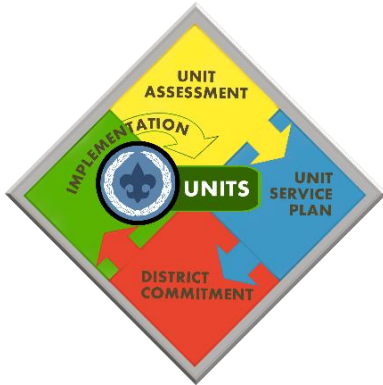

THE UNIT SERVICE PLAN



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 **S**pecific, **M**easurable, **A**chievable, **R**elevant and **R**esource oriented, and **T**ime 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](https://my.scouting.org/tools)