



JOURNEY TO EXCELLENCE

Session Length: 55 Minutes

Through this session, you will:

Explain the Journey to Excellence program requirements.

Demonstrate what the insights tell about a lodge and section.

Guide Arrowmen to realize why these requirements are important to the continuous improvement efforts of a lodge.

Enable Arrowmen to use the outputs of the Journey to Excellence Insights to create a plan for improvement.

Appendix Resources:

- PowerPoint presentation
- Journey to Excellence rubric
- Journey to Excellence worksheet

SESSION NARRATIVE

A method of continuous improvement

3 Minutes

Journey to Excellence is exactly what it sounds like: a journey. Journey to Excellence's objective is to help every lodge improve each year. That improvement isn't a one step push to get everything right; it is a process of constantly trying different methods to better the lodge, even in areas of current strength.

In order to use Journey to Excellence successfully, a lodge executive committee must learn to objectively measure success and best practices using the Journey to Excellence metrics. The important thing to remember about the Journey to Excellence is that it's meant to be difficult. For example, only about 10% of lodges each year will earn gold on any given requirement!

Journey to Excellence is a dynamic metric system that strives for all lodges to improve in one or two areas each year. The areas that the Journey to Excellence focuses on are extremely important to the success of a lodge. Each of the metrics focuses on an important piece of a lodge's journey to success.

These metrics lead to success because they were developed to measure the most important aspects of a lodge's operation and management. The six factors (finance, membership, program, unit service, council support, and leadership and governance) are the categories by which lodges are judged. These categories, and their requirements, break lodge operations into manageable chunks for measuring improvement.

Before Journey to Excellence, the Order of the Arrow used a program called Quality Lodge. Quality Lodge was a checklist of actions to complete in order to be deemed "quality", however, the checklist did not delve deep into the operations of a lodge like Journey to Excellence does. Journey to Excellence highlights areas of growth where growth is needed nation-wide, allowing all lodges to work on the same areas at the same time.

The requirements**15 Minutes**

Trainer instructions: Hand out copies of the requirements for participants to follow along. Allow participants to review the requirements for 2-3 minutes. Go over each requirement briefly (under 60 seconds each). Make sure to stress that these are the inputs of the JTE program. These are reported by the lodge to the national office at the time of recharter.

A) Finance

1. Fiscal management: Develop and successfully execute a lodge annual budget.
 - a. Bronze: Follow budget approved by LEC.
 - b. Silver: Operate in the black.
 - c. Gold: Close year with a larger balance than projected.

This requirement is designed to make sure that the lodge is managing money responsibly by keeping a budget and more importantly, following it.

Trainer Tip: Show example of a lodge budget. The audience in this session may not be familiar with a budget.

2. Contribution to council: Contribute cash, materials, or both to the council.
 - a. Bronze: Contribute an average of \$3.50 per member.
 - b. Silver: Contribute an average of \$7.00 per member.
 - c. Gold: Contribute an average of \$21 per member.

It is the Order's responsibility to support the Scouts and Scouters of its council. This requirement encourages lodges to directly support their council, relative to their size.

B) Membership

3. Membership impact: Experience positive growth in membership over the previous year.
 - a. Bronze: Grow membership by at least 1.
 - b. Silver: Grow membership by at least 1%.
 - c. Gold: Grow membership by at least 16%.

An organization is either growing, or dying. Continuously increasing the number of people participating in the OA program must be an essential concern of the lodge.

4. Membership retention: Improve retention rate of lodge members.
 - a. Bronze: Achieve 67% or a 4% increase over prior year.
 - b. Silver: Achieve 76% or a 4% increase over 69%.
 - c. Gold: Achieve 84% or a 5% increase over 76%.

Membership retention shows that a lodge's program is keeping members interested and that they see value in being a dues-paid member.

5. Unit elections: Conduct unit elections in all troops and teams within the council.
 - a. Bronze: Complete unit elections in 34% of units.
 - b. Silver: Complete unit elections in 60% of units.
 - c. Gold: Complete unit elections in 100% of units.

