



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 re-platformed so that all my.Scouting Tools are built sharing the same application programming interfaces.

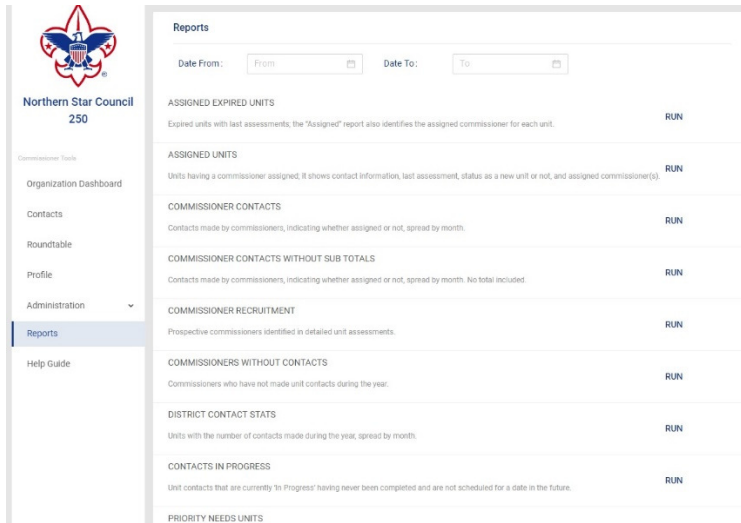


Figure 1

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)

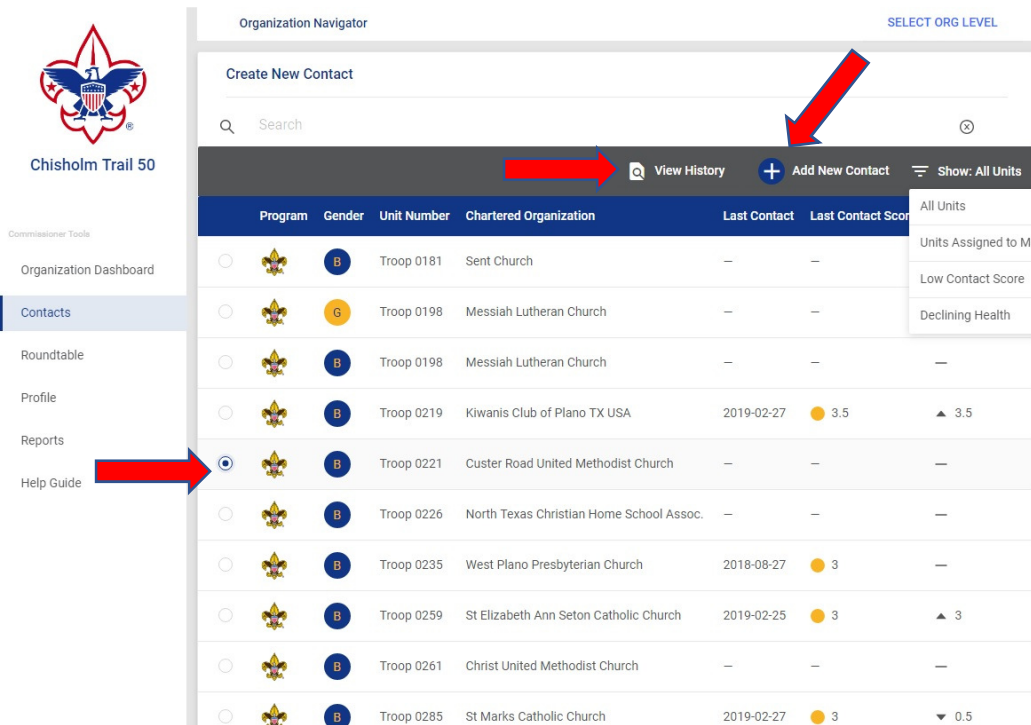


Figure 2

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.

