Journey to Excellence

A guide containing a compilation of requirements, best practices, and resources for lodges working to complete the Journey to Excellence program

Scouting's National Honor Society
ORDER OF THE ARROW
JOURNEY TO EXCELLENCE GUIDE

BOY SCOUTS OF AMERICA
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This guidebook has been developed for use by lodges working to complete the Journey to Excellence (JTE) program. Contained in this booklet is an in-depth look into the requirements along with “tips for success”, technical details, frequently asked questions, and links to additional resources. This JTE Guidebook is designed to help lodge officers and advisers understand the JTE program and to provide guidance to empower lodges to perform well on the requirements. This JTE Guidebook is available for download from http://www.oa-bsa.org.

PURPOSE

Journey to Excellence, the new performance recognition program adopted by the Boy Scouts of America, changes the basic way we measure and recognize success by moving away from measuring process and moving toward measuring performance. To be aligned with the BSA and to capitalize on this best practice used in the corporate performance measurement field today, the Order of the Arrow adopted the Journey to Excellence format in 2012 to evaluate lodge performance and to motivate and recognize continuous improvement in lodge operations.

Ultimately, utilizing the JTE program brings the OA in line with the BSA’s performance measure. Journey to Excellence uses a balanced scorecard approach, which is one of the best practices in performance measurement. The greatest benefit of this new program is that we can continually challenge ourselves to improve in all areas of a lodge’s annual operations.

HISTORY

Prior to 2012, the Order of the Arrow implemented the Quality Lodge program which used fixed performance metrics to measure a lodge’s performance each year. The JTE program replaced the Quality Lodge program in 2012.

JOURNEY TO EXCELLENCE AND QUALITY LODGE COMPARISON

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<td>• “Next year let’s work on A, B, and C.”</td>
<td>• “Try again next year.”</td>
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HOW IT WORKS

The Journey to Excellence petition is based on a score card format. Each lodge has the opportunity to achieve one of three different levels of recognition: Bronze, Silver, or Gold. Lodges earn points for each requirement they complete. The sum of the total points earned determines a lodge’s placement on the JTE measurement scale.

THE JTE PROCESS

Your lodge accomplishes the Journey to Excellence throughout the course of the entire year, not just at the end of the year when your results are submitted. So, as you review the pages in this guidebook, consider how the lodge will need to plan to complete each requirement.

The first step in planning is to **review your lodge’s JTE performance** from the previous year or two. Try to understand your lodge’s strengths and weaknesses in the various JTE requirements. You must know where you are if you are to plan where to want to go! Your lodge leadership should analyze its performance in each of the JTE categories. Here are some questions to consider as you review your lodge’s performance:

- What requirements did we have difficulty completing?
- What could we have done differently to overcome barriers to good performance?
- Where did our lodge do best? Can we maintain or improve this performance?
- Were there requirements for which the lodge had no plan that could have been completed with a little preparation?
- How has our performance on certain requirements changed over the past few years?
- Are there requirements for which our lodge’s performance was significantly below the section or national averages?
- Did we consider the relative point values in our planning process?

After identifying where improvement is needed, the lodge leadership should **look for ideas on how to succeed**. This guidebook is not the only resource; other lodges in your section may have innovations in their approach to the Journey to Excellence. Exchange ideas on JTE with other lodges at section conclaves and section training seminars. In fact, hundreds of successful ideas on lodge program submitted by lodges around the country are gathered as “best practices” and accessible on the national OA website at the link listed below. Take advantage of the many resources that are identified in this guidebook and find good ideas for your lodge.

Armed with the knowledge of where and how the lodge can improve, it is finally time for the lodge leadership to **set formal S.M.A.R.T. goals** and to determine exactly how they will better
themselves through Journey to Excellence. Remember the definition of a S.M.A.R.T. goal: Specific, Measurable, Attainable, Relevant, and Time bound.

“A journey of a thousand miles begins with one step”, so as you begin, consider each requirement individually. Create a backdated calendar for each requirement, and then spread the effort and responsibilities to the lodge officers and committees. Be very clear as you share the specific duties and deadlines with your lodge leaders. As you plan, remember to coordinate your calendar with the council calendar because your lodge is an integral part of the council. Also, consider how you will communicate with your members, chapters, and the council throughout the process to make all of the lodge’s efforts successful. Finally, recognize that some JTE requirements hold a higher point value than others; take these point values into account as you prioritize and set your lodge JTE goals.

Record keeping is essential while working on the Journey to Excellence program. The OA LodgeMaster application is the primary tool for lodge record keeping and makes tracking the JTE details a lot easier. Without accurate record keeping, your lodge loses the opportunity to see a true picture of your performance via the Journey to Excellence.

As your lodge program unfolds during the year, use OA LodgeMaster to check your JTE progress. Are you on track with your established goals? Is your lodge falling short of any requirements? Take action while there is still time to make your goals for the year!

Finally, at the conclusion of the year, use OA LodgeMaster to score and submit your JTE performance data to the national Order of the Arrow committee. This guidebook includes the detailed scoring information for each requirement in the chapters that follow. The overall scoring for the JTE award levels and the data submission procedure are found in the Scoring the Lodge’s Performance chapter at the end of this guidebook.

**GENERAL RESOURCES**

Several resources are available from the national Order of the Arrow committee to aid your lodge with Journey to Excellence and with your annual operations. These include, but are not limited to: Guide for Officers and Advisers, Field Operations Guide, Guide to Inductions, Lodge Finance Manual, Best Practices, and the Lodge Leadership Development Planning Guide. All of these resources are available on the national Order of the Arrow site, www.oa-bsa.org.

Additional resources may be available from your section such as section conclave training and section training seminars. JTE resources may also be available from your region. Each region has a volunteer JTE coordinator whose responsibility is to support each lodge in its efforts to implement the JTE program.

**National JTE website**

http://www.oa-bsa.org/pages/content/jte
2016 JTE Scoresheet
http://www.oa-bsa.org/pages/content/printable-forms#2016jtepoints

OA LodgeMaster
http://lodgemaster.oa-bsa.org/

National JTE website – 2015 changes
http://www.oa-bsa.org/pages/content/lodge-ledger-2015-07-1

2015 Chapter JTE worksheet template
http://www.oa-bsa.org/pages/content/printable-forms#chapter-workbook

National Order of the Arrow Publications
http://www.oa-bsa.org/pages/content/publications

Order of the Arrow Best Practices
http://www.oa-bsa.org/pages/content/best-practices

REGION WEBSITES:

Central Region
central.oa-bsa.org

Southern Region
southern.oa-bsa.org

Northeast Region
northeast.oa-bsa.org

Western Region
western.oa-bsa.org

QUESTIONS:

If you have questions on the Order of the Arrow JTE program you may contact the JTE committee directly at jte@oa-bsa.org.
MAJOR JTE CATEGORIES

The seventeen requirements of the lodge JTE program are organized into six major categories:

- Finance
- Membership
- Program
- Unit Service
- Council Support
- Leadership and Governance

FINANCE

Maximum point value: 500

The two requirements in the finance category are designed to recognize lodges that develop and properly use an annual budgeting process in which lodge funds are held in a council custodial account and managed by the lodge executive committee. The requirements in finance also recognize lodges that strengthen ties with the council through financial support. This support consists of both material and cash contributions to the council.

MEMBERSHIP

Maximum point value: 1500

Membership is a key component of our success as an organization. The four important criteria in the membership category bring to light several key challenges faced by lodges as we work to maintain and increase membership.

Today, lodges face a variety of challenges to maintain and increase membership. The JTE membership criteria encourage lodges to retain active members and to grow in total membership where possible. While growth is not mandatory to earn JTE recognition, lodges that are successful in this category offer programs and activities of interest to both new Ordeal members and older members inspiring them to continue active membership in the OA.

This category also recognizes lodges that are successful in establishing contact and holding OA elections in as many units in the council as possible providing opportunities for Scouts in all units to become members of the Order of the Arrow. A unit with eligible Scouts which does not conduct an OA election creates a missed opportunity for both the Scout and the lodge.

Recent JTE data show that many Scouts who are elected to the OA do not attend the Ordeal. To help counteract this trend, requirements in the Membership category reward lodges that induct the large majority of elected Scouts.
Lodges with active participation and whose events are well attended not only do well in the program category of JTE but tend to do well in the JTE program as a whole. The JTE requirements in the program category recognize this fact and reward lodges whose events are attended by a healthy percentage of the lodge membership.

An important component of a lodge program includes service – both council and community focused service projects. Requirements in the program category encourage lodges to implement service in both areas and recognize lodges whose service projects are meaningful and well-supported by the lodge membership.

Lodges with an active program offer opportunities for Ordeal members to become Brotherhood members, and the program metrics of JTE recognize lodges that are successful in achieving a healthy percentage of Brotherhood conversion. Finally, lodges are encouraged to engage members by meeting lodge defined goals for participation in section and national events.

Recognizing that successful units comprise the core element of a council program, this new category of JTE requirements, added in 2015, challenges lodges to improve their service to all units in the council. Unit service JTE requirements encourage Order of the Arrow lodges to be visible and to support units through a variety of methods. Lodges that score well in this new category strive to strengthen the relationship between units and the OA by assisting units to earn the Unit of Excellence award, through a well-functioning OA Troop Rep program, and most importantly by in-person visits by Arrowmen to unit meetings and events.

Part of our mission as an integral part of the council is to support our council. The three requirements in the council support category embrace this mission. One key metric in the council support category encourages lodges to tackle specific service projects designated by the Scout executive. These projects support the council’s specific current needs while building a stronger relationship with the council. Within this JTE category, lodges are also encouraged to provide staff support for council and district events, a service for which many councils look first to the Order of the Arrow. Additionally, this category measures a lodge’s efforts in promoting camping in units within the council.
LEADERSHIP AND GOVERNANCE

Maximum point value: 300

The final category in the JTE program, leadership and governance, challenges lodges to train all lodge leaders through a Lodge Leadership Development program. In addition, the leadership and governance category encourages lodges to develop a written performance plan and to share both their plan and a report of their accomplishments with the council executive board. These reports ensure that the service and achievements of the OA lodge are visible to the leadership of the local council.

Figure 1 - Relative value of the 2016 JTE categories
FINANCE ITEM #1

FISCAL MANAGEMENT: “Develop and successfully execute a lodge annual budget.”

