Commissioner Tools Step by Step

Patriots’ Path Council

March 15, 2015
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Commissioner Tools Step by Step

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**Introduction**

As a scoutmaster, my unit commissioner gave me a piece of rope during one of his unit visits. He recommended that I always keep a bit of rope in my scout pants because you never know when you will have an opportunity to teach a scout how to tie a knot. Teaching scout craft is fundamental to this program and this was a terrific tip for me to be more effective in sharing my talents with our youth.

The metrics in the Journey to Excellence is another tool that we have to become more effective in sharing our talents. The activities that it monitors are all items that contribute to make a scouting unit prosper and in turn continue to give us opportunities to teach how to tie that knot.

A lot of units come to the end of the year only then look at the Journey to Excellence to see if they happen to get it. At that time of year, it really is too late to do anything about achieving it. It can become a source for frustration.

One of the things that excite me about the new commissioner tools is that they take a proactive approach to identify areas for improvement and gives us a strategy to make improvements.

The collaborative assessment and the resulting plan give us a chance for success in Journey to Excellence before it is too late. Capturing the information in Commissioner Tools make it accessible by the unit commissioner, all members of the district’s unit service team, and also district professionals.

The objective of this document is to explain, guide and demonstrate the key functions of the commissioner tools website to enable you to make the most of the unit service plan.

Thank you for all you do for scouting. I hope that you will be able to take advantage of this guide to help you in achieving success for your units.

Joseph Jeffs

Commissioner Tools Champion

Patriot’s Path Council
The Unit Service Plan

Initial Conversation: The process starts with a conversation between the unit commissioner and the Unit Key 3. The “Unit Key 3” is comprised of: Chartered Organization Representative, Committee Chair, and Unit Leader (Cubmaster, Scoutmaster, or Crew Advisor). The objective of this meeting is to explain the process that is being described here and agree that all parties have common goal to deliver an excellent program for our scouts. If the members of the Unit Key 3 do not already have a my.scouting.org login, it would be a good idea to have them create them during or immediately after the initial meeting. It is also necessary to have them review their profile to ensure their contact information is correct. The unit commissioner should be given the email address of the person who will complete the unit detailed self-assessment. Also during this initial meeting the unit commissioner will agree with the unit key 3 on a date for a follow-up meeting to review the self-assessment.

Unit Self-Assessment: The unit self-assessment is part of a detailed assessment; it is a simple form that basically lets the unit communicate their current status towards Journey to Excellence. It also lets them enter any needs that they may need assistance with. Even though the unit commissioner can send the self-assessment form to multiple members of the unit key 3, only one entry from the unit can be submitted. For this reason, we recommend that the unit commissioner only send the form to the person that will fill it out. The assessment is designed to identify the strengths and needs of the unit in the specific areas of Membership, Program, Finance, and Governance. To make the form easier to fill out, please refer to the ratings guide for each question. In the comments section, please explain the reason for the rating and any concerns you may have regarding that topic. It is helpful to complete the unit self-assessment a few days prior to the follow-up meeting with the unit commissioner to give him or her time to read through it.

Detailed Assessment: During this follow-up meeting the unit commissioner will confirm the unit self-assessment and may suggest some areas where the unit can improve. Together the unit Key 3 and the unit commissioner will agree on an action plan and the unit key 3 will identify someone in their organization to take the lead to address the plan.

Simple Assessment: At later unit visits, the unit commissioner discusses with the unit leads the progress against their action plan. This review is recorded as a simple assessment in commissioner tools.
Recommended Training Videos
The commissioner tools website contains a number of videos that introduce the new program. While there are additional videos available I recommend these as a starting point. Once a video starts playing it will automatically advance to another video. Feel free to stop it and return to the initial list.

http://www.scouting.org/Home/Commissioners/tools.aspx

There are additional videos available in the Question and Answer section of this same page. These videos do not focus on how to use the site. Feel free to look at the topics and select the ones of interest.
### Icons

<table>
<thead>
<tr>
<th>Application Icons</th>
<th>Menu Icons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Council</td>
<td>Home Menu</td>
</tr>
<tr>
<td>Service Area</td>
<td>Commissioners Administration</td>
</tr>
<tr>
<td>District</td>
<td>Organization Security Manager</td>
</tr>
<tr>
<td>Help</td>
<td>Commissioner Tools</td>
</tr>
<tr>
<td>Edit Information</td>
<td>Training Manager</td>
</tr>
<tr>
<td>Required Field</td>
<td>My Organization Dashboard</td>
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<tr>
<td>Add More information</td>
<td>Member Manager</td>
</tr>
<tr>
<td>More Menu Options within that menu</td>
<td>Organization Manager</td>
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<tr>
<td>Close Window</td>
<td>Announcements</td>
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<td>Score of a Simple Assessment</td>
<td>Calendar</td>
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<tr>
<td>Score of a detailed Assessment:</td>
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</tr>
<tr>
<td>Color Code</td>
<td></td>
</tr>
<tr>
<td>1-2 Red</td>
<td></td>
</tr>
<tr>
<td>2-4 Gold</td>
<td></td>
</tr>
<tr>
<td>4-5 Green</td>
<td></td>
</tr>
<tr>
<td>Latest Unit Assessment with change from prior assessment.</td>
<td></td>
</tr>
<tr>
<td>Health Icons</td>
<td>Color Code</td>
</tr>
<tr>
<td>$ Planning and budget</td>
<td>1-2 Red</td>
</tr>
<tr>
<td>$ Membership</td>
<td>3-4 Gold</td>
</tr>
<tr>
<td>$ Program</td>
<td>4-5 Green</td>
</tr>
<tr>
<td>$ Volunteer Leadership</td>
<td></td>
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# Roles & Activities

