

# *Commissioner Tools – Updated*

# **OVERVIEW**

# The mission of Unit Service is to help units better serve more youth through Scouting.

## **Our Objectives:**

- 1. Supporting unit growth and retention through the Journey to Excellence
- 2. Contacting units and capturing in commissioner tools their strengths, needs and a unit service plan that enables continuing improvement
- 3. Linking unit needs to district operating committee and other resources
- 4. Supporting timely unit, district and council charter renewal
- 5. Supporting unit leaders by delivering effective roundtables that provide program ideas, relationship development, and timely communication

This document (Phase 1) is intended to give commissioners an overview of the version of Commissioner Tools updated in April 2019. Phase 2 of the Commissioner Tools training project will include updates to all relevant courses in the BSA Learn Center, Instructor-led Basic training courses, and College of Commissioner Science courses. **This is the primary Commissioner Tools training document until further notice.** There will be separate documents for the following groups of commissioners:

- Unit Commissioners
- Administrative Commissioners
- Roundtable Commissioners.

Depending on your role as a commissioner, you can go directly to the document that pertains to your role. You are also encouraged to read through the other documents.

The updated version of Commissioner Tools provides a new look and feel with improvements to all who use Commissioner Tools. New features include easier navigation, and a completely redesigned report section with customizable date ranges (fig 1). The tool is also being replatformed so that all my.Scouting Tools are built sharing the same application programming interfaces.

•						
	Reports					
The second se	Date From: Fro	m 🗇	Date To:		<b></b>	
Northern Star Council 250	ASSIGNED EXPIRED UNIT					RUN
	Expired units with last assess	iments, the "Assigned" report	also identifies the as	signed commissioner	for each unit.	
Commissioner Tools	ASSIGNED UNITS					RUN
Organization Dashboard	Units having a commissioner	assigned, it shows contact in	nformation, last asset	sment, status as a nev	v unit or not, and assigned com	missioner(s).
Contacts	COMMISSIONER CONTA	CTS				RUN
Roundtable	Contacts made by commission	oners, indicating whether ass	igned or not, spread b	y month.		RUN
Roundtable	COMMISSIONER CONTA	CTS WITHOUT SUB TOTA	LS			
Profile	Contacts made by commission	oners, indicating whether ass	igned or not, spread b	y month. No total inclu	ded.	RUN
Administration ~	COMMISSIONER RECRUI	TMENT				
Reports	Prospective commissioners i	dentified in detailed unit asse	essments.			RUN
Help Guide	COMMISSIONERS WITH	OUT CONTACTS				
	Commissioners who have no	t made unit contacts during t	he year.			RUN
	DISTRICT CONTACT STA	TS				
	Units with the number of con	tacts made during the year, s	pread by month.			RUN
	CONTACTS IN PROGRES	s				
	Unit contacts that are current	ly 'in Progress' having never l	peen completed and a	re not scheduled for a	date in the future.	RUN
	PRIORITY NEEDS UNITS					



## NAVIGATOR/ORGANIZATION NAVIGATOR

The new version of commissioner tools has an improved method of navigation that makes it easier for a **unit commissioner** to find the unit(s) with which they are working. (*figure 2*)

^	0	rganization	Navigator				SEL	ECT ORG LEVEL
	Cre	ate New C	ontact					
	Q					V		$\otimes$
Chisholm Trail 50					Q View Histo	ory 🕂 A	dd New Contact	\Xi Show: All Units
mmissioner Tools		Program	Gender	Unit Number	Chartered Organization	Last Contact	Last Contact Scor	All Units
Organization Dashboard	0	*	В	Troop 0181	Sent Church	-	-	Units Assigned to M
			-					Low Contact Score
Contacts		S.	G	Troop 0198	Messiah Lutheran Church	-	-	Declining Health
Roundtable		*	В	Troop 0198	Messiah Lutheran Church	10	-	-
Profile		*	В	Troop 0219	Kiwanis Club of Plano TX USA	2019-02-27	9 3.5	▲ 3.5
Reports Help Guide	•	*	В	Troop 0221	Custer Road United Methodist Church	-	-	-
Help Guide	0	*	В	Troop 0226	North Texas Christian Home School Assoc.	-	-	-
		*	В	Troop 0235	West Plano Presbyterian Church	2018-08-27	<mark>.</mark> 3	-
		*	В	Troop 0259	St Elizabeth Ann Seton Catholic Church	2019-02-25	03	▲ 3
		*	в	Troop 0261	Christ United Methodist Church	-	-	-
		-	B	Troop 0285	St Marks Catholic Church	2019-02-27	<u> </u>	▼ 0.5



This is the screen from which commissioners select a unit to enter an assessment. As a unit commissioner in the district, you can see every unit in your district or you can filter for only those units which are assigned to you. Additionally, notice that you can filter for those units

that are at risk – those units with a score of 2.5 or below, or those units whose score has declined. Select the unit for which you wish to add a contact and select it by clicking on the dot to the left of the unit number. From this point, you can view the unit's history and/or add a new contact.