- BRONZE: 50 points “Complete and follow an annual budget approved by the lodge executive committee.”
- SILVER: 100 points “Close the year with a positive operating balance (i.e., operate in the black).”
- GOLD: 200 points “Close with an operating balance at least as great as your budget projection.”

PURPOSE:

This requirement encourages lodges to properly manage the finances of the lodge, to ensure money is spent as directed by the lodge executive committee, and to help the lodge operate without a deficit.

Under the leadership of the lodge chief and lodge treasurer the LEC develops, implements, and maintains a budget for the local OA lodge and chapters following the guidelines set forth in the Lodge Finance Manual. This process provides the youth leaders with an opportunity to learn how to manage a budget for an organization and ensures money is spent as intended for preapproved purposes.

REQUIREMENT IN-DEPTH:

This requirement is based on the fact that successful lodges create and follow an annual budget. A lodge must not only be aware of income and expenses during the year but also must manage these finances accordingly. Lodges that operate without a budget are more likely to lose money, and lodges that lose money year after year risk jeopardize the entire Order of the Arrow program in the council.

To meet the Bronze level in this requirement a lodge must develop and follow an annual budget, and this budget must be approved by the lodge executive committee. The budget need not be extremely complicated but should be appropriate to the size and financial resources of the lodge. Youth leaders, in particular the lodge treasurer and lodge chief, should be involved in this process with the guidance of adult advisers. Lodge leaders who know the resources they have at their disposal will be more successful. By giving every dollar a name and sticking to the budget, the lodge should be able to avoid most potential financial surprises.
TIPS FOR SUCCESS:

- Review past budgets and use them as a guide to create an annual budget.
- Use the budget template provided in the Lodge Finance Manual.
- Map out the average cost for standard lodge functions to include location, dining, flap/patch, and all other expenses related to the specific function.
- Review specific committees and their expenses into the year and determine if there was enough money allocated or if more should be allowed to the committee for the year.
- Consider holding a budget workshop for lodge members to explain how a budget works, and to give them the opportunity to decide how they want lodge funds spent.
- Seek guidance from past lodge chiefs, the lodge adviser and staff adviser before presenting to the LEC.
- Avoid creating a budget that is too complex.
- Determine the success of past lodge fundraisers and consider the need to invest in any other fundraisers to generate more funds for the lodge.
- Determine if fundraisers should be short term projects such as patch auctions and dinners, or if they should be long term, such as new lodge shirts, patches or other memorabilia.
- Keep the lodge executive committee up-to-date on the status of the budget. For example, the lodge treasurer could provide regular updates at LEC meetings.
- Do not hesitate to invest a portion of the lodge budget into service opportunities provided by your council, section, and region.
- Consider the opportunities that you could enable by allocating a percentage of money into scholarships for NOAC, NLS, NLATS, and other training opportunities.

TECHNICAL DETAILS:

All Order of the Arrow funds must be in a custodial account held by the local council on behalf of the OA lodge and its chapters. The OA lodge cannot have its own bank account.

Supplies purchased by the OA lodge are the property of the lodge and not included in council inventory.

The lodge budget should be under the control of the lodge executive committee. Typically, the annual lodge budget should be created by the lodge treasurer in consultation with the treasurer’s adviser and the lodge adviser. The budget is then approved by the lodge executive committee.

The lodge must not have a deficit to achieve Silver or Gold in this requirement.
RESOURCES:

Lodge Finance Manual  
http://www.oa-bsa.org/pages/content/publications#lfm

Guide for Staff Advisers  
http://www.oa-bsa.org/pages/content/publications#gsa
FINANCE ITEM #2

CONTRIBUTION TO COUNCIL: “Contribute cash, materials, or both to the council.”

- **BRONZE:** 75 points  “Contribute an average of $4.50 per lodge member.”
- **SILVER:** 150 points  “Contribute an average of $8.50 per lodge member.”
- **GOLD:** 300 points  “Contribute an average of $24.00 per lodge member.”

PURPOSE:

Developing good relations with one’s council is vital for both the lodge and for the council to be successful. The council is often dependent on the Order of the Arrow for its service to the Scout camps and its support of council program activities such as summer camp staff and district events. Similarly, the lodge is dependent on the council, for the council makes possible (manages) the entire scope of Scouting program of which the Order of the Arrow is a part. By providing funds to the council, the lodge is ultimately creating opportunities for the council and districts to serve their community and host various Cub/Boy Scout events.

REQUIREMENT IN-DEPTH:

This requirement is based on the total number of lodge members and the amount of money and materials you are able to donate to the council in their name. Large lodges are likely to contribute more cash and materials to the local council, so this requirement is based on the per-member contribution. Divide the sum of the cash and materials contributions for the year by the total number of members at the end of the year.

\[
\text{Contribution per member} = \frac{\text{Total cash contributions} + \text{Total material contributions}}{\text{Total end-of-year membership}}
\]

This requirement strengthens the ties between the lodge and the council and allows the Order of the Arrow lodge to have a role in the financial health of the council.

**Example #1:** Calculate the total number of active lodge members you currently have, and donate $2.00 per member. e.g., if your lodge has 750 members who have paid their dues for the year, donate $1,500 to your council.
**TIPS FOR SUCCESS:**

- Study the lodge’s annual budget to determine how much you are able to donate before stating the amount. Lodge’s with lower annual revenue should not yet aspire to complete the Gold Level.
- Find ways and specific projects the money can be donated to such as camporees, service events or other projects.
- Use the contribution of money to build a stronger relationship between your lodge and the council, this will allow for both of you to have better opportunities in the future.
- Many lodges award James E. West recognition to a member annually. The lodge generally makes a donation to a council endowment fund, or something equivalent, in their name. This is a great way to recognize a member of your lodge, and also help to fulfill the Journey to Excellence requirement.
- A donation of supplies to the council for a service project at camp can be counted towards this requirement. Calculate the total cost of the supplies or estimate the fair market value. Add this value to the total contributions.
- Ensure any large contributions made by the lodge are visible to the council leadership. For example, if the lodge makes a large, one-time contribution to the council capital campaign, organize a brief presentation ceremony in which the lodge chief presents an oversized check to the council president.

**TECHNICAL DETAILS:**

Contributions of materials to the council count toward this requirement. For example, if the lodge purchases supplies or materials for a service project at the council camp, the fair market value of these goods counts as a contribution. If the value is unclear, use the purchase price, or check with your Scout executive who has the final authority to set the fair market value.

Contributions to the council by lodge members do not count. Contributions to the council must be made by the lodge.

**FREQUENTLY ASKED QUESTIONS:**

*Question #1: My chapter adviser made a $500 contribution to our council’s Friend of Scouting campaign. Since my chapter adviser is an active member of the lodge, does this contribution count toward this JTE requirement?*

No, contributions to the council must be made by the lodge in order to count toward this JTE requirement. While contributions to the council made by individuals are critical to the success of the council, these contributions do not affect this JTE requirement.
**Question #2:** This year, our lodge voted to honor a longtime Arrowman and sponsored a James E. West fellowship by making a $1,000 contribution to the council on behalf of this Arrowman. Does this contribution count toward this requirement?

Yes, this contribution should be included as a lodge contribution to the council.

**Question #3:** Last year, our lodge made a $1,000 contribution to the national Order of the Arrow endowment fund to recognize a member as a Legacy Fellow. Does the $1,000 contribution to the OA endowment fund count toward this JTE requirement?

No, this JTE requirement is specifically designed to encourage and recognize lodge contributions to the local council. Contributions made by lodges or individuals to the OA endowment fund do not count toward achievement of this requirement.

**RESOURCES:**

[Lodge Finance Manual](http://www.oa-bsa.org/pages/content/publications#lfm)
MEMBERSHIP ITEM #3

MEMBERSHIP IMPACT: “Experience positive growth in membership over the previous year.”

- **BRONZE**: 150 points  “Grow membership by at least 1.”
- **SILVER**: 300 points  “Grow membership by at least 1%.”
- **GOLD**: 600 points  “Grow membership by at least 9.5%.”

PURPOSE:

A positive growth in membership is a strong sign of a lodge’s overall program. It shows that the lodge is actively looking for new ways to bring Arrowmen into the program and keep them interested in Scouting. This can be through leadership opportunities, a creative program, and service within the lodge’s respective community.

REQUIREMENT IN-DEPTH:

In this requirement, lodges are asked to show positive growth in their annual membership records, which are traditionally perceived as members who have paid their dues. Therefore the successful collection of dues is essential to making a successful count of all active members. The only plausible way a lodge would fail to meet this expectation would be if more members failed to pay their dues than candidates inducted in a year’s time. With so many other activities available in today’s world, it can often be difficult to retain membership. The key to making this a success is putting on a program that your members want to be part of.

TIPS FOR SUCCESS:

- Publish the dues due dates through Lodge publications and social media.
- Make direct contact to members through post-cards or e-mails. These could be sent directly to members.
- Offer Early-Bird discounts.
- Collect dues at chapter and lodge meetings/functions.
- Promote the OA and collect dues at non-lodge sponsored council events.
- Consider using the OA LodgeMaster system to distribute information.
- Aspire to be creative and innovative in all functions of the lodge, especially program.

**JTE FACT:** In 2015, slightly more than half our lodges experienced a membership growth; although, only 27 lodges (9%) had growth of at least 15%.
TECHNICAL DETAILS:

This requirement has the highest point value of all the JTE items.

All dues paid members count in total membership; this includes youth, adults, professional scouters, and volunteer members. OA members who have not paid their dues should not be counted. Scouts elected to the OA but not yet inducted should not be counted.

To calculate your lodge’s membership growth, subtract your lodge’s total membership at the beginning of the year from the total membership at the end of the year. If this number is positive (in other words, membership at the end of the year was greater than at the beginning of the year) your lodge experienced growth and met at least the Bronze benchmark.

To calculate your growth percentage, divide the growth by the total membership at the beginning of the year.

\[
\text{Membership Growth percentage} = \frac{\text{Total end-of-year membership} - \text{Total beginning-of-year membership}}{\text{Total beginning-of-year membership}}
\]

FREQUENTLY ASKED QUESTIONS:

Question #1: Is membership growth a mandatory requirement?

Membership growth is no longer a mandatory requirement. A lodge can earn any JTE award level even if the lodge membership did not increase during the year. Of course, the lodge must earn enough points through other requirements.

RESOURCES:

Best Practices
http://www.oa-bsa.org/pages/content/best-practices
MEMBERSHIP ITEM #4

MEMBERSHIP RETENTION: “Improve the retention rate of lodge members.”