UNIT CONTACT SUMMARY PAGE

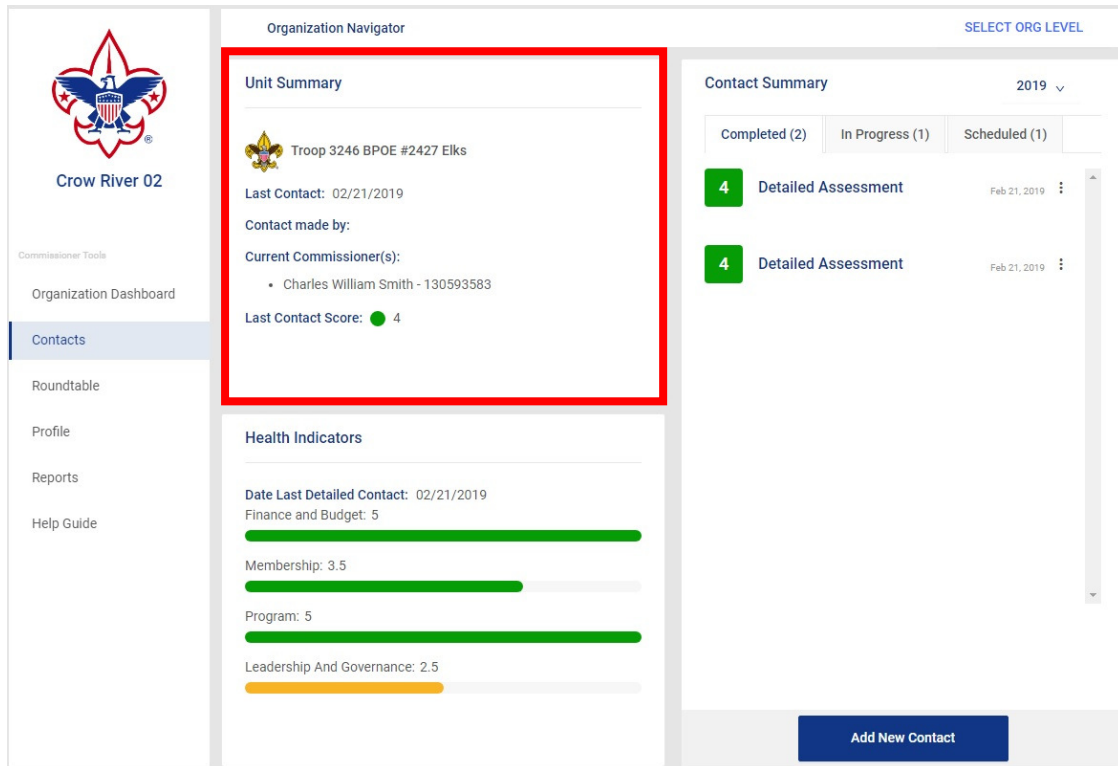


Figure 3

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.

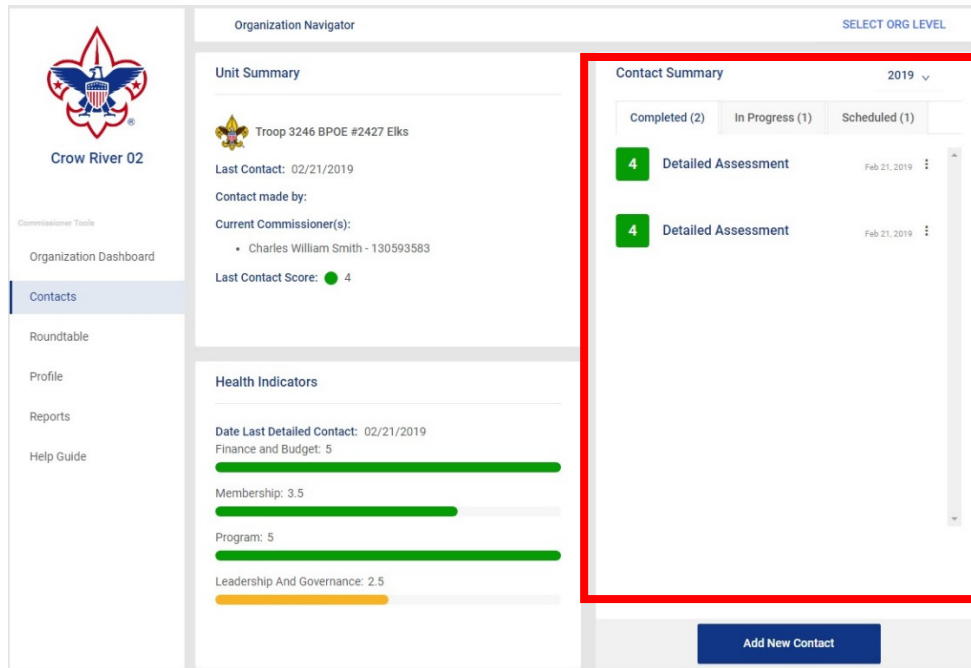


Figure 4

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.

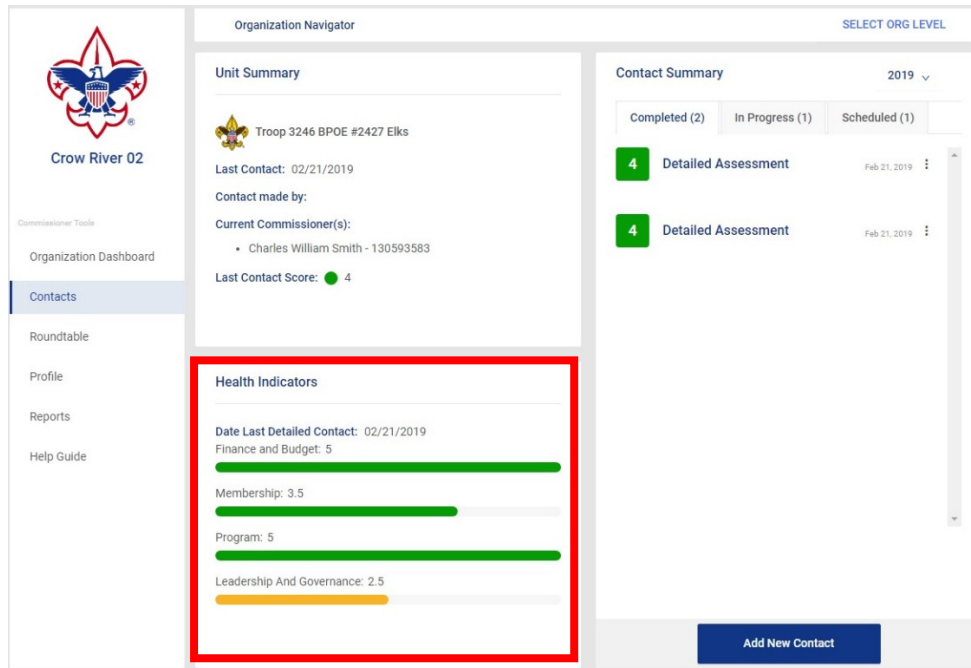


Figure 5

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.

