


Commissioner Update – March 2016

Last week we announced a new report called In Progress Contacts that can be run from the Report tab on your district and council dashboards. It is located after the District Contact Stats 2016 report in the drop down list.



The reason we added this report was so commissioners can better manage those contacts that have not been marked complete. The report can be used by administrative commissioners to insure work recorded is not lost. Once a contact is started a commissioner or professional has 60 days to complete it. This limitation was set to encourage timely action be taken which will in turn allow for administrative commissioners and district executives the ability to get the unit the appropriate assistance they need.

If a contact appears on the report as In Progress the commissioner who created it should go to the unit dashboard where he can locate the contact and finish it by clicking on the contact.



A screenshot of a contact form. The "Select Type of Contact" dropdown is set to "Unit Meeting". The "Visitor (Commissioner)" field contains "Kendrew, Debra - 1234560". The "Date of Contact (MM/DD/YYYY)" field contains "03/04/2016". Below these fields is a "Unit Health" section with a dropdown set to "Unit health unchanged". At the bottom, there are two buttons: "2016 Detailed Assessment" and "Simple Assessment". A blue arrow points to the "Simple Assessment" button. At the very bottom, there are "Delete Contact" and "Save Contact" buttons.

This window will open. If you want to add more information click the appropriate simple or detailed assessment button, complete the scoring and click the save contact button.

It is suggested that before allowing those contacts started in January or February and left in Progress to expire, that commissioners take the time to complete them as soon as possible. This will allow them to be credited to JTE tracking as well.

ALSO – with the changes last week to split out the Unit Service Plan into a separate step (step 7) on the detailed assessment you can now mark a contact with a Unit Service Plan as complete and still come back later and update Step 7 in the Unit Service plan without the 60 day limitation. Thus the benefit of moving the Unit Service plan to its own step – permits commissioners more time to track and assist their units who are working on improvements.

Steps to Complete Your Assessment

Step 1 - Training and Membership	Review Data
Step 2 - Planning and Budget	Not Completed ✓
Step 3 - Membership	Not Completed ✓
Step 4 - Program	Not Completed ✓
Step 5 - Volunteer Leadership	Not Completed ✓
Step 6 - Unit Priorities and Other Details	Not Completed ✓
Step 7 - Unit Service Plan	Not Completed ✓