

LA200 – How To: JTE

National OA Adviser Training

Session Length: 25 Minutes

Overview:

- What is JTE
- Why JTE
- History of JTE
- Why Keep Score
- How JTE Works

Learning Objectives:

- Lodge JTE Award
- Scoreboard Review
- Review of JTE Guidebook
- Process for Improvement
- JTE Major Category Review
- Scoring Rules

Slide 2 - DETAILED OUTLINE OF THE SESSION:

This session will explain the importance of the JTE program and point you to where to find the forms and templates and resources to start keeping score, see how your program measures up and to develop an improvement plan. This session is an overview of the current [\(2016\) Lodge JTE standards](#) and provides a brief review of the [JTE Guidebook](#). Included are the JTE Form and a “Tips” summary for all 17 criteria.

Slide 3 – What is JTE

Journey to Excellence, the new performance recognition program adopted by the Boy Scouts of America, changes the basic way we measure and recognize success by moving away from measuring process and moving toward measuring performance. To be aligned with the BSA and to capitalize on this best practice used in the corporate

performance measurement field today, the Order of the Arrow adopted the Journey to Excellence format in 2012 to evaluate lodge performance and to motivate and recognize continuous improvement in lodge operations. Ultimately, utilizing the JTE program brings the OA in line with the BSA’s performance measure. Journey to Excellence uses a balanced scorecard approach, which is one of the best practices in performance measurement. The greatest benefit of this new program is that we can continually challenge ourselves to improve in all areas of a lodge’s annual operations.

Slide 4 – History of JTE

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

Slide 5 – History of JTE

JOURNEY TO EXCELLENCE AND QUALITY LODGE COMPARISON

<u>Journey to Excellence</u>	<u>Quality Lodge</u>
<ul style="list-style-type: none"> • Focused on outcomes • Encourages continuous improvement • Multiple ways to meet requirements <ul style="list-style-type: none"> - Three levels - Increasing in difficulty • Establish goals for improvement • Continuous process • “Next year let’s work on A, B, and C.” 	<ul style="list-style-type: none"> • Focused on process • Fixed performance standards • Simply pass or fail <ul style="list-style-type: none"> - Requirement is met - Requirement is not met • Minimum requirements • Finite ending • “Try again next year.”

Slide 6 – Why keep score?

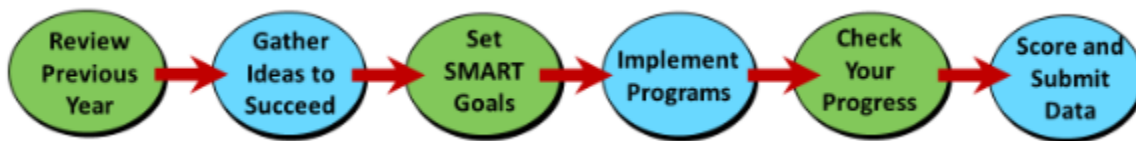
In almost any business or industry, there are statistics being kept and recorded to analyze and document the growth of that business or organization. Keeping “Stats” are a big part of every sport, or competition these days. If you don’t get a report card, but instead just get a “pass or fail” grade, you don’t really know how you measure up to others or if you are on the edge of falling in or out of the satisfactory level that everyone is striving for. In other words, if it’s not measured, it’s not managed. But we all need to realize that even the best of people or organizations always have room for improvement, or have areas that can use some improvement.

Slide 7 – How It Works

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

Slide 8 – The JTE Process

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



The first step in planning is to review your lodge's JTE performance from the previous year or two. Try to understand your lodge's strengths and weaknesses in the various JTE requirements. You must know where you are if you are to plan where to want to go! Your lodge leadership should analyze its performance in each of the JTE categories. (A great guide to use for understanding your lodge's strengths and weaknesses is session [LA-150, Conducting a Lodge Needs Assessment](#).)