<table>
<thead>
<tr>
<th>Activity</th>
<th>Unit Key3</th>
<th>Unit Commissioner</th>
<th>Roundtable Commissioner</th>
<th>District Commissioner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conduct a Simple Assessment</td>
<td></td>
<td>⬰</td>
<td></td>
<td>⬰</td>
</tr>
<tr>
<td>Schedule a Collaborative Assessment</td>
<td></td>
<td></td>
<td></td>
<td>⬰</td>
</tr>
<tr>
<td>Filling in a unit self-assessment</td>
<td>⬰</td>
<td>⬰</td>
<td></td>
<td>⬰</td>
</tr>
<tr>
<td>Filling in the Commissioner’s Detailed Assessment</td>
<td></td>
<td></td>
<td></td>
<td>⬰</td>
</tr>
<tr>
<td>See list of my Assigned Units and contacts</td>
<td></td>
<td>⬰</td>
<td></td>
<td>⬰</td>
</tr>
<tr>
<td>Schedule a Roundtable</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Complete a Roundtable</td>
<td></td>
<td></td>
<td>⬰</td>
<td></td>
</tr>
<tr>
<td>Assign a Commissioner to a Unit</td>
<td></td>
<td></td>
<td>⬰</td>
<td></td>
</tr>
<tr>
<td>Unassign a Commissioner to a Unit</td>
<td></td>
<td></td>
<td>⬰</td>
<td></td>
</tr>
<tr>
<td>Run Reports</td>
<td></td>
<td></td>
<td>⬰</td>
<td></td>
</tr>
<tr>
<td>Use Discussions</td>
<td>⬰</td>
<td>⬰</td>
<td>⬰</td>
<td>⬰</td>
</tr>
</tbody>
</table>

**Key**

- ⬰ Primary Activity
- ○ Knowledgeable – Can coach others
Before you start

Supported Internet Browsers
my.Scouting™ Tools requires using the latest version of Google Chrome, Mozilla Firefox, Safari and Internet Explorer (v11).

Using older versions of browsers are not supported. Attempting to use Internet Explorer version 9 or 10 will cause critical features to not work properly.

Watch Your Back
The Back button will take you all the way out of the my.Scouting.org application. Please use the navigation buttons and menu items to return to prior screens. Also note that in most browsers the backspace key doubles as a Back button when you are not in a text edit field.

Patriots’ Path Council Organization
In your use of commissioner’s tools, you will often have to navigate the organization to find the unit that you are working with. In most cases, the scouting unit will be listed in the district that ends in the number 1. These are highlighted in green in the organization chart shown here.
Unit Commissioner Activities

Verify your Profile

To ensure that emails are sent to you and that you have the appropriate access, it is important that you review your profile the first time you use commissioner tools as well as when your contact information changes.

1. Log in
2. From the home Menu Select “My Dashboard”

3. Click on the fields that you want to edit. Name, Gender, Member Number, Birthdate, and active positions come from registration information and cannot be changed. For the first section to edit the other information click on the pencil icon. For other fields, double click on the field you want to edit

4. Fun Fact, you can print your membership card by clicking on the icon.
Conduct a Simple Assessment
A simple assessment is a fast and simple way to record a contact that a commissioner makes with a unit including basic information. The simple assessment should contain concerns and positives about the unit.

5. Log in
6. From the Home Menu, Click on the name of your council, this will open the council sub menu if it was not already open.

7. Click on the Commissioner Tools menu item
8. Use the Organizational Navigator to select the unit you are assessing. First you will need to navigate to your district by clicking on the district name. Once you select your district you can search for the unit by unit number (four digits with leading zeros, example below shows entry of 0884)
9. Press the + New Contact Button, Enter type of contact from the pull down menu, Visitor (it will default to you), date of contact, and change in unit health.

The types of contact available are Unit Meeting, Unit Committee/Leader Meeting, Unit Key 3 Meeting, Unit Activity, Unit Parent Meeting, or Other.
10. Press the simple assessment

![Image of simple assessment interface]

11. Select an Overall Assessment Score

<table>
<thead>
<tr>
<th>Relative Ranking</th>
<th>Score</th>
<th>Color</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>High</td>
<td>5</td>
<td>Green</td>
<td>Nearly an ideal situation</td>
</tr>
<tr>
<td>Medium-High</td>
<td>4</td>
<td>Lime</td>
<td>Making progress towards the ideal unit</td>
</tr>
<tr>
<td>Medium</td>
<td>3</td>
<td>Yellow</td>
<td>Typical Unit; Could be improved</td>
</tr>
<tr>
<td>Medium-Low</td>
<td>2</td>
<td>Orange</td>
<td>Needs Improvement; Watch Carefully</td>
</tr>
<tr>
<td>Low</td>
<td>1</td>
<td>Red</td>
<td>Weak Situation; Needs Immediate Action</td>
</tr>
</tbody>
</table>

If you have conducted a detailed assessment with the unit in the past, then I would recommend that you discuss progress against the units action plan and use that progress as a guide in rating the unit during the simple assessment. This will give more continuity of the scoring and give you a better understanding of the unit’s progress.

12. Enter comments

- How the unit service plan is being implements
- Special Needs
- Good ideas you have seen
- General observations
You can type as much as you want. I have entered the entire Gettysburg Address just to prove it.

13. Print Save and Complete Contact. You will automatically be directed back unit dashboard with the revised score and change from the prior assessment.