- **BRONZE:** 75 points  “Achieve 63% or a 4% increase over prior year.”
- **SILVER:** 150 points  “Achieve 74% or a 4% increase over 63%.”
- **GOLD:** 300 points  “Achieve 85% or a 5% increase over 74%.”

PURPOSE:

Each lodge goes about fulfilling this requirement in a different way, but in order to maintain a positive growth rate, lodges need to find new ways to improve their annual program.

REQUIREMENT IN-DEPTH:

What exactly is membership retention? Membership retention is the percentage of current, active OA members that return the following year and continue their active membership.

There are two primary factors in membership retention. First, members who had been active in the past may become inactive and no longer participate in lodge events or pay lodge dues. Keep your current members engaged in the OA program by ensuring the leadership is in the hands of the youth and lodge events are fun.

The second factor in membership retention is getting brand new Ordeal members active and interested in the lodge program. Brand new Ordeal members who do not return to participate in lodge activities are sometimes called “sash and dashers”. Recognizing that an Arrowman actively serving his unit is an active member of the OA (Ten Induction Principles #10) the OA needs new Arrowmen to lead and participate in our program.

Programs such as Jumpstart, new member orientation, and fun, get-involved activities for brand new Arrowmen reduce the number of brand new Ordeal members who “sash and dash”! Be sure your lodge’s new Ordeal members know that the OA is not all “arduous labor”; OA membership can be great fun!

TIPS FOR SUCCESS:

- Ensure that each event, including Ordeals, includes an element of fellowship and fun.
- Bring more lodge members to the Conclave! Let the section help you promote the Order.
- Help your chapter chiefs develop programs for meetings. Successful chapter meetings will promote themselves.

JTE FACT: In 2015, the nationwide membership retention was **75.4%**.
• Create fun chapter activities in addition to the chapter meetings.
• Use themes at events (survivor, pirates, cavemen, etc.) so that Arrowmen can get excited and prepare for events in advance.
• Promote friendship outside of Scouting. Many Arrowmen will tell you they hang out with their best friends in the OA even outside of camp.
• Schedule a cracker barrel, feast, or some fun activity directly after the Ordeal ceremony.
• Introduce Arrowmen in the same school to one another. Some sections have “Section Supper Clubs” at each college for the Arrowmen which attend. While this might not work for a high school, you could help them connect via social media and then they can remind one another of meetings at school.

TECHNICAL DETAILS:

What exactly is membership retention? How is membership retention calculated? Membership retention is the percentage of current, active OA members that return the following year and continue their active membership. To calculate membership retention percentage, first identify your total membership at the beginning of the year. The question is: “how many of these Arrowmen returned?” Your end-of-year membership total includes newly inducted Arrowmen. Subtract the number of newly inducted Arrowmen from the end-of-year total to determine how many Arrowmen continued their membership. Here is the formula: Take the end-of-year total membership and subtract the number of Arrowmen inducted during the year. Divide this result by the total beginning-of-year membership. This ratio is your lodge’s membership retention percentage for this year.

\[
\text{Membership Retention} = \frac{\text{Total end-of-year membership} - \text{Inductions this year}}{\text{Total beginning-of-year membership}}
\]

Technically, this metric focuses on retention of Arrowmen who were registered members of the lodge at the beginning of the year and ignores the impact of inducting new members. In other words, inducting an unusually large number of Ordeal candidates will not affect your membership retention percentage this year. In addition, the negative impact of “sash and dash” will not be reflected in the membership retention metric until the following year.
FREQUENTLY ASKED QUESTIONS:

Question #1: What does “4% increase over prior year” mean?

This simply means that your current percentage is four percentage points higher than last year.

Example #1: Last year’s membership retention rate was 50%, and this year’s rate grew to 54%. This earns bronze level since the difference is at least four percentage points.

Example #2: Last year’s membership retention rate was 59%, and this year’s rate grew to 62%. This does not earn any award level since the difference is not at least four percentage points, and the current percentage did not meet the fixed bronze level of 63%. The difference in this example is three percentage points.

Question #2: What does “5% increase over 74%” mean?

This simply means that your current percentage is five percentage points higher than last year, and your current percentage is at least 74%.

Example #3: Last year’s membership retention rate was 69%, and this year’s rate grew to 74%. This earns gold level since the difference is at least five percentage points, and the current rate is at least 74%.

RESOURCES:

The Best Practices section of www.oa-bsa.org brings together the most innovative and successful practices in the nation. Frequently check for new additions to this page.

Best Practices for Membership Retention
http://www.oa-bsa.org/pages/content/best-practices#MR

Video for new members – produced by the national OA committee (2014)
http://www.oa-bsa.org/pages/content/lodgeledger-2014-07-05

Video for new members’ parents – produced by the national OA committee (2014)
http://www.oa-bsa.org/pages/content/lodgeledger-2014-07-05
MEMBERSHIP ITEM #5

UNIT ELECTIONS: “Conduct unit elections in all troops and teams within the council.”

<table>
<thead>
<tr>
<th>LEVEL</th>
<th>POINTS</th>
<th>REQUIREMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>BRONZE</td>
<td>75</td>
<td>“Complete unit elections in 37% of units.”</td>
</tr>
<tr>
<td>SILVER</td>
<td>150</td>
<td>“Complete unit elections in 64% of units.”</td>
</tr>
<tr>
<td>GOLD</td>
<td>300</td>
<td>“Complete unit elections in 100% of units.”</td>
</tr>
</tbody>
</table>

PURPOSE:

Unit elections give Scouts the chance to recognize their peers who best exemplify Scouting’s principles. In addition to this, it is a chance for lodges to make a good impression to the troops and convey the message that there are endless opportunities for adventure and leadership within Scouting.

REQUIREMENT IN-DEPTH:

All troops and teams should be contacted and given the opportunity to request an OA election. Election teams must be trained with all team members in proper uniform with the arrow sash. Preferably team members are from units other than the one where the election is being held.

Let’s discuss how to schedule an election. It’s a fairly simple process wherein the chapter chief, or other designee, will contact either the lodge staff adviser or his district executive and request the contact information for all of the Scoutmasters and Varsity Coaches within his chapter’s boundaries. Some lodges suggest that three attempts of contact be made – a phone call, followed by an e-mail, and if needed another phone call. Once the person in charge of the chapter’s elections has made contact with the Scoutmaster, an election should be scheduled for a date and time convenient for both the unit and the election team. It’s recommended that the Arrowman scheduling the election keep a calendar of all election dates and times. This process can be summarized in this bulleted form:

- 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

Now that we’ve got an evening for the unit to have an election, it’s important that our election team be on their game. By referring to the Guide to Inductions, as mentioned above, the team will stick to the guidelines and be able to present the election results to the person in charge of elections in an orderly manner. But what makes an election great, rather than just acceptable?
LLD programs and chapter meetings are a great time to make sure your unit election teams are up to par. But let’s be honest – it isn’t always easy to find Arrowmen to be on an election team. After going to one’s own troop meeting once a week, it can become a burden to go to a different troop to hold an election. Many lodges encourage their members to join an election team by offering recognition items such as patches or other small tokens of appreciation to thank them for their time and service.

**TIPS FOR SUCCESS:**

- An opportunity to schedule unit elections is at the district roundtable meeting. Having the chapter or lodge chief (or other officers) speak to the unit leaders in attendance will show an eagerness to send an election team and provide them with more information regarding the Order.
- Utilize your council newsletter and website to give contact information of who unit leaders should contact to schedule an election.
- Contact the Arrowmen in the unit which is having an election. Ask them to remind their fellow Scouts that a meeting is coming up and they should be in attendance.
- Different lodges and councils have different views on holding summer camp elections. If your lodge holds elections at camp, this is a great time to reach the desired percentage of unit elections. If this is something your lodge doesn’t do but is interested in doing, remember that the very first OA elections were held during summer camp, back in 1915. However, camp elections require just as much attention and adherence to the rules and procedures of elections as any unit election held at the unit’s meeting place – one major thing to check on prior to the election is that the unit must have at least 50% of its members in attendance. Also remember that no elections may be held for units that are from another council.

**TECHNICAL DETAILS:**

Count only Boy Scout Troops and Varsity Teams in this calculation. Do not count Venturing Crews or Cub Scout Packs.

A visit to a unit for the purpose of conducting an OA election counts for this requirement – even if no one is elected. As long as the unit requests the election and the election team attends for this purpose, the visit counts toward this requirement regardless of the outcome.

Two criteria must be met to meet this requirement for each unit:

- The unit requests an OA election
- The OA election team visits the unit for the purpose of conducting the election

If not enough Scouts are present to conduct the election or the unit leader does not approve any Scouts to be on the ballot, the election team should still present the informative elements of the unit election: the video or script about the OA and the lodge, and an explanation of the purpose of the election.
It is recommended that unit elections are conducted by youth members from a different unit.

An election team may also provide additional service during a unit visit such as camping promotions.

Very few lodges will be able to conduct OA elections in every single unit in the council. Some units may have no eligible Scouts, and unfortunately some units may not want an OA election. Nonetheless, it is important that the OA establish contact with these units and if possible make a unit visitation to provide some service, teaching, or promotion. Establish a connection to the unit. Help the unit understand that the OA exists and can serve the unit in ways other than just the OA election. By creating a supportive and positive image of the Order of the Arrow, units that do not hold elections this year will be more likely to consider having OA elections in the future.

Beginning in 2016, it is not required for lodges to enter the total number of units in the council; this information will be automatically obtained from the national database of Boy Scout units. The number of units in each council as of April 1 will be used for the calculation for this requirement.

**FREQUENTLY ASKED QUESTIONS:**

**Question #1:** Our election team went to a troop meeting to conduct an OA election, but not enough Scouts were present to conduct the election. Does this count as a unit election for this requirement?

Yes, this counts. The purpose of the visit was to conduct an OA election. Also the election should be rescheduled.

**Question #2:** During summer camp an election team comprised of camp staff OA members visited a troop’s campsite and conducted an OA election. Does this count?

Yes, this counts as long as the election is organized by the lodge. All OA activities at summer camp – elections, ordeals, brotherhood conversions, service projects, etc. – count toward JTE requirements.

**Question #3:** Our chapter election team visited the troop meeting of a brand-new troop and conducted a camp promotion presentation. No Scout in this unit was eligible for the OA. Does this count?

No, this does not count. The purpose of the visit was not to conduct an OA election.