Select **view history** to refresh your memory about the unit or to get information about the unit if you are newly assigned to it. The figure below is an example of the unit dashboard.

Δ	Organization Navigator		SELECT ORG LEVEL
	Unit Summary	Contact Summary	2019 🗸
Crow River 02 Commissioner Tools Organization Dashboard Contacts Roundtable	Troop 3246 BPOE #2427 Elks Last Contact: 02/21/2019 Contact made by: Current Commissioner(s): • Charles William Smith - 130593583 Last Contact Score: • 4	Completed (2)       In Progress (1)         4       Detailed Assessment         4       Detailed Assessment	Scheduled (1)           Pab 21, 2019           Feb 21, 2019           Feb 21, 2019
Profile	Health Indicators		
Reports Help Guide	Date Last Detailed Contact: 02/21/2019 Finance and Budget: 5		
	Membership: 3.5		
	Program: 5		
	Leadership And Governance: 2.5		
		Add New Con	tact

## UNIT CONTACT SUMMARY PAGE



There are several important pieces of information displayed here. The red highlighted box provides; the unit type, number, the name of the Chartered Partner, the date of the last contact, and the name of the commissioner or professional who made the contact. You can also see the name of the commissioner assigned to the unit. Finally, you see the last contact score.

$\wedge$	Organization Navigator		SELECT ORG LEVEL
	Unit Summary	Contact Summary	2019 🗸
	Troop 3246 BPOE #2427 Elks	Completed (2) In Progress (1)	Scheduled (1)
Crow River 02	Last Contact: 02/21/2019	4 Detailed Assessment	Feb 21, 2019
Commissioner Tools	Contact made by: Current Commissioner(s):	4 Detailed Assessment	Feb 21, 2019
Organization Dashboard	Charles William Smith - 130593583 Last Contact Score:      4	-	
Contacts Roundtable			
Profile	Health Indicators	_	
Reports Help Guide	Date Last Detailed Contact: 02/21/2019 Finance and Budget: 5		
	Membership: 3.5		
	Program: 5		*
	Leadership And Governance: 2.5		
		Add New Cont	act



In the Contact Summary box, users can see three tabs labeled Completed, In Progress, and Scheduled, each with the number of contacts in that category shown parenthetically. In the upper right-hand corner, using the pulldown arrow the user can change the year for which the information is displayed. As required, from here commissioners have **48 hours** from submission to edit or delete a completed contact. Click on the 3 dots after the contact date to edit or delete the contact. After **48 hours** you will only be allowed to view or print the assessment.

Δ	Organization Navigator		SELECT ORG LEVEL
	Unit Summary	Contact Summary	2019 🗸
	1000 3246 BPOE #2427 Elks	Completed (2) In Progress (1)	Scheduled (1)
Crow River 02	Last Contact: 02/21/2019	4 Detailed Assessment	Feb 21, 2019
Commissioner Tools	Contact made by: Current Commissioner(s):	4 Detailed Assessment	Feb 21, 2019
Organization Dashboard	Charles William Smith - 130593583 Last Contact Score:      4	-	
Contacts			
Roundtable		_	
Profile	Health Indicators		
Reports	Date Last Detailed Contact: 02/21/2019 Finance and Budget: 5		
Help Guide		-	
	Membership: 3.5	-	*
	Program: 5	-	
	Leadership And Governance: 2.5	-	
		Add New Con	tact



The final box displays the unit health indicators for the unit based on the latest detailed assessment. These indicators only appear when a detailed assessment has been completed.

# **CREATING CONTACTS**

Now that you have reviewed the unit history, you can proceed directly to adding your own assessment for this unit based on your last contact with the unit.

$\wedge$	Organization Navigator		SELECT ORG LEVEL
	Unit Summary	Contact Summary	2019 🗸
	Troop 3246 BPOE #2427 Elks	Completed (2) In Progres	s (1) Scheduled (1)
Crow River 02	Last Contact: 02/21/2019	4 Detailed Assessment	Feb 21, 2019
mmissioner Tools	Contact made by: Current Commissioner(s):	4 Detailed Assessment	Feb 21, 2019
Organization Dashboard	Charles William Smith - 130593583 Last Contact Score:      4	-	
Contacts			
Profile	Health Indicators		
Reports	Date Last Detailed Contact: 02/21/2019		
Help Guide	Finance and Budget: 5	- 1	
	Membership: 3.5		Ţ
	Program: 5 Leadership And Governance: 2.5	-	
	Concerning with operation. 2.5		
		Add New	/ Contact

Figure 6

Click on the Add New Contact button to add your contact. The add new contact window will appear.

٨	Organiza	tion Navigator			_	SELECT ORG LET	VEL
	Unit S			×		2019 🗸	
	1				rogress (1)	Scheduled (1)	
Crow River 02	Last C Conta	TROOP	3246 BPOE #2427 ELKS		sment		
	Currer	* Type of Contact:	Unit Meeting		sment		
Organization Dashboard Contacts	Last C	Commissioner:	Russell Blane Bass				
Roundtable		* Date of Contact:	Date Of Contact	ë			
Profile	Healt						
Reports	Date L Financ	* Unit Health:	Unit health unchanged	~			
Help Guide	Memb	Detailed Assessment	Simple Asso	essment			
	Program: 5		_	_			
	Leadership A	And Governance: 2.5					
					Add New Contact		

Figure 7

Here you have several bits of information that are required to be entered in order to proceed. The first is to indicate the type of contact you have made.