A simple assessment does not provide feedback in the Health Indicators so they are not updated until the next detailed assessment.
Schedule a collaborative detailed assessment

The personal relationships and desire to help each other are the real strength of the commissioner core. More important than ever, a unit commissioner must establish a solid relationship with a unit’s leaders based on mutual respect and an understanding of one another’s motivation for involvement in Scouting and vision of future success for the unit. Only then can we start with a collaborative assessment of a unit’s strengths and needs.

After introducing the concept to unit leaders, a unit commissioner can send an electronic assessment form to them by email that can be completed quickly and easily online, and the results of their assessments will be captured by Commissioner Tools and be available for review there. Unit assessments will be most effective when the unit commissioner facilitates a meeting with unit leaders to review their initial input and finalize an assessment of the unit’s strengths, needs, and greatest opportunities to improve the quality of the program it provides to the youth it serves.

Since only one unit assessment can be submitted, I recommend that as you discuss with the unit that they are to expect the assessment, you should also get agreement on who will fill it out. That way you can just send the electronic assessment to the one person and avoid the confusion of multiple people trying to submit their input.

A separate handout will be available on the Council Commissioner Tools site to give further guidance to the unit on how to complete the self-assessment.
1. **Log in**

2. From the Home Menu, Click on the name of your council, this will open the council sub menu if it was not already open.

3. **Click on the Commissioner Tools Menu then Use the Organizational Navigator select the unit you are assessing.** First you will need to navigate to your district by clicking on the district name. Once you select your district you can search for the unit by unit number (four digits with leading zeros, example below shows entry of 0884 )
4. Press the + New Contact Button, Enter type of contact, Visitor (it will default to you), and date of scheduled meeting. Again you should have already introduced the key three to the goals and objectives of the meeting before doing this step. When you set the date in the future, the system automatically changes to allow you to email the electronic assessment form.
5. Select the members of the Key three that you would like to send the assessment form to and press the “Send Unit Assessment to Unit Key-3” button. You can also enter an additional email to send the assessment to. You can use this to copy the email to yourself. During sandbox simulation, I recommend that you copy yourself so that you can try the entire process.
6. Alternatively (and perhaps additionally), you can press the Detailed Assessment button.

7. From here you can press the Print Unit Assessment Form. When you press the print button, the system creates a PDF file that you can view or print. This form can be viewed or printed anytime during the assessment process. It will contain the latest available information in the system. This form will already have pre-filled unit specific information in the Training and Membership section. I recommend that you press the Print Unit Assessment form at this time to view what they system has prefilled in so that you can respond to any unit questions. Since you are sending the unit assessment electronically to the unit key, you only need to print this form right before your meeting with them so that you have their answers for reference during the discussion and a place to take notes. Using the electronic email notification is the preferred method of providing the form to the unit since the unit can key their input directly into the my.scouting.org website.
8. Once the appointment is scheduled you will see it as scheduled on the Unit Page
Filling in a Unit Assessment

If the commissioner has electronically sent the unit assessment form to the key-3 then they will receive an email with a link to the assessment form as shown below.

1. According to the scouting tools website, a login will be required before opening the form.
2. Clicking on the link will open the commissioner tools in the users default browser and will take them directly to the assessment without having to log in. Note that if an older version of internet explorer is their browser, they may need to copy the URL and past it into a compatible browser such as chrome or Firefox.
3. Press the Detailed Assessment Button which will open the following screen.
4. Press Step 1 – Planning and Budget to start filling out the first section of the form. As you update the form, your changes are saved automatically.

5. When rating Planning and Budget, the key 3 need to select one of the following ratings.

   Please see Ratings Guides available starting on Page 64

   1 Weak situation; needs immediate action
   2 needs improvement; watch carefully
   3 typical unit, could be improved
   4 making progress toward the ideal unit
   5 nearly an ideal situation

6. Fill in the unit comments and press done. Progress for the completed section will be reflected on the page.
7. Next press Step 2 Membership

Please see Ratings Guides available starting on Page 64

| 1 Weak situation; needs immediate action | 2 needs improvement; watch carefully | 3 typical unit, could be improved | 4 making progress toward the ideal unit | 5 nearly an ideal situation |

8. Fill in each section and press done
Retention is a scout that was enrolled last year and has enrolled this year.
9. Progress will be updated on the main page
10. Next press on Step 3 Program
11. Fill in each section with a rating and comments

<table>
<thead>
<tr>
<th>Rating</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Weak situation; needs immediate action</td>
<td></td>
</tr>
<tr>
<td>2 Needs improvement; watch carefully</td>
<td></td>
</tr>
<tr>
<td>3 Typical unit, could be improved</td>
<td></td>
</tr>
<tr>
<td>4 Making progress toward the ideal unit</td>
<td></td>
</tr>
<tr>
<td>5 Nearly an ideal situation</td>
<td></td>
</tr>
</tbody>
</table>

Please see Ratings Guides available starting on Page 64
12. When you press done, the main screen will be updated with your status
13. Press Step 4 Volunteer Leadership

14. Fill in each section and press done

<table>
<thead>
<tr>
<th>Rating</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Weak situation; needs immediate action</td>
</tr>
<tr>
<td>2</td>
<td>Needs improvement; watch carefully</td>
</tr>
<tr>
<td>3</td>
<td>Typical unit, could be improved</td>
</tr>
<tr>
<td>4</td>
<td>Making progress toward the ideal unit</td>
</tr>
<tr>
<td>5</td>
<td>Nearly an ideal situation</td>
</tr>
</tbody>
</table>
15. The status screen will now show each section complete.

16. Use the Print Unit Assessment form to review your work. You will see that additional information has been pre-filled as to number of people registered and trained.