**Question #4:** Our chapter election team visited the troop meeting ready to conduct an OA election, but the Scoutmaster said he did not approve any Scout to be eligible for election this year. Does this count?

**JTE FACT:** Of the 43,028 troops and teams in the nation at the end of 2015, only 22,349 of these held OA elections in 2015.
Yes, this counts. The purpose of the visit was to conduct an OA election.

**Question #5:** The Scoutmaster of one troop in my chapter indicated that he did not want an OA election in his unit this year. However, the Scoutmaster invited our chapter election team to his unit to do a wilderness camping presentation. Our team visited the unit and did a great job with this presentation, but we did not conduct an OA election. Does this count?

No, this does not count toward this requirement. The purpose of the visit was camping promotion and will count toward the Council Camping Support requirement.

**Question #6:** How do we determine how many troops and teams are in our council?

As of 2016, it will not be necessary to submit the total number of units in the council, for this information will be automatically retrieved from the councils. The number for the calculation will be based on the number of troops and team as of April 1.

**RESOURCES:**

An excellent, but often overlooked, resource for lodges and chapters which are in need of stronger unit elections programs can be found in Chapter 2 of the *Guide to Inductions*. This chapter highlights the standard procedures for carrying out a unit election. You’ll find the rules and procedures which are a must for Arrowmen who are new to holding unit elections.

Also in the Guide are all of the forms you’ll need as well as a “ceremony” script to give Arrowmen an idea as to what they should say to the units. It may be beneficial for election teams to utilize these tools, especially teams with newer Arrowmen, or Arrowmen who aren’t very comfortable with public speaking.

**Guide to Inductions**  
http://www.oa-bsa.org/pages/content/guide-to-inductions

**Unit Elections Forms**  

**Unit Election Video – resource for election teams**  
http://www.oa-bsa.org/uploads/resources/lodgeresourcepak/lodge_unit_elections.mov

**Conducting Unit Elections Training Video**  
http://www.oa-bsa.org/uploads/resources/lodgeresourcepak/lodge_conducting_unit_election.mov

**Lodge Program Resource Videos**  
http://www.oa-bsa.org/pages/content/lodge-program-resource-videos
MEMBERSHIP ITEM #6

ORDEAL COMPLETION: “Induct Ordeal candidates.”

- **BRONZE:** 75 points “Induct at least 65% of Ordeal candidates or increase 5% over prior year.”
- **SILVER:** 150 points “Induct at least 78% of Ordeal candidates or increase 5% over 65%.”
- **GOLD:** 300 points “Induct at least 100% of Ordeal candidates.”

PURPOSE:

Ordeals bring new members into the Order of the Arrow. Candidates are traditionally invited to the Ordeal through a “call out” and are given further instructions afterwards. A strong ratio between the number of Scouts “called out” and those that undergo the Ordeal indicates that the Order of the Arrow is seen by the council as an excellent outlet for leadership development, cheerful service, and outdoor adventure. These are characteristics each lodge should strive to embody.

JTE data collected over the past few years make it clear that a significant number of Scouts elected to the OA do not complete the Ordeal. Nationwide in 2015, more than ten thousand Scouts elected to the OA did not attend the Ordeal!

REQUIREMENT IN-DEPTH:

The more opportunities your lodge offers for Ordeal completion, the higher your completion rate will likely be. Look at your lodge schedule. Are there lodge activity weekends which don’t offer Ordeal completion? If so, why not? Are the activities of this weekend more productive than those of an inductions weekend?

Effective communication from the unit election all the way to the induction is one key to successful Ordeal participation.

TIPS FOR SUCCESS:

It’s important to let candidates know when the Ordeals will be held. It’s encouraged that candidates receive a personal letter from the lodge leadership with dates on which they can complete their Ordeal. These letters should be mailed about one month prior to the first inductions weekend.

JTE FACT: In 2015, **42,441** Scouts were elected to the Order of the Arrow, but **10,073** of these Scouts did not complete the Ordeal.
• Plan Ordeals in the lodge yearly calendar.
• Conduct unit elections in a timely manner to ensure elected candidates have time to work the Ordeal into their schedules.
• Avoid local area event conflicts when scheduling: sports, council events, etc.
• Effectively track names and contact information for all elected candidates.
• Conduct successful and inspiring “call out” ceremonies to encourage Scouts to attend the Ordeal.
• Work throughout the year to establish a positive image of the OA throughout the council.
• Dispel rumors and myths about the Ordeal that may discourage Ordeal attendance.
• Encourage OA troop representatives to promote Ordeals at troop meetings.
• Communicate effectively with all elected candidates using several communication channels.
• Promote Ordeals at both council and district committee meetings.
• Perform impressive Pre-Ordeal and Ordeal ceremonies with well-trained and well-practice teams.
• Establish competent leadership to conduct registration, cook, and obtain service materials needed for Ordeals.
• Conclude Ordeals by promoting future events and encouraging members to become active within the lodge and their chapters.

TECHNICAL DETAILS:

This criterion requires lodges to keep track of every Scout who is elected to the OA. Do not simply assume that the number of elected candidates was the total number of new Ordeal members inducted.

\[
\text{Induction Rate} = \frac{\text{Number of youth elected this year}}{\text{Number of adults approved for induction}} + \text{Inductions this year}
\]

What does “increase 5% over 65%” mean? This simply means that your current percentage is five percentage points higher than last year, and your current percentage is at least 65%.

Example #1: Last year’s induction rate was 60%, and this year’s rate grew to 65%. This earns silver since the difference is at least five percentage points, and the current rate is at least 65%.

Example #2: Last year’s induction rate was 73%, and this year’s rate grew to 77%. Even though the current rate is greater than 65%, this earns bronze since the difference is only four percentage points.
Other examples:

<table>
<thead>
<tr>
<th>Last year</th>
<th>This year</th>
<th>Award level</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>61%</td>
<td>66%</td>
<td>Silver</td>
<td></td>
</tr>
<tr>
<td>70%</td>
<td>75%</td>
<td>Silver</td>
<td></td>
</tr>
<tr>
<td>60%</td>
<td>65%</td>
<td>Silver</td>
<td></td>
</tr>
<tr>
<td>73%</td>
<td>77%</td>
<td>Bronze</td>
<td>Not at least 5 points difference</td>
</tr>
<tr>
<td>54%</td>
<td>64%</td>
<td>Bronze</td>
<td>Not at least 65%</td>
</tr>
</tbody>
</table>

Candidates have one year from the time of election to be inducted into the OA. To be completely accurate in this calculation, Scouts elected in the previous year who have not completed the Ordeal and who were still eligible to complete a scheduled Ordeal within this one year period should be included in this calculation as elected candidates.

FREQUENTLY ASKED QUESTIONS:

**Question #1:** How do we account for adult Scouters in this calculation?

Keep track of the number of adult Scouters nominated and approved for induction into the OA. Include the total number of approved adults in the calculation as shown.

RESOURCES:

**Guide to Inductions**
[http://www.oa-bsa.org/pages/content/guide-to-inductions](http://www.oa-bsa.org/pages/content/guide-to-inductions)

**Best Practices for Inductions**
[http://www.oa-bsa.org/pages/content/best-practices#IND](http://www.oa-bsa.org/pages/content/best-practices#IND)

**Video for new members – produced by the national OA committee (2014)**
[http://www.oa-bsa.org/pages/content/lodgeledger-2014-07-05](http://www.oa-bsa.org/pages/content/lodgeledger-2014-07-05)

**Video for new members’ parents – produced by the national OA committee (2014)**
[http://www.oa-bsa.org/pages/content/lodgeledger-2014-07-05](http://www.oa-bsa.org/pages/content/lodgeledger-2014-07-05)
PURPOSE:

Participation is a key measure of a lodge’s program success. Lodges with active participation and whose events are well attended not only do well in the Participation requirement but tend to do well in the JTE program as a whole.

Every lodge strives to provide a quality program for their members, and one of the best ways to judge the success of the program is through attendance. Which of your lodge events do Arrowmen enjoy the most? Why do they enjoy these events? How can the characteristics of a successful activity be applied to improve attendance at events with weaker attendance?

REQUIREMENT IN-DEPTH:

To determine lodge event participation, add the attendance of all events where all lodge members were invited to attend (e.g., fellowships and lodge banquets), then divide by the number of events to get an average attendance number. Divide that number by the total lodge membership to determine the overall average percent of the lodge in attendance.

\[
\text{Average event attendance} = \frac{\text{Sum of attendance of all lodge events}}{\text{Number of lodge events}}
\]

\[
\text{Lodge participation} = \frac{\text{Average event attendance}}{\text{Total lodge membership}}
\]
Example #1:

Lodge X had four full-lodge events during the year. At the end of the year, the total lodge membership was 400. Based on the calculation shown below, lodge X had a participation rate of 31% for the year earning Silver for this requirement.

<table>
<thead>
<tr>
<th>Event</th>
<th>Attendance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Winter Banquet</td>
<td>100</td>
</tr>
<tr>
<td>Spring Fellowship</td>
<td>120</td>
</tr>
<tr>
<td>Summer Fellowship</td>
<td>130</td>
</tr>
<tr>
<td>Fall Fellowship</td>
<td>150</td>
</tr>
</tbody>
</table>

Sum of attendance = 100 + 120 + 130 + 150 = 500
Number of events = 4
Average event attendance = 500 / 4 = 125
Lodge participation = 125 / 400 = 31%

TIPS FOR SUCCESS:

Use the following tips to increase your lodge attendance.

- Start a promotions team whose job it is to promote lodge and section events to your membership.
- Keep prices as low as possible.
- Create innovative chapter competitive events.
- Offer Brotherhood questionnaires and ceremonies at all full lodge events.
- Look at your schedule – how can you fill the down time?
- Do your participants like the food? If not, talk with your cook crew.
- Offer relevant training sessions which are fun and hands-on.
- Give opportunities for Arrowmen to get involved with ceremonies at lodge events.
- Have a midnight capture the flag competition between chapters with glow sticks.
- Have door prizes at each meal.
- Raffle off a “free trip to Conclave” for everyone who registers for the lodge event in advance.
- Make sure your lodge officers are interacting with the membership.
- Which lodge in your section is your “rival”? What do you want to beat them at during next year’s Conclave (ceremonies, competitions, etc.)? Rally your lodge together and practice at a lodge event – promotion is key!
- Invite a section, region, or national officer to join a lodge meeting by Skype to promote national events.

