

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 Quality 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:
 - Quality Unit 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.)



Pack Self-Assessment

Pack Number: _____ District: _____ Date Completed: _____

Completed by: _____ Date Review Meeting Held: _____

	Doing a Great Job	Would Like Improvement	Need Help	Comments and Needs
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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% *Boys' Life* 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. Quality Pack Award Standards

- A. We annually recharter on time. _____
- B. We earned the Quality pack 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
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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% *Boys' Life* 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. Quality Troop/Team Award Standards

- A. We annually recharter on time. _____
- B. We earned the Quality troop or team 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
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Quality Criteria

I. Crew/Ship Leadership

- 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. _____

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 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. _____

III. Membership/Attendance

- 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. _____

IV. Quality Crew/Ship Award Standards

- A. We annually recharter on time. _____
- B. We earned the Quality crew or ship award last year. _____
- C. We are on track to earn the award this year. _____