17. Note you can still go back and make changes after you preview the report.

18. Once you are satisfied with your entries, press the complete contact button.
Filling in the Commissioners Detailed Assessment

1. Navigate to the Unit page following the same procedure as “Schedule a collaborative detailed assessment”

2. Click on the already scheduled contact, you will notice is says that the unit assessment has already been completed.

3. Click on the 2015 Detailed Assessment button
5. Press on the step 2 Planning and Budget button. Note the unit score and comments are already filled in.
6. Do not fill in the Assessment Score at the top of the page, if left blank then the system can calculate the score for you. If you fill it in, then you will not be able to score the individual sections within the question area.
7. Enter a score for the budget, Budget comments.

<table>
<thead>
<tr>
<th>Rating</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Weak situation; needs immediate action</td>
<td></td>
</tr>
<tr>
<td>2 needs improvement; watch carefully</td>
<td></td>
</tr>
<tr>
<td>3 typical unit, could be improved</td>
<td></td>
</tr>
<tr>
<td>4 making progress toward the ideal unit</td>
<td></td>
</tr>
<tr>
<td>5 nearly an ideal situation</td>
<td></td>
</tr>
</tbody>
</table>

Please see Ratings Guides available starting on Page 64

8. In the planning and budget section there is only one question. In later sections there will be multiple questions. Based on the answers to all the questions identify a forward action if necessary and enter it in the Action Needed box. Not all area requires a forward action.

9. As you discuss this with the unit key three identify a person to take the lead in closing out this action and put them in the Accountability section.

10. Update Action Completion on Detailed Assessment. There is an actual completion date field however, this field is not currently used. The assessment will be locked after 60 days so until some new feature is added to the software we cannot update it.
11. Once you complete a section and press done, the score for that section is reflected on the assessment main page.

12. Repeat the steps that you used for the Budget (Once completed the name changes to Finance Assessment) to complete the information for Membership, Program, and Volunteer Leadership.
13. The Unit Priorities and Other Details section is different. This section provides information that feeds the unit health report so that we can get an overview of what are our unit needs and where units need help.
14. In the JTE award section you enter what level of JTE the unit is striving for. If there are leaders that are planning to leave the unit, enter their succession plan status in the following list box.
15. In the I Need Help section, write a brief description in the boxes where you need additional help in supporting the unit to improve. These fields are not mandatory; only enter information where you have a need.
16. There is a section for comments that you need to discuss with the District Commissioner or Assistant District Commissioner. There is also a place to capture potential Unit Commissioners for recruitment. If you fill in one of these fields also please follow-up with an email to your District Commissioner to ensure they can act in a timely manner.

17. Finally, check off any Priority Needs in the last section.

18. Once have reviewed your entries and are done use the “Complete Contact” button to finish. If you plan to return and work on the assessment some other time you can use the Back button instead.

19. A summary of the completed contact is now on the unit page.
District and Council Commissioner Activities

Assign a Commissioner to a Unit – From Commissioner Profile

1. Log in

2. From the Home Menu, Click on the name of your council, this will open the council sub menu if it was not already open.

3. Click on Commissioner Administration
4. Click on the Service Area (Division) where the district is located
5. Click on the District to see a list of unit commissioners

6. Scroll or use the search box above the list of commissioners to find the commissioner that you want to assign.

7. Click on the user’s name, Then Click on “Assigned Units” under the contact counts.
8. Press the Assign Unit Button

9. Click on the Service Area, then the District, then the SubDistrict (if applicable) to get the list of units to assign. If you want to search for the unit by number, you will need to enter as a four digit number with leading zeros. If you are scrolling to find the unit, you may need to press the LOAD MORE option.

Boy Scout units are listed after cubscout units.
10. Click on the unit number and press Assign Unit.
11. The user’s record will now reflect that the unit is assigned.

Unassign a Commissioner from a Unit

1. Log in
2. From the Home Menu, Click on the name of your council, this will open the council sub menu if it was not already open.
3. Click on Commissioner Administration
4. Click on the Service Area if applicable (Division) where the district is located

5. Click on the District to see a list of unit commissioners

6. Scroll or use the search box above the list of commissioners to find the commissioner that you want to assign.
7. Click on the user’s name, then click on “Assigned Units” under the contact counts.

8. Press the Unassign button for the unit.

**Run Reports**
The same set of reports can be run at different levels of the organization (Council, Service Area, District, and Sub District).
1. Select Commissioner Tools in your council’s section
2. In the Units section of Commissioner Tools, Use the Organization Manager to select the level of the organization you want to report on:

If you do not see this page with the reports button you may need to click on the Council Name in the Organization Manager. Click on the Reports Button.

3. Select the Report that you want to run
4. You can download the report to excel if you scroll to the bottom of the report and press the Export All button.

5. You can run another report by selecting the “Reports List” button or you can close the window with the “X” button.
**Unit Health**
This report shows the last numeric health score, last assessment date, if the last assessment was a Summary or Detailed contact for each unit, and monthly roundtable attendance for each unit.

**Commissioner Activity**
This Report shows the number of contacts that have been made monthly by commissioners registered at the district or council level.

The sum column at end of report has percentage of commissioners contacting units.

**Commissioner Recruitment**
This report displays a list of all possible Unit Commissioner Candidates, their contact information and notes, entered in the detailed assessment. This is not filtered by date.

**Expired Units**
List of expired Units

**District Contact Stats**
Provides number of unit contacts for each month by unit

**Commissioner Contact Stats**
This report displays the number of contacts made monthly by each commissioner registered at the district or council level. Contacts are broken into assigned and additional contact (contact made for a unit they are not assigned) buckets. The total number of assigned unit contacts and the percentage of assigned unit contacts are displayed. Additional contacts ARE NOT included in the subtotal numbers; however they are included in the yearly totals and may be totaled manually once the report is exported.

