Journey to Excellence Guidebook 2012

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

Southern Region, Order of the Arrow
The 2012 Journey to Excellence Guidebook is a publication of the Southern Region, a subdivision of the national Order of the Arrow. All information contained in this book is in no way a substitute for information released by the national Order of the Arrow committee.

Please refer to the national Order of the Arrow for the most up to date policies, procedures, and requirements.
# Index

## Introduction
- Purpose of Journey to Excellence ................................................................. 3
- Quality Lodge Comparison ............................................................................. 3
- How it Works .................................................................................................... 4
- Planning and Communication ......................................................................... 4
- General Resources .......................................................................................... 5

## Finance
- Fiscal Management .......................................................................................... 6
- Contribution to council .................................................................................... 7

## Membership
- Membership Impact ........................................................................................ 8
- Ordeal completion ............................................................................................ 9
- Brotherhood conversion .................................................................................. 10
- Membership retention ..................................................................................... 11

## Program
- Unit elections .................................................................................................. 12
- Section and national event attendance .......................................................... 14
- Lodge communications ................................................................................... 16
- Lodge event participation ................................................................................. 18
- Lodge planning ............................................................................................... 18

## Council Service
- Council service projects ................................................................................ 21
- Council camping support ............................................................................... 23
- Council program support ............................................................................... 24
- Council designated support ........................................................................... 25

## Leadership and Governance
- Lodge and chapter leadership ....................................................................... 26
- Annual Report .................................................................................................. 28

## Scoring the Lodge’s Performance ................................................................. 29
Introduction

This guidebook, in coordination with the Southern Region Lodge Assistance Program Committee, has been developed for use by lodges working to complete the Journey to Excellence program. Contained in this booklet is an in depth look into the requirements along with “Steps to Success.”

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 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 is adopting the Journey to Excellence format to evaluate lodge performance and evaluate opportunities for continuous improvement.

Ultimately, this change has been made to bring us in line with the BSA’s performance measure. Journey to Excellence uses a balance 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 get better in all areas of a lodge’s annual operations.

Quality Lodge Comparison

<table>
<thead>
<tr>
<th>Journey to Excellence</th>
<th>Quality Lodge</th>
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</thead>
<tbody>
<tr>
<td>• Focused on outcomes</td>
<td>• Focused on processes</td>
</tr>
<tr>
<td>• Encourages improvement</td>
<td>• Fixed performance standards</td>
</tr>
<tr>
<td>• Multiple ways to meet the requirement</td>
<td>• Pass or Fail</td>
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<tr>
<td>– Three levels</td>
<td>– Requirement is met</td>
</tr>
<tr>
<td>– Increasing in difficulty</td>
<td>– Requirement is not met</td>
</tr>
<tr>
<td>• Establish goals for improvement</td>
<td>• Minimum requirements</td>
</tr>
<tr>
<td>• Continuous process</td>
<td>• Finite ending</td>
</tr>
<tr>
<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 three different levels of recognition: Bronze, Silver, and Gold. The Bronze level requirements can be equated to the past Quality Lodge requirements. 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.

This score card is broken down into five categories:
- Finance
- Membership
- Program
- Council Service
- Leadership and Governance

Membership impact and Brotherhood Conversion are both required items to qualify for Journey to Excellence. This means that you must attain, at a minimum, the Bronze level for these two requirements.

Planning and Communication

As you work on each requirement and the pages in this book, remember to consider how the lodge will need to plan to complete the requirement, and how it will communicate with its members, chapters and the council throughout the process to make all of the lodge’s efforts successful. Journey to Excellence allows you, in many ways, to establish your own goals to work towards. To make the most of this opportunity, each lodge should set its goals at the beginning, and hold true to the goals until the end.

Planning for Journey to Excellence should begin before the start of the year. When a lodge prepares to submit its Journey to Excellence Recognition Petition for the past year, the lodge leadership needs to analyze its performance during that year. What requirements did the lodge have difficulty completing? What were some things the lodge could have done differently to avoid any troubles? Were there requirements the lodge had no plan for completing that it could have finished with a little preparation? How did the lodge progress through each Journey to Excellence requirement?

