

Scouting's Journey to Excellence
2012 OA Chapter Performance Recognition Program

Date: _____

Chapter: _____ Lodge: _____ Council: _____

Chapter Chief: _____ Chapter Adviser: _____ Chapter Staff Adviser: _____

Reviewed and approved by the lodge: _____ Level Achieved: _____

To qualify for recognition chapters must complete this paperwork on time, and be in compliance with the current editions of the OA Handbook, Guide for Officers and Advisers, Guide to Inductions, and ceremony books. In addition, the chapter must operate according to lodge and/or council established procedures for OA chapters. The assessment of the OA Chapter Performance Recognition Program is managed by the lodge that authorizes and oversees the chapter's work. It also needs to be coordinated with the chapter staff adviser and district committee and/or district executive. Follow your lodge's submission deadlines and procedures.

Item Nbr	Objective	Bronze Level	Silver Level	Gold Level	Bronze Points	Silver Points	Gold Points
Finance					Total Points: 200		
1	Fiscal Management: Manage chapter revenue and expense according to council-lodge established procedures and leadership.	Establish financial target(s) for the chapter	Meet the chapter's financial target(s)	Exceed the chapter's financial target(s)	75	100	200
Membership					Total Points: 600		
2	Membership Impact: Experience positive growth in membership in the chapter over the previous year. [REQUIRED]	Grow membership by at least 1	Grow membership by at least 1%	Grow membership by at least 3%	75	100	200
3	Ordeal completion: 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
4	Brotherhood conversion: Convert eligible Ordeal members to Brotherhood [REQUIRED]	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
5	Membership retention: Improve retention rate of chapter 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
Program					Total Points: 800		
6	Unit elections: Conduct unit elections in district 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
7	Lodge, section and national OA event attendance: Attend lodge, section and national OA events.	Set and achieve a chapter attendance goal for OA events	Exceed the chapter attendance goal by 10%	Exceed the chapter attendance goal by 20%	25	50	100
8	Chapter communications: Maintain active communications within the chapter.	Have and follow a written chapter communication plan	Communicate regularly with unit OA troop representatives	Contribute to the lodge and/or council newsletter or website	25	50	100
9	Chapter meetings and event participation: Improve chapter membership participation at chapter meetings and events.	Set and achieve a chapter attendance goal for chapter meetings or events	Exceed the chapter attendance goal by 20%.	Exceed the chapter attendance goal by 30%	25	50	100

10	Chapter planning: Maintain an active planning process that guides chapter program and supports the lodge's plans.	Have a written annual plan approved by the lodge executive committee; submit approved plan to district committee and/or executive.	Conduct an annual review and update of your plan, in conjunction with your lodge's plan	Meet with the district committee and/or executive to review/update your plan	25	50	100
11	Lodge designated support: Complete lodge executive committee designated programs or projects.	Complete one program or project	Complete two programs or projects	Complete three programs or projects	75	100	200
District and Council Service					Total Points: 800		
12	District/Council service projects: Complete district executive/ Scout Executive approved service project(s) on Council property or in the community.	Complete project(s) equal to at least 2 hours of service per chapter member	Complete project(s) equal to at least 2.5 hours of service per chapter member	Complete project(s) equal to at least 3 hours of service per chapter member	75	100	200
13	District/council camping support: Conduct camp promotion contacts to district 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	District/council program support: Provide OA member staff support for district and/or council program events.	Support two district and/or council events	Support three district and/or council events	Support five district and/or council events	75	100	200
15	District/council designated support: Complete district executive and/or Scout Executive designated program support projects.	Complete one project	Complete two projects	Complete three projects	75	100	200
Leadership and Governance					Total Points: 200		
16	Chapter leadership: Participate in and/or conduct at least one LLD during the year with qualified instructors using current material.	Achieve at least 75% of chapter leadership trained or 3% increase	Achieve at least 80% of chapter leadership trained or 3% over 75%	Achieve at least 85% of chapter leadership trained or 3% over 80%	25	50	100
17	Annual report: Submit a written annual report of chapter accomplishments to the lodge executive committee and/or district committee.	Written report submitted to the lodge executive committee and district committee and/or executive	Written and verbal report given to Scoutmasters at roundtable by the chapter chief	Written and verbal report given to the lodge executive committee and district committee and/or executive by the chapter chief	25	50	100
Total achieved							
					Grand Total		

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 chapter and lodge performance and also 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 chapter's performance

- To qualify for Silver or Gold points within an individual criterion, the chapter must have completed the lower level criterion (e.g., to qualify for Silver Level in item number 1, the chapter must have completed the Bronze Level in that item)
- To determine the chapter's overall performance level, the chapter 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 #2 and #4.