**Priority Needs Units**
This report provides a summary of units with priority needs as defined in their detailed assessments.

**Unassigned Units**
This report lists units without a Commissioner and their last contact and assessment.
**Scheduling a Round Table**

When you schedule a roundtable you tell when the roundtable will take place and the types of units that are expected.

1. **Log in**
2. **From the Home Menu, Click on the name of your council,** this will open the council sub menu if it was not already open.
3. **Select the Commissioner Tools**

![Diagram of Home Menu and Commissioner Tools](image-url)
4. Use the organizational navigator to select your district then click on the word Roundtable in the header.

5. Press the +New Roundtable button
6. You will default as the round table Facilitator, you can select someone else if you are filling in the form on their behalf. You can also enter the date of the roundtable, and they types of units that will be represented in separate sessions. If the roundtable has already been completed you can back date it.
7. Press Save Roundtable. The new roundtable will now appear on the district page either as scheduled or in progress depending on the date.
Completing a Round Table
When you complete a roundtable you fill in attendance for each unit type, meeting notes, comments and needs.

1. Enter Commissioner tools and navigate to your district just like you did when you scheduled the round table.
2. Click on the Roundtable words in the blue bar. Then click on the date of your scheduled roundtable.
3. Click on the button that says Open Roundtable Form
4. For each unit type Click on the type to enter the attendance
5. Enter the total number of people in the top of the form, then enter the number of people from each unit. Then Press Done.

6. Click on the Meeting Notes to enter Meeting Notes, Comments and Needs.
7. Fill in the information and press the done button.
8. Now that the form is complete you can press Complete Roundtable.
9. The district page will be updated with the updated roundtable information.
See List of assigned units and view contacts Commissioner Profile

You can see what contacts that you have scheduled as well as the contacts that you have completed in commissioner tools.

1. From the Home menu, navigate to Commissioner tools and select Commissioner Profile

2. You can click on the contact to edit or view the contact.

3. You can view your assigned units and their latest health from the Assigned Units Page.
Use the Discussions
Discussions can occur on the Council, Service Area, or District level. Currently there is no email notification for discussions. You may need to let the people you want input from aware that the discussion is going on so that they can contribute.

1. From the home menu, go to commissioner tools and select Discussion
2. Navigate with the organizational Navigator to the level that you want to have the discussion on. For example select your district.

3. To start a new Discussion topic press +New Discussion

4. Fill in the form and press Post discussion.

5. The Discussion will now appear on the District page for anyone to add to it.

6. To contribute to the Discussion Click on the title
7. Press Add Entry and fill in your comments the press commit.

8. You can then press Exit Discussion to return to the district page.

9. If you wish to no longer accept comments on this topic, you can Close Discussion.
10. Closed Discussions can be reopened by clicking on the discussion and pressing the Reopen Discussion Button.
### Ratings Guides

#### Ratings Guide for Cub Scouts

<table>
<thead>
<tr>
<th>1 weak situation; needs immediate action</th>
<th>2 needs improvement; watch carefully</th>
<th>3 typical unit, could be improved</th>
<th>4 making progress toward the ideal unit</th>
<th>5 nearly an ideal situation</th>
</tr>
</thead>
</table>

**Step 1 - Planning and Budget**

Planning and Budget: Have a program plan and budget that is regularly reviewed by the pack committee, and it follows BSA policies relating to fundraising.

<table>
<thead>
<tr>
<th>No Documented Budget</th>
<th>Budget and program plan is not reviewed by the pack committee.</th>
<th>Have an annual program plan and budget adopted by the pack committee.</th>
<th>Achieve Level 3, plus pack committee meets at least six times during the year to review program plans and finances.</th>
<th>Achieve Level 4, plus pack communicates annual program plan and budget prior to October 31, 2015.</th>
</tr>
</thead>
</table>

**Step 2 - Membership**

Retention: Retain a significant percentage of youth members.

<table>
<thead>
<tr>
<th>Reregister Less than 50% of eligible members and no improvement from prior year.</th>
<th>Reregister 50% of eligible members, or have improvement over the prior year.</th>
<th>Reregister 60% of eligible members, or have improvement over the prior year.</th>
<th>Reregister 65% of members, or reregister 60% and have improvement over the prior year.</th>
<th>Reregister 75% of members, or reregister 65% and have improvement over the prior year.</th>
</tr>
</thead>
</table>

Building Cub Scouting: Have an increase in Cub Scout membership or maintain a larger than average pack size.

<table>
<thead>
<tr>
<th>No new members.</th>
<th>Register new members in the pack without a formal program</th>
<th>Conduct a formal recruitment program by October 31 and register new members in the pack.</th>
<th>Achieve Level 3, and either increase youth members by 5% or have at least 40 members.</th>
<th>Achieve Level 4, and either increase youth members by 10% or have at least 60 members.</th>
</tr>
</thead>
</table>

Webelos-to-Scout transition: Have an effective plan to graduate Webelos Scouts into Boy Scout troop(s).

<table>
<thead>
<tr>
<th>No joint activities with a troop and less than 40% of Webelos have completed “Scouting Adventure”</th>
<th>One joint activity with a troop or more than 40% of Webelos have completed “Scouting Adventure”</th>
<th>With a troop, hold two joint activities or 75% of second year Webelos have completed “The Scouting Adventure.”</th>
<th>60% of eligible Webelos register with a troop.</th>
<th>80% of eligible Webelos register with a troop and the pack has at least one active den chief.</th>
</tr>
</thead>
</table>

**Step 3 - Program**

Advancement: Achieve a high percentage of Cub Scouts earning rank advancements.

