MCS 303

Managing Unit Service at the District Level

Time allotted	50 minutes
Teaching format	Instructor-led discussions with PowerPoint support, Activity

Resources

Handouts	• MCS 303 – Trained Commissioner PowerPivot Tool instructions – 1 per person • MCS 303 - Analyzing Commissioner Tools Data, 1 per person
Equipment and materials	• MCS 303 – Managing Unit Service at the District Level course plan • MCS 303 – Managing Unit Service at the District Level PowerPoint presentation • Computer and projector • Whiteboard or flipchart, appropriate markers and eraser
Resources for additional participant learning	• https://www.scouting.org/commissioners/tools/

Course Connections

Connections to other CCS courses	• **BCS 153 – Roundtable and Commissioner Tools**

Presentation Outline

Note to instructor: This course covers a lot of information – To avoid running out of allotted time, pacing in each report will be important.

Introduction and Course Objectives

Managing unit service in the district is the main responsibility of the district commissioner who is aided in this task by various assistant district commissioners. This course will familiarize the student on the modules available in Commissioner Tools so that they can enhance their ability to support the unit.

Introduce the learning objectives, noting that by the end of this session, each participant should…

- **Understand** what information a district commissioner needs to know to manage unit service
- **Know** where to find this information
- **Know** how to apply the information to manage unit service

What do we need to know? - 10 minutes (including 5-minute buzz group activity)

Managing unit service in the district is the main responsibility of the district commissioner and he or she is aided in this task by various assistant district commissioners.

District commissioners may appoint as many assistant district commissioners as they need to aid them in managing the district's unit service. Some of these assistants may be responsible for a portion of the district based on geography, (i.e., north, south, east, west). Others may be appointed for specific tasks like training, commissioner tools, charter renewal, awards etc.

The span of control for assistant district commissioners has generally been recognized as a 1:5 ratio. This is all dependent on the size of the district and the number of registered commissioners in the district. So, each assistant district commissioner ideally supervises five or fewer unit commissioners who in turn may be assigned to anywhere from 1 to 3 units depending on the number of unit commissioners available.

For virtual presentation, bring each bullet point up and discuss individually within the slide or, if possible, use the virtual platform's whiteboard.

Buss Group Activity and Instructor-led Discussion - 5 minutes:
Ask: What information do you think a district commissioner needs to know in order to best manage unit service in the district? Wait for answers.
For classroom environment - write answers on a whiteboard or flipchart or bring each bullet point up and discuss individually within this slide.

- *How many units are in the district?*
- *What type of units?*
- *How many are boy units?*
- *How many are girl units?*
- *How many attend roundtable?*
- *When was their last contact by a commissioner?*
- *Is there a unit service plan?*
- *Is it being worked?*
- *How many unit commissioners are in the district?*
- *Are they assigned to a unit?*
- *Are they making and recording contacts?*
- *Are they trained?*
- *Anything else?*

Finding the information in Commissioner Tools – 15 minutes

There are 12 reports organic to Commissioner Tools, but there are a few specific reports that a district commissioner needs to use on a regular basis.

Key Unit Service Management Indicators
There are a few specific reports that a district commissioner needs to use on a **REGULAR** basis.

- The Commissioner Contacts report provides a by-name accounting of all commissioners who made and reported unit contacts for the period selected.
- The Detailed Assessment with Comments report shows all the detailed assessments that have been completed along with the comments entered by a commissioner. This report should be reviewed monthly so that the district commissioner has a good idea of what types of issues units in the district are facing.
- District Contact Stats report and visual analysis. We'll discuss more in a minute.
- The Simple Assessment with Comments report will give you an idea of the progress being made on any open unit service plans.
- The Units with a Service Plan report shows specific issues a unit has and details the kind of help a unit needs to improve its program.

These three reports use power pivot tables to provide a district commissioner unit service management information about the district.

- Unit Contact Analysis report
- Roundtable Analysis report
- Units Needing Assistance report

Distribute the handout - "Trained Commissioner PowerPivot Tool" document.

Applying Information to Manage Unit Service: Unit Service Analytics – 20 minutes

Distribute the handout **"Analyzing Commissioner Tools Data"** document**.**

For virtual presentation, consider whether to distribute this handout (a) prior to class, (b) during class via the chat line, if available, or email, (c) after class, or (d) a combination.

Unit Service Analytics
This is the Unit Contact Analysis report. This report uses the Sept 2020 power pivot table. Two commissioner tools reports are used in generating this report. You need the District Contact Stats report along with the Assigned and Unassigned report.

Unit Contact Analysis contains multiple reports that covered various aspects of Unit & Commissioner Management:

- "Unit Contact Analysis" tab - provides information on the number of units per district, the number & percent which have been contacted at least once this year, the number & percent contacted in the last month, the number of new units and the number & percent of

those which have been contacted once this month, the overall number of simple and detailed assessments in the district.

