As was mentioned in the navigation and simple assessment video, there are 2 types of assessments. We have seen how quick and easy entering a simple assessment can be so now we'll look at a detailed Assessment. The detailed assessment should be completed twice each year; once at charter renewal time and again at the midpoint of the charter year. Whenever possible, it is preferred that a detailed assessment be done in collaboration with the Unit Key 3. However, this is not always possible so the assessment can be done unilaterally by the commissioner or professional. The assessment is meant to engage commissioners and unit leaders in implementing a continuous improvement process for the unit. It provides the greatest insight into unit health.
Select the unit for which you wish to enter a detailed assessment. Click on the add new contact button and the add new contact window appears. Select the date of the contact if it has already occurred or select a date into the future that you have arranged to meet with the unit key 3.
When scheduling a Detailed Assessment for a future date, click the date of contact box and the dropdown calendar will appear. Select a date into the future that you have arranged to meet with the unit key 3 and invite them to participate in the evaluation of their unit.
Having selected a date for your collaborative assessment meeting, invite the unit key 3 to participate in the evaluation of their unit to help create what will become a “collaborative Detailed Assessment.” Do this by clicking on the radio button next to each name of the unit key 3. Whether collaborative or not, only by creating a Detailed Assessment will the commissioner be able to create a Unit Service Plan.
Commissioner tools will send an email to the persons you have selected. This is a sample of the e-mail the Unit Key 3 would receive from commissioner tools and the email will be from the commissioner that set up the detailed assessment meeting. The email will contain a link for each member of the key3 to enter their own evaluation of their unit.
There is also an option when documenting a Detailed Assessment whereby the commissioner or professional has chosen not to score each sub-element in an evaluation area. When choosing not to evaluate each sub-element in a Detailed Assessment, the commissioner or professional is consciously deciding to create an Intermediate Assessment which is a subset of the Detailed Assessment. Select the intermediate assessment by clicking on the words highlighted in red.
Once you have selected the Detailed Assessment button, the Detailed Assessment window appears. There is a good bit of information for the commissioner on this page.

Again, you see the scoring matrix at the top of the page. In the upper left corner, you can view the evaluation area scores from the last Detailed Assessment that was completed for the unit. (This box will not appear if a Detailed Assessment has never been completed for this unit.) This box allows the commissioner the option of prepopulating the Detailed Assessment with the same scores from the last Detailed Assessment, which can be a handy reference when completing the current assessment entries.
This box allows you to print blank assessment forms. The Unit Assessment Form is for the commissioner to give to the unit and the Commissioner Assessment Form is meant for the commissioner to complete. You can also print a copy that contains a summary of the unit information that is provided in the training and membership section.
The training and membership sections provide information regarding the number of adults and youth registered with the unit as well as the training status of the adult leaders both for youth protection training and their position specific training. The list of Leaders Needing YPT and Not Trained Leaders provides the name, position and BSA member ID number so that you can use the my.Scouting Training Manager tool to verify their training and see what training the member may be lacking. Remember, position training status counts positions, not persons.
Clicking on the see list of leaders needing YPT produces this list
Clicking on see leaders not trained produces this list.
As you scroll down the page, you see the various evaluation areas of the assessment that will be scored. These categories are aligned one for one with the unit's Journey to Excellence criteria. The first category in the assessment is the planning and budget category. Enter the score that you think is appropriate for the statement in this category. A score and an entry in the comments section is required.
Proceed through the remaining categories as you did for Planning and Budget. You will notice that the remaining categories have several sub-elements that should be answered.
Proceed through the remaining categories as you did for Planning and Budget. You will notice that the remaining categories have several sub-elements that should be answered.
Each of the assessment categories have topics and statements that go into greater detail for each category consistent with the unit’s Journey to Excellence scorecard. When you send the collaborative Detailed Assessment email to the Unit Key 3, they will see these topics and statements for each element of the assessment so that they can evaluate them from their own perspective. As the date of the collaborative Detailed Assessment meeting approaches, you as the unit commissioner or professional, can go back into the Unit Contact Summary page and view the comments made by the Unit Key 3.
To change the assessment to an intermediate Detailed Assessment, click the Change to Intermediate Assessment choice. This collapses all sub-element evaluation areas and provides just one score to enter for the entire category, and your comments as the unit commissioner or professional.
As the date of the collaborative Detailed Assessment meeting approaches, you as the unit commissioner, can go back into the Unit Contact Summary page and view the comments made by the Unit Key 3. As they complete their unit assessment, the system will compile those comments. The unit commissioner can view a compilation of all the comments in advance of the meeting by looking at the various evaluation elements within Commissioner Tools.

To view the comments made on an upcoming (collaborative) Detailed Assessment, click on the Scheduled tab to view all scheduled assessments. This will show you the Detailed Assessment you are working on with the unit. Clicking on the 3 dots to the right of the date shows a pulldown with 3 choices, Edit Contact, Delete, and Print Assessment. Select Edit or Print Assessment to VIEW whether the Unit Key 3 have responded to the collaborative Detailed Assessment email. If they have, you can optionally print the assessment. As a Best Practice, you should make enough copies for each person that will attend the collaborative Detailed Assessment meeting.
The final required section of the Detailed Assessment is reviewing any priority needs that the unit may have. Before you open this section, the dot in the top right corner will be red. At a minimum, to complete this section and turn the dot in the top right corner green, you will need to select from the pulldown bar to indicate the unit's JTE goal. Select from bronze, silver, or gold. If the unit has decided not to seek a JTE goal, then select No Ranking.
Scrolling down the page, you see the Key Leader(s) line. If the unit is planning a change in leadership over the next four months, indicate the existence or absence of a unit succession plan. Also indicate whether or not there are any issues with the unit that you as the commissioner may need help with from your ADC or DC. If there are none, you can leave this blank. As a unit commissioner or professional, hopefully you have gotten to know several of the adult leaders in the unit that you think might make a good unit commissioner. Please add their name and phone number to the report so that the district commissioner can contact them.
The final section of this page before getting into the Unit Service Plan is the Priority Need(s) section. These are critical areas that can indicate danger to the unit if they are not addressed in a timely fashion. Make sure to indicate them if they exist. Once the meeting with the unit’s Key 3 is over, return to the contact and this time select edit the contact and enter the information from the assessment meeting.
The next key task for a unit commissioner or professional after conducting a (collaborative) Detailed Assessment is to build a Unit Service Plan so that there is a plan of action to aid the unit in achieving its improvement goals. The category for the service plan is available in the pulldown window. You can see the same four Journey to Excellence categories that make up the Detailed Assessment. Select the category for which you are building a plan. If desired, it is possible to make several entries for the same category. Make sure that you enter a target date for completing or meeting the goal. There is a place for you to return to your service plan to record the date that the task was completed. In the first free text box, describe the task that is to be completed with as much detail as you can. The next text box allows you to record who is responsible for completing the task or making sure that the goal is achieved. This can be a unit person, a district person, the unit commissioner, or any combination thereof. If there is more than one category that requires a service plan, click the add another service plan button. Remember, a commissioner has 48 hours to edit and delete a completed contact that may have been made in error. New in this updated Commissioner Tools, commissioners will be able to go back into the Unit Service Plan and add comments in the task area to update the status of a task, even beyond the 60 days up until the target completion date.
If you experience any problem with commissioner tools, try and solve the problem at the lowest level possible. Be sure you are using a supported browser. When calling member care, there may be a wait, or you may need to leave a message.

If you use JIRA, set an account. Use your email as your username.
Commissioner Tools