After identifying where improvement is needed, the lodge leadership should begin looking for ideas on how to succeed. This guidebook is provided as one of many resources available to you for that purpose. The lodge should also contact the lodges in their section to see how they have approached Journey to Excellence. 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 determine exactly how they will better themselves through Journey to Excellence. Remember the requirements of a S.M.A.R.T. goal: Specific, Measurable, Action-Oriented, Realistic/Rewarding, and Timely.
“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 **delegate** specific duties and deadlines to lodge officers and committees. As you plan, remember to include all responsibilities to your council, and consider other opportunities to serve as you coordinate your calendar with the council calendar.

**Record keeping** is essential while working on the Journey to Excellence program. It is important that you are able to back up your percentages and statistics so that you may answer any questions from your lodge or council with accurate information.

**General Resources**

Several resources are available from the national Order of the Arrow, along with your sections, to aide you with Journey to Excellence, and 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](http://www.oa-bsa.org)
Finance

Finance Item #1
Fiscal Management: “Develop and successfully execute a lodge annual budget.”
- Bronze: “Complete and follow an annual budget approved by the lodge executive committee”
- Silver: “Close the year with a positive operating balance (i.e., operate in the black)”
- Gold: “Close with an operating balance at least as great as your budget projection”

Purpose:
This requirement exists in order to ensure positive growth of lodge finances and properly placed funds selected and controlled by the Lodge Executive Committee. Having the Lodge Executive Committee (LEC), overseen by the Lodge Chief, develop a Lodge annual budget gives the lodge the opportunity to fund better lodge memorabilia, commit to more leadership opportunities and to have more service opportunities. With more revenue coming into the lodge comes better opportunities.

Requirement In-Depth:
This requirement is based off the ideas of having completed a lodge annual budget, having a positive operating balance of lodge income, and successfully meeting the projections that were previously approved, if not exceeding those projections. Use the budget template provided in the Lodge Financial Manual to layout your lodges finances for the year and follow through. Have the lodge treasurer give monthly updates on the status of the lodges’ commitment to the budget. By giving every dollar a name and sticking to the budget, the lodge should be able to avoid most financial surprises.

Tips for Success:
- Create a successful annual lodge budget, review past budgets if they exist
- Consider holding a budget workshop for lodge members to explain how a budget works, and 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
- Map out the average cost for standard lodge functions to include location, dinning, 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
- Determine the success of past lodge fundraisers and if the lodge should invest in any other fundraisers to generate more funds for the lodge
- Determine if fundraisers should be short term projects such as 50/50 raffles, dinners, or if they should be long term, such as new lodge shirts, patches or other memorabilia
- 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

Resources:
Lodge Financial Manual
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 support and service of the lodge for Camp Staff and dedication with service to the camps, just as the lodge is often dependent on a location for function service days, and other areas of program. 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 off of how many lodge members you have in on your membership role and how much money you are able to donate in their name. This requirement also exists to complete the ties between the Order of the Arrow and The Boy Scouts of America, and to allow for the Order of the Arrow to have a face in the progression of Scouting’s Council’s.
Example: (Calculate the total number of active lodge members you currently have, and donate $2.00 per member. I.e. 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 Camp-O-Ree’s, 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 of the 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. Just calculate the total cost of the supplies, and add that in to the total contributions.
Membership

Membership Item #3
Membership Impact: “Experience positive growth in membership over the previous year” [REQUIRED]
- Bronze: “Grow membership by at least 1”
- Silver: “Grow membership by at least 1%”
- Gold: “Grow membership by at least 3%”

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 keeping them interested in Scouting. This can be through leadership opportunities, a creative program, and service within the lodge’s respective community.

Requirements 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 see.

Tips for Success:
- Publish the 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
- Early-Bird fees
- Collection of dues at chapter meetings/functions
- Promotion at non-lodge sponsored Council event
- Consider using the OA Lodge Master system to distribute information.
- Put on a program that the lodge members would like to see. Aspire to be creative and innovative in all functions of the lodge, especially program
Purpose:
An Ordeal is a time lodges use to 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 excellence outlet for leadership development, cheerful service, and outdoor adventure. These are characteristics each lodge should strive to embody.