- "CT District Summary Report" tab – provides a local version of the monthly report published by the Strategic Performance office.
- "Monthly Contact Analysis" tab – provides an analysis of the number of units contacts recorded by month for the current year. This information is provided by council, district, and sub-district.
- "Monthly Contact Analysis Chart" tab – provides the same information as above, but in a bar chart format. This report can also be filtered to show a singular council, a district, or group of districts, and sub-districts.
- "New Units" tab – provides a listing, by council, district, and sub-district of the units defined as a "new unit" in Commissioner Tools (36 months), including a count of the number of new units in each district. Additional filters allow this to be used to show "All" units, and to filter new units by the year they became a new unit.

Put the 2 reports along with the pivot table tool into one folder. Leave the downloaded reports in their original .csv format. Once all three items are in the file, open the excel tool and enable data. The tool will pull data from both reports and you will get a report that looks like this.

Across the bottom of the workbook, you will see several tabs. The information found in the tabs will be very helpful in helping to manage commissioner resources in your district.

Roundtable Analysis Report looks at roundtable attendance from several aspects - the number and types of units attending, the number of volunteers attending, and the actual attendance by each unit. The latter was also designed to determine the percent of Roundtables attended by a unit, based on the maximum number of Roundtables conducted and recorded in Commissioner Tools for that district. Analysis is provided in statistical and graphical forms.

This tool was developed to look at a typical "program year," August – July. Using the roundtable analysis tool requires the running of 2 roundtable attendance reports. The first report should be for the previous year. Set the date range to read the previous year and be sure to set the months for the whole year. (Jan-Dec)

The second report should be run for the current year so be sure to clear the date range boxes before you run the report. By leaving the date range blank. The report will cover the months from Jan. to the present as indicated in the second figure.

Once each of these reports are downloaded you will need to rename them and put them in a new, separate folder along with the Roundtable Analysis tool. The previous year Roundtable Attendance report should be named Roundtable__Attendance__20xx.csv, and this year's report should be named Roundtable_Attendance_20xx. (Be sure to replace the 2 x's with the number of last year and the number of the current year).

Units Needing Assistance Report is a tool that highlights units in the district that have a unit health score of 2.5 or lower. These units need help now. In a district that might have limited commissioner

resources, you can use the information in this report to assign commissioners to the units with the greatest need for assistance.

In a separate new file, place the tool and the 3 reports this tool needs to generate the data. The reports needed are the assigned and unassigned report, the priority needs report and the roundtable attendance report. Again, once all the reports are in the file with the tool, open the tool in excel and the tool will do the rest.

The Unit Contact Visual Analysis report provides a visual depiction of the "District Contacts Stats" report for your district. By default, the report is sorted with units that have the most contacts on the left, but you can change this sort order by the clicking the "Sort Order" button to choose a "Unit Number" sort. We do suggest that, especially if you have a large district, that you look at this information by Unit Type – focusing on one-unit type at a time.

The report will automatically show you the number of simple (blue) and detailed (orange) contacts each unit has received. You may also look for filtered data that shows units with no detailed assessments, or those which have not been contacted at all. Filters allow you to look at specific unit types (Packs, Troops, etc.,) or just new units.

To view this information:
Step 1 - Run the District Contact Stats Report then select export to csv and analyze. The data you need for this analysis will be in your download file.
(the next step is on slide 13 with the resulting report on slide 14)

Step 2 - Open the Download folder and select District_Contact_States.csv. Then click the open button.

Notice the filters that are available for this report. Run a report at your leisure and use the filters to see all the information this tool can generate. New units deserve a great deal of attention.

Commissioner Profiles
A feature in commissioner tools that is available only to administrative commissioners, is the administration tab. This is where you assign and unassign commissioner to Units.

But if you want to take a quick look at an individual commissioner and what they are doing, you can use the commissioner administration tab to get dashboard view of an individual commissioner's unit service activity. Click on an individual commissioner's name and their profile will appear.

The profile shows you all the registered positions a commissioner holds, it provides a list of units to which a commissioner is assigned, and It provides a history of the contacts the commissioner has made, including: Completed, In Progress, and Scheduled. The final data field provides a view in the form of a graph the number and types of assessments the commissioner has completed during the last four months.

Commissioner tools provides access to the Profile tab for all commissioners which gives them a snapshot of themselves as a commissioner. The profile tab is available to all commissioners so they can see how they are performing. Note that in the Profile view you can see an 'SP' (Service Plan) icon next to each Detailed Assessment with a Unit Service Plan.
This feature can be very useful in coaching commissioners.

Trained Commissioner Analysis Tool
Distribute the handout: Analyzing Commissioner Tools Data document

The final thing you should track for your commissioners is their training. You can do this using the trained commissioner analysis tool. This tool gives you a summary of trained and untrained commissioners. The tabs across the bottom will give you a by name listing of trained and untrained commissioners. Follow the instructions in the training analysis handout to generate this analysis.

Summary/Conclusion – 2 minutes

You should now:

- Understand what information a district commissioner needs to know to manage unit service
- Know where to find this information
- Know how to apply the information to manage unit service

Questions? – 3 minutes