TECHNICAL DETAILS:

Count only full lodge events for this requirement. Full lodge events are major lodge activities such as fellowships and banquets to which the entire lodge membership is invited. Service days, special events, conclaves, and national activities need not be included even though the entire lodge is invited. Chapter events, meetings, and activities should not be included.
FREQUENTLY ASKED QUESTIONS:

*Question #1:* Only a few lodge members attended this year’s section conclave since the location was very far from our council. Does this very low participation rate count against us for this requirement?

No, a low conclave attendance does not count against your lodge for this requirement. It is not necessary to count the section conclave as a “full lodge event”. However, if you were the service lodge for the conclave, and a large percentage of your members attended the event, you may choose to include the conclave as an event for this calculation. Inclusion of the section conclave in this requirement is optional.

*Question #2:* My lodge has over 3,000 members, and our Ordeals are conducted by chapters. Each member is invited to their chapter’s Ordeal. How should we count these chapter Ordeals for this participation requirement?

Large lodges that manage Ordeals on a chapter level may choose to include these events in their calculation. Determine the participation percentage for these events based on the total membership of the chapter(s) invited. Average these percentages to produce a single participation rate for all chapter level events, and treat this percentage as a single event when combined with full lodge events. Contact the JTE committee at jte@oa-bsa.org if needed for more detail.

RESOURCES:

*Best Practices for Events and Promotions*
http://www.oa-bsa.org/pages/content/best-practices#Events
PROGRAM  ITEM #8

BROTHERHOOD COMPLETION: “Convert eligible Ordeal members to Brotherhood.”

- **BRONZE:** 50 points  “Convert at least 25% or 5% increase over prior year.”
- **SILVER:** 100 points  “Convert at least 32% or 3% increase over 25%.”
- **GOLD:** 200 points  “Convert at least 50% or 3% increase over 32%.”

PURPOSE:

Many lodges equate the Brotherhood program to just keeping new members active for one year after the Ordeal, and having them “seal their membership” in the Order. But without a strong active base of experienced Arrowmen, lodges are forced to have to “reinvent the wheel” each year. Brotherhood conversion is essential for lodges to build a strong pool of Arrowmen to pull from to fill chapter and lodge leadership positions and to run a successful lodge program.

REQUIREMENT IN-DEPTH:

This statistic appears on a field in your lodge charter renewal. This is a reliable way to measure the percentage of members that your lodge is retaining after their induction. It is important to seek out Scouts and Scouters who may have “sash and dashed” and encourage them to become active again by converting to Brotherhood.

JTE FACT:  In 2015, twenty-three lodges inducted more than 50% of their eligible Ordeal members to Brotherhood membership.

TIPS FOR SUCCESS:

- One way to remind brothers of their opportunity for Brotherhood is to send personalized e-mails, postcards, social media messages, or phone calls. Lodge/chapter meetings and lodge publications are also an excellent way to accomplish this.
- Certain lodges have found success with this goal by charging Scouts for both their Ordeal and Brotherhood at their Inductions Weekend. This stops the Scout from forgetting that they must sign up for Brotherhood, and gives them the incentive to come back to complete it.
- You can also promote the importance of the Brotherhood by having a Brotherhood reception each week at summer camp. This event would give you the opportunity to recruit Arrowmen for the call-out later in the week and recognize Brotherhood members.
- Get members involved in the chapter meetings and planning meetings, for example, host the meeting at a local park and play disc golf prior to meeting.
- Use the “Extended Elangomat Program.” (see Resources below)
TECHNICAL DETAILS:

The Brotherhood completion rate is calculated by dividing the total number of Brotherhood inductions by the total number of Ordeal members who were eligible for Brotherhood. The number of Ordeal members who were eligible for Brotherhood includes those that earned Brotherhood and those that did not.

Brotherhood Conversion =

What does “5% increase over prior year” mean? This simply means that your current percentage is five percentage points larger than last year.

Example #1: Last year’s brotherhood completion rate was 10%, and this year’s rate grew to 15%. This earns bronze level since the difference is at least five percentage points.

Example #2: Last year’s brotherhood completion rate was 19%, and this year’s rate grew to 20%. This does not earn any award level since the difference is not at least five percentage points, and the current percentage did not meet the fixed bronze level of 25%. The difference in this example is one percentage point.

What does “3% increase over 25%” mean? This simply means that your current percentage is three percentage points larger than last year, and your current percentage is at least 25%.

Example #3: Last year’s brotherhood completion rate was 22%, and this year’s rate grew to 25%. This earns silver level since the difference is at least three percentage points, and the current rate is at least 25%.

FREQUENTLY ASKED QUESTIONS:

Question #1: Is Brotherhood Completion a mandatory requirement?

Brotherhood Completion is no longer a mandatory requirement. A lodge can earn any JTE award level even though the lodge did not do well in Brotherhood completion rate during the year. Of course, the lodge must earn enough points through other requirements.
RESOURCES:

Guide to Inductions – Chapter 9 Journey to Brotherhood
http://www.oa-bsa.org/pages/content/guide-to-inductions

Best Practices for Brotherhood Conversion
http://www.oa-bsa.org/pages/content/best-practices#BC

Extended Elangomat Program
PROGRAM ITEM #9

SERVICE PROJECTS: “Complete Scout executive approved service project(s) on council property and in the community.”

- **BRONZE:** 50 points  
  “Complete project(s) equal to at least 3.5 hours of service per lodge member.”

- **SILVER:** 100 points  
  “Complete project(s) equal to at least 6 hours of service per lodge member.”

- **GOLD:** 200 points  
  “Complete project(s) equal to at least 15 hours of service per lodge member.”

PURPOSE:

As an “integral part of the council” according to the “Mission of the Lodge,” it is the lodge’s responsibility to give service not only to local Scout units and the council but also to the local community. Whether benefiting the council or community, service projects exemplify the lodge’s commitment to support the overall Scouting program in the local area. Not only is it the right thing to do, but service to the council also helps build a strong and cooperative relationship between the lodge and the council. Examples of service inspire young Scouts to become Arrowmen and give a positive image of the lodge to the council’s volunteer leaders who may not be associated with the Order.

By organizing a few service projects in addition to the lodge’s other projects throughout the year, most lodges should be able to achieve three service hours per member. As the Brotherhood of Cheerful Service, the lodge and its members must set the example by leading a life of cheerful service; this requirement encourages us to continue to do so.

REQUIREMENT IN-DEPTH:

Proper planning from the beginning of the lodge calendar is essential to attaining this requirement. Look at the lodge’s recharter numbers at the beginning of the year. How many hours will the lodge have to record in order to attain bronze, silver, or gold? What types of service projects will be offered, and how will these projects be promoted?

Summarize the success of the service projects in the lodge’s annual report to the council.

JTE FACT: In 2015, fifteen lodges provided an average of more than 20 hours of service per member.
TIPS FOR SUCCESS:

- Develop a program to coincide with projects. For example, if performing trail work for a local park, request permission to camp at the park and enjoy a weekend of outdoor adventure and service.
- Promote the lodge’s work through council and local news.
- Offer an incentive program for Scouts who complete service hours.
- Remember that you can conduct both council service projects and community service projects.
- Don’t forget to include service hours accomplished preparing for and at Ordeals.
- Take advantage of the conclave for all lodges to contribute to the local community in a conclave-wide service project.
- Share the success of your service projects in your annual report to the council.

\[
\text{Service hours per member} = \frac{\text{Total end-of-year membership}}{\text{Attendance at service project #1} \times \text{Length of project #1 in hours} + \text{Attendance at service project #2} \times \text{Length of project #2 in hours} + \ldots}
\]

TECHNICAL DETAILS:

To fulfill this requirement the lodge must conduct service projects that benefit the community, the council, or the council camp. Usually, a lodge conducts several service projects of various types during the course of the year; however, a single project may be sufficient if it is well-attended by the lodge membership.

Keep track of the number of Arrowmen who attend a service project and multiply by the length of the project measured in hours to determine the total number of hours spent in service by the lodge for the project. Add the total number service hours for each project and then divide this total by the total lodge membership to determine the number of service hours per member.

There is no need to write a detailed report on each project, but be sure to include a summary of the service projects in the lodge’s annual report.
FREQUENTLY ASKED QUESTIONS:

Question #1: Do service hours by Arrowmen and candidates during Ordeals count toward this requirement?

Yes, lodge service projects include all service rendered under the auspices of the lodge and at the discretion of the Scout executive.

Question #2: Is it necessary that my lodge conduct at least two service projects: one must serve the council, and one project must benefit the community?

No, the service projects can include one, both, or a combination of the two types of projects. Acceptable service projects for this requirement are at the discretion of the Scout executive.

Question #3: Does a service project organized by a chapter count toward this total?

Yes, all lodge and chapter service projects count toward this requirement.

RESOURCES:

Lodge Community Service Guide:
http://www.oa-bsa.org/pages/content/publications#lcsg

Best Practices for Service
http://www.oa-bsa.org/pages/content/best-practices#Service

Service Ideas
http://www.oa-bsa.org/pages/content/service-ideas

National Service Award
http://www.oa-bsa.org/pages/content/national-service-award
Journey to Excellence

Program Item #10

Section and National Event Attendance: “Attend section and national events.”

- **Bronze:** 25 points  “Set and achieve a lodge attendance goal at scheduled section and national events.”
- **Silver:** 50 points  “Exceed the lodge attendance goal by 10%.”
- **Gold:** 100 points  “Exceed the lodge attendance goal by 20%.”

Purpose:

National and section events are the highlight of many Arrowmen’s Scouting experience. Opportunities to participate in OA High Adventure, a National Order of the Arrow Conference (NOAC), and section conclaves are unique experiences to themselves as they provide outlets for fellowship with Scouts and Scouters from across the nation, and are not to be missed. This JTE requirement encourages lodges to promote these events and to set and achieve goals for attendance.

Requirement in-Depth:

It is up to the lodge to set attendance goals, and these goals should motivate the lodge to encourage attendance at section and national events by both youth and adult Arrowmen.

Review your lodge attendance goals and actual attendance at section and national events from prior years and take these into account. Also, consider distance and travel costs, for these will vary from year to year.

To achieve any level of recognition for this goal, your lodge must first set an attendance goal. To set such a goal for a section event, you’ll first need to know what percentage of the section your lodge makes up. This percentage will also be your goal for the section event. Find out what the section attendance target will be, and aim to meet the percentage compatible with your lodge. The distance between the event location and the lodge membership should be taken into account when establishing the goal.

