

# **Current vs Ideal State**

**Unit Service Plans in Sam Houston Area Council**

**Moving From One to the Other**

**College of Commissioner Science**

**Doctoral Project**

**Submitted by**

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## **Summary**

To create increased awareness of the current state of unit service plans within Sam Houston Area Council. Connect commissioners with resources to encourage moving toward an ideal state of unit service plans. And achieve this through starting a process of increased awareness throughout the Sam Houston Area Council Commissioning Team.

## **What is a Unit Service Plan**

According to the Commissioner Manuals: The Unit Service Plan is the following.

**"The Unit Service Plan enables commissioners to fulfill their mission to help units better serve more youth through Scouting. It enables improved retention of units using Journey to Excellence metrics; it's a better way to provide unit service."**

It is the outcome of a unit commissioner and the unit key three developing a set of goals from the detailed assessment process.

The entire document detailing the unit service plan may be found at

### **The Unit Service Plan**

<https://www.scouting.org/wp-content/uploads/2018/07/The-Unit-Service-Plan-FINAL.pdf>

## The Unit Service Plan's Strategic Importance

In order to understand why a unit service plan is needed, we need to understand its strategic importance to the Commissioning Corps.

### Boy Scouts of America Commissioners Webpage

The Boy Scouts of America Commissioners primary webpage lists the following:

#### OUR MISSION

As commissioners, we share the BSA's mission: To prepare young people to make ethical and moral choices over their lifetimes by instilling in them the values of the Scout Oath and Law.

#### OUR VISION

Every member of the BSA has a great Scouting experience.

#### 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 renewals.
5. Supporting unit leaders by collecting and distributing information, enabling program training, and providing networking opportunities.

#### OUR GOALS

1. Enable an increased number of units.
2. Enable the retention rate of units.
3. Enable implementation of a **unit service plan** through collaborative detailed assessments and an increased number of significant unit contacts.

#### OUR METHODS

1. The Unit Roadmap
2. New Member Coordinators
3. Unit Key 3
- 4. The Unit Service Plan**
5. Journey to Excellence
6. My.Scouting Tools (Including Commissioner Tools)
7. Continuous Recruiting

## **8. Assigning Resources to Greatest Needs**

The unit service plan is mentioned three times: once under objectives, once under goals, and once under our methods. The unit service plan is clearly meant to be a significant tool in our commissioning toolbox.

So why should we put a unit service plan in place? A handout from BCS 115 answers that very question.

## **Why Do A Unit Service Plan?**

"There's a simple answer to that question: a Unit Service Plan enables commissioners to fulfill their mission to help units better serve more youth through Scouting. But as with most things, it probably isn't quite that simple." (Commissioner Manuals: The Unit Service Plan)

The entire handout text may be found in both the Bachelor and Master College of Commissioner Science curriculum in

- Why Do a Unit Service Plan Handout
  - BCS 116
  - MCS 116
- Curriculum Link
  - <https://www.scouting.org/commissioners/training/college-of-commissioner-science/>

So we know what, how important it is, and why we do them, how are we doing in Sam Houston Area Council. Let's take a look at our Current State.

## **Current State of Unit Service Plans in Sam Houston Area Council**

There are currently very few unit service plans in place in the Sam Houston Area Council.

<b>Unit Service Plans by District (8/19/22)</b>	<b>Count</b>
George Strake	1
Iron Horse	6
Mustang	1
Phoenix	1
San Jacinto	1
Thunder Wolf	3
<b>Total</b>	<b>14</b>

\*Source: Sam Houston Area Council Commissioner tools

However, there is much more activity in the area of Simple and Detailed Assessments

<b>Assessments (8/19/22)</b>	<b>Count</b>
Simple	1,575
Detailed	117

\*Source: Sam Houston Area Council Commissioner Tools

Theoretically, if a unit service plan was put in place for each detailed assessment, we would have a 100% correlation of unit service plans to detailed assessments. However, we currently only have a 10% correlation of unit service plans to detailed assessments.

## **Why are Unit Service Plans not being implemented?**

In a very unscientific poll, based in conversations with commissioners, I believe the following reasons contribute to the lack of unit service plans.

### **Lack of Awareness**

The unit service plan as referenced above is mentioned three times on the Commissioning home page on the BSA website. So why is there a lack of awareness? This is both training and promotion based. All of us are guilty of running online training in the background while we work on other projects. Three hours later with emails reviewed and bills paid we can also put on the coveted "Trained" patch. In the last ten years, 231 commissioners have taken BCS 116, 35 have taken MCS 316, and 85 have taken DCS 516.

Units know what the Journey to Excellence is, but most don't understand that assessments both simple and detailed are being entered into Commissioner Tools. And they most definitely don't know what a Unit Service Plan is.

### **Lack of Emphasis**

The unit service plan has got to be one of the least mentioned commissioning tools in all of Scouting. Rarely, is it mentioned at the unit, district, or council level on the non-commissioning side. It is almost never heard of in a commissioning training or environment (even though there is a specific MCS and DCS course dedicated to it). District and Council level Commissioners usually emphasize simple and detailed assessments so they can show they have been visiting units.

### **Lack of Promotion**

Promotion of the importance of the unit service plan promoted from a council, division, or district level is rarely heard. The unit service plan is meant to be a primary tool in our Commissioning Toolbox, but we all but ignore it.

### **Lack of Understanding**

When unit service plans are mentioned, most Scouter's believe it is for a troubled unit. Unit Service Plans are for all units in all states of performing.

### **Lack of Trust**

Not all units, but a good number of units do not understand the role of the commissioner. As a result, when a unit commissioner shows up, they don't know they are there to help. Plus, when we want to go through things like JTE and a detailed assessment, they feel like they are being audited as opposed to assisted.

## **Moving towards Ideal State**

So how do we move towards an ideal state of Unit Commissioners and Unit Key Three's developing a Unit Service Plan based on the detailed assessment?

### **Create Awareness**

**Proposed Action:** Present the current state to the Council Commissioner's Monthly meeting to create awareness among the division commissioners.

### **Create Emphasis**

**Proposed Action:** Request the Division Commissioners begin discussions at their Division Meetings to help their District Commissioners understand the importance

**Proposed Action:** Discuss the issue with my West Division District Commissioners to begin to include it in there metric conversations of simple and detailed assessments.

### **Create Promotion**

**Proposed Action:** Briefly present the current state of unit service plans at the next Council Coordinated meeting

### **Create Understanding**

**Proposed Action:** Develop a short PowerPoint that can be utilized by Division, District, and Unit Commissioners to help commissioners understand the importance and resources available.

### **Create Trust**

This is something that I cannot have an action item on. I can only emphasize to commissioners to establish a relationship with the unit by making frequent and friendly contacts.

## **Deliverables**

The deliverables for this will come in several forms. Development of a presentation, presenting to strategic groups that surround my West Division Commissioner registered position and presenting at College of Commissioner Science if requested.

- Create Current State/Roadmap of Resources Presentation handout
- Current State/Roadmap of Resources presentation shared with the Council Commissioners meeting
- Distribute Current State/Roadmap of Resources presentation to Council Commissioning team and encourage discussions of it at their division meetings
  - Emphasize the need for their commissioning team to take MCS 316 if they have not already done so
- Present Current State/Roadmap presentation to West Division Commissioners
  - Encourage them to present it as their district commissioning training moment or have me present at their meeting
  - Emphasize the need for our commissioners to start implementing Unit Service Plans
  - Encourage my commissioner team to take MCS 116 at College of Commissioner Science
    - Also encourage them to have their commissioners take the courses as well
- Distribute Current State/Roadmap handout at the October Council Coordinated Commissioner breakout session.
- Teach MCS 316 and DCS 516 at the College of Commissioner Science 2022
  - MCS 316 is currently not in the Curriculum list, but according to Debbie Rollinson can be added
  - Include my Current State/Roadmap presentation as an additional handout for
    - BCS 116 – Collaborative Assessments
    - MCS 316- The Unit Service Plan
    - DCS 516 – The Unit Service Plan and the District
- Submit a project evaluation
- Provide a conclusion based on the deliverables and evaluation

## **Evaluation of Project**

The above described Doctorate of Commissioner Science Project was initially approved on August 28, 2022. All of the above deliverables were achieved.