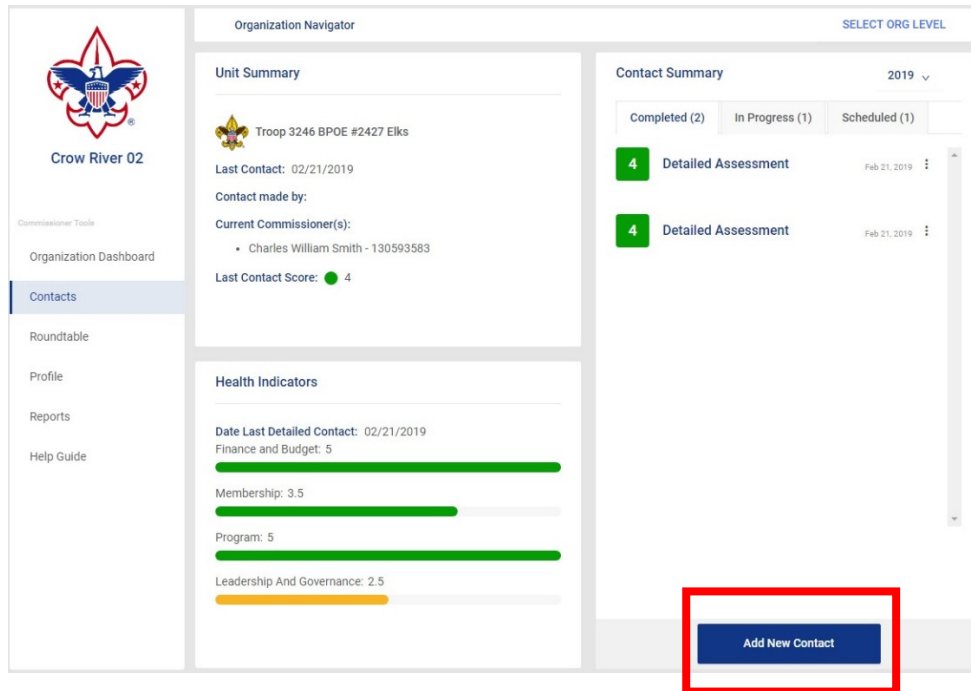


Figure 6

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

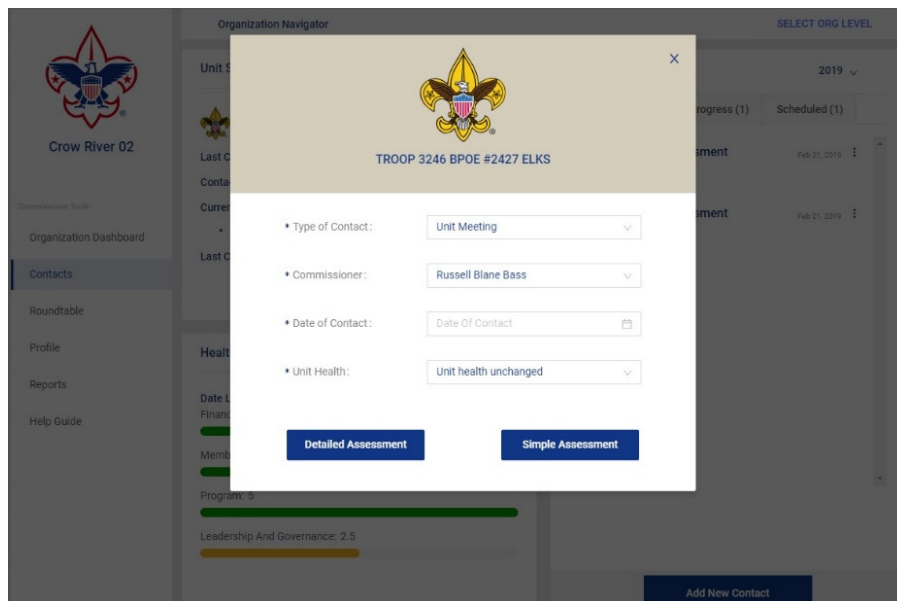


Figure 7

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.

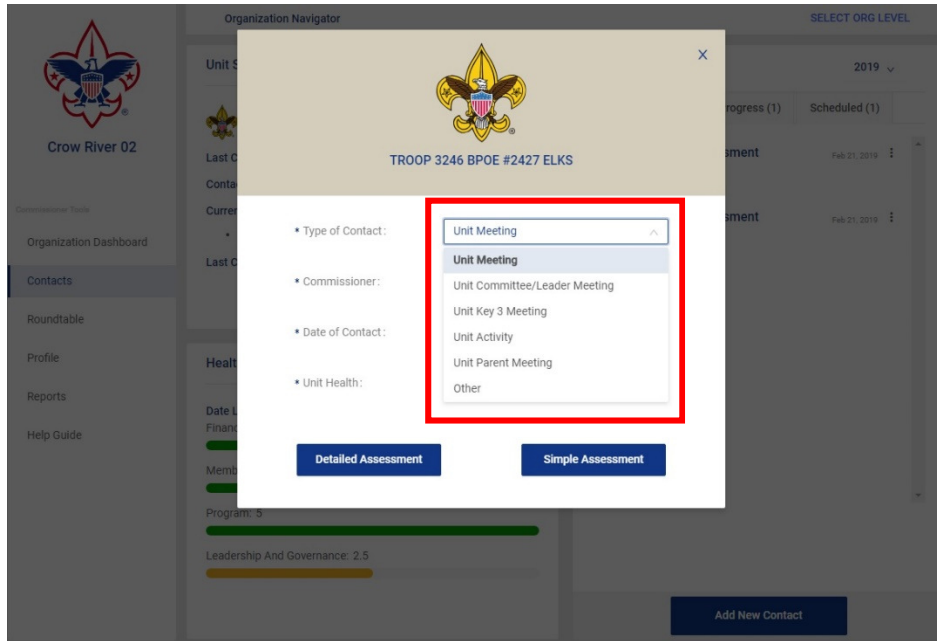


Figure 8

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”.

