

# 19—GUIDELINES FOR UNIT ACTION PLANNING MEETING

## Guidelines for Unit Self-Assessment and Action Planning Meeting

**Present at meeting:** Unit Leader—Unit Committee Chair—Unit Commissioner

**Purpose of meeting (Use as the agenda for the meeting.):**

- To evaluate the unit's progress toward achieving the Journey to Excellence Unit Award
- To review the unit's goals, successes, and vision for the coming year
- To identify any areas of improvement—leadership, program, and membership
- To determine any specific actions needing to be taken to assist with unit improvements and determine who will follow up on those actions
- To schedule any necessary follow-up to monitor progress

**When to conduct meeting:**

- After the unit commissioner has visited the unit for the first time
- Annually to review strengths and areas of improvement to help provide direction for needed support, preferably six months prior to the annual charter renewal
- As needed when a problem arises
- When unit leadership changes

**How should the arrangements for this meeting be set up?**

- The unit commissioner speaks to the unit leader during the first unit visit to schedule the meeting date, time, and location.
- The dialog should include:
  - Approaching the unit leader after the meeting and requesting that a second meeting be set up with the unit leader and the unit committee chair.
  - Setting the meeting, preferably at the leader's or the chair's home.
  - Asking them to complete the unit self-assessment form prior to the meeting.
  - Letting them know the visit will include a discussion of the self-assessment form and how the goals and vision of their unit's program can be supported.

**Why only the unit commissioner, unit leader, and unit chair?**

- It provides a small group to openly analyze the program, their unit's needs, and steps to be taken to help resolve any issues.
- It helps open a dialog between the unit and the district. Once they meet and determine what needs to be done, others can be involved in helping determine which direction to go and any potential improvements that can be identified.

**What preparation should be made prior to the action planning meeting?**

- Review the statistics of the unit available from the local council and the district team, especially looking at:
  - Journey to Excellence status
  - Outdoor program participation
  - Advancement reports
  - Trained leadership status
  - Youth Protection training
  - Participation in district and council events
  - Roundtable attendance
- Complete the unit self-assessment form after the visit to analyze observations and review the statistics gathered from the council/district prior to the action planning meeting. (The self-assessment form is designed to take the place of the commissioner worksheet previously used by commissioners.)

# 20—UNIT SELF-ASSESSMENT FORMS



## Pack Self-Assessment

Pack Number: \_\_\_\_\_ District: \_\_\_\_\_ Date Completed: \_\_\_\_\_

Completed by: \_\_\_\_\_ Date Review Meeting Held: \_\_\_\_\_

Quality Criteria	Doing a Great Job	Would Like Improvement	Need Help	Comments and Needs
I. Pack Leadership				
A. An active committee meets monthly.				
B. Assistant leaders are in place for pack and dens.				
C. Adult leaders are registered and Fast Start and Basic Training are completed.				
D. All dens have active den chiefs.				
E. An active pack trainer is on the pack committee.				
F. At least one adult is trained in BALOO (Basic Adult Leader Outdoor Orientation).				
G. All adults are trained in Youth Protection.				
H. Webelos leaders have been trained in Outdoor Leader Skills for Webelos leaders.				
II. Program				
A. We develop an annual program calendar and share it with our families.				
B. We operate under the annual budget plan.				
C. We conduct monthly pack leader meetings to plan den and pack meetings.				
D. Den and pack leaders attend roundtables.				
E. We review our program routinely with our chartered organization representative.				
F. We develop an active outdoor program to involve our families.				
G. A good percentage of our youth earn advancement awards regularly.				
H. We conduct a monthly summertime program.				
I. Our unit is 100% <i>Boys' Life</i> with all families.				
J. We conduct at least one service project annually.				
III. Membership/Attendance				
A. We have dens of all ages involved.				
B. Our weekly den meetings are strongly attended by our members.				
C. We have good participation from youth and parents at pack meetings.				
D. Our youth and leaders wear their uniforms to den and pack meetings and on outings.				
E. We have an annual plan to recruit new youth members.				
IV. Journey to Excellence Award Standards				
A. We annually recharter on time.				
B. We earned the Journey to Excellence award last year.				
C. We are on track to earn the award this year.				