- A presentation was developed for presentation purposes
  - Sam Houston Area Council Current State and Roadmap – The Unit Service Plan
- The presentation was shared at the December 2022 Council Commissioner Team meeting
- A copy was given to all of the Division Commissioners to share with their commissioning teams
- The presentation was shared at the following commissioner meetings held in the West Division
  - Texas Skies
  - David Crockett
  - Red Wolf
  - Big Cypress
- The presentation was shared at the January Key Leader's Conference Commissioner's Breakout and not the October Council Coordinated as originally planned
- I taught both MCS 316 and DCS 516 at the 2022 College of Commissioner Science
- A deliverable that was not part of the original project but will impact our council's strategic plan is that Sam Houston Area Council now has a goal of all Cub Scout Packs having a Unit Service Plan in place by May 31, 2023.

## **Conclusion**

When I first started down the path of my Doctorate of Commissioner Science Project, I did not fully understand the lack of awareness, misunderstanding of, and need for and lack of Unit Service Plans. I was acutely aware that it was an underutilized tool for Commissioner Service in the Sam Houston Area Council.

There was an acute lack of awareness not only of the Unit Service Plan, but also what it is for. Most commissioners I spoke with during my presentations were not aware of it, although most seasoned commissioners and District Commissioners were. However, most had never utilized it as a tool in unit service.

The individuals who were aware of them mostly understood them to be a tool for units that were struggling or had a significant issue that needed attention. The process of presenting my presentation on Unit Service plans and teaching the courses at College of Commissioner Science has helped the individuals who have seen the presentation and attended the classes realize that it is really a goal setting tool for unit improvement.

The need for Unit Service Plans is to have a tool that helps the Unit and its Commissioner to lock arms and leverage resources to improve the unit. The lack of the plans was based primarily in misunderstanding that they are only for struggling units.

The project itself was a very satisfying process. I was looking for a project that would have a real impact on unit service and improve our local commissioning efforts. It helped me to reach out to the District Commissioners in my Division. It has created a lot of conversations outside of my division at various Roundtables regarding unit service. And completing a Unit Service Plan is now a stated piece of the Sam Houston Area Council strategic plan for Cub Scout units.

My sincere thanks to Pam White, Debbie Rollinson, the West Division Commissioning team, and the Council Commissioning team for playing a part in this project.

## **Appendix**

**Unit Service Plan DCS Proposal**

**Doctoral Project Approval E-mail**

**Why do a Unit Service Plan PDF**

**The Unit Service Plan**

**Unit Service Plan PDF**

**Commissioner Homepage <https://www.scouting.org/commissioners/>**

**College of Commissioner Science PowerPoint**

**BCS 116 Collaborative Assessments**

**MCS 316 The Unit Service Plan**

**DCS 516 The Unit Service Plan and the District**

**Unit Service Plan Current State/Roadmap PowerPoint**

## Suggested Thesis/Project Proposal Form

1. Complete this form and submit it to your council's Doctoral Review Team for approval.
2. They will review the proposal, may make suggestions and /or approve the proposal.
3. You may submit the name of a potential Advisor/Coach or you may request one to be assigned to you.

### Thesis Topic / Project Selection

Candidate Name: Randy LeForce Date: 8/23/2022  
Address: 13515 Kluge Corner Ln Phone: 580-984-1480  
City: Cypress State: TX Zip Code: 77429  
E-mail: rleforce@sbcglobal.net  
Council: Sam Houston Area Council District: Big Cypress  
Current positions(s) in Scouting: West Division Commissioner, UC, ASM

Proposed thesis/project topic: (Please attach a proposed outline and a current college transcript.)

Proposed Project Title: Current vs Ideal State of the Unit Service Plans in Sam Houston Area Council: Moving from one to the other.

Purpose of Project: To create increased awareness of the current state of unit service plans within Sam Houston Area Council. Connect commissioners with resources to encourage moving toward an ideal state of unit service plans. And achieve this through starting a process of increased awareness throughout the Sam Houston Area Council Commissioning Team.

The Unit Service Plan is mentioned by name in the Objectives, Goals, and Methods on Scouting's Commissioner homepage. Currently, there are 14 Unit Service plans in place, 117 Detailed Assessments, and 1,575 Simple Assessments in Sam Houston Area Council. Project would include assessment of current state and a set of deliverables promoting movement towards ideal state.

Proposal approved by: \_\_\_\_\_ Date: \_\_\_\_\_

Position: \_\_\_\_\_

Project / Thesis Advisor: Pam White

Position: ACC Council: Sam Houston Area Council

Phone: (      ) \_\_\_\_\_ E-mail: pwhitehouston@comcast.net

## Randall LeForce

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**From:** pwhitehouston@comcast.net  
**Sent:** Sunday, August 28, 2022 8:39 AM  
**To:** 'Randall LeForce'  
**Cc:** 'Debbie Rollinson'  
**Subject:** RE: Doctorate of Commissioner Science Proposal

Randy,

Your project has been approved. I look forward to seeing your plan on how we can use the Unit Service Plan to better serve our units.

Since Debbie has been working closely with you along the planning of this concept, I think it would be best for her to continue to mentor you. However, if you need my assistance (or any other doctorate advisor), please do not hesitate to let us know. I'm sure you will do an amazing job on this project, and I am excited to see how it develops.

Keep me posted on your progress. I assume you intend to have this completed in time for this year's CCS. I'm so glad you are back in town and working with SHAC again!

Pam

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**From:** Randall LeForce <[rleforce@sbcglobal.net](mailto:rleforce@sbcglobal.net)>  
**Sent:** Tuesday, August 23, 2022 2:56 PM  
**To:** [pwhitehouston@comcast.net](mailto:pwhitehouston@comcast.net)  
**Cc:** Debbie Rollinson <[debbie.rollinson@icloud.com](mailto:debbie.rollinson@icloud.com)>  
**Subject:** Doctorate of Commissioner Science Proposal

Pam,

I hope you had a great trip to Germany. I have been doing a lot of thinking, reading DCS Thesis/Project documents, and trying to get my creative juices flowing around the Unit Service Plan idea. I have also had multiple conversations with Debbie while you were out of the country on how this might take flight.

The attached items are the outcome of my thoughts, conversations, and working to develop an idea that meets the criteria.

Attached for your review are the following items:

- Current CCS Transcript
- DCS Proposal Document
- Current vs Ideal State – Unit Service Plans in Sam Houston Area Council: Moving From One to the Other
- Current State / Roadmap Presentation

I look forward to hearing from you.

Regards,

Randy LeForce  
580-984-1480 cell

## WHY DO A UNIT SERVICE PLAN?

There's a simple answer to that question: a Unit Service Plan enables commissioners to fulfill their mission to help units better serve more youth through Scouting. But as with most things, it probably isn't quite that simple.

A Unit Service Plan provides ***focus***. It is built upon a *collaborative assessment* of a unit's strengths and needs. Before attempting a collaborative assessment, a unit commissioner must establish a solid relationship with a unit's leaders based on mutual respect and an understanding of one another's motivation for involvement in

Scouting and vision of future success for the unit. Once completed, a *collaborative assessment* enables unit leaders and their unit commissioner to identify and prioritize specific tasks that will strengthen the unit most quickly. *Collaborative assessments* are a new approach; not all unit leaders are going to immediately understand, or perhaps, accept it. Unit commissioners should do their best to gain acceptance (their relationship with unit leaders will be an asset in that), but each unit needs a customized service plan. Sometimes, the only alternative will be to build that plan based on the unit commissioner's assessment of the unit's strengths and needs. Done well, that should ultimately cause unit leaders to think more highly of Unit Service and increase their acceptance of a *collaborative approach* to assessment and plan development.



A Unit Service Plan contains ***actionable information***. It includes a limited number (typically, five to seven) SMART goals; goals that are **Specific, Measurable, Achievable, Relevant and Resource oriented, and Time based**. SMART goals identify what is going to be done, who is accountable for the task, and when it is expected to be completed. Since collaborative assessments and unit service plans should be updated at least twice each year, the tasks should be sufficiently limited in scope to enable completion within six months. That enables unit leaders and their unit commissioner to remain focused and best supports continuous improvement of the unit.

A Unit Service Plan enables ***linkage*** to other resources needed to ensure success. Neither unit leaders nor unit commissioners are experts in every element of Scouting. But unit commissioners can provide access to subject matter experts that serve on our district operating committees. If the collaborative assessment identifies, for example, specific needs for training of youth and/or adults, a member of the district training committee would be able to assist. District membership committee members could be a resource in developing new approaches to growing a unit; district camping committee members could assist a unit interested in developing a high adventure program for its older youth, and so on. Once the need is identified, the unit commissioner can facilitate linkage.