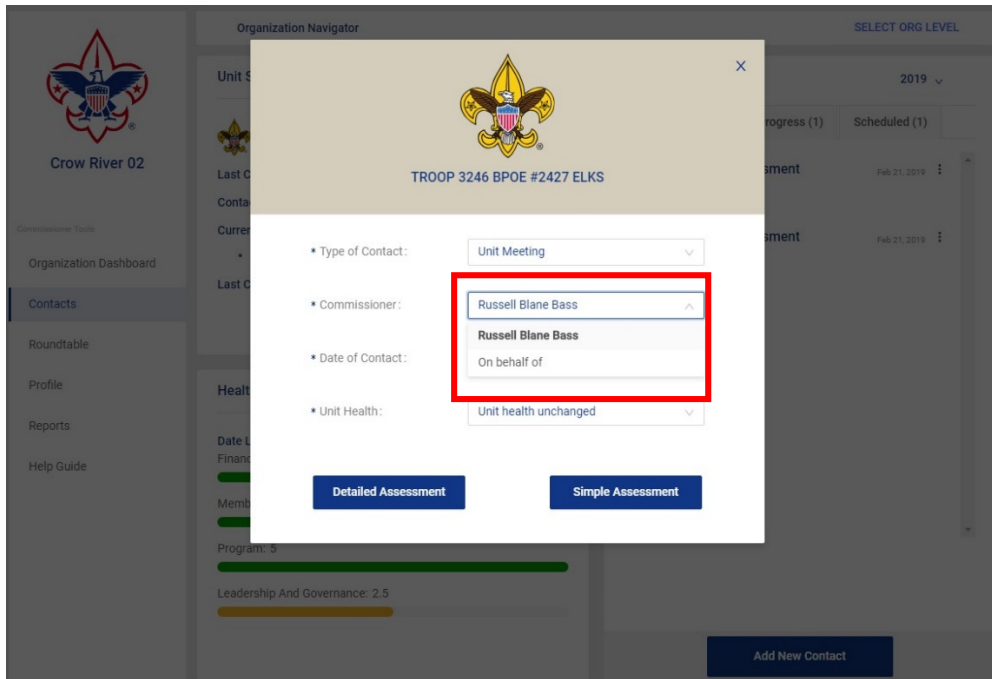


Figure 9

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.

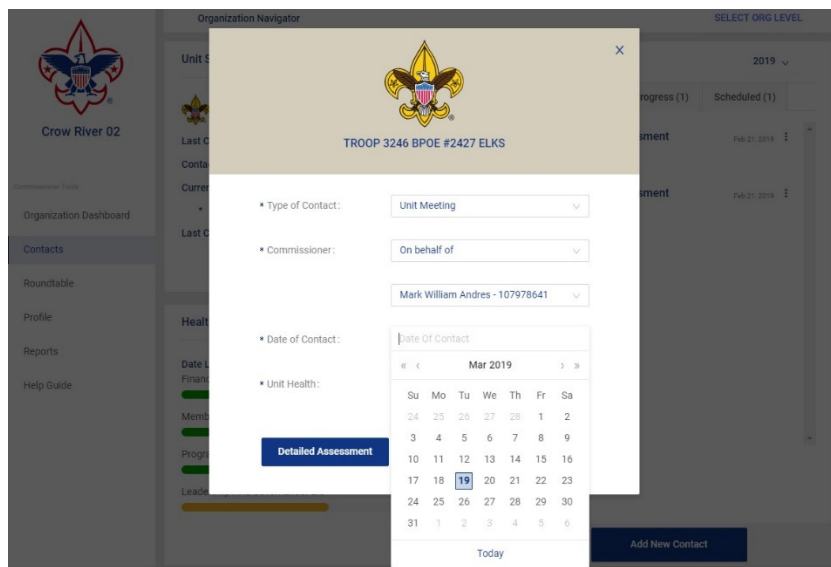


Figure 10

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.

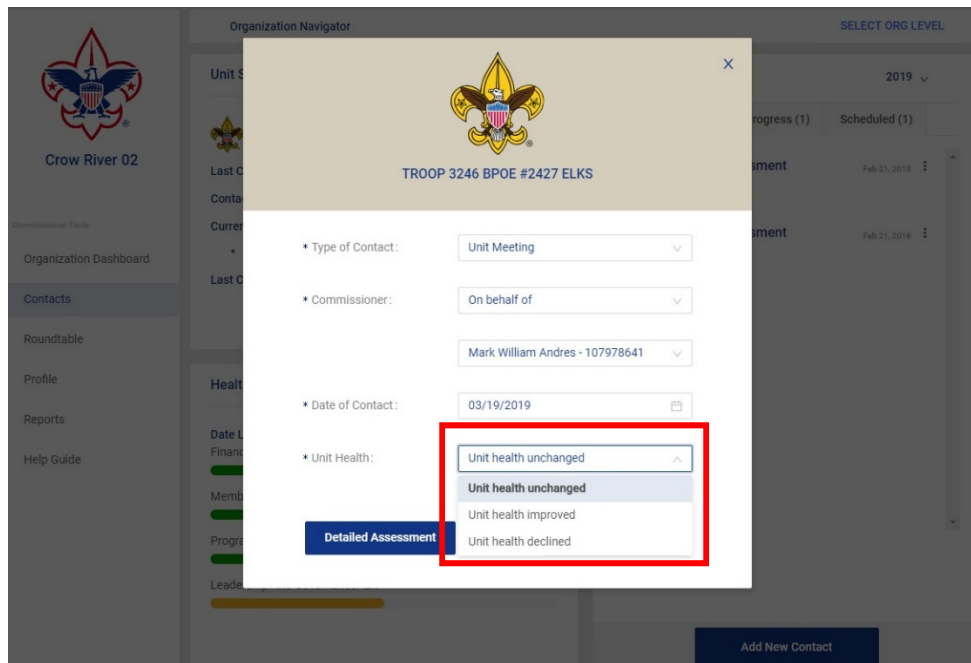


Figure 11

SIMPLE ASSESSMENT

Here we chose a Simple Assessment.