Slide 9 – JTE Questions

Besides using the techniques described in the [LA-150](#) session (in particular the SWOT analysis) here are some questions to consider as your review your lodge's performance:

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

After identifying where improvement is needed, the lodge leadership should look for ideas on how to succeed. As a handy reference, a condensed version of the [JTE](#)

[Guidebook](#) “Tips” is attached to this session. This tips sheet and the JTE guidebook are not the only resource; other lodges in your section may have innovations in their approach to the Journey to Excellence. Exchange ideas on JTE with other lodges at section conclaves and section training seminars. In fact, hundreds of successful ideas on lodge program submitted by lodges around the country are gathered as “best practices” and accessible on the national OA website at the link listed below. Take advantage of the many resources that are at the end of this session and find good ideas for your lodge.

Slide 10 – Goals

Armed with the knowledge of where and how the lodge can improve, it is finally time for the lodge leadership to set **formal S.M.A.R.T.** goals and to determine exactly how they will better themselves through Journey to Excellence. Remember the definition of a S.M.A.R.T. goal: **S**pecific, **M**easurable, **A**ction based, **R**elated to the purpose, and **T**ime bound.

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

Slide 11 – Record Keeping

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

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

Finally, at the conclusion of the year, use OA LodgeMaster to score and submit your JTE performance data to the national Order of the Arrow committee. The detailed scoring information for each requirement is contained in the *Journey to Excellence* guide. The overall scoring for the JTE award levels and the data submission procedure are found at the end of this session and in the **Scoring the Lodge’s Performance** chapter at the end of the guidebook.

Slide 12 – Major JTE Categories

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

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

Slide 13 – JTE Points

FINANCE

Maximum point value: 500

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

MEMBERSHIP

Maximum point value: 1500

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

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

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

Recent JTE data show that many Scouts who are elected to the OA do not attend the Ordeal. To help counteract this trend, requirements in the Membership category reward lodges that induct the large majority of elected Scouts.

PROGRAM

Maximum point value: 900

Lodges with active participation and whose events are well attended not only do well in the program category of JTE but tend to do well in the JTE program as a whole. The JTE

requirements in the program category recognize this fact and reward lodges whose events are attended by a healthy percentage of the lodge membership.

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

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

UNIT SERVICE

Maximum point value: 400

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

COUNCIL SUPPORT

Maximum point value: 700

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

LEADERSHIP AND GOVERNANCE

Maximum point value: 300

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

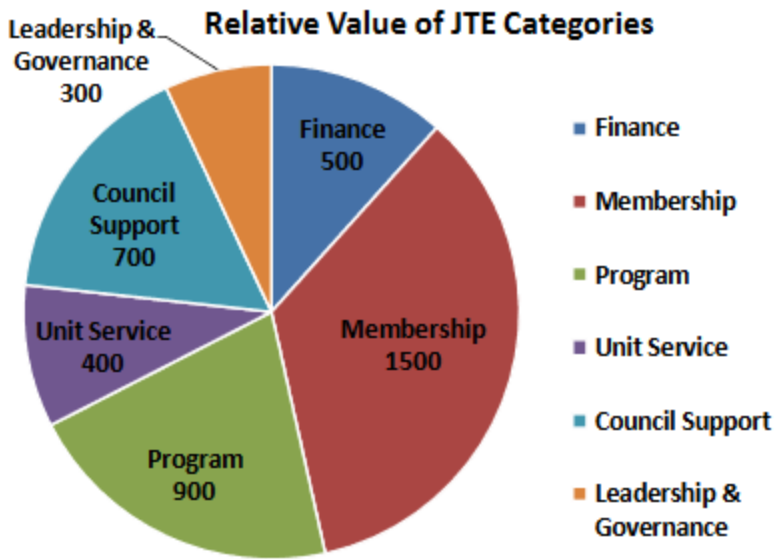


Figure 1 - Relative value of the 2016 JTE categories

Slide 14 – JTE Scoring

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

Scoring the Lodge’s JTE Performance: Overall JTE award levels are determined by the grand total points earned and the number of criteria for which the lodge achieved at least Bronze.