Integrating the Unit Service Plan process and Commissioner Tools' technology provides ***efficiency***. The *collaborative assessment* and the resulting plan can both be captured in Commissioner Tools using the Detailed Assessment function. Once completed, that information is easily accessible by the unit commissioner, all members of the district's Unit Service team, and also district professionals. In addition, members of the council's Unit Service team and field service professionals can also review the plan if their support is needed. And, the Unit Service Plan offers the opportunity to replace the variety of other, uncoordinated unit assessment and unit service planning tools with a single, coordinated approach to helping our units better serve more youth through Scouting. Finally, the Simple Assessment function in Commissioner Tools provides a quick and easy way to document plan progress. Simple Assessments document regular, monthly contacts by a unit commissioner. Unit contacts recorded in Commissioner Tools should involve substantive interaction with unit leaders that ensure Unit Service Plan progress or address some other significant unit need.

The simple answer to the question remains: a Unit Service Plan enables commissioners to fulfill their mission to help units better serve more youth through Scouting. And in the process, it enables improved retention of traditional units and improves the performance rating of units using Journey to Excellence metrics. It truly is a better way to provide Unit Service!

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## THE UNIT SERVICE PLAN

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### THE ROLE OF THE UNIT SERVICE PLAN

The Unit Service Plan enables commissioners to fulfill their mission to help units better serve more youth through Scouting. It enables improved retention of units using Journey to Excellence metrics; it's a better way to provide unit service.

### WHY BUILD A UNIT SERVICE PLAN?

We perform best when we measure what matters.

Unit retention and growth are the best measures of the impact of Unit Service. Unit commissioners help unit leaders deliver a quality program. A quality program attracts youth, and adults, to Scouting; it's also the primary reason they stay. Units that deliver a quality program grow and prosper.

A Unit Service Plan provides a road map for unit leaders to develop and deliver a quality program. Working together with unit leaders, unit commissioners use detailed assessments to develop a plan that responds to the unit's unique strengths and needs. Through regular contacts, they help ensure that progress is made toward established goals.

Journey to Excellence is Scouting's continuous improvement tool. Detailed assessments and unit service plans address all elements of a unit's Journey to Excellence. A Unit Service Plan helps ensure a unit is continually improving.

Remember that unit commissioners must achieve just 5 objectives to have an impact on the units they serve:

- Supporting unit growth and retention through the Journey to Excellence.
- Contacting units and capturing in Commissioner Tools their strengths and needs, and a unit service plan that enable continuing improvement.
- Linking unit needs to district operating committee and other resources.
- Supporting timely unit, district and council charter renewals.
- Supporting unit leaders by delivering effective roundtables that provide program ideas, relationship development, and timely communication.

The Unit Service Plan and Commissioner Tools support the first three. The actionable information available in Commissioner Tools and the relationships unit commissioners develop

through significant contacts with unit leaders help ensure that units renew their charter on time.

Some will ask why a unit service plan is needed when we already have a continuous improvement tool: Journey to Excellence (JTE). That's a great question.

Perhaps it will help to think about the rear-view mirror in your car. Like the mirror, JTE provides useful information about what has been accomplished. JTE measures leading indicators that can also provide a warning; they can help identify where a change in course or corrective action is needed.

The unit service plan is our GPS. Based on a *detailed collaborative assessment* developed with the unit's leaders, it identifies and prioritizes key tasks that will lead to our destination: a unit that serves more youth through Scouting with a quality program.

A unit service plan provides *focus*. It is built upon a *detailed collaborative assessment* of a unit's strengths and needs. Before attempting a collaborative assessment, a unit commissioner must establish a solid relationship with a unit's leaders based on mutual respect and an understanding of one another's motivation for involvement in Scouting and vision of future success for the unit. Once completed, a *collaborative assessment* enables unit leaders and their unit commissioner to identify and prioritize specific tasks that will strengthen the unit most quickly.

*Detailed Collaborative assessments* are a new approach; not all unit leaders are going to immediately understand, or perhaps, accept it. Unit commissioners should do their best to gain acceptance (their relationship with unit leaders will be an asset in that), but each unit needs a customized service plan. Sometimes, the only alternative will be to build that plan based on the unit commissioner's assessment of the unit's strengths and needs. Done well, that should ultimately cause unit leaders to think more highly of Unit Service and increase their acceptance of a *collaborative* approach to assessment and plan development.

A unit service plan contains *actionable information*. It includes a limited number (typically, three to five) SMART goals: goals that are *Specific, Measurable, Achievable, Relevant* and *Resource oriented*, and *Time based*. SMART goals identify what is going to be done, who is accountable for the task, and when it is expected to be completed. Since detailed collaborative assessments and unit service plans should be updated at least twice each year, the tasks should be sufficiently limited in scope to enable completion within six months. That enables unit leaders and their unit commissioner to remain focused and best supports continuous improvement of the unit.

A unit service plan enables *linkage* to other resources needed to ensure success. Neither unit leaders nor unit commissioners are experts in every element of Scouting. But unit commissioners can provide access to subject matter experts that serve on our district operating committees. If the collaborative assessment identifies, for example, specific needs for training youth and/or adults, a member of the district training committee would be able to assist. District membership committee members could be a resource in developing new approaches to growing a unit; district camping committee members could assist a unit interested in

developing a high adventure program for its older youth, and so on. Once the need is identified, the unit commissioner can facilitate linkage.

Integrating the unit service plan process and Commissioner Tools' technology provides efficiency. The *detailed collaborative assessment* and the resulting plan can both be captured in Commissioner Tools using the Detailed Assessment function. Once completed, that information is easily accessible by the unit commissioner, all members of the district's Unit Service team, and district professionals. In addition, members of the council's Unit Service team and field service professionals can also review the plan if their support is needed. And, the unit service plan offers the opportunity to replace the variety of other, uncoordinated unit assessment and unit service planning tools used in the past with a single, coordinated approach to helping our units better serve more youth through Scouting. Finally, the Simple Assessment function in Commissioner Tools provides a quick and easy way to document plan progress. Simple Assessments document regular, monthly contacts by a unit commissioner. Unit contacts recorded in Commissioner Tools should involve substantive interaction with unit leaders that ensure unit service plan progress or address some other significant unit need.

#### **DEVELOPING A DETAILED COLLABORATIVE ASSESSMENT**

Unit assessments aren't new; our approach to them should be.

Traditionally:

- We've asked our unit commissioners to assess units independently based on their observations during visits. We trained them to make recommendations to unit leaders to improve unit performance.
- We've trained our unit leaders to conduct self-assessments and develop ways to improve unit performance.
- We've recruited subject matter experts to staff our district committees. There we could find individuals with a passion for advancement, or training, or growing membership, or finance, or camping, or any one of a number of topics about which leaders need to know to help their unit grow and prosper.
- We didn't have processes to facilitate coordination of those assessments and sharing of that knowledge.
- Not sharing assessments and expertise made it more difficult for commissioners to serve units effectively.

Detailed collaborative assessments require that unit commissioners and unit leaders communicate; that they work together openly to identify unit strengths and unit needs. Open communication enables them to prioritize those needs. That helps them focus first on tasks that will have the greatest impact on program quality.

Sometimes, the only alternative will be to build a plan based on the unit commissioner's assessment of the unit's strengths and needs. Unit service plans based on a collaborative assessment will have the greatest impact, however.

Relationships are the foundation of effective collaboration; in fact, relationships are the foundation of effective unit service. Effective relationships are built upon trust. Trust is built upon understanding.

Commissioners should seek to understand what motivates unit leaders to serve youth through Scouting. Through that process, unit leaders should come to understand that their unit commissioner has only one objective: to help the unit better serve more youth through Scouting.

Scouting is a game with a purpose. Unit service is an impact game: commissioners serve units to help them grow and prosper.

Once effective relationships have started to develop, unit commissioners will likely find greater acceptance of a proposal to discuss openly the unit's strengths and needs. Those discussions can result in a collaborative assessment which will serve as the foundation of a unit service plan. Again, a unit service plan based on a collaborative assessment will have the greatest impact as it provides the greatest focus to everyone involved.

Journey to Excellence is the tool we use to continuously improve program quality. The elements of Journey to Excellence are embedded in the design of the unit service plan.

Just as all unit leaders may not initially accept the collaborative assessment concept, all may not appreciate the value of participation in Journey to Excellence. Unit commissioners with a good relationship with their unit's leaders are likely to find them interested in discussing leader training, budgeting, advancement, camping and so on, all of which are elements of JTE.

Improving these leading indicators help the unit provide a quality program, leading to the unit's ability to attract and retain youth and adults

As a result, there is only one place in Commissioner Tools where a reference to Journey to Excellence is found: in Step 6 of the Detailed Assessment function it is possible to indicate which JTE level of achievement the unit is seeking. "No Ranking" is an option in addition to "Bronze," "Silver," and "Gold."