Conducting unit elections is the first step in adding new membership. The lodge should endeavor to complete a unit election in every unit.

6. Ordeal completion: Induct Ordeal candidates.
 - a. Bronze: Induct at least 64% of Ordeal candidates or increase 5% over prior year.
 - b. Silver: Induct at least 76% of Ordeal candidates or increase 5% over 64%.
 - c. Gold: Induct at least 98% of Ordeal candidates.

% inducted = Number of Ordeal candidates / number of candidates

The lodge should focus on effectively communicating the value of membership to candidates, so they want to complete their ordeal.

C) Program

7. Lodge event participation: Improve lodge membership participation at full lodge events.
 - a. Bronze: Average at least 13% of lodge membership at all lodge-wide events.
 - b. Silver: Average at least 20% of lodge membership at all lodge-wide events.
 - c. Gold: Average at least 34% of lodge membership at all lodge-wide events.

Active and engaged membership is the cornerstone of a thriving lodge. The lodge should focus on getting as many members to lodge events as possible.

8. Brotherhood completion: Convert eligible Ordeal members to Brotherhood.
 - a. Bronze: Convert at least 25% of 5% increase over prior year.
 - b. Silver: Convert at least 32% or 3% increase over 25%.
 - c. Gold: Convert at least 49% or 3% increase over 32%.

Brotherhood conversion demonstrates retention among members who have been Arrowmen for less than a year. Helping new Arrowmen complete their Brotherhood shows their continued interest in the program.

9. Service projects: Complete scout executive approved service project(s) on council property and in the community.
 - a. Bronze: Complete project(s) equal to at least 3 hours of service per lodge member.
 - b. Silver: Complete project(s) equal to at least 5 hours of service per lodge member.
 - c. Gold: Complete project(s) equal to at least 14 hours of service per lodge member.

Service to others is the cornerstone of what the OA is. Conducting service projects on behalf of the council, relative to lodge size, is an important component of any lodge program.

10. Section and nation event attendance: Attend section and national events.
 - a. Bronze: Set and achieve a lodge attendance goal at scheduled section & national events.
 - b. Silver: Exceed the lodge attendance goal by 10%.
 - c. Gold: Exceed the lodge attendance goal by 20%.

Section and national events allow lodges to exchange ideas, learn best practices, and be informed about new programs and events available to them.

D) Unit Service

11. 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 Arrowmen from another unit.
 - a. Bronze: In-person visits conducted with 31% of units.
 - b. Silver: In-person visits conducted with 60% of units.
 - c. Gold: In-person visits conducted with 100% of units.

The OA program should be a visible part of every council. Lodges are encouraged to conduct an in-person visit with every troop or team to improve unit service and relationships. These visits may double as the unit election, or camp promotion.

12. Unit of Excellence Award: Assist troops and teams in the council to earn the OA Unit of Excellence Award.
 - a. Bronze: Award earned by 10% of units in the council.
 - b. Silver: Award earned by 25% of units in the council.
 - c. Gold: Award earned by 50% of units in the council.

Unit of Excellence Award: seeks to identify those units and leaders within them, who excel at incorporating the OA into their annual planning.

E) Council support

13. Council designated support: Key 3 meets with scout executive and lodge completes agreed upon projects.

- a. Bronze: Complete one project.
- b. Silver: Complete two projects.
- c. Gold: Complete three projects.

The lodge exists to support the council and its units. The scout executive should designate projects of importance each year to help the council advance in its mission.

14. Council program support: Provide OA member staff support for council and district program events.

- a. Bronze: Support 2 council or district events.
- b. Silver: Support 3 council or district events.
- c. Gold: Support 5 council or district events.

Supporting council events provides needed resources to the council, and helps with visibility for units.

