



JOURNEY TO EXCELLENCE

2012 District Workbook

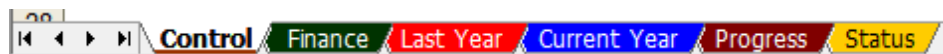
In charting the district's Journey to Excellence, having the right tools will enable the district leadership to set direction along a path of continuous improvement. The 2012 Journey to Excellence District Workbook is designed to be one of these tools. The workbook will allow the district to set goals, monitor progress, and measure its score in seventeen Journey to Excellence criteria.

You can download the District JTE Workbook by visiting the Journey to Excellence site through MyScouting or click the following address:

http://www.scouting.org/filestore/mission/xls/JTE_District_Workbook.xls

Workbook Contents

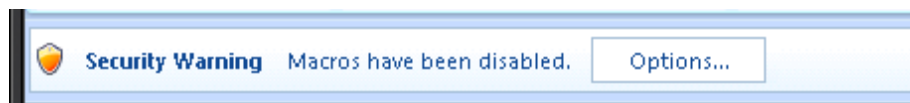
The workbook is a macro-enabled *Excel* document. It contains six separate sheets: four of these are for data entry, and two are designed strictly as reports. These sheets include:



- ◆ **Control:** This is where you enter the district and council name. It has buttons to produce monthly reports and links to support documents.
- ◆ **Finance:** Here you define monthly and annual district finance goals. Also, you enter monthly progress in achieving these goals.
- ◆ **Last Year:** In order to measure improvement, data must be entered for 2011 on this sheet.
- ◆ **Current:** Enter your 2012 achievements each month for the JTE criteria.
- ◆ **Progress:** This report shows your progress against goals and last year for a selected month,
- ◆ **Status:** This gives you a dashboard of Journey to Excellence scores for any month.

Workbook Basics

Macros: Since this workbook uses macros to create reports, it is important to enable macros when you open it. Otherwise, nothing will happen when you click the buttons. In *Excel 2007*, click Options on the Security Warning to enable macros from a *Trustworthy* source.



Protection: Most of the cells in the workbook are protected because there are formulas that should not be changed. However, the light yellow cells (on most computer screens) are designed for user input. The green cells show the percentage calculations, and the brown cells show points.

Saving the Document: Remember to save your work. Although *Excel* may ask, it will not do this automatically.

Preparing for the Journey: District Name

Enter your district and council name in the yellow cells on the control sheet. Include the words “District” and “Council” in the names. Other sheets will automatically populate with these names.

My district is:
Takeany District

My council is:
Nation's Best Council

Note: The parameters on the bottom of the control sheet help the system determine scores on a monthly basis. They are locked and require no input from the user.

Preparing for the Journey: Establishing Last Year's Base

For best results, every light yellow cell on the “Last Year” sheet needs a value. These values will come from a variety of sources, including:

- Objectives Progress Reports for every month in 2011.
- Total available youth determined for 2011, if not on the Objectives Progress Reports.
- Total finance dollars raised by the district in 2011. Be sure to apply the same rules that will be used in 2012.
- Retention rate from MyBSA.
- Report showing numbers of boys advancing in each district. This report will be distributed to the council in mid-January. The advancement reports produced through ScoutNET do not show numbers of boys advancing and will not provide the data needed for JTE.
- Community Service Hours report for each month in 2011. (See special instructions at end of document.)
- Total number of chartered organizations and number visited in 2011, according to council records.
- Report showing percentage of units receiving the required number of visitations for all months in 2011. This report will be distributed to the council in mid-January.
- Total number of quality units or bronze, silver, or gold units at the end of 2011, according to council records.
- Number of district committee meetings held during 2011.
- Determination if there was a succession plan and if all key district positions were filled in 2011.
- Percentage of trained direct contact leaders from MyBSA.

For further assistance in determining the data sources for each criterion, see the special instructions at the end of the document.

Note: For best results, fill in all of the data for last year. If data are missing, the workbook will not be able to calculate the points base for 2011 and performance growth in 2012.