٨	Organizat	tion Navigator				SELECT ORG LEVE	EL.
	Unit S			×		2019 🗸	
	A.				rogress (1)	Scheduled (1)	
Crow River 02	Last C Conta	TRO	OP 3246 BPOE #2427 ELKS		sment	Feb 21, 2019	
	Currer				sment	Feb 21, 2019	
		* Type of Contact:	Unit Meeting A				
Contration (Contraction)	Last C		Unit Meeting				
Contacts		* Commissioner:	Unit Committee/Leader Meeting				
Roundtable		* Date of Contact :	Unit Key 3 Meeting Unit Activity				
Profile	Healt		Unit Parent Meeting				
Reports		* Unit Health:	Other				
	Date L		·				
Help Guide	Financ						
	Memb	Detailed Assessmen	Simple Assessment				
	Program: 5						
	Program. 5						
	Leadership A	nd Governance: 2.5					
						_	
						t	

Figure 8

The pull-down bar has several choices; Unit Meeting, Unit Committee/Leader Meeting, Unit Key 3 Meeting, Unit Activity, Unit Parent Meeting, and Other. When you select Other, a text box appears where you can indicate the other methods of contact you have used such as email, text message, or phone call.

The next field requiring completion is who is making the contact. The default selection is you, the commissioner who has signed into Commissioner Tools. However, you may be entering this contact on behalf of a fellow commissioner or professional. You can indicate for whom you are entering the contact through the commissioner pulldown bar. As was mentioned, your name is the default selection, or you can choose "On Behalf of".

٨	Organizat	tion Navigator				SELECT ORG LE	VEL
	Unit S			×		2019 、	
	A				rogress (1)	Scheduled (1)	
Crow River 02	Last C Conta	TROOP	3246 BPOE #2427 ELKS		sment		:
Commissioner Tools	Currer				sment		
Organization Dashboard	• Last C	* Type of Contact:	Unit Meeting V				
Contacts	Last C	* Commissioner:	Russell Blane Bass 🔗				
Roundtable		* Date of Contact :	Russell Blane Bass On behalf of				
Profile	Healt	* Unit Health:					
Reports	Date L	* Unit Health:	Unit health unchanged V				
Help Guide	Financ						
	Memb	Detailed Assessment	Simple Assessment				
	Program: 5						
	Leadershin A	nd Governance: 2.5					
				A	dd New Contac	t	

Figure 9

When you select "On Behalf Of" another dropdown list appears which lists all of the commissioners registered in your district with 'professional' provided as the last choice. Select the name of the commissioner for whom you are making the entry and then select the date of the contact.

٨	Organiza	tion Navigator									(	SELECT OR	GLE	VEL	
	Unit §				0					×		20	19 、		
K Y	A.			S	2						rogress (1)	Scheduled			
Crow River 02	Last C Conta	TROOP	3246 BP	OE #	2427	ELKS	5				sment				
Commissioner Toole	Currer										sment				
Organization Dashboard		* Type of Contact:	Unit N	teetin	g						sment				
Contacts	Last C		On be												
Contacts		* Commissioner:	Un be	nair o											
Roundtable			Mark	Willia	n And	res - 1	0797	8641							
Profile	Healt														
Reports		* Date of Contact:	Date (												
	Date L Financ		« ‹		М	ar 20	19		> >>>						
Help Guide		* Unit Health:	Su	Мо	Ти	We	Th	Fr	Sa						
	Memb		2.4				28	1	2						
		Detailed Assessment	3	4	5	6	7	8	9						
	Progra	Detailed Assessment	10	11	12	13	14	15	16						
	Leade		17	18	19	20	21	22	23						
			24	25	26	27	28	29	30						
			31				4	5	0		dd New Contac				
						Today	1			4	ou new Contac	No. of Concession, Name			

Figure 10

A calendar dropdown appears so that you can select the date that the contact occurred, **NOT THE DATE OF THE ENTRY.** 

The arrows at the top of the calendar will allow you to go back **60 days**. Or you can schedule a contact into the future. We'll talk more about that as we discuss Detailed Assessments and collaborative contacts.

The final point on this screen is the unit health status. The pulldown bar provides for three choices: Unit Health Unchanged, Unit Health Improved, and Unit Health Declined. Select the appropriate choice and then select the type of assessment you wish to enter.

There are two primary types of assessments that a commissioner can enter; a Simple Assessment or a Detailed Assessment. When scheduling a future Detailed Assessment contact the commissioner can optionally invite the unit's Key 3 members to participate in the evaluation of their unit to help the commissioner create what will become a "collaborative Detailed Assessment." Whether collaborative or not, only by creating a Detailed Assessment will the commissioner be able to create a Unit Service Plan (discussed further below).