**Example #1:** Lodge X has 512 members and belongs to a section with a membership of 5,000. Thus, lodge X makes up approximately 10% of the section membership. If the section conclave attendance goal is 1,000 Arrowmen a reasonable goal for the lodge X conclave attendance could be 10% of 1,000 or 100 Arrowmen. The driving distance to the conclave for lodge X is only about one hour making the event easy to attend, so they adjust the goal upward. Lodge X sets an attendance goal of 120 Arrowmen.
To meet this item’s goal for national events, be sure to put all national events for the year on the table. Include NOAC, NLS, and NLATS in your planning. Your goals for these events might not be predictable through a formula, based on the location and other mitigating factors. Rather than setting a percentage goal for national events, you may prefer to set a numeric goal such as “50 Arrowmen attend NOAC”.

**TIPS FOR SUCCESS:**

Some things to consider regarding the silver and gold levels for this item:

- Consider the section, region, and national calendars to avoid scheduling conflicting lodge events.
- It will likely be easier to pass your goals for section events than it will be to pass the goals for national events.
- Some lodges give out a specified number of NLS “scholarships” each year. You may find that an Arrowman who doesn’t get such a scholarship would be inclined to wait until the next year in hopes of getting a scholarship, rather than paying his own way for this year. Certain lodges have dealt with this issue by setting aside a specific amount of money to be evenly distributed between NLS participants, rather than awarding “full-rides” to a set number of Arrowmen.
- Many sections, and even some lodges have recently discovered the benefits of having a promotions team or committee. This team would best be utilized by having a short presentation at every lodge gathering (maybe even every meal on a lodge weekend) to promote specific events. Promotions teams are also excellent groups to manage the lodge’s Facebook and Twitter accounts, adding promotional content as needed.
- You may be interested in raffling off a “Free trip to Conclave” at a lodge banquet or other lodge-wide event. It’s suggested that only Arrowmen who sign up for Conclave at the event be entered in the drawing, to increase registration.
- Lodges should always be on the lookout for ways to lower the cost of attending a section or national event.
- Consider a fundraiser project to offset travel costs for a national event.
- Invite a section, region, or national officer to join a lodge meeting by Skype to promote the event.
- And of course, why would anyone want to sign up for an event if their lodge and chapter officers aren’t signed up yet? Officers should be at the top of the registration list!

**TECHNICAL DETAILS:**

It is up to the lodge to set attendance goals, and these goals should be challenging but achievable.

When considering the award level earned for this requirement, consider the overall level of goal achievement when reviewing your achievements for multiple events. For example, a lodge may exceed its goal for a section event but fall short of its goal for a region or national event.
Take all section, region, and national events into account for which the lodge set attendance goals and determine the overall level of goal achievement. Calculate the average or prioritize the events in some manner that is fair and appropriate for your lodge. Ultimately, it is up to the lodge leadership to determine its level of achievement in this requirement.

**FREQUENTLY ASKED QUESTIONS:**

*Question #1: Should both youth and adults be counted?*

It is up to the lodge to set attendance goals, and these goals should motivate the lodge to encourage attendance at section and national events by both youth and adults. However, it is acceptable if a lodge sets attendance goals for certain events based only on youth attendance.

**RESOURCES:**

OA High Adventure Promotions Material
http://adventure.oa-bsa.org/resources.php

Best Practices for Events and Promotions
http://www.oa-bsa.org/pages/content/best-practices#Events
UNIT VISITATION: “Conduct an in-person visit to every troop or team in the council. Visits must happen at a unit meeting or event, and be conducted by trained Arrowmen from other units.”

- **BRONZE:** 50 points  “In-person visits conducted with 31% of units.”
- **SILVER:** 100 points  “In-person visits conducted with 60% of units.”
- **GOLD:** 200 points  “In-person visits conducted with 100% of units.”

PURPOSE:

This requirement challenges lodges to improve their service to all units in the council. One important way to serve units is for Arrowmen to visit in person. The purpose of the visit could be one of many choices: camp promotion, high adventure promotion, skills instruction, or to conduct an OA election. Not only do units benefit from the in-person visits, but the OA also benefits from the positive image of the Order of the Arrow these visits can create for the Scouts and Scouters of these units.

REQUIREMENT IN-DEPTH:

Unit visitations must be conducted by Arrowmen from a different unit. When Arrowmen from a different unit visit, a typical Scout’s view of Scouting is broadened; he begins to see Scouting as more than just his own unit. He may envision opportunities to continue his participation in Scouting on a wider basis beyond the unit level.

TIPS FOR SUCCESS:

- Combine this requirement with camp promotion visits or unit election visits.
- Visit units during council or district events.
- Establish a method to keep track of these unit visitations.
- Be sure to visit units that have no Scouts eligible for the OA.

TECHNICAL DETAILS:

The lodge staff adviser or Scout executive should provide a count of the total number of troops and teams that are registered in the council at the end of the year. To obtain an accurate percentage do not reduce this number. For example, do not subtract the number of new troops or the number of units that did not conduct OA elections. Only count Boy Scout troops and Varsity teams; do not count Venturing crews or Cub Scout packs.
FREQUENTLY ASKED QUESTIONS:

_**Question #1:*** Our chapter unit election team visited a troop meeting to conduct an OA election. Does this visit count toward this requirement?*_

Yes, a unit election team visit to a unit meeting counts as a unit visitation for this requirement.

_**Question #2:*** My chapter visited several Webelos dens to conduct crossover ceremonies. Do we count these visits for this requirement?*_

No, count only visits to troops and teams in the council for this requirement. Visits to Cub Scout packs and dens build interest in Boy Scouting and help increase Scouting membership in the long term, but these visits do not count toward this requirement.
UNIT SERVICE ITEM #12

UNIT OF EXCELLENCE AWARD: “Assist troops and teams in the council to earn the OA Unit of Excellence Award.”

- **BRONZE:** 50 points  “Award earned by 10% of troops/teams in the council.”
- **SILVER:** 100 points  “Award earned by 25% of troops/teams in the council.”
- **GOLD:** 200 points  “Award earned by 50% of troops/teams in the council.”

PURPOSE:

This JTE requirement encourages lodges to utilize the OA Unit of Excellence award to strengthen the support for the Order of the Arrow at the unit level.

REQUIREMENT IN-DEPTH:

The Order of the Arrow Unit of Excellence Award seeks to identify those units, and the leaders within them, who excel at incorporating the OA into their annual planning. This award is intended to provide a tool for lodges to recognize, incentivize, and operationalize unit-level participation in Order of the Arrow programs.

The OA Unit of Excellence Award’s criteria recognize units that:

- Operate a complete OA Troop/Team Representative program
- Invite the lodge to conduct unit elections
- Encourage attendance at lodge events and meetings
- Consider the lodge calendar in unit planning
- Encourage unit Ordeal members to achieve Brotherhood membership

The OA Troop/Team Representative Adviser (Assistant Scoutmaster or Assistant Varsity Coach) is a new, official BSA adult position of responsibility that has been created in conjunction with this award. The adviser guides the youth OA Representative and serves as the ‘voice of the Order’ at the adult level in the troop/team structure. Patches for these positions can be purchased through the BSA Supply Division at your local Scout Shop.

TIPS FOR SUCCESS:

- Distribute and promote Unit of Excellence Award information to Scoutmasters and Varsity Team Coaches. A sample letter to unit leaders can be found in the resources listed below.
- Ensure OA Troop/Team Representatives are well-informed about the Unit of Excellence award.
- Encourage OA Troop/Team Representatives to track the status of the award for their unit.
- Develop a method on the chapter or lodge level to keep track of units that have earned the award.
- Present ribbons, patches, and certificates annually at troop/team meetings or Courts of Honor.
- List Troop/Team Numbers, Scoutmasters/Coaches, and Charter Partners in lodge and council publications, banquet programs, and on the OA and/or council website.
- Invite all recognized Troop/Team Reps, Troop/Team Rep Advisers, and Scoutmasters/Coaches to an annual “thank-you” dinner, hosted by the lodge.
- Create a special event at district or council camporees to recognize Units of Excellence.

**TECHNICAL DETAILS**

The OA Unit of Excellence is an Order of the Arrow award. The lodge oversees the award in the council and determines which units meet the requirements. The lodge should track the requirements and identify units of excellence each year. The award certificates for Scoutmasters and Coaches are approved and signed by the lodge chief and lodge adviser.

**FREQUENTLY ASKED QUESTIONS:**

**Question #1:** How do we determine how many units have earned this award?

This award is an Order of the Arrow award. The chapter or lodge determines which units have earned the award and must track the requirements.

**Question #2:** What recognition does the unit receive for achieving this award?

The unit receives a ribbon for the unit flag each year the award is achieved. In addition, the OA Troop/Team representative, his adviser, and the unit leader are recognized by a certificate. Order forms for both the ribbon and the certificates are listed below.

**Question #3:** How do we obtain the OA Troop/Team Rep Adviser uniform patch?

Patches for these positions can be purchased through the BSA Supply Division at your local Scout Shop.

**RESOURCES:**

**Unit of Excellence Award information**


**Unit of Excellence patch award order form**

Unit of Excellence ribbon order form

Unit of Excellence Scoutmaster of excellence award certificate

Unit of Excellence Coach of excellence award certificate
COUNCIL DESIGNATED SUPPORT: “Key 3 meets with Scout executive and lodge completes agreed upon projects.”

- **BRONZE:** 100 points  “Complete one project.”
- **SILVER:** 200 points  “Complete two projects.”
- **GOLD:** 400 points  “Complete three projects.”

**PURPOSE:**

The purpose of this requirement is to help establish a strong link between the lodge and council leadership through the planning and execution of annual goals that benefit both the lodge and council.

**REQUIREMENT IN-DEPTH:**

Working in collaboration with the council Scout executive, lodges are encouraged to develop projects that will contribute to the council. These projects can vary in purpose based on the current needs of the lodge and council, but so long as the council and lodge benefit from the Scout executive approved projects, the requirement is completed.

**TIPS FOR SUCCESS:**

Examples of Scout executive designated council support projects:

- The lodge is to make a minimum contribution of $1,000 to the council endowment fund through the awarding of a James E. West Fellowship to a deserving member of the lodge.
- The lodge is to publish or update a Where to Go Camping pamphlet, CD, or information published on the council or lodge website.
- The lodge key 3 is to meet with the Scout executive at least quarterly to discuss progress in the lodge.
- The lodge is to provide manpower, resources, and/or program assistance in support of the council Cub Scout outdoor program.
- The lodge is to provide support to a minimum of ten Cub Scout crossover ceremonies.
- At least one adult and two youth are to attend a National Lodge Adviser Training Seminar (NLATS) and a National Leadership Seminar (NLS) respectively.
- The lodge is to create and activate an OA Mentoring Program within the council.
At least one lodge member is to attend an Order of the Arrow High Adventure program.