Organization Navigator SELECT ORG LEVEL

Simple Assessment

Low Medium - Low Medium Medium - High High

1 2 3 4 5

Select overall score:

1 1.5 2 2.5 3 3.5 4 4.5 5

* Comments:

Type your comments here...

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.

Figure 13

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.

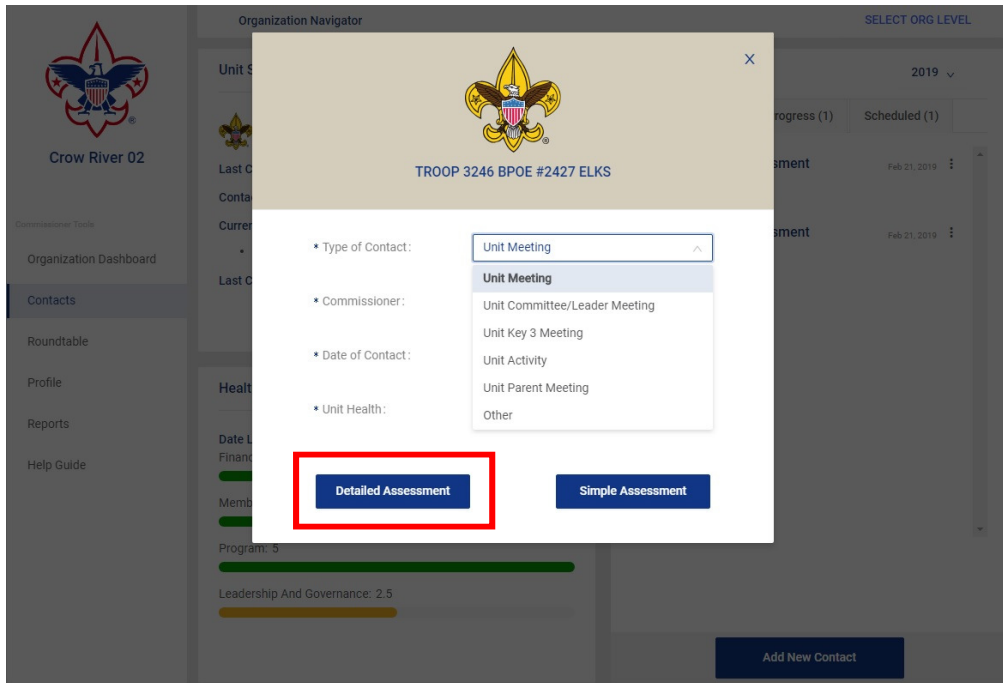


Figure 14

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.

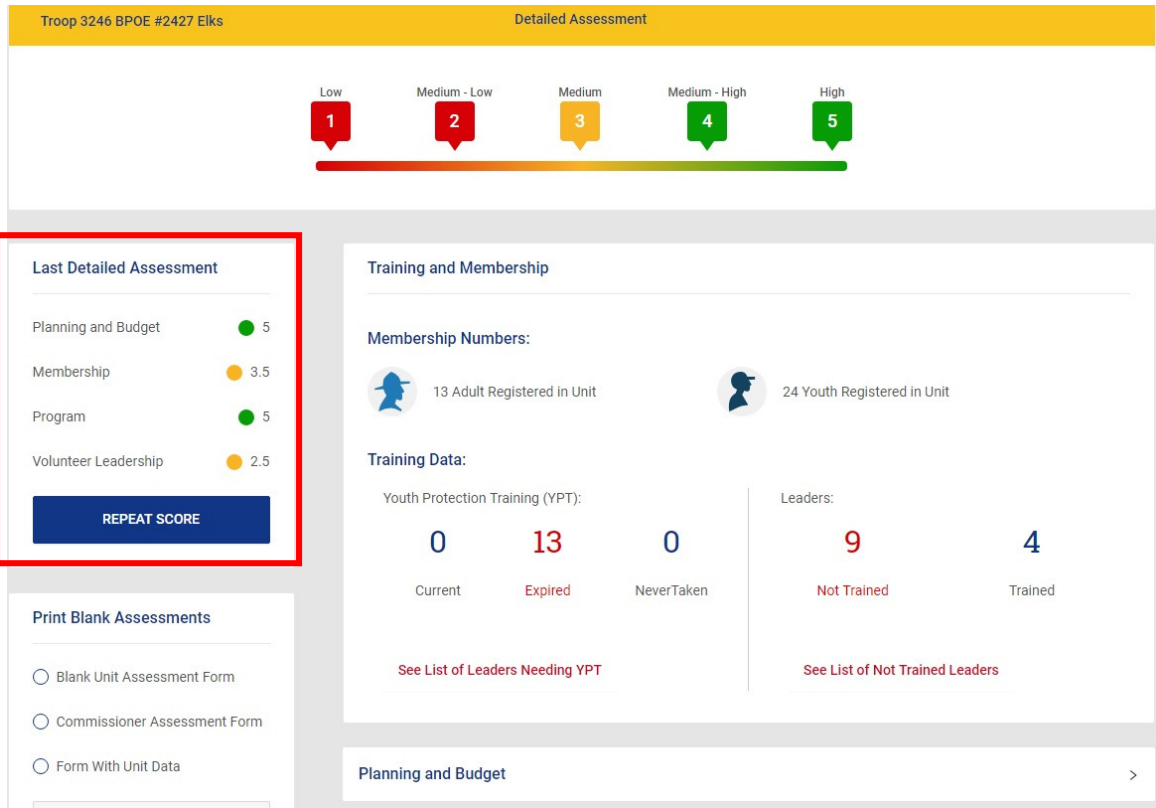


Figure 15

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.