- **BRONZE:** 1400 points
“Earn at least 1400 grand total points and complete Bronze or better in at least 10 criteria.”
- **SILVER:** 2050 points
“Earn at least 2050 grand total points and complete Bronze or better in at least 12 criteria.”
- **GOLD:** 2550 points
“Earn at least 2550 grand total points and complete Bronze or better in at least 15 criteria.”

Slide 15 – General Rules

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

Slide 16 – Continued Improvement

To encourage continued improvement, the JTE program takes two approaches:

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

PERFORMANCE IMPROVEMENT AWARD METRICS

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

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

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

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

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

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

Slide 17 – Annual Adjustment

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

The goal is that the large majority (80%) of lodges will receive some recognition and that a small percentage (10%) will earn Gold. Most lodges should receive some JTE recognition, and Gold is intentionally difficult!

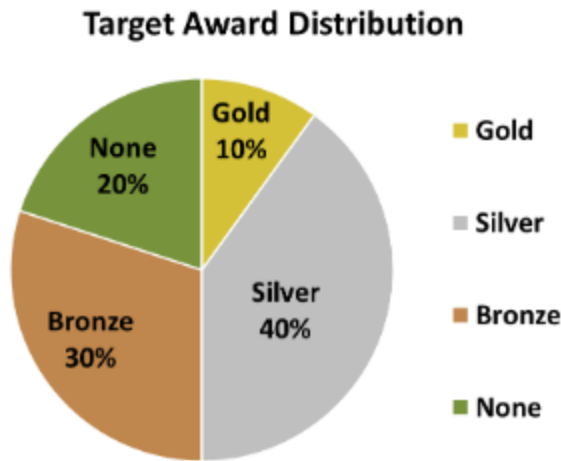


Figure 2 - Target JTE Award Distribution

Slide 18 – Awards

AWARDS FOR JTE PERFORMANCE

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

JTE PIN FOR LODGE FLAP

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



LODGE NAME LISTED IN THE ORDER OF THE ARROW ANNUAL REPORT

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

JTE-CERTIFIED LODGES ELIGIBLE FOR OTHER OA AWARDS

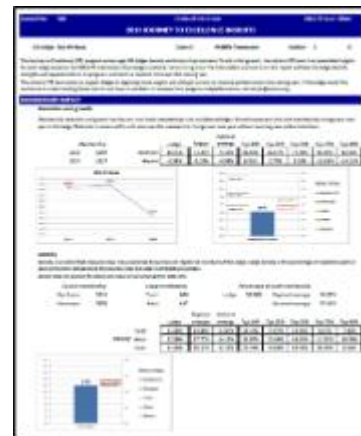
Achieving at least bronze level of performance is required to apply for all national lodge awards and recognitions. (*Order of the Arrow Handbook*, 2015 edition; pg. 95)

Slide 19 – JTE Insight Reports

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

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

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



Slide 20 – Section Statistics Report

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

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

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



Slide 21 – Resources

GENERAL RESOURCES

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

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

JTE Guidebook

<http://www.oa-bsa.org/pages/content/publications#jteg>

National JTE website

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



JTE Scoresheet for 2016 – PDF File

http://www.oa-bsa.org/uploads/resources/forms/2016_JTE_points.pdf

JTE Scoresheet for 2016

<http://www.oa-bsa.org/pages/content/printable-forms#2016jtepoints>

OA LodgeMaster

<http://lodgemaster.oa-bsa.org/>

National JTE website – 2015 changes

<http://www.oa-bsa.org/pages/content/lodge-ledger-2015-07-1>

2015 Chapter JTE worksheet template

<http://www.oa-bsa.org/pages/content/printable-forms#chapter-workbook>

National Order of the Arrow Publications

<http://www.oa-bsa.org/pages/content/publications>

Order of the Arrow Best Practices

<http://www.oa-bsa.org/pages/content/best-practices>

QUESTIONS:

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