<table>
<thead>
<tr>
<th>Have less than 30% of Cub Scouts advance one rank</th>
<th>Have 30% of Cub Scouts advance one rank</th>
<th>Have 50% of Cub Scouts advance one rank</th>
<th>Have 60% of Cub Scouts advance</th>
<th>Have 75% of Cub Scouts advance</th>
</tr>
</thead>
</table>

Outdoor activities: Conduct outdoor activities and field trips.

<table>
<thead>
<tr>
<th>Each den does not have the opportunity to participate in outdoor activities or field trips during the year.</th>
<th>Each den has the opportunity to participate in one outdoor activity or field trip during the year.</th>
<th>Each den has the opportunity to participate in three outdoor activities or field trips during the year.</th>
<th>Each den has the opportunity to participate in five outdoor activities or field trips during the year.</th>
</tr>
</thead>
</table>

Day/resident/family camp: Cub Scouts attend day camp, family camp, and/or resident camp.

<table>
<thead>
<tr>
<th>Cub Scouts do not participate in camping experiences</th>
<th>33% of Cub Scouts participate in a camping experience or improvement over the prior year.</th>
<th>50%, or 33% and have improvement over the prior year.</th>
<th>75%, or 50% and have improvement over the prior year.</th>
</tr>
</thead>
</table>
1 weak situation; needs immediate action | 2 needs improvement; watch carefully | 3 typical unit, could be improved | 4 making progress toward the ideal unit | 5 nearly an ideal situation

**Service projects:** Participate in service projects.

- Does not participate in service projects.
  - Participate in one service project.
  - Participate in two service projects and enter the hours on the JTE website.
  - Achieve Level 4, plus at least one of the service projects is conservation-oriented.

- Participate in three service projects and enter the hours on the JTE website.

**Pack and den meetings:** Dens and the pack have regular meetings.

- Hold less than six pack meetings a year.
  - Hold six pack meetings a year. Den and pack meetings have started not by October 31.
  - Achieve Level 3, plus dens meet at least twice a month during the school year.
  - Achieve Level 4, plus earn the Summertime Pack Award.

- Hold eight pack meetings a year. Den or pack meetings have started by October 31.

**Step 4 – Volunteer Leadership**

**Trained leadership:** Have trained and engaged leaders at all levels.

- Not all leaders and assistance have completed youth protection training.
  - Cubmaster, den leaders, and assistants have youth protection training.

- Cubmaster, den leaders, and assistants have completed an orientation and youth protection training.
  - Achieve Level 3, plus the Cubmaster and den leaders have completed position-specific training or, if new, will complete within three months of joining.

- Achieve Level 4, plus two-thirds of registered committee members have completed position-specific training for the pack committee.

**Leadership recruitment:** The pack is proactive in recruiting sufficient leaders.

- No Cubmaster or less than three committee members.
  - Have a Cubmaster and a committee with at least three members.

- Have a Cubmaster, assistant Cubmaster and a committee with at least three members.
  - Achieve Level 3, and by May 31, the pack committee identifies pack and den leadership for the next year.

- Achieve Level 4, plus every den has a registered leader by October 15.
### Ratings Guide for Boy Scouts

<table>
<thead>
<tr>
<th>1 weak situation; needs immediate action</th>
<th>2 needs improvement; watch carefully</th>
<th>3 typical unit, could be improved</th>
<th>4 making progress toward the ideal unit</th>
<th>5 nearly an ideal situation</th>
</tr>
</thead>
</table>

#### Step 1 - Planning and Budget

<table>
<thead>
<tr>
<th>Planning and Budget Rating Guide</th>
<th>No Budget Review</th>
<th>Have an Annual program plan and budget adopted by troop committee</th>
<th>Troop committee meets at least 6 times a year to review progress</th>
<th>Troop conducts a planning meeting involving youth leaders for the following program year</th>
</tr>
</thead>
</table>
### Service projects: Participate in service projects, with at least one benefiting the chartered organization. Ratings Guide

<table>
<thead>
<tr>
<th>Score</th>
<th>Description</th>
<th>Description</th>
<th>Description</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 weak situation; needs immediate action</td>
<td>Does not participate in service projects.</td>
<td>Participate in one service project and enter the hours on the JTE website.</td>
<td>Participate in three service projects and enter the hours on the JTE website.</td>
<td>Participate in five service projects at least one benefiting our charter organization and enter the hours on the JTE website.</td>
</tr>
<tr>
<td>2 needs improvement; watch carefully</td>
<td>The troop has patrols, and each has a patrol leader.</td>
<td>The troop has patrols, and each has a patrol leader. There is an SPL, if more than one patrol. The PLC meets at least four times a year.</td>
<td>Achieve level 3, plus the PLC meets at least six times a year. The troop conducts patrol leader training.</td>
<td>Achieve level 4, plus the PLC meets at least ten times a year. The troop conducts patrol leader training. At least one Scout has attended an advanced training course, such as NYLT or Order of the Arrow Conference.</td>
</tr>
<tr>
<td>3 typical unit, could be improved</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4 making progress toward the ideal unit</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5 nearly an ideal situation</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Patrol method: Use the patrol method to develop youth leaders. Ratings Guide

