

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

**(conducted annually)**

**Present at Meeting: Unit Key 3 (Unit Leader, Unit Committee Chair, Chartered Organization Representative), Unit Commissioner, and District Executive**

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

- To evaluate the unit's progress toward achieving the Journey to Excellence Performance Recognition Award
- To review the unit's goals, successes, and vision for the coming year, including a succession plan for future unit leadership
- To identify any areas of improvement—leadership, program, membership, youth and unit retention
- To determine any specific actions needed 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 (annually):**

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

**How should the arrangements for this meeting be made?**

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

**Why only the unit leader, unit chair, chartered organization representative, unit commissioner, and district executive?**

- 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 dialogue between the unit and the district. Once they meet and determine what needs to be done, others can be involved in helping determine in 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:
  - JTE Unit status: Bronze, Silver, Gold
  - Outdoor program participation
  - Advancement reports
  - Trained leadership status
  - Youth Protection training
  - Participation in district and council events
  - Roundtable attendance
- Complete the unit assessment form after the visit to analyze observations and review the statistics gathered from the council/district prior to the action planning meeting.