15. Council camping support: Conduct camp promotion contacts to council troops and teams.

- a. Bronze: Complete contacts to at least 75% of units or a 3% increase over prior year.
- b. Silver: Complete contacts to at least 80% of units or a 3% increase over 75%.
- c. Gold: Complete contacts to at least 85% of units or a 3% increase over 80%.

Part of maintaining the traditions and spirit of camping is getting new campers to experience it. The Order of the Arrow assists in convincing Scouts to participate in a camping program.

F) Leadership and Governance

16. Leadership development: Conduct at least one LLD during the year with qualified instructors using current material.

- a. Bronze: Achieve at least 56% of LEC members trained or 3% increase over prior year.
- b. Silver: Achieve at least 83% of LEC members trained or 3% over 66%.
- c. Gold: Achieve 100% of LEC members trained or 3% over 83%.

Continued improvement requires education and teamwork. Participating in the LLD program informs lodge leadership, and brings them together to develop as a team.

17. Planning and reporting: Submit a written performance plan and annual report of accomplishments to the scout executive and council board.

- a. Bronze: Submit a written annual lodge performance plan to the scout executive.
- b. Silver: Submit a written annual report to the council executive board.
- c. Gold: Verbal annual report given to the council executive board by the lodge chief.

The OA is accountable to the council's scout executive and executive board. An annual plan allows the scout executive to work with the lodge to align the goals of the council and the lodge, and the report allows the board to see the OA's positive impact first hand.

The eight key metrics

10 Minutes

Shortly after they recharter, each lodge is provided with a *JTE Insights Report*. This report reports the lodge performance relative to the rest of the lodges in the nation. While the report contains a large amount of information, there are eight key metrics that are the essential indicators of a lodge's health. These are the core areas every lodge should focus on improving.

Trainer instructions: At this time, hand out a copy of the JTE Insights report for each participant's home lodge so they can follow along and view their own lodge performance. The Section Adviser should have a copy of each report; if not, contact jte@oa-bsa.org.

A) Density

The percentage of eligible OA members in the council reflected on that year's membership. It's measured by taking the total number of Boy Scout youth in the council plus the number of adults in either Boy Scout troops or in council/district positions and dividing that into the lodge's membership:

$$\frac{\text{registered OA members}}{\text{Boy Scout youth + eligible adults}}$$

This measurement is more informative for the lodge than overall membership growth, since it incorporates changes in the council's membership into its formula. The lodge should seek to serve as high a percentage of eligible Arrowmen as possible.

NOTE: This metric can never reach 100% because not all Boy Scout youth are eligible for induction into the OA. Make this clear.

B) Retention

Current year membership minus those inducted divided by last year's membership. It's a measurement of how many Arrowmen from the previous year the lodge held onto in a given year. It's the most important element to positive membership growth in a lodge.

$$\frac{\text{current year's membership} - \text{inductions}}{\text{previous year's membership}}$$

C) Support per member

Total financial contributions divided by the number of members.

$$\frac{\text{financial contributions}}{\text{membership}}$$

This metric shows how well a lodge supports its council. This value can be in the form of actual money given to the council or in materials for a project. This metric is an important element of communicating the OA program's value to the council, and keeps the lodge focused on supporting the growth of the Scouting program.

NOTE: Stress that lodges depend on councils and cannot exist without them.

D) Units requesting

The percentage of units in the council requesting an OA election.

$$\frac{\text{units requesting an election}}{\text{total number of units in council}}$$

This metric shows how well a lodge interacts with its units. A lodge that has a high number shows that their lodge-unit relations are healthy, and will have a good influx of new members each year.

NOTE: This metric can reach 100%.

E) Induction rate

The number of candidates that actually completed their Ordeal divided by the number of candidates elected. It evaluates how many potential members the lodge "left on the table" in any given year.

$$\frac{\text{ordeal inductions}}{\text{candidates elected}}$$

There are any number of reasons candidates might choose not to become members of the OA. The lodge's responsibility is to identify those reasons and modify its program (in promotion of the OA, explanation of programs, or adjustment of Ordeal schedules) to achieve as close to 100% as possible.