The focus of a unit service plan built upon a collaborative assessment is continuous improvement. By limiting assessments and action plans to the elements of Scouting we hope to improve rather than a score to be achieved, more leaders are likely to be attracted to assessing unit strengths and needs and developing action plans that will result in improving program quality.

Commissioner Tools supports the development of a collaborative assessment of any type of unit at any time. Packs, Troops, Teams, Crews, and Ships, Posts, and Clubs can all benefit from the process and Commissioner Tools supports each. It enables unit commissioners to email a link to a scheduled detailed assessment to the Unit Key 3 and other leaders who assist in the assessment process. It also enables unit commissioners to finalize the results of the collaborative assessment in Commissioner Tools.

## JOURNEY TO EXCELLENCE TOOLS

Unit commissioners and unit leaders have access to tools that facilitate assessment of a unit's strengths and needs. Using the unit Journey to Excellence Tracking Workbook, unit commissioners and leaders have tools to more easily and efficiently capture and track progress on all elements of a unit's Journey to Excellence.

## UNIT ASSESSMENT SCORING MATRIX

Commissioner Tools enables scoring unit performance on a scale of 1 to 5 with colors of ranging from red through yellow to green. A scoring matrix summarizes that approach and provides definition to the numbers and colors:

RELATIVE RANKING	SCORE	COLOR	DEFINITION
HIGH	5	GREEN	NEARLY AN IDEAL SITUATION
MEDIUM-HIGH	4	LIME	MAKING PROGRESS TOWARDS THE IDEAL UNIT
MEDIUM	3	YELLOW	TYPICAL UNIT; COULD BE IMPROVED
MEDIUM-LOW	2	ORANGE	NEEDS IMPROVEMENT; WATCH CAREFULLY
LOW	1	RED	WEAK SITUATION; NEEDS IMMEDIATE ACTION

## **BUILDING A UNIT SERVICE PLAN**

Once a detailed collaborative assessment is completed and recorded in Commissioner Tools, the foundation for a unit service plan has been created. All that remains is to identify three to five higher priority needs that, if addressed, would improve the unit's ability to better serve youth and then establish SMART goals for each. The plan, too, can be recorded and managed by the unit commissioner in the Detailed Assessment function in Commissioner Tools.

Ideally, a unit service plan should include goals to be completed within the next six months. Completing a detailed collaborative assessment and establishing a plan towards the beginning of each calendar year positions unit commissioners and unit leaders to update the assessment – and the plan – toward the middle of the coming year and lays a solid foundation for continuous improvement of unit performance.

Mobile access to Commissioner Tools enables unit commissioners to develop truly collaborative assessments and unit service plans, entering information directly into Commissioner Tools while working with unit leaders. All that is needed is an internet connection to provide access via a mobile device. With mobile access, unit commissioners have access to actionable information that enables them to work more efficiently.

## **LINKING NEEDS TO RESOURCES**

Our district operating committees are – or should be – comprised of a variety of subject matter experts. That should be where Scouters experienced in camping, advancement, training, planning, budgeting, fund raising, membership development, district activities, and so on, can be found. Like commissioners, district operating committee members are also committed to starting and sustaining successful units and willing to share their expertise to help units better serve more youth through Scouting.

Unit commissioners are diagnosticians; they work with unit leaders to identify a unit's most pressing needs. Often, those needs can be addressed by unit leaders and committee members and many of the goals included in the unit service plan may be assigned to them. But sometimes other expertise is needed and it often can be found in a district operating committee member. A member of the district finance committee, for example, may be able to help a unit that doesn't have an annual budget and lacks experience in developing one. A member of the district camping committee likely can assist a troop without backpacking experience that wants to build that into its annual program plan. District membership committee members may be able to help a pack or crew build a plan to recruit new members; and training committee members can help address unit leader training needs. Once the unit service plan has been completed, the unit commissioner should link unit needs to district operating committee resources to ensure achievement of goals for which unit leaders don't have the necessary expertise.

## **PROCESS OVERVIEW**

The available tools provide unit commissioners with a complete process to help units serve more youth better through Scouting:

1. As the Scouting year begins,
  - a. Share with the Unit Key 3:
    - i. The latest Journey to Excellence Scorecard; identify and discuss any changes.
    - ii. The current Training Manager report; identify and discuss any questions.
    - iii. The current Journey to Excellence Tracking Workbook; identify data sources.
  - b. Discuss how these tools can be used to develop plans to ensure continuing unit success.
  - c. Discuss the collaborative development of a unit service plan using these tools to begin identifying unit strengths and needs.
2. Schedule a meeting with the Unit Key 3 (and other key unit leaders) to develop a collaborative assessment of unit strengths and needs.
3. Enter a future Contact in Commissioner Tools for the date of the scheduled meeting.
4. Begin completion of a Journey to Excellence Tracking Workbook for the unit.
  - a. Download a Tracking Workbook from scouting.org
  - b. Enter data into the Tracking Workbook.
5. Participate in the detailed collaborative assessment of unit strengths and needs.
  - a. Review and update with local data the Tracking Workbook.
  - b. Identify key unit strengths and needs.
  - c. Identify SMART goals to be completed over the next 6 months to address the three to five greatest needs.
6. Using the Detailed Assessment function, update the Contact in Commissioner Tools to establish a unit service plan.
  - a. Enter detailed collaborative assessment results.
  - b. Enter SMART goals
  - c. Complete other applicable elements of the Detailed Assessment.
7. In ongoing contacts with the Unit Key 3:
  - a. Update the Tracking Workbook.
  - b. Update the unit service plan in Commissioner Tools.
8. Renew the assessment and planning process at six month intervals.

## **IN SUMMARY**

The unit service plan provides unit commissioners and unit leaders with a tool to develop customized solutions to address unit needs, enable continuous improvement, and ensure the ability to better serve more youth through Scouting.

## **RESOURCES**

- Using Commissioner Tools – BSA Learn Center
  - <https://my.scouting.org/>
  - Key Segments:
    - Accessing Commissioner Tools
    - The Units Tab
    - Simple Assessments
    - Entering a Unit Contact
    - Unit Assessment Scoring Matrix
    - The Detailed Assessment for Commissioners
- Journey to Excellence Scorecards
  - <https://www.scouting.org/awards/journey-to-excellence/>
- Journey to Excellence Tracking Workbooks
  - <https://www.scouting.org/awards/journey-to-excellence/>
- Training Manager report in
  - [my.scouting.org tools](#)

## Create a Unit Service Plan from Page 3 of the Detailed Assessment:

Print Blank Assessments	Current	Expired	Never Taken	Not Trained	Trained
<input type="radio"/> Blank Unit Assessment Form					
<input type="radio"/> Commissioner Assessment Form			See List of Leaders Needing YPT		
<input type="radio"/> Form With Unit Date				See List of Not Trained Leaders	
<b>PRINT</b>	<b>Planning and Budget</b>				>
	<b>Membership</b>				>
	<b>Program</b>				>
	<b>Volunteer Leadership</b>				>
	<b>Unit Priorities and Details</b>			<span style="color: red;">● Incomplete</span>	>
	<input type="checkbox"/> <b>Create Unit Service Plan</b>				>

### Unit Service Plan

Do you want to create a Unit Service Plan?

Yes     No

Select Add Service Plan to begin.