There is also an option when documenting a Detailed Assessment whereby the commissioner or professional has chosen not to score each sub-element in an evaluation area. When choosing not to evaluate each sub-element in a Detailed Assessment, the commissioner or professional is consciously deciding to create an Intermediate Assessment which is a subset of the Detailed Assessment.

٨	Organiza		SELECT ORG LEVEL						
	Unit S				×		2019	~	
	A.					rogress (1)	Scheduled (1)		
Crow River 02	Last C Conta	TROOP	3246 BPOE #2427 ELKS			sment		:	
Commissioner Tools	Currer					sment		:	
Organization Dashboard		* Type of Contact:	Unit Meeting						
Contacts	Last C	* Commissioner:	On behalf of	$\sim$					
Roundtable			Mark William Andres - 107978641	$\sim$					
Profile	Healt								
Reports		* Date of Contact :	03/19/2019	曲					
Help Guide	Date L Financ	* Unit Health:	Unit health unchanged	~					
	Memb		Unit health unchanged						
			Unit health improved						
	Progra	Detailed Assessment	Unit health declined						
	Leade.	_							
					ļ	dd New Contac	t		

Figure 11

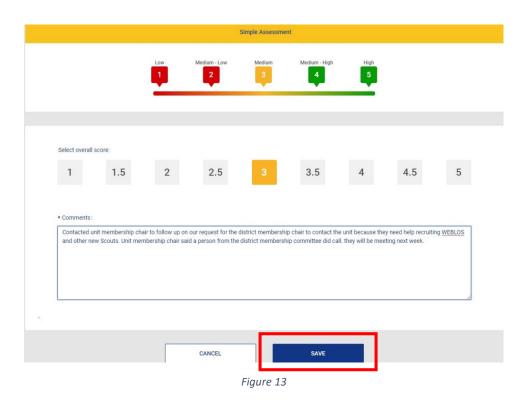
#### SIMPLE ASSESSMENT

Here we chose a Simple Assessment.

rganization Naviga	tor							SELECT ORG LEV
				Simple Assessme	nt			
		Low	Medium - Low	Medium 3	Medium - High	High 5		
Select overall se	core:							
1	1.5	2	2.5	3	3.5	4	4.5	5
* Comments :								
	nments here							
								le

Figure 12

At the top of the screen is the unit health scoring matrix. Hover your mouse over each number to get a brief definition of what that score means. Then, choose the score you feel most accurately reflects the present health of the unit as determined from your latest contact with the unit.



In the example above, (*fig 13*) you see that the score chosen was a three. This means that this is a typical unit but, there is room for improvement. The comments box must be completed (You can zoom in on the comments box to view a typical simple assessment comment). Remember, your comments should be *Actionable Information* about the unit so that the appropriate assistance can be provided. When you are satisfied with your comments and score, click on the SAVE button. Your simple assessment is now complete.

#### **DETAILED ASSESSMENT**

The next type of assessment that a unit commissioner can enter is a Detailed Assessment, from the type of contact screen, select Detailed Assessment.

