

# BCS 116

## Collaborative Assessments



<b>Time allotted</b>	50 minutes
<b>Teaching format</b>	Instructor-led discussion with PowerPoint support, Group activities

### Resources

<b>Handouts</b>	<ul style="list-style-type: none"> <li>• BCS 116 - Why Do a Unit Service Plan? – 1 per participant</li> <li>• BCS 116 - Collaborative Assessment Meeting Agenda - 1 per participant</li> </ul>
<b>Equipment and materials</b>	<ul style="list-style-type: none"> <li>• BCS 116 – Collaborative Assessments course plan</li> <li>• BCS 116 – Collaborative Assessments PowerPoint presentation</li> <li>• Computer and projector, wireless presenter (if desired)</li> <li>• Whiteboard or flipchart, appropriate markers and eraser</li> </ul>
<b>Resources for additional participant learning</b>	<ul style="list-style-type: none"> <li>• <a href="https://www.scouting.org/commissioners/">https://www.scouting.org/commissioners/</a></li> <li>• <i>Journey to Excellence</i> - <a href="http://www.scouting.org/jte.aspx">http://www.scouting.org/jte.aspx</a></li> <li>• Commissioner Tools Training thru my.scouting.org – BSA Learn Center (temporarily at Commissioner National site - Technology for Commissioners)</li> <li>• Webinars <a href="https://www.youtube.com/watch?v=j5LjnB_SbMA&amp;feature=youtu.be">https://www.youtube.com/watch?v=j5LjnB_SbMA&amp;feature=youtu.be</a></li> <li>• Assessment Forms <a href="https://www.scouting.org/commissioners/starting-sustaining-and-growing-units/">https://www.scouting.org/commissioners/starting-sustaining-and-growing-units/</a></li> <li>• Unit Roadmap – Starting, Sustaining &amp; Growing Units <a href="https://www.scouting.org/commissioners/starting-sustaining-and-growing-units/">https://www.scouting.org/commissioners/starting-sustaining-and-growing-units/</a></li> </ul>

### Course Connections

<b>Connections to other CCS courses</b>	<ul style="list-style-type: none"> <li>• MCS 316 - Developing the Unit Service Plan</li> <li>• DSC 516 - Succeeding with the Unit Service Plan</li> </ul>
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	<ul style="list-style-type: none"> <li>• BCS 107 - Journey to Excellence</li> <li>• BCS 105 - Resolving Common Unit Problems</li> </ul>
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## Presentation Outline

### Introduction and Course Objectives – 5 minutes

Instructor Introduction along with quick orientation to course activities

This course examines and discusses the need for collaboration in assessing unit's strengths and needs to build a Unit Service Plan with the unit leaders and record progress in Commissioner Tools in working toward their goals.

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

*Read goals and corresponding informational text for each bullet on slide*

At the end of this training a commissioner will be able to:

- **Understand** the importance of the Collaborative Assessment
- **Develop** and **utilize** a Unit Service
- **Assess** and **record** results of the Unit Service Plan in Commissioner Tools

### Collaborative Assessment – 15 minutes with 5-minute activity (slides 3-11)

Discussion includes multiple aspects of collaborative assessment.

#### Why Collaborative Assessments?

Unit leaders and commissioners hopefully have a common goal. That goal is to deliver a quality program that attracts youth and adults to scouting and keeps them active longer.

A commissioner impacts quality program delivery by first establishing an effective and solid relationship with key unit leaders. Communication, understanding and honesty are needed to do this. Mutual trust and respect are the intended results.

The most effective Unit Service Plans start with a collaborative assessment of a unit's strengths and needs. This helps unit leaders and their unit commissioner identify and prioritize tasks that will strengthen the unit quickly, providing a common focus for actions.

#### How frequently?

Collaborative assessments and Unit Service Plan updates should be done as part of the annual charter renewal and JTE process. It is recommended to renew the assessment and planning process at six-month intervals. Adjustments to the Unit Service Plan can be made at this time.

Tasks should be limited in scope and number so they can be completed within six months. The best plans enable continuous progress.

Other times when it is appropriate to conduct a collaborative assessment are when there is a change in unit leadership or when there is a change in unit commissioners.

A collaborative assessment is also done as needed when problems arise.

### **Who participates?**

The unit Key 3 (Committee chair, unit leader and charter organization representative) and the unit commissioner are the participants in the collaborative assessment. They are the only participants because they are the ones who provide leadership and guidance to the unit. Since it is a smaller representative group, it can be more open to analyzing their program, unit needs, and necessary steps to help resolve any issues.

It also 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 support or resources needed.

### **Preparation**

Remember the importance of building relationships. A collaborative assessment should not be undertaken until the unit commissioner has established a solid relationship with the unit's key leaders, discussed the value of a collaborative assessment, and reached agreement with them to proceed with developing one. This step should never come as a surprise to unit leaders.

