

## **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.)