Requirement In-Depth:
The more opportunities your lodge offers for Ordeal completion, the higher your completion rate will rise. Look at your lodge schedule. Are there 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? Strong communication throughout on both the lodge and chapter level is key to a successful Ordeal.

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.

- Plan annual Ordeals in lodge yearly calendar
- Conduct unit elections in a timely manner to insure your elected candidates have time to work the Ordeal into their calendar
- Avoid local area event conflicts when scheduling; sports, Council events, etc.
- Establish “Ordeal Master” a year in advance
- Establish ceremonies teams
- Promote Ordeals at both Council and District committee meetings
- Encourage OA troop representatives to promote Ordeals at troop meetings
- Conduct a successful “call out” to encourage Scouts to attend Ordeal
- Establish competent leadership to conduct registration, cooking, and service materials needed for Ordeals
- Conclude Ordeals with promotion of future events as well as encouraging members to become active within their Chapters

Membership Item #4
Ordeal completion: “Complete induction of elected Ordeal candidates”
- Bronze: “Complete induction of at least 60% of Ordeal candidates or 5% increase”
- Silver: “Complete induction of at least 75% of Ordeal candidates or 5% increase over 60%”
- Gold: “Complete induction of at least 90% of Ordeal candidates or 5% increase over 75%”
Purpose:
 Many lodges equate the Brotherhood program to just keeping the member 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” on a yearly basis. Brotherhood conversion is essential for lodges to have a strong pool of Arrowmen to pull from to fill chapter and lodge leadership positions, and 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.

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. 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. Such an 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 (Example: host meeting at a local park and play disc golf prior to meeting)
 • Use of the “Extended Elangomat Program.” (See Requirement Resources)

Resources:
 Extended Elangomat Program

Membership  Item #5
Brotherhood conversion: “Convert eligible Ordeal members to Brotherhood”  [REQUIRED]
• Bronze: “Convert at least 30% or 5% increase over prior year”
• Silver: “Convert at least 40% or 3% increase over 30%”
• Gold: “Convert at least 50% or 3% increase over 40%”
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:
To determine retention, take current year total membership minus current year Ordeal inductions, times 100 and then divide by prior year total membership. For example, (2012 total membership minus 2012 Ordeal inductions) * 100) ÷ (2011 total membership). All numbers are to be taken from the respective lodge charter renewal applications.

Tips for Success:
Ideas for improving the lodge's membership retention through activities at events follow:
- Have a cracker barrel and/or fun even scheduled directly after the Ordeal Ceremony.
- Have a true “Fellowship” – an event where the focus is fun and Brotherhood rather than inductions.
- Bring more folks to Conclave! Let the Section help you promote the Order.
- Successful chapter meetings will promote themselves. Help your Chapter Chiefs develop programs for 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.
- 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.
- The Best Practice’s addition to www.oa-bsa.org brings together the most innovative and successful practices in the nation. Frequently check for new additions to this page.

Resources:
Best Practices
http://oa-bsa.org/resources/lodge/bestpractices/
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 must have been contacted and given the opportunity to request an election. Election teams must be trained, all team members in proper uniform during each unit election, and team members must be from units other than the one for which the election is being held.

Let’s discuss how to schedule an election. It’s a fairly simple process wherein the Chapter Chief will contact either the Lodge Staff Adviser or his District Executive and request the contact information for all of the Scoutmasters 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 on a night 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 simplified in this bulleted form:

- Chapter Chief requests unit leader contact information
- Youth in charge of elections contacts unit leaders (at least 3 attempts)
- Youth coordinates date and time of election with unit leader
- Election team carries out the election of specified date and time

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 Arrowmen for their time and service.

**Tips for Success:**

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.

Some tips for Unit Elections (in no particular order):

- 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.