Unit   Cow River 02   Last   Commissioner:   Unit Meeting   Organization Dashboard   Corracts   Roundtable   Profile   Heig Guide   Heig Guide   Date of Contact:   Unit Key's Meeting   Unit Health:   Unit Registing   Meeting   Unit Health:   Unit Health:   Date of Contact:   Date of Contact:   Date of Contact:   Unit Health:   Date of Contact:   Date of Contact:   Date of Contact:   Unit Health:   Date of Contact:   <	٨	Organizati	ion Navigator			_	SELECT ORG LEVEL
Crow River 02 Last c TROOP 3246 BPOE #2427 ELKS ment #4621 2019 ment   Conta   Organization Dashboad   Contacts   Roundtable   Profile   Heat   Unit Heatth:   Other   Date I   Profile   Heat   Unit Heatth:   Other   Date I   Profile   Heat   Profile   Heat   Date I   Profile   Heat   Profile   Profile   Heat   Profile   Heat   Profile   Heat   Profile   Profile   Heat   Profile   Heat </th <th></th> <th>Unit S</th> <th></th> <th></th> <th>×</th> <th></th> <th></th>		Unit S			×		
Conta   Organization Dashboard   Contacts   Roundtable   Profile   Healt   Profile   Healt   Unit Health:   Other   Detailed Assessment   Simple Assessment						rogress (1)	Scheduled (1)
Contained Contained   Organization Dashboard • Type of Contact:   Unit Meeting • Commissioner:   Unit Meeting Unit Committee/Leader Meeting   Unit Key 3 Meeting Unit Activity   Unit Parent Meeting Unit Parent Meeting	Crow River 02	Last C	TROOP	3246 BPOF #2427 FLKS		sment	Feb 21, 2019
Organization Dashboard          • Type of Contact:         Unit Meeting         • Commissioner:         Unit Meeting         Unit Committee/Leader Meeting         Unit Key 3 Meeting         Unit Key 3 Meeting         Unit Activity         Unit Parent Meeting         Unit Parent Meeting		Conta					
Organization Dashboard • Type of Contact: Unit Meeting   Contacts • Commissioner: Unit Meeting   Roundtable • Date of Contact: Unit Key 3 Meeting   Profile Heat Unit Activity   Profile Heat Unit Parent Meeting   • Unit Health: Other   Help Guide Finant Detailed Assessment Forgram: 5		Currer				sment	Feb 21 2019
Contacts          • Commissioner::         Unit Committee/Leader Meeting         Unit Key 3 Meeting         Unit Key 3 Meeting         Unit Key 3 Meeting         Unit Activity         Unit Parent Meeting         Unit Parent Meeting		•	* Type of Contact:	Unit Meeting A			
Roundtable     Unit Key 3 Meeting       Profile     Healt       Reports     Date L       Help Guide     Finance       Detailed Assessment     Simple Assessment		Last C		Unit Meeting			
Reports     Date of Contact:     Unit Activity       Profile     Healt     Unit Health:       Profile     Date I       Help Guide     Finant       Detailed Assessment     Simple Assessment	Contacts		* Commissioner:	Unit Committee/Leader Meeting			
Profile Healt Unit Activity Reports Date L Help Guide Detailed Assessment Simple Assessment	Roundtable			Unit Key 3 Meeting			
Reports Help Guide Help Guide Detailed Assessment Detailed Assessment Program: 5			* Date of Contact :	Unit Activity			
Reports Date L Financ Memb Detailed Assessment Detailed Assessment Program: 5	Profile	Healt		Unit Parent Meeting			
Help Guide Finant Memb Program: 5	Reports		* Unit Health:	Other			
Detailed Assessment     Simple Assessment       Program: 5     ••••••••••••••••••••••••••••••••••••							
Program: 5	Help Guide						
		Memb	Detailed Assessment	Simple Assessment			
							×
Leadership And Governance: 2.5		Program: 5					
		Leadership Ar	nd Governance: 2.5				
Add New Contact					A	dd New Contac	L L L L L L L L L L L L L L L L L L L

Figure 14

Once you have selected the Detailed Assessment button, the Detailed Assessment window appears. There is a good bit of information for the commissioner on this page.

Troop 3246 BPOE #2427 Elks	Detailed Assessment	
	Low Medium - Low Medium Medium - High High	
Last Detailed Assessment	Training and Membership	
Planning and Budget 5 Membership 3.5 Program 5	Membership Numbers:	
Volunteer Leadership 2.5	Training Data: Youth Protection Training (YPT): Leaders:	
	0 13 0 9 4 Current Expired NeverTaken Not Trained Trained	
Print Blank Assessments		
Blank Unit Assessment Form     Commissioner Assessment Form	See List of Leaders Needing YPT See List of Not Trained Leaders	
Form With Unit Data	Planning and Budget	>



Again, you see the scoring matrix at the top of the page. In the upper left corner, you can view the evaluation area scores from the last Detailed Assessment that was completed for the unit. (This box will not appear if a Detailed Assessment has never been completed for this unit.) This box allows the commissioner the option of prepopulating the Detailed Assessment with the same scores from the last Detailed Assessment, which can be a handy reference when completing the current assessment entries.

Troop 3246 BPOE #2427 Elks		Detailed Assessm	nent			
	Low Medium - Low 2	Medium 3	Medium - High	High 5		
Last Detailed Assessment	Training and Mem	bership				
Planning and Budget 5 Membership 3.5 Program 5	Membership Num	pers: egistered in Unit	2	24 Youth Registered in Un	it	
Volunteer Leadership 2.5	Training Data: Youth Protection T	raining (YPT):		Leaders:		
	0	13	0	9	4	
Print Blank Assessments	Current	Expired	NeverTaken	Not Trained	Trained	
<ul> <li>Blank Unit Assessment Form</li> <li>Commissioner Assessment Form</li> </ul>	See List of Lead	ers Needing YPT		See List of Not Trained	I Leaders	
Form With Unit Data	Planning and Budge	t				>



This box allows you to print blank assessment forms. The Unit Assessment Form is for the commissioner to give to a unit and the Commissioner Assessment Form is meant for the commissioner to complete. You can also print a copy that contains a summary of the unit information that is provided in the training and membership section.

Troop 3246 BPOE #2427 Elks		Detailed Asses	sment		
	Low Medium - Lo	w Medium	Medium - High	High 5	
Last Detailed Assessment	Training and Mer	nbership			
Planning and Budget 🛛 🔵 5	Membership Nur	nbers:			
Membership 🥚 3.5	13 Adult	Registered in Unit		24 Youth Registered in Uni	t
Program 🔵 5	×				
/olunteer Leadership 🥚 2.5	Training Data:				
REPEAT SCORE	Youth Protection			Leaders:	
	0	13	0	9	4
Print Blank Assessments	Current	Expired	NeverTaken	Not Trained	Trained
) Blank Unit Assessment Form	See List of Lea	aders Needing YPT		See List of Not Trained	Leaders
Commissioner Assessment Form					
) Form With Unit Data	Planning and Budg	net			



The training and membership sections provide information regarding the number of adults and youth registered with the unit as well as the training status of the adult leaders both for youth protection training and their position specific training. The list of Leaders Needing YPT and Not Trained Leaders provides the name, position and BSA member ID number so that you can use the my.Scouting Training Manager tool to verify their training and see what training the member may be lacking. Remember, position training status counts positions, not persons.