Preparing for the Journey: Finance Plan and Goals

Unlike other criteria, finance measures will be set by the council. Most likely, the council held a finance planning conference where goals were set for 2012.

The workbook allows you to define a finance goal as a whole or in up to five parts. You will want to set bronze, silver, and gold objectives for each item. The target is what the district plans to achieve.

For example, the goal may be simply total FOS, and only the first line of the form will be used.

Category	Bronze	Silver	Gold	Target
Total FOS	\$60,000	\$65,000	\$70,000	\$65,000
Total	\$60,000	\$65,000	\$70,000	\$65,000

Alternately, the goal may break out items as defined by the council.

Note: If you include special events, these goals should be net of direct benefits. Product sale goals should be net of cost of goods sold and commissions paid to units. Rather than attempting to figure an exact number, you might use a fixed percentage of gross sales based upon past performance.

Category	Bronze	Silver	Gold	Target
Family FOS	\$50,000	\$55,000	\$60,000	\$55,000
Community FOS	\$30,000	\$32,000	\$34,000	\$32,000
Special Events Net	\$25,000	\$27,000	\$30,000	\$30,000
Popcorn Sale (Net 30%)	\$30,000	\$31,000	\$32,000	\$31,000
Total	\$135,000	\$145,000	\$156,000	\$148,000

Once the annual goals are established, you will need to enter monthly bronze goals for each item. It is not necessary to define the monthly goals for silver and gold, as the workbook will calculate these based upon ratios with year-end goals. These monthly goals should not simply represent arbitrary values, but reflect your fundraising plan. Monthly goals need to reflect cumulative year-to-date totals.

\$\$\$	Family FOS											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Bronze Goal	\$20,000	\$30,000	\$35,000	\$40,000	\$42,000	\$44,000	\$45,000	\$45,000	\$46,000	\$47,000	\$48,000	\$50,000
Actual												
Percent	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

When all of the goals have been entered, the workbook will calculate the totals needed to achieve bronze, silver, and gold for each month.

\$\$\$	Total Finance											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Bronze Goal	\$35,000	\$51,000	\$61,000	\$71,000	\$73,000	\$75,000	\$76,000	\$76,000	\$77,000	\$97,000	\$108,000	\$50,000
Silver Goal	\$45,500	\$66,300	\$79,300	\$92,300	\$94,900	\$97,500	\$98,800	\$98,800	\$100,100	\$126,100	\$140,400	\$65,000
Gold Goal	\$49,000	\$71,400	\$85,400	\$99,400	\$102,200	\$105,000	\$106,400	\$106,400	\$107,800	\$135,800	\$151,200	\$70,000
Actual	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Percent	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Preparing for the Journey: Setting Other Goals

Once your district completes its goal planning, you'll want to use the workbook to track progress towards these goals. Year-end goals are entered in the third column on the Current sheet. Be sure to enter goals for all criteria (except finance).

Membership		Dec Goal
2	Cub Scouts	925
2	Boy Scouts	600
2	Venturers	125
2	Explorers	60
2	Total Available Youth	14,698

Once all goal elements are entered for a criterion, the workbook will calculate the determined standard achievement, performance growth, and potential points. Performance growth may not be present for all criteria and it requires that data be entered for last year.

2	Market Share	11.63%
2	Performance Growth	5.32%
2	Market Share Points	200

When all goals have been entered, the workbook will calculate the total points and potential recognition level.

Total Score		Dec Goal
	Total Points Earned	1,850
	Recognition Level	Gold

Taking the Journey: Entering Monthly Achievements

Early in the month you should collect the various reports to determine the values to enter for last month's achievements. The reports for advancement and unit visitations will not be sent to the council until about the 10th of each month.

Enter finance achievements in the actual columns on the Finance sheet.

\$\$\$	Family FOS			
	Jan	Feb	Mar	Apr
Bronze Goal	\$20,000	\$30,000	\$35,000	\$40,000
Actual	\$21,678			
Percent	108.4%	0.0%	0.0%	0.0%

Enter all other values in the light yellow cells on Current sheet. Be sure data have been entered in all cells for the month.