**Resources:**
The Guide to Inductions offers unit election videos [http://www.oa-bsa.org/resources/pubs/gti/](http://www.oa-bsa.org/resources/pubs/gti/) *(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)*
### Program Item #8

**Section and national event attendance:** “Attend section and national events”

- Bronze: “Set and achieve a lodge attendance goal at scheduled section & national events”
- Silver: “Exceed the lodge attendance goal by 10%”
- Gold: “Exceed the lodge attendance goal by 20%”

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**Purpose:**

National and section events are the highlight of many Arrowmen’s scouting experience. Opportunities to participate or lead in OA High Adventure, National Order of the Arrow Conference® (NOAC), and Conclaves are unique experiences to themselves as they provide outlets for fellowship with scouts and scouters from across the world, and are not to be missed.

**Requirement In-Depth:**

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 compiles. 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.

**Example:**

*Section SR-11 has a total of 5,000 members. Example Lodge has 512 members. Therefore, Example Lodge compiles 10.24% of SR-11’s membership. SR-11 has a Conclave attendance goal of 1,000 Arrowmen. 10.24% of 1,000 is 102.3, meaning that Example Lodge’s attendance goal should be 103 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 their location and other mitigating factors. Rather than setting a percentage goal for national events, you may prefer to set numeric goal such as 50 Arrowmen at NOAC.

**Tips for Success:**

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

- It will likely be easier to pass your goal 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) regarding events for which the lodge wishes to push promotions. 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, especially in regards to lowering the cost the lodge adds to the initial fee.

- And of course, why would anyone want to sign up for an event if their lodge and chapter officers aren’t signed up yet? You should be at the top of the registration list!

Resources:

OA High Adventure Promotions Material

NLS
http://www.southern.oa-bsa.org/nls

NLATS
http://oa-bsa.org/programs/nlats/

NOAC and other national Event Materials are updated yearly and all info can be found on the national Order of the Arrow website.
**Program   Item #9**  
**Lodge communications:** “Maintain active communications within the lodge”  
- Bronze: “Have and follow a written lodge communication plan”  
- Silver: “Publish a lodge newsletter or update your lodge web site at least quarterly ”  
- Gold: “Contribute to the council newsletter or web site”

**Purpose:**  
With any organization, strong communication is essential to an active and productive lodge. It is important that lodges have a solid communication base to make distribution on information easy on all members, and consequently avoid accidentally overlooking Arrowmen wanting to serve. By establishing a communication chain (generally beginning with the Lodge Chief) members are able to quickly distribute and receive information about lodge functions.