E) Brotherhood conversion

The number of eligible candidates converted to Brotherhood. Annual Brotherhood conversions divided by the number of Ordeal members in the lodge minus new Ordeal inductions that year plus Brotherhood conversions.

Brotherhood conversions

Ordeal members – Ordeal inductions + Brotherhood conversions

F) Service hours per member

The lodge's total service hours divided by membership.

$$\frac{\text{service hours}}{\text{lodge membership}}$$

This metric shows how well a lodge is carrying out the fourth part of Purpose of the OA. Service is necessary for all lodges to carry out to help councils and communities.

G) Event participation

The percentage of the lodge membership that attends the average event during the course of the year divided by the total lodge membership.

$$\frac{\text{average event participation}}{\text{lodge membership}}$$

Event participation correlates with overall lodge performance more than any other metrics. Lodges with high event participation retain members, conduct service, complete Brotherhood conversions, and induct members. If a lodge is going to focus on any one area to improve, it should be getting more members to attend events.

Secondary metrics

In addition to the eight key metrics, the *JTE Insights Report* contains other metrics. These secondary metrics provide additional insight into the lodge's health, but should be considered subordinate to the eight key metrics when focusing on improving the lodge:

- % youth
- membership distribution
- growth %
- % dues of financial support
- election completion
- Conclave participation
- camp promotion
- LEC ratio
- LEC trained

On the road to improvement**5 Minutes**

The requirements that we just discussed are meant to help lodges improve- they give a general direction for lodges to go. We will now discuss steps to improve in each of these metrics and how any Arrowmen can contribute to the Lodge's Journey to Excellence designation.

Using the eight key metrics from the Journey to Excellence Insights, lodges can tell a lot about strengths and weaknesses and implement a plan to improve from there.

Breakout**10 Minutes**

Split the group into groups of 3-5 Arrowmen with a mix of lodges represented in each group. Allow the groups to go through and discuss the 8 key metrics for 10 minutes. The goal is for each group to highlight the strengths of certain lodges and share those practices with other lodges.

Trainer instructions: This is where knowing the territory and understanding people come in handy. There may not be a lodge with a clear, working solution to solve a key metric problem, so make sure to note that and have canned solutions ready.

Debrief**10 Minutes**

Trainer instructions: Pick out a few youth officers and a few metrics to use as examples and give applicable advice. Methods mentioned here are not doctrine and may not work for every lodge. Before presenting any of the tips and tricks in this syllabus, try to facilitate a discussion in the training to see if other lodges present have a way to fix the problem.

Once the group discussion is over, lead a larger discussion moving through each of the metrics to see what was discussed.

Allow each group to share what was discussed and offer your own tips. Some tips have been provided below as a starting point.

1. Density: The amount of eligible people who are active in the OA.

This is a problem in many lodges who cannot seem to reach or peak the interest of Scouts/Scouters. Here are a few tips...

- ✓ Advertise the Order of the Arrow's fun activities without revealing sensitive information
- ✓ Show the benefits of being a member
- ✓ Do Cub Scout crossover ceremonies
- ✓ Have a presence at ALL council events
- ✓ Build up the OATR program

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

Lodges all over the country serve their councils monetarily and with labor. Here are a few tips to help lodges contribute more...

Monetarily:

- ✓ Give a percentage of auction profit.
- ✓ Zero-out account at year-end (except funds to pull through to next large expense).
- ✓ Give a portion of an event fee to the council.
- ✓ Produce a fundraiser patch.
- ✓ Allow council to make a lodge flap as part of a fundraiser set.

Materials:

- ✓ Donate materials to a council auction.
- ✓ Give materials for a council improvement project.

Service:

- ✓ All service given to council properties and at council events counts as a gift to the council.