Once this agreement is reached, a future date is set by the unit commissioner in the Detailed Assessment function of Commissioner Tools. It gives the commissioner the opportunity to solicit input from the unit Key 3. Commissioner Tools provides the email address for each key 3 member and by checking the box next to their names, Commissioner Tools will send an email to the selected unit leaders which will enable them to complete an assessment form. Their input will be captured in the detailed assessment created by the unit commissioner.

This gives the commissioner and unit Key 3 a means to develop their own initial perspective of the unit before the meeting occurs.

### Collaborative Assessment Meeting Agenda - Activity – 5 minutes (slide 8)

What items would you place on the agenda for this meeting? (give participants an opportunity to suggest an agenda).

List their suggestions on a white board or flip chart. Once everyone has had an opportunity to contribute, hand out the sample agenda. (5 minutes)

Remind participants that this is just a suggested list of topics to be discussed and that they need to develop the topics that are the most appropriate for their units.)

As you can see, the agenda mirrors the sections of the assessment forms in Commissioner Tools.

*(Hand out sample agenda forms – 1 per participant)*

For virtual presentation, consider the following:

- Run the discussion as described.
- Use virtual whiteboard or a PowerPoint slide in “Normal” view and use it like a whiteboard.

### Journey to Excellence

The Unit Assessment is based upon JTE Objectives (for example, Advancement, Retention, Trained Leadership, etc.). JTE scores will help identify the unit’s strengths and opportunities for improvement.

Journey to Excellence standards are updated each year in August and are posted at

<http://www.scouting.org/jte.aspx>

**Instructor Note:** *Have the class scan the QR code on the slide*

Units that are successful in the JTE Objectives areas attract and retain more youth.

Familiarity with current JTE standards will provide a common perspective for everyone involved in developing and executing a Unit Service Plan.

Through ongoing unit contacts, commissioners capture periodic updates of the collaborative assessment of unit health and ensure the plan for improvement is moving forward.

Unit contacts made by the unit commissioner and logged in the Commissioner Tools can also provide valuable perspective in the assessment process.

The information developed during the Unit Assessment Meeting is the foundation of the Unit Service Plan, which will be captured in Commissioner Tools, where it will be available for ongoing reference by the unit commissioner.

### **Scoring Matrix**

A Unit Assessment does not have to be difficult process. Unit leaders and engaged commissioners know, intuitively, a unit's strengths and its opportunities to improve.

Look at the example of a unit's assessment scoring matrix.

A unit Key 3 and unit commissioner can use it in conducting the unit assessment that is the foundation of a Unit Service Plan. Whether the scale is "Low-Medium-High," "Red-Yellow-Green," or "1-2-3-4-5," the matrix provides a simple approach to assessing a unit's performance in key areas such as Finance, Membership, Program, and Leadership & Governance.

The definitions provide a frame of reference: a "High"/"Green"/"5" assessment indicates the unit is nearly ideal in an area, for example.

The next logical step in the process, once opportunities for improvement are identified, is to prioritize them. It may not be practical to attack all of them at the same time; prioritizing them will enable the best possible use of available resources to improve unit performance.

Unit Assessments should always include the unit's program plan. Our best units, those with the highest retention of youth and adults, invariably create and maintain an annual program plan that ensures the unit's program is relevant to the youth it serves.

### **What is measured**

This is an example from the Journey to Excellence scorecards of what is measured. As you can see, this also mirrors the sections of the assessment forms in Commissioner Tools.

Now that the collaborative assessment meeting has been completed, it is time to identify all the areas in which the unit wishes to focus their improvement efforts. As these areas are identified, specific responsibility needs to be assigned to specific individuals. These individuals may be unit resources, district and council resources or commissioner resources. This is a key point because this is where the unit commissioner can link district and council resources to unit needs, which is one of the five objectives for commissioners.

Finally, the unit commissioner takes all this information, consolidates it and develops a Unit Service Plan to help the unit make the identified improvements

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## **Service Plan – 15 minutes including 5-minute activity (slides 9-15)**

### **The Unit Service Plan**

The Unit Service Plan is our primary tool that enables us to link unit needs to district operating committee resources. It was also a key element in the design of Commissioner Tools.

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.

Based upon a collaborative assessment of unit health, commissioners develop a service plan that is customized to respond to a unit's strengths and needs and draws upon resources available within the unit, its charter organization, and through the district operating committee

### **The Unit Service Plan Process**

Using the results of the Unit Assessment Meeting, the Unit Key 3 and unit commissioner should work together to develop the Unit Service Plan, a list of action items that will strengthen the unit and the program it offers to the youth it serves. In addition, they should establish completion target dates and assign responsibility for each.