Please select a category for this service plan

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

#### ▼ Create Unit Service Plan

\* Category for this Service Plan

\* Target Completion Date

Actual Completion Date

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

Type your comments here

Select a category	<input type="checkbox"/>
Planning and Budget	
Membership	
Program	
Volunteer Leadership	

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

Type your comments here

 ADD ANOTHER SERVICE PLAN

# **College of Commissioner Science**



**BCS 116**

# **Collaborative Assessments**

Revision date 8/1/2021

# Course Objectives



**At the end of this training a commissioner  
will be able to:**

- Understand the importance of the Collaborative Assessment
- Develop and utilize a Unit Service Plan
- Assess and record results of the Unit Service Plan in Commissioner Tools

# Why Collaborative Assessments?

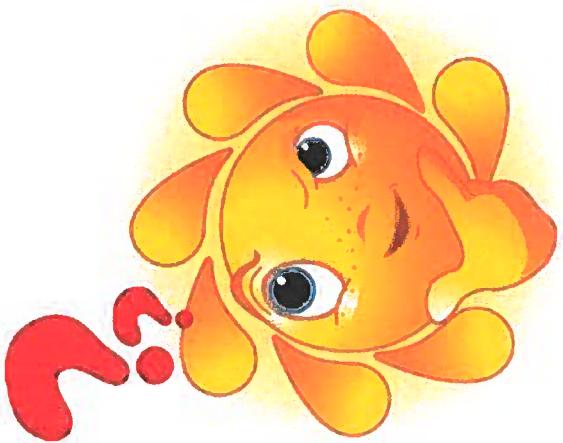


- Basis for Unit Service Plan
- Impacts quality program delivery

# Collaborative Assessments



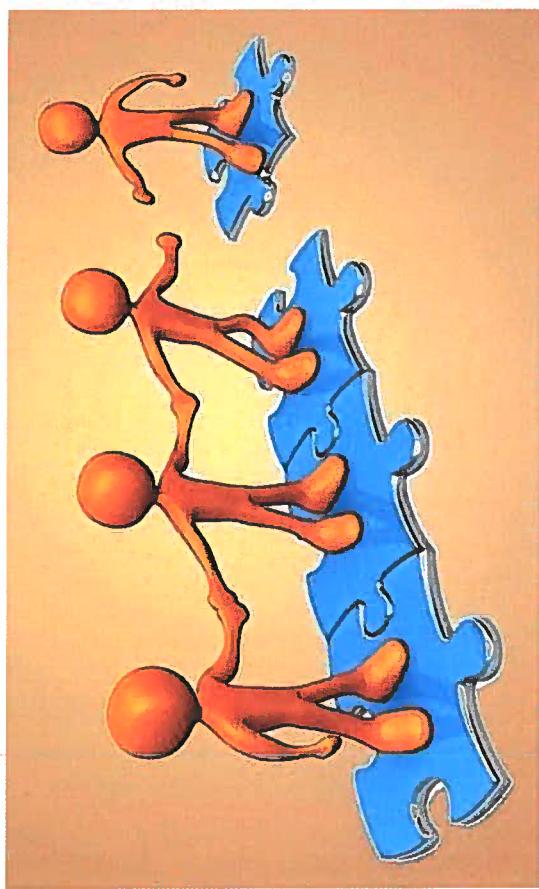
**How frequently?**



# Collaborative Assessments



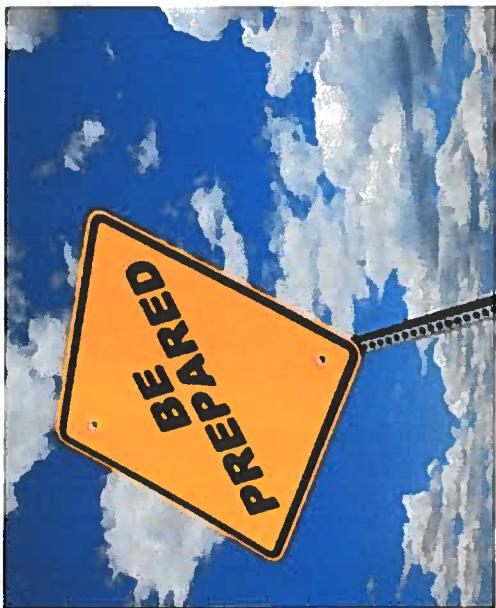
**Who participates?**



# Collaborative Assessments



## Preparation





## Commissioners of Boy Scouts of America

Scheduled Contact Date - 09/04/2020

Greetings:

Our council is using Commissioner Tools on [my.scouting.org](http://my.scouting.org). As a Unit Commissioner, my top priority is to help you and your unit deliver the best possible Scouting experience to your youth. I am sending you a Unit Assessment form that can help us with that process. Please take a few minutes, in collaboration with the other members of your unit Key Three (the unit leader, committee chairman, and chartered organization representative have received this email) to complete it. During my scheduled visit on 09/04/2020, I hope to discuss with you the results of your completed Unit Assessment.

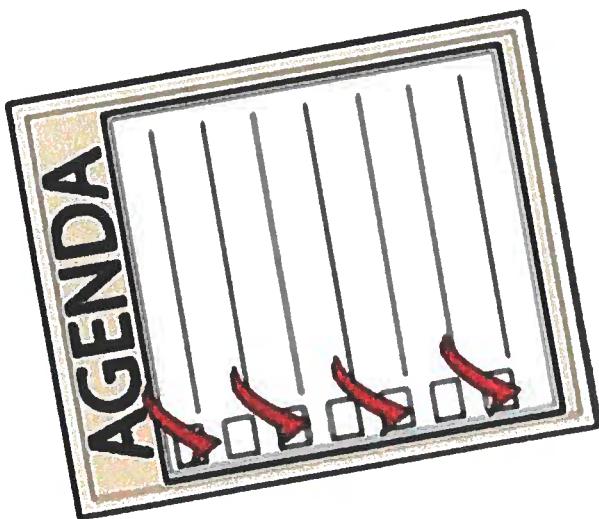
[Click here](#) to view and complete your assessment. If you click on the link and it doesn't open, please do not give up; copy and paste it into your browser (Chrome, Firefox and Safari are recommended) and try that. To do so, right click on the link, and select "Copy Hyperlink". Then, open your browser, right-click in the search bar, select "Paste", and then hit enter.

Thank you for your time and I look forward to seeing you.

Yours in Scouting,

Commissioner

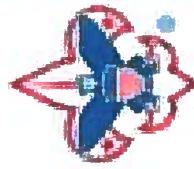
# Collaborative Assessment Meeting



# Unit Assessments



JOURNEY TO EXCELLENCE



<http://www.scouting.org/jte.aspx>

# Scoring Matrix



RELATIVE RANKING	SCORE	COLOR	DEFINITION	PROGRAM PLAN
HIGH	5	GREEN	NEARLY AN IDEAL SITUATION	PLAN CREATED AND DISTRIBUTED
MEDIUM-HIGH	4	LIME	MAKING PROGRESS TOWARDS THE IDEAL UNIT	PLAN COMPLETED
MEDIUM	3	YELLOW	TYPICAL UNIT; COULD BE IMPROVED	MEETING SCHEDULED
MEDIUM-LOW	2	ORANGE	NEEDS IMPROVEMENT; WATCH CAREFULLY	UNIT WILL SCHEDULE
LOW	1	RED	WEAK SITUATION; NEEDS IMMEDIATE ACTION	NO MEETING PLANNED

# What do you measure?



PACKS	TROOPS	CREWS
Budget	Budget	Budget
Retention	Retention	Retention
Building Cub Scouting	Building Boy Scouting	Building Venturing
Annual Charter Renewal Process	Annual Charter Renewal Process	Annual Charter Renewal Process
Webelos-to-Scout Transition	Webelos-to-Scout Transition	Activities
Advancement	Advancement	Super Activity
Outdoor Activities	Short Term Camping	
Day/Resident/Family Camp	Long Term Camping	
Service Projects	Service Projects	Service Projects
Fitness	Fitness	Fitness
Pack & Den Meetings	Courts of Honor/Parents Meeting	
Trained Leadership	Trained Leadership	Trained Leadership
Leadership Planning	Patrol Method	Youth Leadership

**Once the Assessment is Done...**



- Actions needed are identified
- Accountability assigned
- Unit Service Plan Developed