The lodge is to recruit a specified number of lodge members to serve as summer camp staff.

**TECHNICAL DETAILS:**

To meet this requirement, the Key-3 must meet with the Scout executive or his or her designee.

The projects assigned to meet this criterion are entirely at the discretion of the Scout executive.

Projects must be identified in advance, preferably at the beginning of the year or at the end of the previous year.

**RESOURCES:**

**Order of the Arrow Best Practices**

[http://www.oa-bsa.org/pages/content/best-practices](http://www.oa-bsa.org/pages/content/best-practices)
COUNCIL SUPPORT ITEM #14

COUNCIL PROGRAM SUPPORT: “Provide OA member staff support for council and district program events.”

- **BRONZE:** 25 points  “Support two council or district events.”
- **SILVER:** 50 points  “Support three council or district events.”
- **GOLD:** 100 points  “Support five council or district events.”

PURPOSE:

As an organization of “honor campers” the Order of the Arrow attracts those who love Scouting. Many have skills that are invaluable to Scout leaders looking to put on a great program. Lodges are heavily encouraged to give back to their respective councils and make a positive impact on the Scouts, Scouters, and “boys in blue.”

REQUIREMENT IN-DEPTH:

The Order of the Arrow is an excellent resource for councils to rely upon when it comes to providing program staff for district and council events. Lodges should identify unique qualities that members hold that could assist in providing quality programs; examples include: American Indian Affairs programs and resources, trainers, cooks, campfire leaders, etc. Offer these resources to the council by communicating with the volunteer and professional leaders responsible for these activities.

TIPS FOR SUCCESS:

- Include multiple types of service opportunities:
  - Cub Scout day camps
  - Summer camps
  - District and council camporees
  - Resident camps
  - Fall festivals
  - Scout fairs
  - Special needs events
- Designate chapters to organize the service for particular events.
- Consider setting up an Indian Village, or something of the equivalent, to promote the Order of the Arrow’s programs and American Indian culture.
- Establish contact with the volunteer district leadership of the events for which the OA will provide service.
- Coordinate the activities or the campfire at a district event.
TECHNICAL DETAILS:

Simply attending a camporee does not count toward this requirement. Arrowmen must provide staff support for the event.

RESOURCES:

Order of the Arrow Best Practices
http://www.oa-bsa.org/pages/content/best-practices
COUNCIL SUPPORT ITEM #15

COUNCIL CAMPING SUPPORT: “Conduct camp promotion contacts to council troops and teams.”

- **BRONZE:** 50 points  “Complete contacts to at least 79% of units or 3% increase over prior year.”
- **SILVER:** 100 points  “Complete contacts to at least 88% of units or a 3% increase over 79%.”
- **GOLD:** 200 points  “Complete contacts to at least 100% of units or a 3% increase over 88%.”

**PURPOSE:**

The outdoor experience is fundamental to Scouting and the Order. Nature provides a unique environment for Scouts to learn and use many skills, from knot-tying to leadership. As honor campers, Arrowmen have a duty to promote camping on a unit by unit basis throughout the council. Camping promotion has many benefits, including increased attendance at council camps, more unit camping trips, and ultimately better Scouts. By visiting units individually and working with the council to develop advertising materials and camping resources, the lodge is fulfilling one of its most important responsibilities to the Scouting program.

**REQUIREMENT IN-DEPTH:**

For this requirement lodges will need to establish records for all troops and teams that have been contacted and received information on camp promotions. To calculate the percentage of units successfully contacted, divide the number of units contacted by the total number of troops and teams in the council.

\[
\text{Percentage of units contacted} = \frac{\text{Number of troops contacted}}{\text{Total number of troops and teams in the council}} + \frac{\text{Number of teams contacted}}{\text{Total number of troops and teams in the council}}
\]
TIPS FOR SUCCESS:

- Conduct camp promotions along with unit elections. This will give the troop an entire evening program giving the Scout leaders a “night off”, allow for plenty of time for Q and A, and save time and travel costs for promotion teams.
- Coordinate with the council to have Arrowmen present at a summer camp promotion night.
- Offer to assist the council to create a publication for camp promotion.
- Promote camping in new units and units that have no Scouts eligible for OA elections.

TECHNICAL DETAILS:

What constitutes an acceptable contact for this requirement is determined by the Scout executive or the council’s Camping Committee if delegated by the Scout executive.

FREQUENTLY ASKED QUESTIONS:

*Question #1:* Our unit election team conducted a camping promotion presentation during the same visit as the unit election. Does this count toward the camping promotion requirement?

Yes, camping promotion can be done during the same visit as the unit OA elections.

RESOURCES:

*Where to Go Camping Guide*

http://www.oa-bsa.org/pages/content/publications#wtgc
LEADERSHIP AND GOVERNANCE ITEM #16

LEADERSHIP DEVELOPMENT: “Conduct at least one LLD during the year with qualified instructors using current material.”

- **BRONZE:** 50 points “Train at least 60% of LEC members or a 3% increase over prior year.”
- **SILVER:** 100 points “Train at least 86% of LEC members or a 3% increase over 60%.”
- **GOLD:** 200 points “Train 100% of LEC members trained or a 3% increase over 86%.”

PURPOSE:

The Lodge Leadership Development Course, or LLDC, is a unique opportunity to train your current and upcoming lodge leadership in a variety of topics. Training is the foundation of a quality program. Effective training, coupled with experiential opportunities for growth, produces competent, knowledgeable leaders who are empowered to carry out the lodge’s vision.

This requirement encourages lodges to plan and conduct a Lodge Leadership Development course and requires that a majority of lodge executive committee members attend the event.

REQUIREMENT IN-DEPTH:

The benchmarks for this requirement focus on the percentage of LEC members who participate in your LLDC program for the year. Calculate your percentage by dividing the total number of LEC members who participate in the event by the total number of LEC members. Other lodge members may be invited to attend, but for this calculation, count only members of the lodge executive committee. What constitutes the LEC is left to the discretion of the lodge.

It is suggested that at least lodge officers, lodge committee chairmen, and chapter chiefs are invited to attend the LLD. Some lodges invite chapter officers and chapter committee chairman too, and other lodges invite all interested arrowmen.

LLD courses must be conducted with qualified instructors and use current LLD materials.
TIPS FOR SUCCESS:

- Use the Lodge Leadership Planning Guide as you organize your lodge’s LLDC (see resources).
- Select training sessions from the LLD Website (see resources).
- Choose qualified trainers and ensure they have access to LLD training material.
- Consider inviting Arrowmen from other lodges that have more experience in a particular area to teach a specific session.
- Make use of the LodgeMaster system to send out invitations in print and electronically to all invited members.
- If your lodge’s budget allows, consider making the LLD course free for participants.
- A train the trainer meeting should be held for all trainers for your event.
- Include current LEC members who staff the event in your calculations.

TECHNICAL DETAILS:

To determine the percentage of trained leaders, divide the total number of LEC members who attended the LLD by the total LEC membership. Count only the LEC members; other attendees who are not members of the LEC do not affect this requirement.

If your lodge holds more than one LLD in the year, then the attendance rate is cumulative; simple add the percentage of trained leaders from each LLDC.

Example #1: The lodge executive committee of Lodge X has 15 youth officers and 10 adult advisers. 35 Arrowmen attended the annual LLDC, 23 youth and 12 adults. 10 of the youth participants were “future lodge leaders” (not currently members of the LEC), and 13 of the youth participants were LEC members. Of the advisers in attendance, 7 were members of the LEC and 5 were not.

Twenty of the twenty-five Lodge X LEC members attended the LLD for a trained percentage of 80%. The number of other future leaders who attended the LLD does not impact this calculation.

<table>
<thead>
<tr>
<th>LEC Membership</th>
<th>LEC Attended LLD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Youth 15</td>
<td>Youth 13</td>
</tr>
<tr>
<td>Adult 10</td>
<td>Adult 7</td>
</tr>
<tr>
<td>Total: 25</td>
<td>Total: 20</td>
</tr>
</tbody>
</table>

LEC members in attendance = 13 + 7 = 20
Total LEC membership = 15 + 10 = 25
Percentage trained leaders = 20 / 25 = 80%

Example #2: Your lodge has 50 eligible members to attend a LLD course, and held two LLD courses. 28 of your LEC members attended the first course, making your percentage for that course 56%. 15 LEC members attended the second course, giving you 30% for that course. In total for that year, 86% percent of your eligible members attended a LLD course, earning the Silver level for this requirement.
FREQUENTLY ASKED QUESTIONS:

Question #1: Who counts as members of the LEC?

It is up to each lodge to determine which officers are members of the LEC.

Question #2: What if Arrowmen who are not members of the LEC attend the LLD? Should we count them?

No, do not count Arrowmen who are not members of the LEC in this criterion. Future lodge or chapter leaders may be invited to the LLD, but these Arrowmen do not count for or against this requirement.

Question #3: Should we count adults for this requirement?

Yes, all key advisers who directly advise a member of the LEC should be invited to participate or staff the LLD and should be counted in this calculation. Adults need training too! Even though these adult advisers have no vote on the lodge executive committee, their presence at the LLD supports the youth to whom they provide guidance.

Question #4: Two of my lodge officers were unable to attend our LLD this year, but both attended last year. Do we count these two officers as “trained” for this requirement this year?

No, while they were trained in previous years, this requirement encourages participation in the lodge’s annual LLD. Only those attending the LLD during current lodge year should be counted.

Question #5: My council is very large geographically, so my lodge ran two LLD sessions this year in different parts of the council. Some LEC members attended the first, some attended the second, and a few LEC members attended both sessions. How do we calculate this?

Calculate the LEC attendance percentage of each LLD session separately and add the two percentages together to figure your total percentage. Do not count any arrowmen twice, though, unless their role (office) changed in between the LLD sessions.

RESOURCES:

Lodge Leadership Development Planning Guide
http://www.oa-bsa.org/pages/content/publications#lldpg

LLD Website and Training Session Outlines
http://lld.oa-bsa.org
LEADERSHIP AND GOVERNANCE  ITEM #17

PLANNING AND REPORTING: “Submit a written performance plan and annual report of accomplishments to the Scout executive and council executive board.”