Print Blank Assessments	Training and Membership	
Blank Unit Assessment Form     Commissioner Assessment Form	Expired YPT	×
Form With Unit Data	Expired:	egistered in Unit
	Sean day database	
	Kevin 🚛 👘 👘	5 1 rained Trained
	Robert Kenne Kenne Stationer	t of Not Trained Leaders
	Kristina 🕁 💷 reteases	t of Not Trained Leaders
	Gregory	>
		>
	Program	>



Print Blank Assessments	Training and Membership				
O Blank Unit Assessment Form	· · · ·				
O Commissioner Assessment Form	Leaders Not Trained				
O Form With Unit Data	Leaders Not Trained Roster:		gistered in Unit		
	Sean Barry Accessor Cubmaster				
	Brian Pack Trainer	e	5	1	
	Kevin Committee Member		ained	Trained	
	Robert de la secondata Den Leader		of Not Trained Leader	S	
	Kristina Musican te regener. Den Leader				>
	Trevor Committee Chairman				>
					>

Figure 19

As you scroll down the page, you see the various evaluation areas of the assessment that will be scored. These categories are aligned one for one with the unit's Journey to Excellence criteria.

Volunteer Leadership 🥚 2.5	Training Data: Youth Protection	Training (YPT):		Leaders:	
REPEAT SCORE	0	13	0	9	4
Print Blank Assessments	Current	Expired	NeverTaken	Not Trained	Trained
O Blank Unit Assessment Form	See List of Lea	ders Needing YP1	г	See List of Not Traine	d Leaders
O Commissioner Assessment Form					
O Form With Unit Data	Planning and Budg	et			• 5 >
PRINT					
	Membership				● 3.5 >
	Program				• 5 >
	Volunteer Leaders	hip			● 2.5 >
	Unit Priorities and	Details			Completed >
	Create Unit Ser	vice Plan			>

Figure 20

The first category in the assessment is the planning and budget category. Enter the score that you think is appropriate for the statement in this category. A score and an entry in the comments section is required.

Proceed through the remaining categories as you did for Planning and Budget. You will notice that the remaining categories have several sub-elements that should be answered.

Print Blank Assessments		
O Blank Unit Assessment Form	See List of Leaders Needing YPT	See List of Not Trained Leaders
O Commissioner Assessment Form		
O Form With Unit Data	Planning and Budget	<mark>●</mark> 3 ∨
PRINT	CHANGE TO INTERMEDIATE ASSESSMENT	
	Budget:	
	<ul> <li>Have a program plan and budget that is regularly re- fundraising.</li> </ul>	viewed by the committee, and it follows BSA policies relating to
		_
	1 2	3 4 5
	* Commissioner Comments:	
	This unit prepares an annual budget for it's pro at their committee meetings.	gram. The unit committee reviews expenditures monthly
		le

Figure 21

Retention: • Retains a significant pr 1 Growing Scouting: • Unit increasing in mem 1 Webelos To Scout Transiti • Troop has an effective 1	2 bership or maintain 2 on:	3 ning a larger than a	4	unit type.
Growing Scouting: • Unit increasing in mem Unit increasing in mem 4 Webelos To Scout Transiti	2 bership or maintain 2 on:	3 ning a larger than a	werage size for its	unit type.
* Unit increasing in mem	bership or maintair 2 on:	ning a larger than a	werage size for its	unit type.
* Unit increasing in mem	bership or maintair 2 on:	ning a larger than a	werage size for its	unit type.
* Unit increasing in mem	2 on:	3	4	
* Unit increasing in mem	2 on:	3	4	
* Unit increasing in mem	2 on:	3	4	
1 Webelos To Scout Transiti	2 on:	3	4	
	on:			5
	on:			5
	on:			0
		elos Scouts into th		
		elos Scouts into th		
* Troop has an effective	plan to recruit Web	elos Scouts into th	1.0701	
1			ie Troop	
1				
	2	3	4	5
	2	3	4	5
* Commissioner Commer	te-			
Type your comme				



To change the assessment to an intermediate Detailed Assessment, click the Change to Intermediate Assessment choice. This collapses all sub-element evaluation areas and provides just one score to enter for the entire category, and your comments as the unit commissioner or professional.

ANGE TO	DETAILED ASS	ESSMENT						
select Ove	rall score:							
1	1.5	2	2.5	3	3.5	4	4.5	5
	oner Comments e your comment							



#### DETAILED ASSESSMENT – COLLABORATIVE/UNIT SELF ASSESSMENT

Whenever possible, it is preferred that a Detailed Assessment be conducted in collaboration with the Unit Key 3. To do this, select a date into the future to meet with the key 3 to schedule a meeting.