# The Unit Service Plan

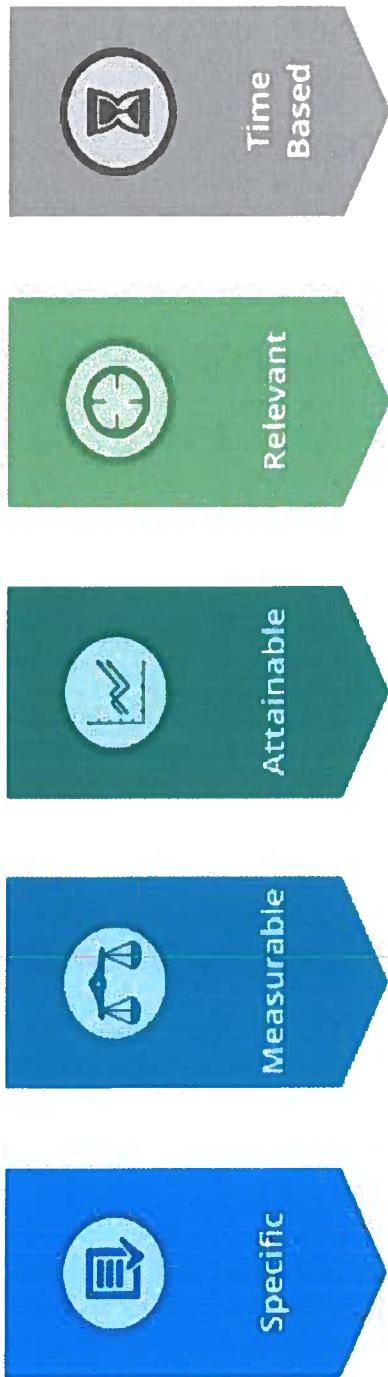


**Our Primary Tool**

# The Unit Service Plan Process



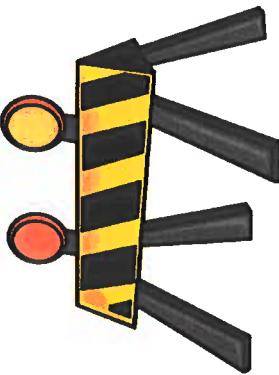
# SMART



## Roadblocks

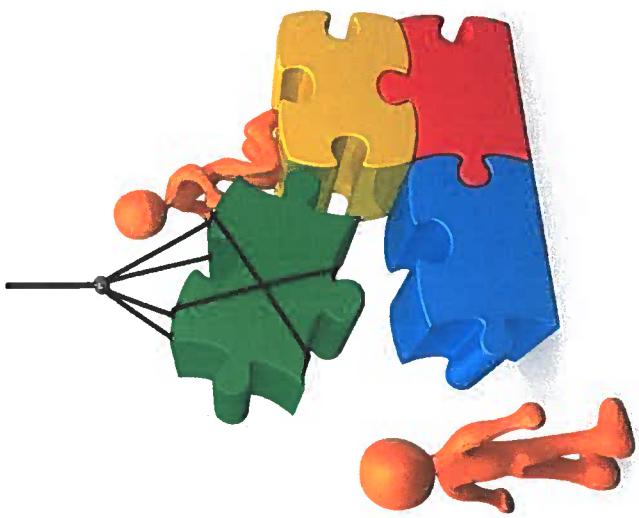


- Why might unit leaders be reluctant to participate in a collaborative assessment or the JTE performance recognition program?
- What can we, as commissioners, do to convince unit leaders to participate?





# Implementation



# Implementation Process



Task 3151: New Board Leader of Nations

Detailed Assessment

Training and Membership

Print Blank Assessments

Blank Unit Assessment Form

Administrations Assessment Form

Form With Unit Data

Membership Numbers:

4 Adult Registered in Unit

5 Youth Registered in Unit

Training Dates:

Youth Protection Training (YPT):

Category	Count	Exercises	Handouts	Test	Trained
4	0	0	0	2	3

See List of Not Trained Leaders

Planning and Budgets

Membership

Program

Volunteer Leadership

Unit Priorities and Details

Incorporate

Create Unit Service Plan

Cancel

Save & Continue



## How the District/Assistant District Commissioner Fit In

- Review and Discuss
- Outline service plans
- Discuss unit needs

# Foundation of Unit Service



## STARTING, SUSTAINING, AND GROWING UNITS



**ASSESS**

- ENGAGE
- COLLABORATE
- IDENTIFY:
  - STRENGTHS
  - NEEDS

**PLAN**

- COLLABORATE
- PRIORITIZE
- SET ACCOUNTABILITY
- SCHEDULE
- REVIEW

**ACT**

- PARTNER
- LINK
- CONTACT
- UPDATE
- CELEBRATE



**RELATIONSHIPS BASED ON TRUST, CANDOR, AND RESPECT**

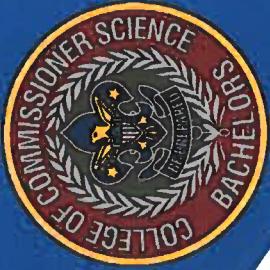
## Course Summary



- The Collaborative Assessment enables the commissioner to develop a relationship with the Unit Key 3.
- Developing a Unit Service Plan helps to assess a unit's strengths and needs.
- Recording the results of the Unit Service Plan in Commissioner Tools provides actionable information to follow up on.



# College of Commissioner Science



Questions?  
Comments!



**College of Commissioner Science**

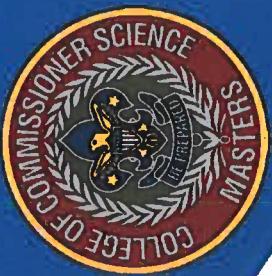


**MCS 316**

**The Unit Service Plan**

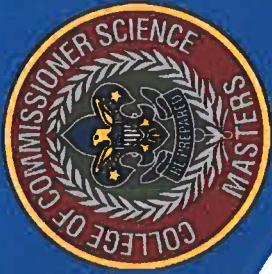
Revision date 8/1/2021

## Learning Objectives



- Discuss the purpose of the Unit Service Plan
- Understand the process of plan development
- Implement the Unit Service Plan

## The Unit Service Plan Purpose



- Created individually for each unit
- Actionable result of *collaborative* detailed assessments
- Enables targeted commissioner service

## Before Starting



- Unit contacts recorded in  
Commissioner Tools
- Unit Collaborative  
Assessments
- Areas identified for  
improvement

## The Process of Development



- Develop action steps
- Identify responsibility
- Create SMART goals
- Ensure resources are available

## **Development of Action Steps**



- Create a list of possible actions
- Know the unit's resources
  - Know the unit's skills
- Prioritize the list with critical needs first



Your Turn

# Breakout Session

# Developing the Unit Service Plan



## Unit Service Plans



## Implementing the Plan

- Collaboration
- Execution
- Monitoring



# Linking Resources

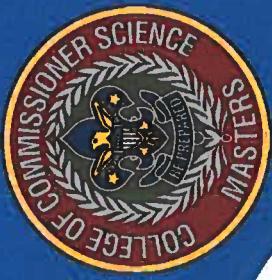


The District  
Operating  
Committee

*Commissioners*

The Unit

## Resources



- District
- Other commissioners
- Other units
- Council



## Commissioner Actions



As a commissioner, look at each action  
step

- Determine a resource at each level beyond the unit commissioner who can provide targeted support.
- Decide on a monitoring strategy and timeline for check-ins.

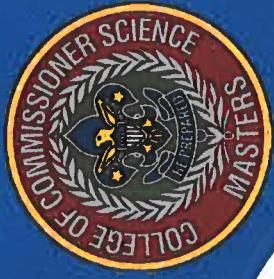
Take a few minutes to write down your ideas and decide on a reporter to share your thoughts.

# Mentoring

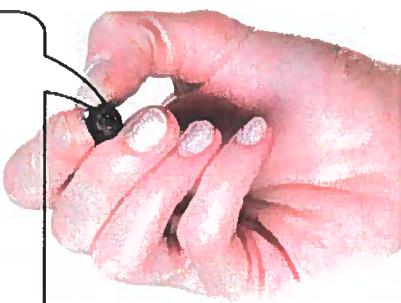


- Resources are provided
- Evaluate effectiveness of resources
- Ensure the unit is taking advantage of resources
- Coach and mentor unit leadership
- Evaluate when unit service plan adjustments are needed

# Course Summary



**SUMMARY**





**Questions?  
Comments!**





# **DCS 516**

# **The Unit Service Plan and the District**

# Learning Objectives



- Discuss the importance of developing a Unit Service Plan
- Identify the district commissioner's role in the successful completion of Unit Service Plans
- Understand the role of the district committee in successfully completing a unit service plan

## Commissioner Objectives



- Support unit growth and retention
- Contact units/build Unit Service Plan
- Link unit needs to resources
- Timely charter renewal
- Support unit leaders