**Requirement In-Depth:**  
To obtain any level of recognition for this item, your lodge will need a written lodge communication plan. The following is an example communication plan. You’ll want to substitute the correct names and contact information as well as adding any positions included in your lodge leadership.

```
J. Doe  
Lodge Adviser  
555-0003  
adviser@lodge.org

E. Goodman  
Lodge Chief  
555-0001  
chief@lodge.org

A. Scouter  
Lodge Staff Adviser  
555-0002  
staffadviser@lodge.org

C. Edson  
Lodge Vice Chief  
555-0004  
vicechief@lodge.org

N. Oac  
Vice Chief of Inductions  
555-0005  
inductions@lodge.org

J. Arrowman  
Lodge Secretary/Treasurer  
555-0006  
treasurer@lodge.org

C. Hief  
Committee Members  
555-0008  
committeeA@lodge.org

N. Utiket  
Ceremony Team Chair  
555-0009  
ceremonies@lodge.org

Lodge Membership  
Via Internet, Newsletters, etc.

Chapter officers  
Chapter members at meetings
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By following such a plan through phone calls or e-mail, you can be sure that everyone in your lodge has the necessary information. Be sure to remind all youth to copy their advisers on all e-mails.

**Tips for Success:**

- Most lodges already have a newsletter, be it a hard-copy either mailed or distributed at lodge events or an e-letter. Regardless of its type, be sure to include valuable, attention-grabbing information.
- Talk to your staff adviser about how you can work to submit information to the Council newsletter. Suggestions for this article include OA involvement at a camp workday, Ordeal service projects, and Lodge Chief reports. You may also wish to include a lodge event schedule.
- Make sure each individual in the communication chain understands their role and is able to follow through quickly and efficiently.
Purpose:
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. It is important to analyze what events Arrowmen enjoy most, and how the success of one program can be applied to one that shows weaker attendance rates.

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.

Example:
\[
\frac{\text{Total attendance of lodge events}}{\text{number of events}} = \text{average attendance}
\]
\[
\frac{\text{Average Attendance}}{\text{Total lodge Membership}} = \text{percent of total lodge participation}
\]

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.
- Have chapter competitions.
- 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 trainings which are fun and hands-on.
- Give opportunities for Arrowmen to get involved with ceremonies at lodge events.
- Pie your lodge officers at Saturday night’s cracker barrel if you reach your attendance goal.
- Have a midnight capture the flag competition between chapters with glow sticks.
- 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!
• Have a national or section officer Skype in during the lodge meeting to promote national events.
Program Item #11

**Lodge planning:** “Maintain an active planning process that guides the lodge program and supports the council strategic plan.”

- Bronze: “Have a written annual plan approved by the Scout Executive”
- Silver: “Conduct an annual review and update of your plan in conjunction with a review of the Council Strategic Plan”
- Gold: “Have an annual meeting with the Scout Executive to review your updated plan”

**Purpose:**
This requirement is used to help ensure that the lodge’s strategic goals are not only established and known by the council, but also assist the council’s objective simultaneously.

**Requirement In-Depth:**
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.

**Tips for Success:**
- Look at your lodge’s previous annual report, how can your prior accomplishments be improved upon?
- How can these goals be set to help improve your lodge’s journey to excellence?
- 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 planbook.

**Resources:**
National Council Strategic Plan
http://digital.scouting.org/strategicplan/
Council Service

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 communities, but also to the council. Whether benefiting the council or community, service projects exemplify the lodge’s commitment to supporting 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 they give a positive image of the lodge to the council’s volunteer leaders who are not associated with the Order. Including reports of all service projects is just one way to give an accounting of the lodge's service to its members and the council. With two council service projects in addition to the lodge’s other projects through the year, amassing three service hours per member should not be very difficult. As the Brotherhood of Cheerful Service for the council, the lodge and its members must set the example by leading a life of cheerful service.

Requirement In-Depth:
Proper planning from the beginning of the lodge fiscal 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?

Note: At least one Council project and one community service project must be conducted and a written report of each project included in the lodge annual report.

Tips for Success:
- Develop a program to coincide with projects. Example: If performing trail work for a local park, request permission to camp there also and enjoy a weekend of outdoor adventure and service
- Promote lodge’s work throughout council and local news
- Offer an incentive program for Scouts who complete service hours
Examples of service projects:
Trail work at local camps, Painting buildings, Camp beautification projects, Tent platform repair, Trail marking, and summer camp setup.

Resources:
Lodge Community Service Guide:
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.

Requirements In-Depth:
For this requirement lodges will need to establish records for all troops that have been contacted and received information on camp promotions. Then compare to the council troop recharter records to calculate the percentage of troops successfully contacted.
Example: \[ \frac{\text{number of troops contacted}}{\text{total troops in council}} = \% \text{ received camp promotions.} \]
Note: What constitutes an acceptable contact under this category is determined by the Council Scout Executive or the Council’s Camping Committee if delegated by the Scout Executive.

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 council on summer camp promotion night to have Arrowmen present
- Assist council with publication for camp promotion

Resources:
Where to Go Camping Guide
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:
Lodges are an excellent resource for councils to rely upon when it comes to providing program staff. Lodges should look at what unique qualities their members hold that could assist in providing quality programs, examples include; AIE programs and resources, trainers, cooks, etc. Then present these resources to the council in addition to their willingness to serve in other staff positions.

Tips for Success:
• Possible service opportunities:
  o Cub Scout day camps
  o Summer camps
  o Resident camps
  o Fall festivals
  o Scout Fairs
• Designate chapters to take on particular events
• Consider setting up an Indian Village, or something of the equivalent, to promote the Order of the Arrow’s programs and culture

Council Service  Item #14
Council program support: "Provide OA members staff support for council and district program events"
• Bronze: “Support 2 council or district events”
• Silver: “Support 3 council or district events”
• Gold: “Support 4 council or district events”
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 respectively.

Requirement In-Depth:
Working in collaboration with the council 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.

Examples of Council Scout Executive designated Council support projects:

- In addition to the contributions in item 2, 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 [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 X amount of lodge members to serve as summer camp staff.

Note: the above project list is provided only as an example of possible projects to consider. Actual projects assigned are entirely at the discretion of the Council Scout Executive.
Leadership and Governance

**Leadership and Governance  Item #16**

**Lodge and chapter leadership:** "Conduct at least one LLD during the year with qualified instructors using current material."

- Bronze: “Achieve at least 75% of eligible members trained or 3% increase”
- Silver: “Achieve at least 80% of eligible members trained or 3% over 75%”
- Gold: “Achieve at least 85% of eligible members trained or 3% over 80%”

**Purpose:**

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

This requirement exists in order to insure that quality training exists, and that as many eligible participants as possible receive the experience.

**Requirement Breakdown:**

This requirement is based off the percentage of eligible members that participated in your LLDC program for the year. If your lodge is holding more than one LLDC that year, then the attendance at each LLD is accumulative, giving you a total percentage for all LLD courses that year. For example: Your lodge had 100 eligible members to attend a LLD course, and held two LLD courses that year. During course one, 55 of your eligible members attended, making your percentage for that course 55%. During course two, 26 eligible members attended, giving you 26% for that course. In total for that year, 81% percent of your eligible members attended a LLD course, giving you the Silver level for this requirement.

Eligible members for the LLD program are left up to the lodge's discretion. It is suggested that at least all lodge officers, chapter officers, lodge committee chairmen, and chapter committee chairman are invited to attend.

Note: LLD courses must be conducted with qualified instructors and using current LLD materials to train lodge and chapter committee chairmen and their advisers.

**Tips for Success**

- To create a qualified LLD program, there are a few resources that you can use to aid in the process. Several materials relating to planning and courses are available through national for your use. *These resources are listed below.
- Consider inviting Arrowmen from other lodges who have more experience in a particular area to train a related course.
- Make use of the Lodge Master 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 weekend should be held for all trainers for your event.

Resources
Lodge Leadership Development Planning Guide
2011 LLD Curriculum
http://lld.oa-bsa.org/2011/
Purpose:
The lodge annual report is an opportunity for the lodge to showcase its achievements, success, and opportunities for improvement to the Council Executive Board. One of the lodge’s ideal functions is to support the council and its program. This report outlines the support, and how the lodge will continue to assist the council in its success.

Requirement In-Depth:
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
- 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 Class A uniform with a sash. You are representing the Order of the Arrow to the Council’s leadership. Make a good impression!
- Make use of pictures, videos, and other creative items to make the report interesting and engaging.
- Insure other council committees, such as the Camping Committee receive copies of the report.

Resources
Lodge Annual Report Template
http://www.main.oa-bsa.org/resources/lodge/
Scoring the Lodge’s Performance

To qualify for recognition lodges must renew their 2012 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://oa-bsa.org/annc/g11/jte/

To qualify for Silver or Gold points within an individual criterion, the lodge must have completed the lower level criterion (e.g., to qualify for Silver Level in item number 1, the lodge must have completed the Bronze Level in that item)

To determine the lodge’s overall performance level, the council will 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, then add the three column scores to obtain the Grand Total points earned.

**Overall award levels are determined as follows using the Grand Total points earned:**
- **Bronze** = at least 800 Grand Total points plus have completed at least bronze performance in 10 criteria, two of which must be objectives #3 and #5.
- **Silver** = at least 1100 Grand Total points plus have completed bronze performance, including items #3 and #5, in at least 12 criteria
- **Gold** = at least 1400 Grand Total points plus have completed bronze performance, including items #3 and #5, in at least 15 criteria

Note: In cases where an individual criterion states for example “Achieve 60% retention or a 4% increase over 50” the award level can only be achieved in reference to the previous year’s performance in that area. In this example, if the lodge achieved 50% retention in the previous year, achieving 54% would be required to qualify them in this area in the current year. If they then achieved 54% in the current year, they would have to achieve at least 58% in the next year to qualify.