PAC	K 3312 VFW POST 1	901
* Type of Contact:	Unit Meeting	
* Commissioner:	John T Capecchi	
* Date of Contact:	04/10/2019	3
Please select the person you out prior to your visit Gregory Youmans	Chartered Organization Rep.	nit assessment form to fil testmine08@gmail.com
Trevor Ryks	Committee Chairman	legacyapp002@gmail.co m
Sean Berg	Cubmaster	legacyapp001@gmail.co m
Send Copy To :	DCorADC@email	.com

Figure 24

The email information of the Unit Key 3 is now displayed for you. Check the box of each person you wish to receive an email notification of the meeting and invitation to participate in a self-assessment. It is a 'Best Practice' to communicate with those who will be receiving this email in advance. As the person scheduling the assessment, you will automatically receive a blind copy of the email that the system will send to the Key 3. You can ask the system to send a copy to someone else. Sometimes it is helpful to send a copy of your intent to conduct a detailed collaborative assessment to your Assistant District Commissioner or District Commissioner.

The email that unit Key 3 members receive about the collaborative assessment, will have a link to a copy of the unit assessment form. It is important to note that ONLY those individuals who have been 'checked' to receive the blank assessment form will receive the email invitation containing the link necessary for their evaluation. Each individual's evaluation comments are recorded separately.

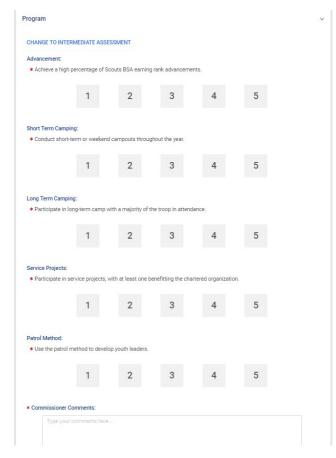
A sample of the e-mail the Unit Key 3 would receive is found here:

https://filestore.scouting.org/filestore/idg/Commissioner\_Email.pdf

As the unit Key 3 members complete their unit assessment, the system will compile those comments. The unit commissioner can view a concatenation of all the comments in advance of the meeting by looking at the various evaluation elements within Commissioner Tools

		FOOMENT				
CHANGE TO INT	ERMEDIATE ASS	ESSMENT				
Budget:						
* Have a progra fundraising.	am plan and budg	et that is regularly	reviewed by the c	committee, and it	follows BSA policies	s relating to
	1	2	3	4	5	
Copy T 2 Need	o Is improvement: v					
2 Need	o Is improvement: v stay on budget - s	vatch carefully spending too much	٦.			
Copy T 2 Need Need to * Commissioner	o Is improvement: v stay on budget - s	spending too much	ı.			

This view allows for the commissioner to add his/her comments to the assessment which can help facilitate the discussion during the collaborative assessment meeting. This is a new feature of Commissioner Tools. It will not be available for assessments that have already occurred, only those that are created and scheduled after the release date of the updated tool.





Each of the assessment categories have topics and statements that go into greater detail for each category consistent with the unit's Journey to Excellence scorecard (fig27). When you send the collaborative Detailed Assessment email to the Unit Key 3, they will see these topics and statements for each element of the assessment so that they can evaluate them from their own perspective. As the date of the collaborative Detailed Assessment meeting approaches, you as the unit commissioner or professional, can go back into the Unit Contact Summary page and view the comments made by the Unit Key 3 (fig25).

^	Organization Navigator		SELECT ORG LEVEL
	Unit Summary	Contact Summary	2019 🗸
	Troop 3246 BPOE #2427 Elks	Completed (5) In Progress (1)	Scheduled (1)
Crow River 02	Last Contact: 03/20/2019	✓ Detailed Assessment	
	Contact made by: John Capecchi		Edit Contact
Commissioner Tools	Current Commissioner(s):	Î	Delete
	Charles William Smith - 130593583	•	Print Assessment
Organization Dashboard	Last Contact Score: 😑 3		
Contacts			
Roundtable	Health Indicators		
Profile	Date Last Detailed Contact: 03/20/2019		
Reports	Finance and Budget: 3		
Help Guide	Membership: 3		
	Program: 3	Add New Conta	act
	Leadership And Governance: 3		



To view the comments made on an upcoming (collaborative) Detailed Assessment, click on the Scheduled tab to view all scheduled assessments. This will show you the Detailed Assessment you are working on with the unit. Clicking on the 3 dots to the right of the date shows a pulldown with 3 choices, Edit Contact, Delete, and Print Assessment. Select Edit or Print Assessment to VIEW whether the Unit Key 3 have responded to the collaborative Detailed Assessment email. If they have, you can optionally print the assessment. As a Best Practice, you should make enough copies for each person that will attend the collaborative Detailed Assessment meeting.

The final required section of the Detailed Assessment is reviewing any priority needs that the unit may have.