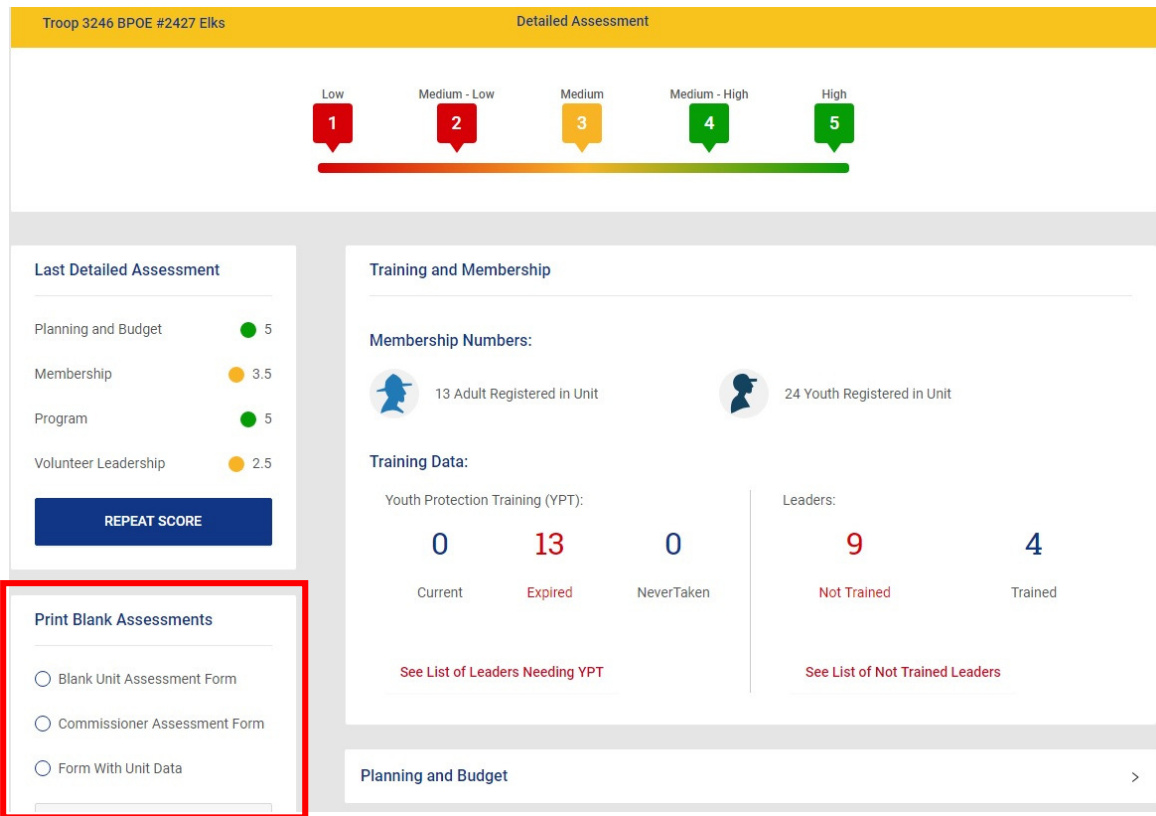


Figure 16

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.

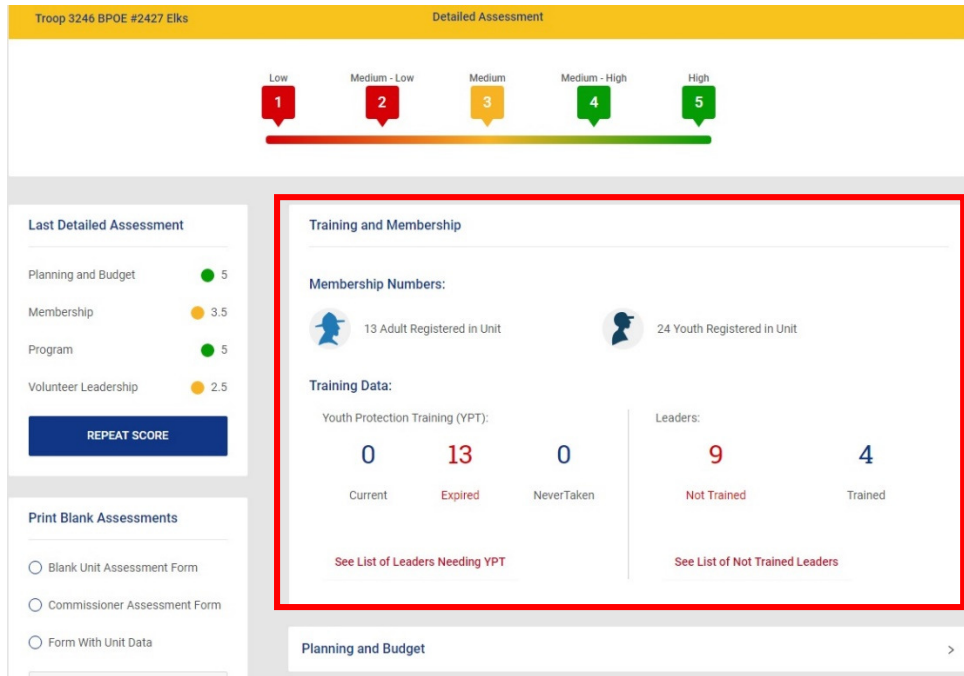


Figure 17

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.