# The Unit Service Plan





## Unit Service Plan

- Develop action items
- Establish target dates
- Resources



**District  
Commitment**

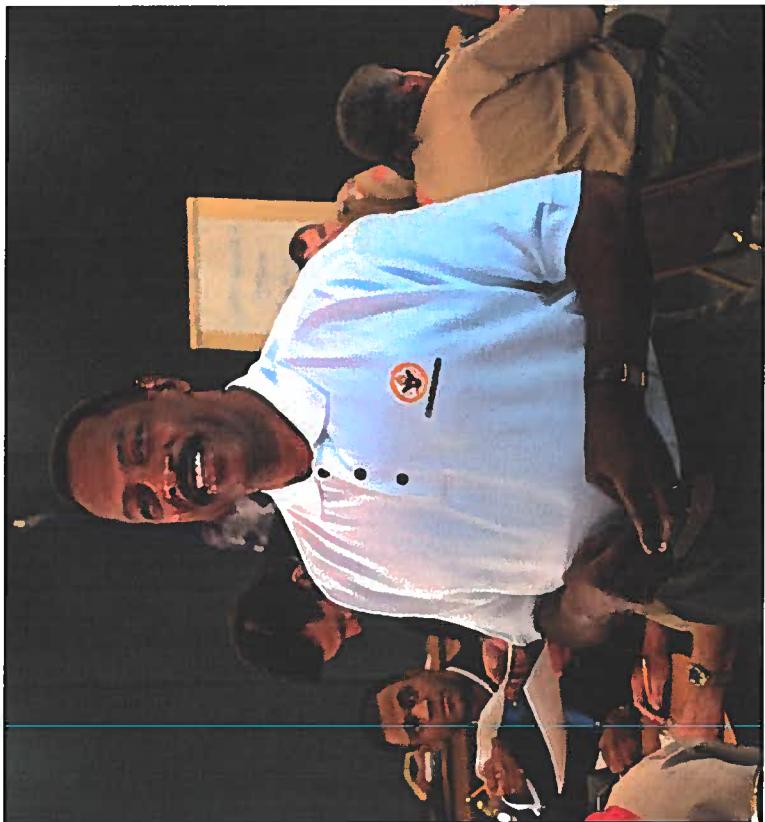


# Implementation

# Unit Service Plan Cycle



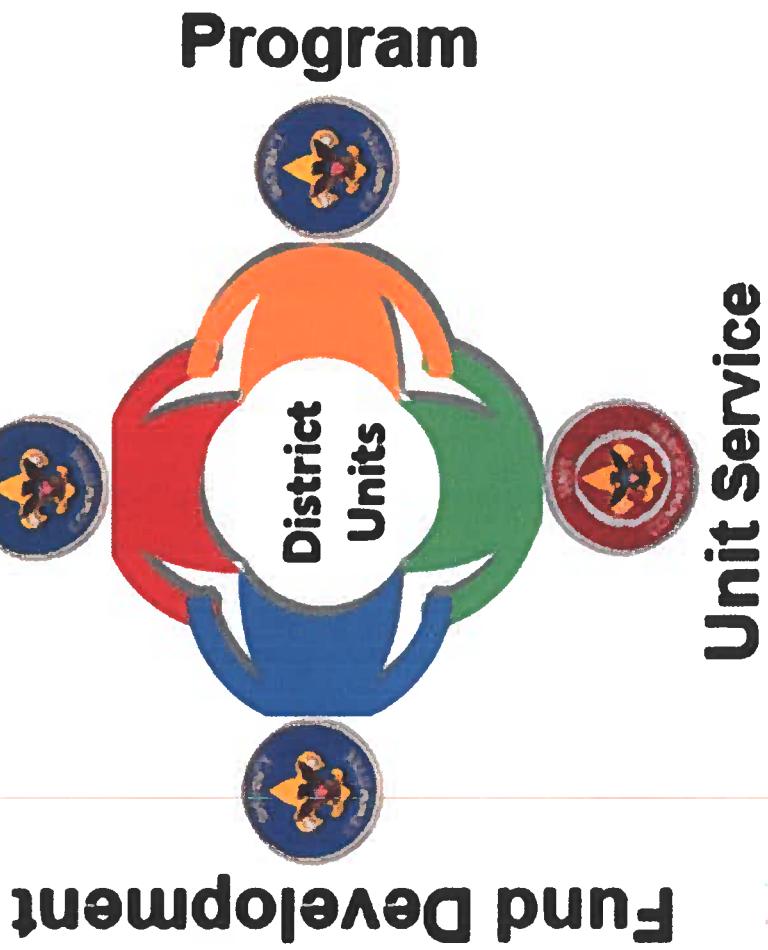
# The District Commissioner's Role



# The District Committee's Role



**Membership**



# Linkage

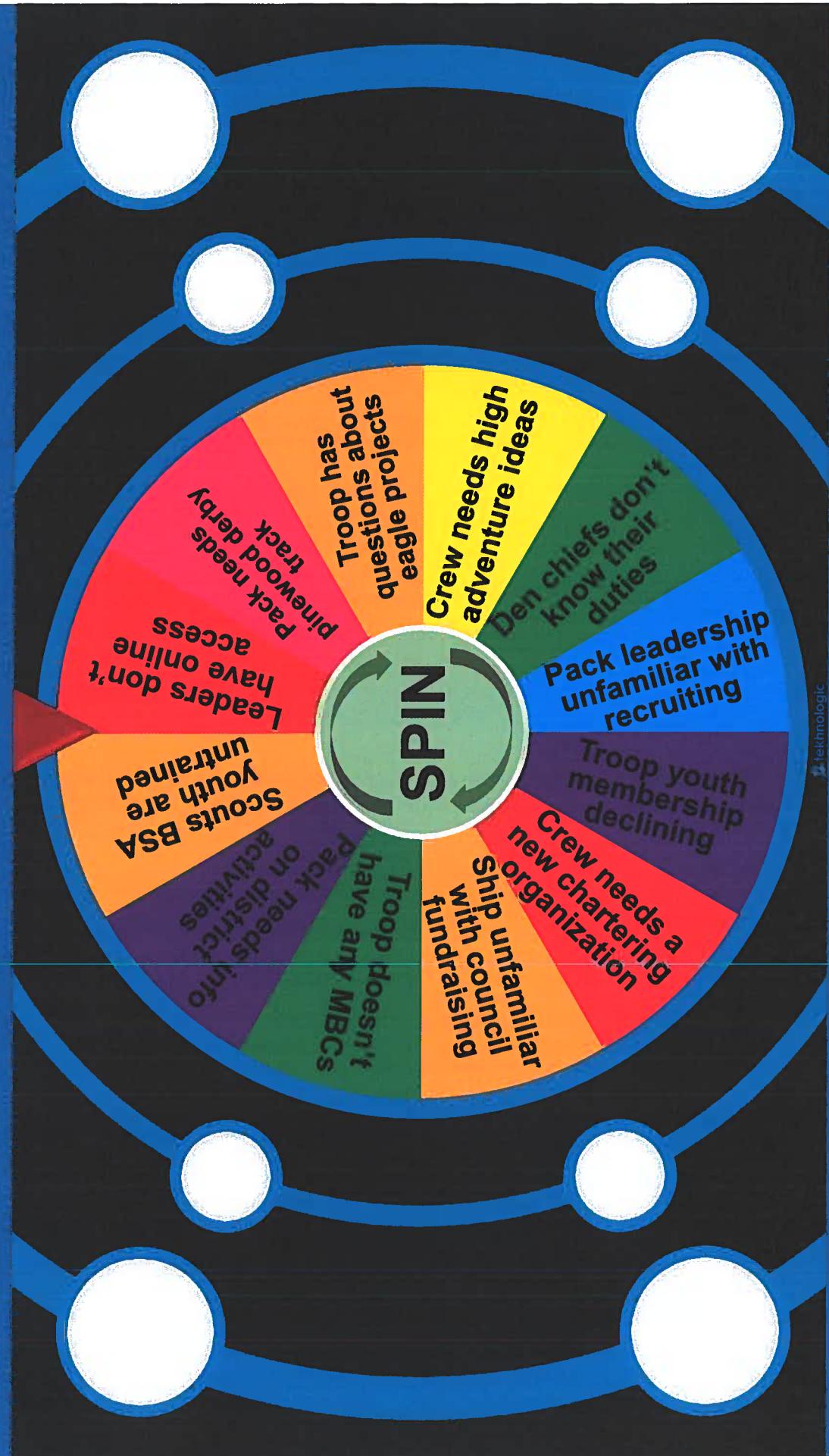


The District  
Operating  
Committee

*Commissioners*

The Unit

## Linking Needs to Resources Activity



# Commissioner Tools



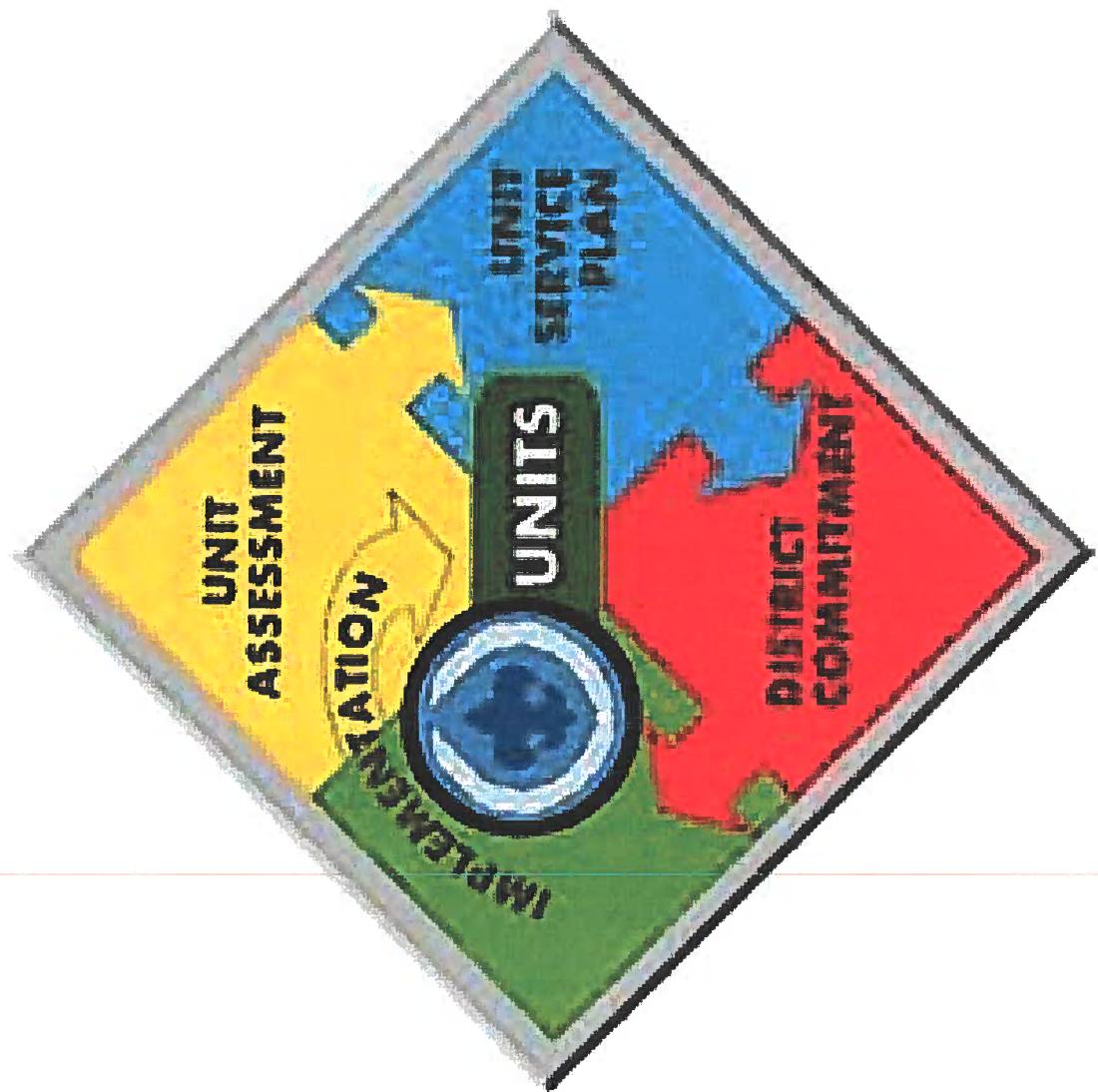
**Create a Culture of Accountability**



## Walk the Talk

- Transparency
- Familiarity
- Application

# Summary





Questions?  
Comments!



# **Sam Houston Area Council**

## **Current State and Roadmap**

# **The Unit Service Plan**

## \* What is a Unit Service Plan

- \* The Unit Service Plan is the natural outcome of a Detailed Collaborative Assessment with a Scout Unit
- \* It allows Units and Commissioners to identify areas for improvement, establish goals and identify internal and district resources to achieve those goals

# \* Why do one?

- \* “There’s a simple answer to that question: a Unit Service Plan enables commissioners to fulfill their mission to help units better serve more youth through Scouting. But as with most things, it probably isn’t quite that simple.”
- \* Source: Commissioner Manuals: The Unit Service Plan

\* The BSA Commissioners home page mentions Unit Service Plans three times

\* Once in Our Objectives

\* Second Objective - Contacting units and capturing in commissioner tools their strengths, needs, and a unit service plan that enables continuing improvement

\* Once in Our Goals

\* Third Goal - Enable implementation of a unit service plan through collaborative detailed assessments and an increased number of significant unit contacts.

\* Once in our Methods

\* Fourth Method - The Unit Service Plan

\* Is it important?

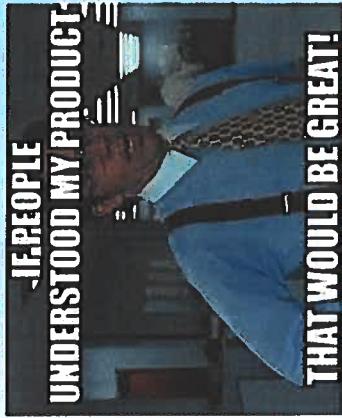
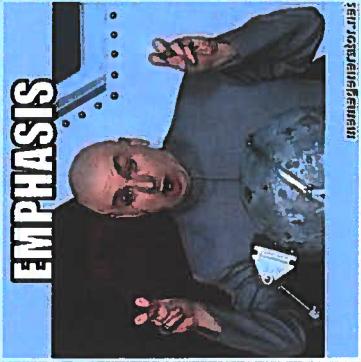
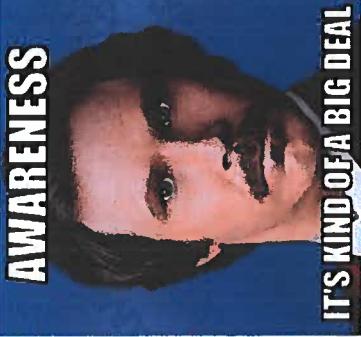
Unit Service Plans by District	Count (11/15/22)
Arrowhead	1
Big Cypress	1
Flaming Arrow	6
George Strake	4
Iron Horse	6
Mustang	1
Orion	3
Phoenix	3
San Jacinto	3
Red Wolf	3
Texas Skies	6
Thunder Wolf	7
Total (10/26/22)	44 (23 past target date)

\* **How are we doing?**

# \* Versus Assessments

Assessments (11/15/22)	Count
Simple	2,008
Detailed	164

- \* Awareness
- \* Emphasis
- \* Promotion