- **Silver** = at least 1100 Grand Total points plus have completed bronze performance, including items #2 and #4, in at least 12 criteria
- **Gold** = at least 1400 Grand Total points plus have completed bronze performance, including items #2 and #4, in at least 15 criteria

Note: In cases where an individual criterion states, in membership retention for example "Achieve 60% 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 chapter achieved 50% retention in the previous year, achieving 54% would be required to qualify them in this area in the current year.

Amplifying instructions keyed to item numbers above:

1. Depending on lodge/council procedures, chapters may or may not have funds or develop annual budgets. The key factor is: Does your chapter follow your lodge's and/or council's budgeting and accounting procedures in establishing its budget or financial targets? A financial target could be having and executing a budget for a specific chapter program/event, or it could be having and executing an annual chapter budget. Award points based on the chapter's success at following lodge/council policies and in setting and/or achieving the established financial target.
3. Ordeal candidates from either lodge or chapter run inductions and ceremonies, as determined by the lodge and/or council, should be counted.
4. Brotherhood candidates from either lodge or chapter run ceremonies, as determined by the lodge and/or council, should be counted.
5. To determine chapter 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 chapter numbers are to be taken from the same database source from which the lodge's reported numbers on its charter renewal application were based.
6. 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.
7. Chapters should support lodge events. Chapter member representation at section and national events or an OA High Adventure program is not required, but counts toward goal achievement when it occurs. The intent of this criterion is to encourage the chapter to set and meet a goal for participation in lodge events, and for chapters to support the lodge in reaching its goals for these events.
9. To determine chapter event participation, add the attendance of all meetings and events where all chapter members were invited to attend, then divide by the number of events to get an average attendance number. Divide that number by the total chapter membership to determine the overall average percent of the chapter members in attendance.
11. Lodge executive committee and/or lodge leadership designated programs or projects are to be developed in conjunction with the lodge leadership and in support of the lodge's work. Examples of projects are listed below.
12. At least one district/council service project and one community service project must be conducted and a written report of each project included in the chapter's 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. District executive/Scout Executive designated program support projects are to be developed during a meeting with the lodge and/or chapter Key 3 with consideration for both the current local council and national Order of the Arrow strategic plans. Examples of projects are listed below.
16. LLD courses must be conducted at either the lodge or chapter level, with qualified instructors and using current LLD materials (see www.oa-bsa.org), to train chapter officers, committee chairmen and their advisers. Eligible participants include elected and appointed youth members of the LEC and their advisers.

Examples of item 11 - Lodge executive committee and/or lodge leadership designed programs:

- The chapter holds a training session for OA Troop/Team Representative positions and communicates with those representatives regularly.
- The chapter leadership attends at least 50% of lodge executive committee meetings and presents reports of chapter activities.
- The chapter will provide at least two members to serve on lodge committees.
- The chapter holds at least three meetings a year and focuses on FUN and FELLOWSHIP for at least half of each chapter meeting.

Examples of item 15 - District executive/Council Scout Executive designated program support projects:

- The chapter is to hold its chapter meetings on the same night and at the same location as the district roundtable for Scoutmasters.
- The chapter key 3 is to meet with the district executive at least quarterly to discuss progress in the chapter.
- The chapter holds a chapter meeting or gathering at a district event such as a camporee.
- The chapter is to provide manpower, resources, and/or program assistance in support of the district Cub Scout outdoor program or conducts at least two Cub Scout/Webelos Arrow of Light crossover ceremonies for Cub Scout packs requesting them.
- The chapter is to conduct a call out ceremony during the campfire at the district camporee.

Note: The above project lists are provided only as example of possible projects to consider. Actual projects assigned are entirely at the discretion of the lodge executive committee and/or lodge leadership and in conjunction with chapter Staff Adviser and/or district executive.