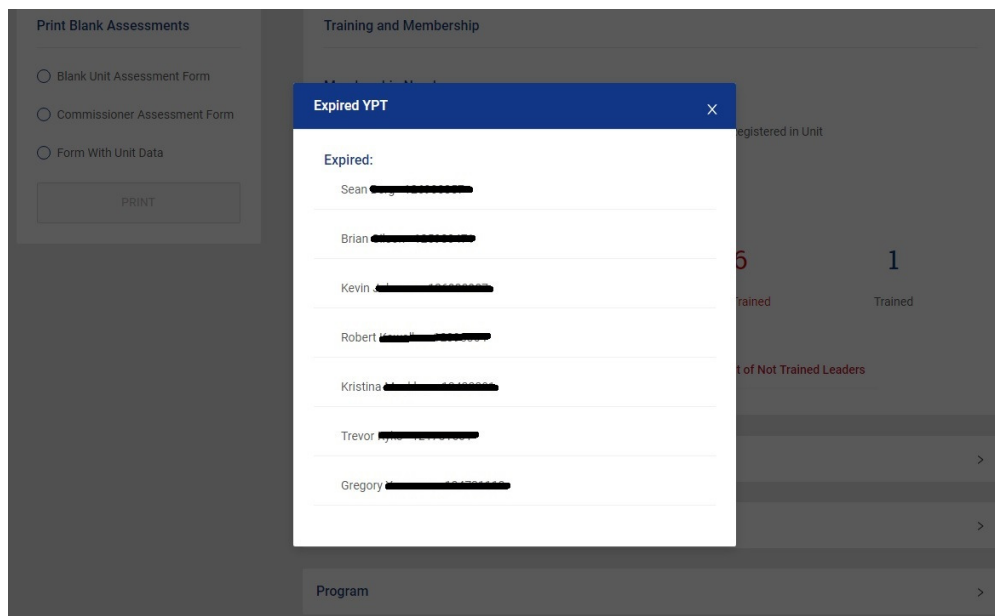


Figure 18

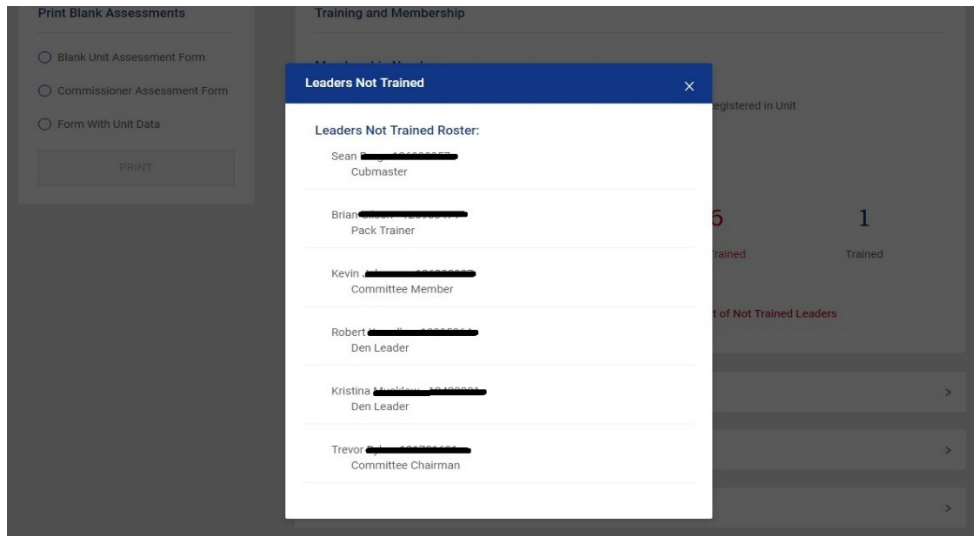


Figure 19

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.

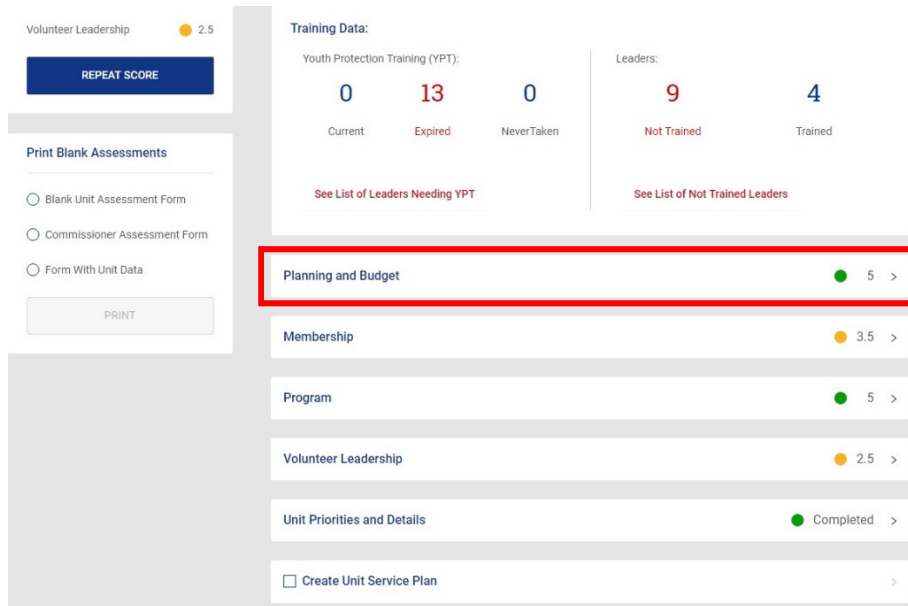


Figure 20

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

- Blank Unit Assessment Form
- Commissioner Assessment Form
- Form With Unit Data

PRINT

See List of Leaders Needing YPT

See List of Not Trained Leaders

Planning and Budget 3

CHANGE TO INTERMEDIATE ASSESSMENT

Budget:

- * Have a program plan and budget that is regularly reviewed by the committee, and it follows BSA policies relating to fundraising.

1 2 3 4 5

* Commissioner Comments:

This unit prepares an annual budget for it's program. The unit committee reviews expenditures monthly at their committee meetings.

Figure 21

CHANGE TO INTERMEDIATE ASSESSMENT

Retention:

- * Retains a significant percentage of youth members.