<table>
<thead>
<tr>
<th>Score</th>
<th>Description</th>
<th>Description</th>
<th>Description</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 weak situation; needs immediate action</td>
<td>Not using patrol method.</td>
<td>Scoutmaster and assistants have completed youth protection training.</td>
<td>Scoutmaster and assistants have completed an orientation and youth protection training.</td>
<td>Achieve level 3, plus the Scoutmaster and 60% of assistants have completed position-specific training or, if new, will complete within three months of joining.</td>
</tr>
<tr>
<td>2 needs improvement; watch carefully</td>
<td>The troop has patrols, and each has a patrol leader.</td>
<td>Scoutmaster and assistants have completed youth protection training.</td>
<td>Achieve level 3, plus the Scoutmaster holds two courts of honor, where troop plans are reviewed with parents.</td>
<td>Achieve level 4, plus the troop holds three courts of honor, where troop plans are reviewed with parents.</td>
</tr>
<tr>
<td>3 typical unit, could be improved</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4 making progress toward the ideal unit</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5 nearly an ideal situation</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Step 4 – Volunteer Leadership

#### Trained leadership: Have trained and engaged leaders at all levels. Ratings Guide

<table>
<thead>
<tr>
<th>Score</th>
<th>Description</th>
<th>Description</th>
<th>Description</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 weak situation; needs immediate action</td>
<td>Not all leaders have completed youth protection training.</td>
<td>Have a Scoutmaster and a committee with at least three members.</td>
<td>Have a Scoutmaster, an assistant Scoutmaster, and a committee with at least three members.</td>
<td>Achieve level 3, plus the troop holds two courts of honor, where troop plans are reviewed with parents.</td>
</tr>
<tr>
<td>2 needs improvement; watch carefully</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 typical unit, could be improved</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4 making progress toward the ideal unit</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5 nearly an ideal situation</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Leadership and family engagement: The troop is proactive in recruiting sufficient leaders and communicates regularly with parents. Ratings Guide

<table>
<thead>
<tr>
<th>Score</th>
<th>Description</th>
<th>Description</th>
<th>Description</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 weak situation; needs immediate action</td>
<td>No Scoutmaster or less than three committee members.</td>
<td>Have a Scoutmaster and a committee with at least three members.</td>
<td>Have a Scoutmaster, an assistant Scoutmaster, and a committee with at least three members.</td>
<td>Achieve level 4, plus the troop holds three courts of honor, where troop plans are reviewed with parents.</td>
</tr>
</tbody>
</table>
## Ratings Guide for Venturing

<table>
<thead>
<tr>
<th>1 weak situation; needs immediate action</th>
<th>2 needs improvement; watch carefully</th>
<th>3 typical unit, could be improved</th>
<th>4 making progress toward the ideal unit</th>
<th>5 nearly an ideal situation</th>
</tr>
</thead>
</table>

### Step 1 - Planning and Budget

Have a program plan and budget that is regularly reviewed by the committee, and it follows BSA policies relating to fundraising.

<table>
<thead>
<tr>
<th>No Budget</th>
<th>Have an annual program plan and budget adopted by the crew committee.</th>
<th>Achieve level 3, plus crew committee meets at least six times during the year to review program plans and finances</th>
<th>Achieve level 4, plus crew conducts a planning meeting involving youth leaders for the following program year.</th>
</tr>
</thead>
</table>

### Step 2 - Membership

Retention: Retain a significant percentage of youth members.

<table>
<thead>
<tr>
<th>Reregister Less than 40% of eligible members or have improvement over prior year.</th>
<th>Reregister 40% of eligible members or have improvement over prior year.</th>
<th>Reregister 50% of eligible members or have improvement over prior year.</th>
<th>Reregister 60% of eligible members.</th>
<th>Reregister 75% of eligible members.</th>
</tr>
</thead>
</table>

Building Venturing: Have an increase in Venturing membership or maintain a larger than average crew size.

<table>
<thead>
<tr>
<th>No Recruitment activities.</th>
<th>Have a membership growth plan that includes a recruitment activity.</th>
<th>Have a membership growth plan that includes a recruitment activity and register new members in the crew.</th>
<th>Achieve level 3, and either increase youth members by 5% or have at least 10 members.</th>
<th>Achieve level 4, and either increase youth members by 10% or have at least 15 members with an increase over last year.</th>
</tr>
</thead>
</table>

### Step 3 - Program

Adventure: Conduct regular activities including Tier II or Tier III adventure.

<table>
<thead>
<tr>
<th>Conduct at Less than Two activities including a Tier II or Tier III adventure.</th>
<th>Conduct at least Two activities including a Tier II or Tier III adventure.</th>
<th>Conduct at least four activities including a Tier II or Tier III adventure.</th>
<th>Conduct at least five activities and at least 50% of youth participate in a Tier II or Tier III adventure.</th>
<th>Conduct at least six activities and at least 50% of youth participate in a Tier II or Tier III adventure.</th>
</tr>
</thead>
</table>

Leadership: Develop youth who will provide leadership to crew meetings and activities.

<table>
<thead>
<tr>
<th>No Youth Leadership</th>
<th>Have a president leading the crew.</th>
<th>Have a president, vice president, secretary, and treasurer leading the crew.</th>
<th>Achieve level 3, plus officers meet at least six times. The crew conducts officer training.</th>
<th>Achieve level 4, plus each crew activity has a youth leader.</th>
</tr>
</thead>
</table>

Service: Participate in service projects, with at least one benefitting the chartered organization.