3. Membership retention: Improve retention rate of lodge members.

Keep members excited using the following tips:

- ✓ Don't do the same, old, boring activities. Change up the fellowship with a pig roast. Have a campfire show after the cracker barrel following the ceremonies.
- ✓ Make a patch. Use it as an incentive for being an Elangomat, volunteering, etc.
- ✓ Host a free event- everyone loves free and it doesn't have to be expensive.

4. Unit elections: Conduct unit elections in all troops and teams within the council.

Start a unit elections committee at the lodge and chapter levels. The committee will be responsible for:

- ✓ Contacting units and scheduling elections.
- ✓ Making sure those elected show up for the induction weekend/ordeal.
- ✓ Getting the rest of the unit excited about the Order and all of its opportunities.
- ✓ Producing a script/agenda that every election should follow.
- ✓ Reporting election results to appropriate parties.

When choosing chairmen for these positions, choose someone who is comfortable talking in front of groups. This person should be well-versed and should know the territory as well as understand the group to whom he is speaking. There is also a unit elections video available on the national website for use in unit elections.

5. Ordeal completion: Induct Ordeal candidates.

Sometimes getting elected is the easy part about the Order of the Arrow. The key to positive membership growth is getting those elected candidates inducted. Here are a few tips:

- ✓ Make everything exciting! No one wants to come to a boring event with boring people.
- ✓ Host a new member orientation for new members *only*. Try inviting parents to show them the value of the program (they'll most likely be driving their son to events). Make it free for all new members and parents.
- ✓ Have a new-members information package for the events for the year.
- ✓ Offer a ticket for so many events in a year at a flat rate. When they check-in to the event, hole-punch one of the event "credits".

6. Lodge event participation: Improve lodge membership participation at full lodge events.

Membership is more than just paying dues, it also means being actively involved and contributing. Making the events exciting can help get members to show up.

- ✓ Do something new at the events! For example, a pig roast is a great banquet meal.
- ✓ New activities like manhunt, Risk games, Jeopardy, trainings, and even video games could spice up the event.
- ✓ Themed events don't have to have a scouting twist. While it's nice to add scouting, it is not necessary. Try a theme like Star Wars or Casino Night, or Sports.

7. Brotherhood conversion: Convert eligible Ordeal members to Brotherhood.

To answer the age-old question of how to get the Brotherhood conversion rate to increase, there is only one answer: make it worth it. After candidates complete their Ordeal, the only feelings they have regarding the OA is work, hunger, silence, and exhaustion. As soon as they are given their sashes, it is absolutely necessary to show them the worth of the Order.

- ✓ Allow for Brotherhood Conversion signups prior to the end of the Ordeal weekend. It binds them to coming in 10 months.
- ✓ Keep the new Ordeal members active, involved, and interested by advertising for future events.
- ✓ Give Elangomats an incentive for getting their clans converted and to events between the ordeal and the conversion.

8. Service projects: Complete scout executive approved service project(s) on council property and in the community.

Many lodges have trouble with service because there is a lack of initiative. Needs are there, they may just not be apparent.

- ✓ Seek out service opportunities everywhere (does not need to be at a camp or council property).
- ✓ Ask for donations – service does not always have to be on the lodge's penny.
- ✓ Staff a council event.

Conclusion

2 Minutes

As we have discussed, the Journey to Excellence program is one that is used to aid lodges in continuous improvement. The program encourages a process of change. This change does not have to be one of sudden reconstruction of lodge practices, but rather it fosters a gradual change that will have a lasting impact on the lodge. The goal is that the Journey to Excellence program will strengthen the lodge in all aspects of operations and management so that a better multi-dimensional program is available for all Arrowmen.

The task now falls to each of you to use the information we have covered in this very in-depth training session so that your Lodges may each grow and continue on the path of success.

TRAINER PREPARATION

The Arrowmen training this session should be extremely familiar with the Journey to Excellence program and comfortable explaining it to others. The trainer must be very well versed in the requirements and the formulas behind them.