1 2 3 4 5

Growing Scouting:

- * Unit increasing in membership or maintaining a larger than average size for its unit type.

1 2 3 4 5

Webelos To Scout Transition:

- * Troop has an effective plan to recruit Webelos Scouts into the Troop

1 2 3 4 5

* Commissioner Comments:

Type your comments here...

Figure 22

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.

Membership

[CHANGE TO DETAILED ASSESSMENT](#)

* Select Overall score:

1 1.5 2 2.5 3 3.5 4 4.5 5

* Commissioner Comments:

Type your comments here...

Figure 23

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.

PACK 3312 VFW POST 1901

* Type of Contact: Unit Meeting

* Commissioner: John T Capecchi

* Date of Contact: 04/10/2019

Please select the person you wish to receive blank unit assessment form to fill out prior to your visit

<input type="checkbox"/>	Gregory Youmans	Chartered Organization Rep.	testmine08@gmail.com
<input type="checkbox"/>	Trevor Ryks	Committee Chairman	legacyapp002@gmail.com
<input type="checkbox"/>	Sean Berg	Cubmaster	legacyapp001@gmail.com

Send Copy To: DCorADC@email.com

Blind CC will be sent to the Commissioner making the entry.

* Unit Health: Unit health unchanged

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

The screenshot displays a web interface titled "Planning and Budget" with a dropdown arrow. Below the title is a link "CHANGE TO INTERMEDIATE ASSESSMENT". The "Budget:" section includes a red asterisk and the text: "* Have a program plan and budget that is regularly reviewed by the committee, and it follows BSA policies relating to fundraising." Below this text are five numbered buttons (1-5). A yellow highlighted box labeled "Unit Comments:" contains a red circle icon, the text "Copy To", and "2 Needs improvement: watch carefully". Below this is a text box with the comment "Need to stay on budget - spending too much." At the bottom, the "Commissioner Comments:" section has a text input field with the placeholder "Type your comments here..." and a small icon in the bottom right corner.

Figure 25

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.

Program

[CHANGE TO INTERMEDIATE ASSESSMENT](#)

Advancement:
* Achieve a high percentage of Scouts BSA earning rank advancements.

1 2 3 4 5

Short Term Camping:
* Conduct short-term or weekend campouts throughout the year.

1 2 3 4 5

Long Term Camping:
* Participate in long-term camp with a majority of the troop in attendance.

1 2 3 4 5

Service Projects:
* Participate in service projects, with at least one benefitting the chartered organization.

1 2 3 4 5

Patrol Method:
* Use the patrol method to develop youth leaders.

1 2 3 4 5

Commissioner Comments:
Type your comments here...

Figure 26

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).

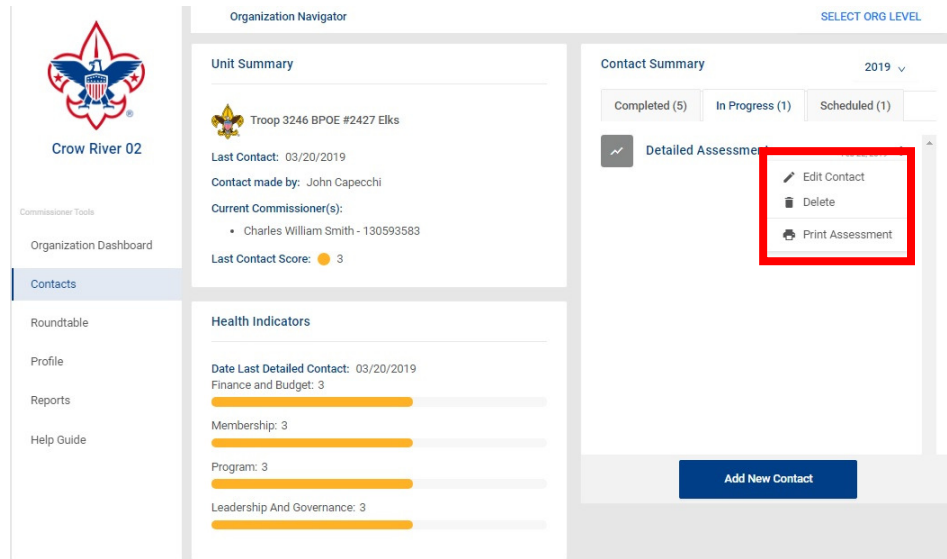


Figure 27

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.

Unit Priorities and Details ● Completed ▾

* Unit striving to achieve the following JTE Award

If Key Leader(s) changing within the next 4 months

Help Needed In:

Need to discuss unit with ADC/DC (optional)

Have a possible UC candidate in this unit?

Youth Attendance: (only for meetings where youth would be in attendance)

Bronze ^

Gold

Silver

Bronze

No Ranking

No ▾

UC Candidate Name

Home ▾ UC Candidate Phone

UC Candidate Email

Steady ▾

Figure 28

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

If Key Leader(s) changing within the next 4 months

Help Needed In:

Need to discuss unit with ADC/DC (optional)

Have a possible UC candidate in this unit?

Please make a selection ^

No Succession Plan

Succession Plan in Place

Please make a selection ▾

UC Candidate Name

Home ▾ UC Candidate Phone

Figure 29

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

Figure 30

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.

Create Unit Service Plan v

x

* Category for this Service Plan

* Target Completion Date

Actual Completion Date

Volunteer Leadership ^

Planning and Budget

Membership

Program

Volunteer Leadership

* Describe an action that will help raise assessment of performance.(e.g. Develop a budget for the year)

Assist unit in developing a succession plan.

* Identify person and entity responsible for the above action.(e.g. Jonathon Doe, Committee Member)

Committee chair and COR along with UC

+ ADD ANOTHER SERVICE PLAN

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 roundtable 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 myscouting@scouting.org.