Membership		Dec Goal	Jan
2	Cub Scouts	925	888
2	Boy Scouts	600	520
2	Venturers	125	112
2	Explorers	60	66
2	Total Available Youth	14,698	14,698

The workbook will calculate determined standard achievements, performance growth (from last year) and total points. In several cases the determined standard achievement will be the same number you entered. In the example below, the direct contact leader training percentage was entered in the yellow cells and the workbook repeated it as the Unit Leadership achievement in the green cells.

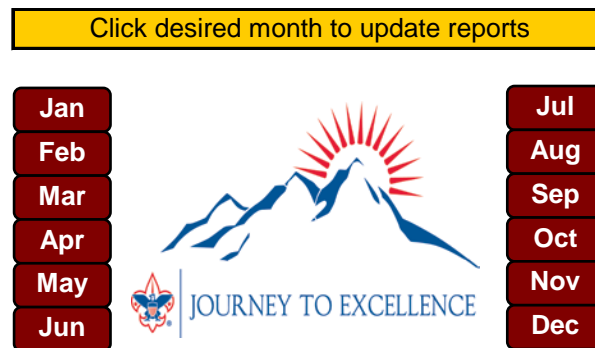
17	Direct Contact Trained %	30.00%	29.00%
17	Unit Leadership	30.00%	29.00%
17	Performance Growth	-3.00%	-2.00%
17	Unit Leadership Points	100	75

Total Score		Dec Goal	Jan
	Total Points Earned	1,850	1,200
	Recognition Level	Gold	Silver

Notes: In entering total available youth, this should be the same value throughout the year. Camping numbers are entered for September through December and should not change during that period.

Taking the Journey: Creating Reports

Once all data has been entered for a month, you may generate the reports. Return to the Control sheet and click the name of the month. Provided that macros enabled, the workbook will generate the Progress and Status reports. If you save the workbook at this time, it will remember the date the reports were updated. You may view the reports and print them as desired. You can also regenerate reports for any past month.



Note: The data entry sheets for Finance, Last Year, and Current are designed to print in a reasonable report format, if desired.

Tools for the Journey: Community Service Hours

The numbers of service hours provided in the district are available from the JTE Service Hours website. To access and instructions for the site, visit <http://scouting.org/JTE.aspx>.

Once you log into the site, you can create a report for any range of dates. During goal setting you want to produce a report for each month. During 2012 you'll produce a regular report of the past month's activities. The report titled *Project Summary.Overall Project Summary* will list the total service hours by district for the selected period.

Tools for the Journey: Sources of Data

The data needed for the district to measure its progress on its journey will come from a variety of sources. Here are some suggestions.

No.	Criterion	Data Source
1	Fundraising	Council-generated reports
2	Market Share	Objectives Progress report (council must enter TAY for district)
3	Membership Growth	Objectives Progress report
4	Youth Retention	MyBSA Dashboard for council
5	Cub Scout Advancement	Special report distributed to councils
6	Boy Scout Advancement	Special report distributed to councils
7	Cub Scout Camping	Council maintained records (Be sure to include all Cub Scouts from the district who have attended any day camp, family camp, or resident camp.)
8	Boy Scout Camping	Council maintained records (Be sure to include all Boy Scouts from the district who have attended any long-term camp or high adventure experience.)
9	Community Service	JTE Service Hours website
10	Chartered Organization Visits	Council maintained records (Sample record sheet is available at http://www.scouting.org/filestore/mission/xls/Chartered_Organization_Visits_Record_Sheet.xls)
11	Commissioner Service	Objectives Progress report
12	Unit Visitations	Special report distributed to councils
13	Unit Performance	Council maintained records (Sample record sheet is available at http://www.scouting.org/filestore/mission/xls/Unit_JTE_Status_Record_Sheet.xls .)
14	Voice of the Scout	Voice of the Scout dashboard
15	District Leadership (Cte members)	Objectives Progress report
16	District Committee	Council maintained records
17	Unit Leadership (Training)	MyBSA Dashboard for council

Updated: 12/6/11