver Level**: At least 1100 Grant Total points **PLUS** have completed bronze performance in at least 12 criteria.

- **Gold Level**: At least 1400 Grand Total points **PLUS** have completed bronze performance in at least 15 criteria.

Questions & Answers   **5-10 Minutes**

Now that we have thoroughly discussed the Scorecard details and the Scoring logistics, I'd like to offer everyone the chance to ask any questions you may have. Our goal is to clear up any confusion so that you all feel comfortable taking this home to implement in your own lodges.

> ***Trainer Tip:*** It would be a good idea to become an expert in the Scorecard so you feel comfortable answering a multitude of questions "off-the-cuff."

SESSION SUMMARY

Conclusion: **3-5 Minutes**

After breaking down the Scorecard into each of the five categories and seeing the different criterion, I think it's safe to say that a lot of thought went into this program. Journey to Excellence offers us a unique opportunity to take positive elements from our old scoring tool (Quality Lodge) and make them even stronger.

Overall, the JTE Scorecard will make all of our lives easier. The reason for this is simply because it will now standardize our metrics. If we have a more individualized criterion across the organization everyone will be on a fair and level playing field. But more importantly, each lodge will be able to do what is feasible for them and that is a new characteristic that makes this program stand out.

We are excited to begin our Journey to Excellence and we look forward to all of your successes. Thank you for all you do.