

**Scouting's Journey to Excellence**  
**2012 OA Lodge Performance Recognition Program**

Council name: \_\_\_\_\_ Council number: \_\_\_\_\_ Headquarters city/state: \_\_\_\_\_

Lodge name: \_\_\_\_\_ Region: \_\_\_\_\_ Section: \_\_\_\_\_

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.

Item Nbr	Objective	Bronze Level	Silver Level	Gold Level	Bronze Points	Silver Points	Gold Points
<b>Finance</b>					<b>Total Points: 400</b>		
1	<b>Fiscal Management:</b> Develop and successfully execute a lodge annual budget.	Complete and follow an annual budget approved by the lodge executive committee	Close the year with a positive operating balance (i.e., operate in the black)	Close with an operating balance at least as great as your budget projection	75	100	200
2	<b>Contribution to council:</b> Contribute cash, materials or both to the council.	Contribute an average of \$2.00 per lodge member	Contribute the equivalent of \$3.50 per lodge member	Contribute the equivalent of \$5.00 per lodge member	75	100	200
<b>Membership</b>					<b>Total Points: 600</b>		
3	<b>Membership Impact:</b> Experience positive growth in membership over the previous year <b>[REQUIRED]</b>	Grow membership by at least 1	Grow membership by at least 1%	Grow membership by at least 3%	75	100	200
4	<b>Ordeal completion:</b> Complete induction of elected Ordeal candidates	Complete induction of at least 60% of Ordeal candidates or 5% increase	Complete induction of at least 75% of Ordeal candidates or 5% increase over 60%	Complete induction of at least 90% of Ordeal candidates or 5% increase over 75%	25	50	100
5	<b>Brotherhood conversion:</b> Convert eligible Ordeal members to Brotherhood <b>[REQUIRED]</b>	Convert at least 30% or 5% increase over prior year	Convert at least 40% or 3% increase over 30%	Convert at least 50% or 3% increase over 40%	25	50	100
6	<b>Membership retention:</b> Improve retention rate of lodge members.	Achieve 50% or a 4% increase over prior year	Achieve 60% or a 4% increase over 50%	Achieve 70% or a 5% increase over 60%	75	100	200
<b>Program</b>					<b>Total Points: 600</b>		
7	<b>Unit elections:</b> Conduct unit elections in council troops and teams desiring them.	Complete elections for at least 90% of requesting units	Complete elections for at least 95% of requesting units	Complete elections for 100% of requesting units	75	100	200
8	<b>Section and national event attendance:</b> Attend section and national events.	Set and achieve a lodge attendance goal at scheduled section & national events	Exceed the lodge attendance goal by 10%	Exceed the lodge attendance goal by 20%	25	50	100
9	<b>Lodge communications:</b> Maintain active communications within the lodge.	Have and follow a written lodge communication plan	Publish a lodge newsletter or update your lodge web site at least quarterly	Contribute to the council newsletter or web site	25	50	100
10	<b>Lodge event participation:</b> Improve lodge membership participation at full lodge events.	Average at least 10% of lodge membership at all lodge events	Average at least 20% of lodge membership at all lodge events	Average at least 30% of lodge membership at all lodge events	25	50	100

11	<b>Lodge planning:</b> Maintain an active planning process that guides the lodge program and supports the council strategic plan.	Have a written annual plan approved by the Scout Executive	Conduct an annual review and update of your plan in conjunction with a review of the Council Strategic Plan	Have an annual meeting with the Scout Executive to review your updated plan	25	50	100
<b>Council Service</b>					<b>Total Points: 800</b>		
12	<b>Council service projects:</b> Complete Scout Executive approved service project(s) on Council property and in the community.	Complete project(s) equal to at least 2 hours of service per lodge member	Complete project(s) equal to at least 2.5 hours of service per lodge member	Complete project(s) equal to at least 3 hours of service per lodge member	75	100	200
13	<b>Council camping support:</b> Conduct camp promotion contacts to council troops and teams	Complete contacts to at least 75% of units or 3% increase	Complete contacts to at least 80% of units or 3% increase over 75%	Complete contacts to at least 85% of units or 3% increase over 80%	75	100	200
14	<b>Council program support:</b> Provide OA member staff support for council and district program events.	Support 2 council or district events	Support 3 council or district events	Support 5 council or district events	75	100	200
15	<b>Council designated support:</b> Complete Scout Executive designated program support projects	Complete one project	Complete two projects	Complete three projects	75	100	200
<b>Leadership and Governance</b>					<b>Total Points: 200</b>		
16	<b>Lodge and chapter leadership:</b> Conduct at least one LLD during the year with qualified instructors using current material	Achieve at least 75% of eligible members trained or 3% increase	Achieve at least 80% of eligible members trained or 3% over 75%	Achieve at least 85% of eligible members trained or 3% over 80%	25	50	100
17	<b>Annual report:</b> Submit a written annual report of accomplishments to the council executive board	Written report submitted	Written report submitted and verbal report given to the executive board	Verbal report given by the lodge chief	25	50	100
<b>Total achieved</b>							
					<b>Grand Total</b>		

Journey to Excellence, the new performance recognition program adopted by the BSA in 2011, 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. Below is specific information to help you understand the criteria and exactly what data will be used to determine the three levels of performance. In planning your strategy, use actual numbers from the previous year to guide your performance improvement goal-planning.

### Scoring the lodge's performance

- 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 above 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.*

**Amplifying instructions keyed to item numbers above:**

2. Contributions are to be in either cash (e.g. an FOS contribution to the council) or materials. In the case of materials, the value should be determined on the basis of current market value or the value determined by the Scout Executive.
6. To determine retention, take current year total membership less current year Ordeal inductions times 100 and then divide by prior year total membership. For example,  $((2012 \text{ total membership less } 2012 \text{ Ordeal inductions}) * 100) \div (2011 \text{ total membership})$ . All numbers are to be taken from the respective lodge charter renewal applications.
7. 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.
8. Lodge representation at all national events is not required. The intent of this criterion is to encourage lodges to set and meet a goal for participation in as many national events as they can support. Attendance at an OA High Adventure program qualifies under this item. Recognizing that quotas to section and national events can vary from year to year, each year's goal should be set such that the lodge leadership considers it more challenging than the previous year's goal.
10. 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.
12. 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.
13. What constitutes an acceptable contact under this category is determined by the Scout Executive or the council's camping committee if delegated by the Scout Executive.
15. Scout Executive designated projects are to be developed during a meeting with the lodge Key 3 with consideration for both the current local council and national Order of the Arrow strategic plans. Example projects are listed below.
16. LLD courses must be conducted with qualified instructors and using current LLD materials (see [www.oa-bsa.org](http://www.oa-bsa.org)) to train lodge and chapter committee chairmen and their advisers.

**Examples of item 15 - 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 award 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 OA national high adventure program.
- The lodge is to recruit XX 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 Scout Executive.*