- \* Understanding
- \* Trust



- \* Increasing the number of Unit Service Plans executed within Sam Houston Area Council will require a map for Commissioners to understand it's role
- \* That map will help create
  - \* Awareness among commissioners via Training
  - \* Emphasis of importance by DC and CC
  - \* Promotion by the UC to their unit
  - \* Trust built by the UC with their unit to Keep Moving Forward

\* **Keep moving forward**

- \* Commissioner Training
  - \* Online Unit Commissioner Training
  - \* Unit Assessments
    - \* 5 minutes
- \* Commissioner Tools Navigation and Simple Assessments
  - \* 4 minutes
- \* Detailed Assessments and Unit Service Plan
  - \* 4 minutes
- \* Unit Service Plan V2
  - \* 10 minutes
- \* College of Commissioner Science
  - \* BCS 116 - Collaborative Assessments
  - \* MCS 316 - The Unit Service Plan
  - \* DCS 516 - The Unit Service Plan and the district

# \* Roadmap - Awareness

- \* As a commissioning corps, we must begin to emphasize the need for bringing the Unit Service plan to the forefront of our commissioning duties.
- \* It is mentioned three different times on the commissioning home page as a: goal, an objective, and a method

## \* **Roadmap - Emphasis**

- \* To the Commissioner Corps
- \* Council Coordinated - Commissioner Breakout
- \* Division Commissioner Meetings
- \* District Commissioner Meetings
- \* College of Commissioner Science
- \* To the Units
- \* Roundtable
- \* Key 3 meetings

## \* **Roadmap - Promotion**

- \* This presentation was designed to give a very high level view of the need for more Unit Service Plans in Sam Houston Area Council.
- \* It also lays out the resources available for understanding the Unit Service Plan
- \* Full understanding of the Unit Service Plan will come into view once Commissioners and Units realize what a powerful tool it can be for continuous improvement within the unit

**\* Roadmap - Understanding**

- \* Trust must be built between a unit and it's commissioner
- \* This comes from frequent and positive interactions with the Unit Commissioner
- \* Part of these positive interactions should involve
  - \* Simple Assessments
  - \* Detailed Assessments
  - \* The Unit Service Plan

\* **Roadmap - Trust**

## \* Conclusion

- \* We have a powerful tool available to us as a Commissioning Corps. The Unit Service plan was designed to help us assist Units to reach their potential.
- \* Why would we not utilize it...

\*Questions?

?????