<table>
<thead>
<tr>
<th>Does not participate in service projects</th>
<th>Participate in one service project.</th>
<th>Participate in two service projects and enter the hours on the JTE website.</th>
<th>Participate in three service projects and enter the hours on the JTE website.</th>
<th>Participate in four service projects and enter the hours on the JTE website.</th>
</tr>
</thead>
</table>

Personal Growth: Provide opportunities for achievement and self-actualization.

| Crew members do not participate in Venturing advancement. | Crew members participate in advancement by earning the Venturing Award. | Achieve level 3, plus crew program includes at least three experiential training sessions. | Achieve level 4, plus the crew has members earning the Discovery, Pathfinder or Summit Awards. |
Step 4 – Volunteer Leadership

Trained Leadership: Have trained and engaged leaders at all levels.

<table>
<thead>
<tr>
<th>1 weak situation; needs immediate action</th>
<th>2 needs improvement; watch carefully</th>
<th>3 typical unit, could be improved</th>
<th>4 making progress toward the ideal unit</th>
<th>5 nearly an ideal situation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advisor or associates have not completed youth protection training.</td>
<td>Advisor and associates have completed an orientation and youth protection training.</td>
<td>Advisor and associates have completed youth protection training.</td>
<td>Achieve level 3, plus the advisor and associates have completed position-specific training or, if new, will complete within three months of joining.</td>
<td>Achieve level 4, plus at least two committee members have completed crew committee training.</td>
</tr>
</tbody>
</table>

Leadership Recruitment: Have a proactive approach in recruiting sufficient leaders and communicating with parents.

<table>
<thead>
<tr>
<th>1 weak situation; needs immediate action</th>
<th>2 needs improvement; watch carefully</th>
<th>3 typical unit, could be improved</th>
<th>4 making progress toward the ideal unit</th>
<th>5 nearly an ideal situation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Does not have an advisor, associate advisor, or a committee with at least three members.</td>
<td>Have an advisor, associate advisor, and a committee with at least three members.</td>
<td>Achieve level 3, plus the crew holds a meeting where plans are reviewed with parents.</td>
<td>Achieve level 4, plus adult leadership is identified by May 31 for the next program year.</td>
<td></td>
</tr>
</tbody>
</table>
Frequently Asked Questions

What is the process to fill in the Actual Completed Dates in the detailed assessment?

This feature is not currently available.

Can I save a shortcut so that my user name is filled in by default?

Yes, if you use the un parameter in the URL that you save as a shortcut, your username can be pre-filled into the login form

https://my.scouting.org/?un=username

Where can I see my UVTS contacts?

The UVTS contacts are available on the unit page in commissioner tools on the “Archive Contacts” button.

Additional Information

How to find out what version of Internet Explorer you are running

On the help menu select “About Internet Explorer”
Installing Chrome

Chrome should be installed from the Google website. Avoid downloading it from other sources as they may contain additional software that you do not need.

http://www.google.com/chrome/

Press Download now
The check box settings are up to you.

If prompted, click "Run" or "Save".

If you have saved the installer, double-click the installer file to start the installation process. Your home page settings and browser history will automatically be imported from your default browser.

**Clearing Browser Cache**

The first time you run the my.scouting.org page, it may take longer than subsequent times. This is because part of the program is stored on your local computer. The next time your computer runs that website, the parts of the program that are saved can run faster. As my.scouting.org pages are changed by the developers there is a small chance that the version that you have saved may not match the current version. The place where your web browser saves parts of the program is called the cache.

You have control over your browsing data. This data includes things like your browsing and download history and saved form data. Use the "Clear browsing data" dialog to delete all your data or just a portion of your data, collected during a specific period of time.

Click the Chrome menu  on the browser toolbar.

1. Select **Tools**.
2. Select **Clear browsing data**.
3. In the dialog that appears, select the checkboxes for the types of information that you want to remove.
4. Use the menu at the top to select the amount of data that you want to delete. Select **beginning of time** to delete everything.
5. Click **Clear browsing data**.

**Security**

**Timeout**

my.Scouting Tools security standards are:
• You must have your member ID associated with your legacy myscouting profile to access the tools.
• After 20 minutes of inactivity, the system will automatically log you out.
• After five invalid login attempts, your account will be locked out for 30 minutes.

Access Level
Access to unit information is controlled by the type of registration that the commissioner has. The breakdown is as follows:

Unit Commissioner:
• Commissioner Tools
• Member Manager
• Training Manager

When they login they will access all of the tools at the District level and will need to drill down to the Unit’s they are contacting.

District Commissioners:
• Commissioner Administration
• Member Manager
• Training Manager
• Commissioner Tools

When they login they will access all of the tools at the District level and can drill down to unit data as needed.

Council Commissioners:
• Commissioner Administration
• Member Manager
• Training Manager
• Commissioner Tools

When they login they will access all of the tools at the Council level and can drill down to the District and Units data as needed.

Running on iPad
My.Scouting functionality is still not supported on iPad tablets. An upgrade is in progress to the base functionality which will allow tools to work on iPads. (For those anxious to use with an iPad, a Photon Flash Player application is available from iTunes that allows my.Scouting Tools to work on the iPad. You must click the “Lightning Bolt” button in the toolbar to enter streaming mode to view Flash content. NOTE: Photon Flash Player is not a BSA supported application.)
**Revision History**

2/12/2015 Joseph Jeffs Frist Draft

3/5/2015 Joseph Jeffs First Public Release

3/12/2015 Joseph Jeffs First Training Feedback

- Added how to determine internet explorer version
- Added Access Level section to Security
- Separated Unit Commissioner Activities as separate section
- Fixed rendering of PDF to include org chart and landscape mode
- Added Revision History
- Simple Assessment overall score comments (step 7)

3/15/2015 Joseph Jeffs

- Added reference to Unit Instructions for conducting the assessment in the Schedule a collaborative assessment section.
- Added Section on Verify your Profile
- Changed page width for Ratings Charts
- Added Unit Service Plan section