Init Priorities and Details	• 0	Completed 🗸
* Unit striving to achieve the following JTE Award	Bronze	^
If Key Leader(s) changing within the next 4 months	Gold Silver	
Help Needed In:	Bronze No Ranking	
Need to discuss unit with ADC/DC (optional)	No	×
Have a possible UC candidate in this unit?	UC Candidate Name	
	Home V 🖉 UC Candidate Pho	ne
	UC Candidate Email	
Youth Attendance: (only for meetings where youth would be in	Steady	$\sim$
attendance)		
Figure 28	3	

Before you open this section, the dot in the top right corner will be red. At a minimum, to complete this section and turn the dot in the top right corner green, you will need to select from the pulldown bar to indicate the unit's JTE goal. Select from bronze, silver, or gold. If the unit has decided not to seek a JTE goal, then select No Ranking.

Scrolling down the page, you see the Key Leader(s) line.

Unit Priorities and Details	Completed
★ Unit striving to achieve the following JTE Award	Bronze v
If Key Leader(s) changing within the next 4 months	Please make a selection
Help Needed In:	No Succession Plan Succession Plan in Place
Need to discuss unit with ADC/DC (optional)	Please make a selection V
Have a possible UC candidate in this unit?	UC Candidate Name
	Home 🗸 🥜 UC Candidate Phone



If the unit is planning a change in leadership over the next four months, indicate whether or not the unit has a succession plan in place. Also indicate whether or not there are any issues with

the unit that you as the commissioner may need help with from your ADC or DC. If there are none, you can leave this blank. As a unit commissioner or professional, hopefully you have gotten to know several of the adult leaders in the unit that you think might make a good unit commissioner. Please add their name and phone number to the report so that the district commissioner can contact them. The final section of this page before getting into the Unit Service Plan is the Priority Need(s) section.

Priority Need(s):	
Issues with Key 3	
Unit not meeting	
Unit with no leader	
Unit with no committee	
Unit with no new members	
Unit conflict with Chartered Organization	
New unit leader lacks orientation or training	
Unit with weak leadership	



These are critical areas that can indicate danger to the unit if they are not addressed in a timely fashion. Make sure to indicate them if they exist.

Once the meeting with the unit's Key 3 is over, return to the contact and this time select edit the contact (fig 28) and enter the information from the assessment meeting.

### **UNIT SERVICE PLAN**

The next key task for a unit commissioner or professional after conducting a (collaborative) Detailed Assessment is to build a Unit Service Plan so that there is a plan of action to aid the unit achieving its improvement goals.

Category for this Service P	an	Volunteer Leadership	
		Planning and Budget	
<ul> <li>Target Completion Date</li> </ul>		Membership	
		Program	
Actual Completion Date		Volunteer Leadership	
Describe an action that will	help raise assessment o	f performance.(e.g. Develop a budget for the year)	
	help raise assessment o bing a succession plan.	f performance.(e.g. Develop a budget for the year)	
	•	f performance.(e.g. Develop a budget for the year)	
Assist unit in develo	oing a succession plan.	f performance.(e.g. Develop a budget for the year) action.(e.g. Jonathon Doe, Committee Member)	1
Assist unit in develo	oing a succession plan.		1

Figure 31

The category for the service plan is available in the pulldown window. You can see the same four Journey to Excellence categories that make up the Detailed Assessment. Select the category for which you are building a plan. If desired, it is possible to make several entries for the same category. Make sure that you enter a target date for completing or meeting the goal. There is a place for you to return to your service plan to record the date that the task was actually completed. In the first free text box, describe the task that is to be completed with as much detail as you can. The next text box allows you to record who is actually responsible for completing the task or making sure that the goal is achieved. This can be a unit person, a district person, the unit commissioner, or any combination thereof. If there is more than one category that requires a service plan, click the add another service plan button. Remember, a commissioner has **48 hours to edit and delete a completed contact** that may have been made in error. New in this updated Commissioner Tools, commissioners will be able to go back into the Unit Service Plan and add comments in the task area to update the status of a task, even beyond the 60 days up until the target completion date.

### **REPORTS**

Unit commissioners have the ability to generate reports from commissioner tools on the units they serve, export them to an excel spreadsheet and sort the information so that they can use the information to plan their efforts in serving their units. More detail on using the reports feature can be found in the Administrative Commissioner document. https://filestore.scouting.org/filestore/idg/Tools\_Phase\_1\_Training\_Administrative\_Commissioner.pdf

### Roundtable

Unit commissioners also have access to Roundtable information. To learn more about Roundtables and commissioner tools see the rouondtable commissioner document.

https://filestore.scouting.org/filestore/idg/Tools\_Phase\_1\_Training\_Round\_Table\_Commissioner.pdf

### **HELP OPTIONS**

Several steps are available to you when you need help in using Commissioner Tools. If you experience trouble logging in to the system, the first step you should take is to be sure you are using a supported and up to date browser.

. Make sure you clear the cache from your browser and retry logging in. If difficulty persists you can call Member Care at 972-580-2489 Monday-Friday, 7:00 AM -7:00 PM. Central time. You can also send an email to <a href="mailto:myscouting@scouting.org">myscouting@scouting.</a>