# Troop/Team Self-Assessment

Troop/Team Number: \_\_\_\_\_ District: \_\_\_\_\_ Date Completed: \_\_\_\_\_

Completed by: \_\_\_\_\_ Date Review Meeting Held: \_\_\_\_\_

Quality Criteria	Doing a Great Job	Would Like Improvement	Need Help	Comments and Needs
I. Troop/Team Leadership	_____	_____	_____	_____
A. An active adult committee meets monthly.	_____	_____	_____	_____
B. Assistant adult leaders are involved in the troop/team.	_____	_____	_____	_____
C. Adult leaders are registered and Fast Start and Basic Training are completed.	_____	_____	_____	_____
D. The unit provides a pack with active den chiefs.	_____	_____	_____	_____
E. An adult leader coordinates training for all adults.	_____	_____	_____	_____
F. An adult leader is trained in Safe Swim Defense and Safety Afloat.	_____	_____	_____	_____
G. An adult leader coordinates Youth Protection training. Everyone is trained.	_____	_____	_____	_____
H. Youth leaders are elected by youth twice per year and are provided training.	_____	_____	_____	_____
II. Program	_____	_____	_____	_____
A. We develop an annual program calendar and share it with our families.	_____	_____	_____	_____
B. We operate under the annual budget plan.	_____	_____	_____	_____
C. We conduct monthly troop/team youth leader meetings to plan unit meetings and outings.	_____	_____	_____	_____
D. We have adult leaders attend roundtables.	_____	_____	_____	_____
E. We review program routinely with our chartered organization representative.	_____	_____	_____	_____
F. We have a strong outdoor program and go on at least one outdoor trip monthly/regularly.	_____	_____	_____	_____
G. A good percentage of our youth earn advancement/recognition awards regularly.	_____	_____	_____	_____
H. Our troop attends summer camp . . .	_____	_____	_____	_____
OR	_____	_____	_____	_____
I. . . our team plans a major activity annually.	_____	_____	_____	_____
J. Our unit is 100% <i>Boys' Life</i> with all families.	_____	_____	_____	_____
K. We conduct at least one service project annually.	_____	_____	_____	_____
III. Membership/Attendance	_____	_____	_____	_____
A. We have youth of all ages involved.	_____	_____	_____	_____
B. Our weekly unit meetings are strongly attended by our members.	_____	_____	_____	_____
C. We have good participation from youth and parents at quarterly courts of honor/recognition meetings.	_____	_____	_____	_____
D. Our youth and leaders wear their uniforms to unit meetings and on outings.	_____	_____	_____	_____
E. We have an annual plan to recruit new youth members, including graduating Webelos Scouts.	_____	_____	_____	_____
IV. Journey to Excellence Award Standards	_____	_____	_____	_____
A. We annually recharter on time.	_____	_____	_____	_____
B. We earned the award last year.	_____	_____	_____	_____
C. We are on track to earn the award this year.	_____	_____	_____	_____



## Crew/Ship Self-Assessment

Crew/Ship Number: \_\_\_\_\_ District: \_\_\_\_\_ Date Completed: \_\_\_\_\_

Completed by: \_\_\_\_\_ Date Review Meeting Held: \_\_\_\_\_

	Doing a Great Job	Would Like Improvement	Need Help	Comments and Needs
<u>Quality Criteria</u>				
<b>I. Crew/Ship Leadership</b>				
A. An active committee with at least three members meets at least four times a year.	_____	_____	_____	_____
B. Assistant adult leaders are involved in the unit. The unit has coed leadership (if the crew is coed).	_____	_____	_____	_____
C. Adult leaders are registered and Fast Start and Basic Training are completed.	_____	_____	_____	_____
D. An adult leader coordinates training for all adults.	_____	_____	_____	_____
E. An adult leader is trained in Safe Swim Defense and Safety Afloat (if aquatic activities are planned).	_____	_____	_____	_____
F. An adult leader coordinates Youth Protection training. Everyone is trained.	_____	_____	_____	_____
G. Youth leaders are elected by youth annually and are trained at a crew officers' seminar.	_____	_____	_____	_____
H. Meetings and activities involve youth chairs and youth officers with adult guidance.	_____	_____	_____	_____
<b>II. Program</b>				
A. We develop an annual program calendar and share it with our families.	_____	_____	_____	_____
B. We operate under the annual budget plan.	_____	_____	_____	_____
C. We conduct monthly unit officer/leader meetings to plan unit meetings and activities.	_____	_____	_____	_____
D. We have adult leaders attend roundtables and Teen Leaders' Council meetings (if held).	_____	_____	_____	_____
E. We review our program routinely with our chartered organization representative.	_____	_____	_____	_____
F. We have a strong program and go on at least one activity per month.	_____	_____	_____	_____
G. We use the advancement/recognition awards programs to encourage personal development.	_____	_____	_____	_____
H. We attend special council/district events.	_____	_____	_____	_____
I. We plan a major activity annually.	_____	_____	_____	_____
J. We conduct at least one service project annually.	_____	_____	_____	_____
K. We support a pack or troop annually.	_____	_____	_____	_____
L. We participate in a Venturing Leadership Skills Course annually.	_____	_____	_____	_____
M. We conduct a minimum of two meetings or activities each month.	_____	_____	_____	_____
<b>III. Membership/Attendance</b>				
A. Our unit meetings are attended by at least 50 percent of our members regularly.	_____	_____	_____	_____
B. Our youth and leaders wear their uniforms to unit meetings and on outings (if applicable).	_____	_____	_____	_____
C. Our unit has an annual plan to recruit new youth members.	_____	_____	_____	_____
<b>IV. Journey to Excellence Award Standards</b>				
A. We annually recharter on time.	_____	_____	_____	_____
B. We earned the award last year.	_____	_____	_____	_____
C. We are on track to earn the award this year.	_____	_____	_____	_____