Finally, resources needed to accomplish specific action items should be identified (some resource needs, such as funding or training, might result in the identification of other action items).

Set SMART goals – Specific, Measurable, Attainable, Relevant and Timely.

### **Roadblocks (*buzz group activity*) Slide 15**

This seems like a process that is straightforward ensuring that all stakeholders have a part in decision making but for many it is one of the most difficult parts of unit service.

**Roadblocks Activity (3 minutes for brainstorming, 5 minutes for reporting)**

Instructor might consider splitting the commissioners into two groups, each considering one of the questions.

Consider also using a recorder as the instructor keeps collecting responses. Another option are large sheets of paper and create lists that are posted for all to see.

Questions to be considered are presented on Slide 15

- Why might unit leaders be reluctant to participate in a collaborative assessment or the JTE performance recognition program?
- What can we, as commissioners, do to convince unit leaders to participate?

For virtual presentation, consider the following:

Use breakout rooms or separate rooms, depending on the virtual platform, for the buzz groups. Note whether you can show a slide in the breakout room. If not, put it into a chat, send it via email in real time, give people time to write down the questions, or assign a leader to each breakout session in advance.

**Assess and Record in Commissioner Tools – 10 minutes (slides 16-19)****Implementation**

The collaborative assessment is now complete, and the Unit Service Plan has been developed. The next thing that needs happen is to implement the unit service plan. This requires the buy-in of the unit leaders, and the unit commissioner who is responsible to ensure things get done as well as the district committee, if needed.

The unit commissioner can use the simple assessment function in Commissioner Tools to report progress on each item of concern that was identified in the collaborative assessment.

Once action items are completed, the commissioner can go back into the detailed assessment and enter the dates when the item was completed as well as recognizing the unit for the work they are doing for their scouts.

An unexecuted plan is of no value.

The unit commissioner is an essential element of the Unit Service Plan's success. An engaged unit commissioner works closely with the unit Key 3 to continually assess progress and help the unit and the district operating committee maintain accountability and make course corrections when necessary.

During contacts, the unit commissioner notes progress, and later records it in Commissioner Tools.

### **District/Assistant District Commissioner**

We just mentioned that it is the responsibility of the unit commissioner to make sure that all the actions that were identified in the collaborative assessment are completed and that the needed linking of district resources actually happens.

Now, it is the responsibility of assistant district commissioners and district commissioner to review and discuss unit service plans with each unit commissioner and provide any assistance needed to ensure district resources reach the unit.

Monthly district commissioner staff meetings are the perfect venue for unit commissioners to outline the service plans they have developed for their units and to report on the progress each unit is making to achieve their goals for improvement. This is also the time for unit commissioners to identify any obstacles that they or the unit have encountered in implementing their plan.

The district commissioner will discuss unit needs with the Program Specialists (Training, Advancement, Camping, etc.) at the monthly district committee meeting.

The unit commissioner and the unit leaders work together collaboratively to make changes. During contacts with the unit, the commissioner notes progress, records in Commissioner Tools and celebrates with the unit on their success or revises goal when needed.

The unit commissioner provides support to units as they build. Commissioners follow the Assess-Plan-Act model through each stage to ensure that every member of the BSA has a great Scouting experience. You will notice the collaboration woven throughout the model.

The commissioner engages the unit in determining its goals. The assessment should be collaborative as a unit discerns their strengths and weaknesses. Together the Key 3 and commissioner prioritize needs. The commissioner can then mentor the unit to solve some on their own or connect the unit with the district resources. A goal is created with a due date and designated unit member who is responsible for action.

Assess, Plan, Act is the process that is useful in supporting change, and moving forward in a collaborative, systematic way in everything we do in unit service. We have worked through the Unit Detailed Assessment in a collaborative way, ensuring the buy-in from the unit leaders and committee. Then it is time to act, working with the unit to accomplish what they set as goals. Then take time to celebrate.

Note that every step, unit service is a process that is not completed by the commissioner on their own. It is a process that builds trust and loyalty between the commissioner and the unit.



## Summary/Conclusion – 3 minutes

Relationships are the foundation of effective collaboration; in fact, relationships are the foundation of effective unit service. As commissioners work to build effective relationships, unit leaders should come to understand that their unit commissioner has only one objective: to help the unit better serve more youth through Scouting. Once effective relationships have started to develop, unit commissioners will likely find greater acceptance of a *collaborative* approach to unit assessment and plan development.

- The Collaborative Assessment enables the commissioner to develop a relationship with the Unit Key 3.
- Developing a Unit Service Plan helps to assess a unit's strengths and needs.
- Recording the results of the Unit Service Plan in Commissioner Tools provides actionable information to follow up on.

## Questions? – 2 minutes