- **BRONZE:** 25 points  “Submit a written annual lodge performance plan to the Scout executive.”
- **SILVER:** 50 points  “Submit a written annual report to the council executive board.”
- **GOLD:** 100 points  “Oral annual report given to the council executive board by the lodge chief.”

PURPOSE:

This requirement helps ensure that the lodge’s strategic goals are not only established and known by the council but also support the council’s objectives at the same time.

The lodge annual report is an opportunity for the lodge to showcase its achievements, successes, and opportunities for improvement to the council executive board. One of the lodge’s primary functions is to support the council and its program. This report outlines the support, and demonstrates how the lodge will continue to assist the council in its success.

REQUIREMENT IN-DEPTH:

There are two parts to this requirement:

- Lodge performance plan
- Lodge annual report

Lay out your lodge’s annual program plan; this includes all scheduled LEC meetings, lodge events and service weekends, council events that the lodge may help host, etc. Does this calendar allow the lodge to meet their annual goals? Compare to the council strategic goals. How can the lodge assist the council in meeting their own goals? Through this collaboration the lodge and council benefit tremendously through a well-established yearly plan.

The annual report’s potential can expand beyond just the council executive board. This report can be sent to lodge members so that they may see the overall success of the lodge that year, how they played into the success, and how they can assist in the success of the lodge in the future. A modified version may also be used when dealing with local organizations in the community when seeking support for the lodge’s functions. Follow the guidelines of developing this report outlined in the “Lodge Annual Report Template” (see resources).
TIPS FOR SUCCESS:

- Create a lodge plan book each year; this can serve as your “annual performance plan”.
- Encourage your chapter chiefs and committee chairmen to develop their own goals for the year. Work with them to establish these goals, and include them in the plan book.
- Identify how your goals can be set to improve your lodge’s performance on JTE.
- Ensure your council executive receives a copy of your plan book.
- Look at your lodge’s previous annual report and ask: how can we improve on last year’s accomplishments?
- Ensure that plenty of information in the presentation is pertinent to the council executive board, and how you assisted the council in its annual operation.
- Reach out to your lodge officers, chapter officers, and committee chairmen to receive input and suggestions for items to put into the report.
- When presenting the report, be in full field uniform with a sash. The lodge chief is representing the Order of the Arrow to the council’s leadership. Make a good impression!
- Use pictures, videos, and other creative items to make the report interesting and engaging.
- Ensure other council committees, such as the Camping Committee, receive copies of the report.
- Use last year’s report as a template and guide if one exists. If not, download and use the national template from the national OA website.

TECHNICAL DETAILS:

The general rules for all JTE requirements require that all lower levels of scoring be met in order to meet a particular level. This means to earn Silver on a requirement, your lodge must also meet the Bronze benchmark. To earn Gold, your lodge must also meet both the Bronze and Silver benchmarks. This is pertinent to this requirement in particular.

Example #1: Your lodge chief gives a verbal report to the council executive board, but the annual report is not in written format. This does not meet the gold benchmark since the silver benchmark was not achieved.

Example #2: Your lodge chief submits a written annual report to the council executive board and gives a verbal report to the board as well. However, no performance plan was created for the year. In this case, the lodge does not earn any points since the bronze benchmark was not fulfilled.
RESOURCES:

Lodge Annual Report Template  
http://www.oa-bsa.org/pages/content/lodge-leadership-annual-report-template

National Council Strategic Plan  
http://digital.scouting.org/strategicplan
JTE SCORING

To qualify for recognition lodges must renew their annual charter on time with appropriate fees and be in compliance with the current editions of the *OA Handbook, Guide for Officers and Advisers, Field Operations Guide, Guide to Inductions*, and ceremony books.

A copy of the Journey to Excellence petition may be found at:

http://www.oa-bsa.org/pages/content/jte

To determine the lodge’s overall performance level, use the petition’s matrix to determine the points earned in each of the 17 individual criteria, circle the criteria completed, add the scores in each column to determine the points earned at each award level, and finally add the three column scores to obtain the grand total number of points earned.

<table>
<thead>
<tr>
<th>Scoring the Lodge’s JTE Performance:</th>
<th>Overall JTE award levels are determined by the grand total points earned and the number of criteria for which the lodge achieved at least Bronze.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>BRONZE:</strong></td>
<td>1400 points “Earn at least 1400 grand total points and complete Bronze or better in at least 10 criteria.”</td>
</tr>
<tr>
<td><strong>SILVER:</strong></td>
<td>2050 points “Earn at least 2050 grand total points and complete Bronze or better in at least 12 criteria.”</td>
</tr>
<tr>
<td><strong>GOLD:</strong></td>
<td>2550 points “Earn at least 2550 grand total points and complete Bronze or better in at least 15 criteria.”</td>
</tr>
</tbody>
</table>

GENERAL RULES

- To meet any award level all lower levels of scoring be met. This means to earn Silver on a requirement, your lodge must also meet the Bronze benchmark. To earn Gold, your lodge must also meet both the Bronze and Silver benchmarks.
- No requirement is mandatory.
- All JTE data must be submitted using the OA LodgeMaster application.
- Alternative award level metrics based on increasing performance are calculated in reference to the previous year’s performance as follows:
  - “X% increase over prior year”: The current year’s performance is at least X percentage points greater than the previous year.
  - “X% increase over Y%”: The current year’s performance is at least X percentage points greater than the previous year, and the current percentage is at least Y%.
• Use correct and accurate numbers throughout the JTE program. If not, some of the benefit and validity of the JTE program may be lost. Furthermore, national averages used for setting benchmarks for future years may be skewed.

CONTINUED IMPROVEMENT

To encourage continued improvement the JTE program takes two approaches:

• Several benchmarks include alternative award level metrics based on increasing performance.
• Benchmarks are adjusted each year based on target distribution.

PERFORMANCE IMPROVEMENT AWARD METRICS

Lodges that are not doing well in a specific requirement can still earn the Bronze award level by making a significant improvement over the previous year even though their current year’s performance does not meet the fixed Bronze level benchmark.

Currently, five requirements include these alternative benchmark metrics to allow lodges to earn Bronze by showing significant improvement over the previous year. This element of the program fosters the JTE goal of “continued improvement”.

By rewarding lodges for making significant gains during the course of the year, lodges are more likely to strive to improve even if there is little hope to achieve the fixed Bronze award benchmark. The lodge is encouraged not to “give up” on a requirement but to work to do better than the previous year.

Silver and Gold award levels may also be earned for significant improvement as well, but only if the current performance meets at least the lower benchmark.

For example, a lodge may earn Silver even if they do not meet the fixed Silver benchmark if they improve by the specified number of percentage points beyond Bronze.

Similarly, a lodge may earn Gold if they improve by the specified number of percentage points beyond Silver even if still below the fixed Gold benchmark.
ANNUAL ADJUSTMENT OF REQUIREMENT BENCHMARKS

As our lodges get better and better in the categories of JTE, more lodges are likely to meet a specified benchmark. To ensure these well-performing lodges continue to improve despite their success, the benchmarks of each JTE requirement are reevaluated and reset annually to reflect the desired expected distribution. The revised benchmarks are calculated based on the actual performance data of all lodges from the previous few years.

The goal is that the large majority (80%) of lodges will receive some recognition and that a small percentage (10%) will earn Gold.

Most lodges should receive some JTE recognition, and Gold is intentionally difficult!

AWARDS FOR JTE PERFORMANCE

There are several recognition items lodges and Arrowmen can receive for earning a JTE award level.

JTE PIN FOR LODGE FLAP

Lodges that are certified as a Journey to Excellence lodge are eligible to purchase pins for youth and adult Arrowmen for wear on the lodge flap. There are three different pins, one for each level: Gold, Silver, and Bronze. The pins may be purchased from the national OA office.

JTE FACT: In 2015, 88 lodges (32%) earned the gold JTE award level.

Figure 2 - Target JTE Award Distribution
LODGE NAME LISTED IN THE ORDER OF THE ARROW ANNUAL REPORT

The names of all lodges that are certified as Bronze, Silver, or Gold Journey to Excellence lodges will be listed in the national Order of the Arrow annual report.

JTE-CERTIFIED LODGES ELIGIBLE FOR OTHER OA AWARDS

Achieving at least bronze level of performance is required to apply for all national lodge awards and recognitions. (*Order of the Arrow Handbook*, 2015 edition; pg. 95)
JTE RESOURCES

Resources such as documents and best practices that support a specific JTE requirement are listed in the requirements section within the detail for the specific requirement.

JTE INSIGHT REPORTS

A JTE insight report summarizes a lodge’s performance on each of eight key JTE metrics.

A JTE Insight Report is created for each lodge and is intended to be used by the lodge chief and his adviser to review the lodge performance on the eight key JTE metrics during the preceding year. An electronic copy of the JTE Insight Report is sent to each lodge adviser in the spring.

The document shows the nationwide percentiles of the key metrics and identifies where the lodge achievement falls within these percentiles. Small graphs compare the lodge performance with both section and national totals and the Bronze/Silver/Gold benchmarks.

SECTION JTE STATISTICS PRESENTATIONS

The JTE statistics presentations consist of charts and graphs that summarize detailed JTE data on a section, region, and national basis.

A JTE Statistics Presentation is created for each section and is intended to be used by the section officers and advisers to review the JTE performance metrics of each lodge within the section. Section officers can refer to these data to identify lodges that excel in specific requirements and to identify lodges that may need assistance with certain JTE program elements. The presentation includes over 100 pages of tables and charts; and thus is best used as a reference tool.

An electronic copy of the JTE Statistics Presentation is sent to each section adviser in the spring.
JTE DOCUMENTS AND LINKS

JTE Guidebook
http://www.oa-bsa.org/pages/content/publications#jteg

National JTE website
http://www.oa-bsa.org/pages/content/jte

JTE score sheet for 2016 – PDF file

JTE score sheet for 2016
http://www.oa-bsa.org/pages/content/printable-forms#2016jtepoints

National JTE website – 2015 changes
http://www.oa-bsa.org/pages/content/lodge-ledger-2015-07-1

2015 Chapter JTE worksheet template
http://www.oa-bsa.org/pages/content/printable-forms#chapter-workbook

OA LodgeMaster
http://lodgemaster.oa-bsa.org/

National Order of the Arrow Publications
http://www.oa-bsa.org/pages/content/publications