

**UNIT PERFORMANCE OBJECTIVES (UPO)**

Unit Assessment Worksheet

Mike Evano, LEC DFS

		Category	Standard (Goal/Objective/Expectation)	Step 1 (Management)	Step 2 (Method)	Step 3 (Metric)
<b>PLANNING</b>	1	Unit Committee	Chartered Organization maintains an active and involved COMMITTEE that manages the success of one or more Units.	COMMITTEE CHAIR: _____	DATES OF COMMITTEE MEETING: (or statement of frequency) _____ _____ _____	CURRENT COMMITTEE SIZE: _____
	2	Annual Planning & Meetings	Unit has a WRITTEN PLAN/CALENDAR by Aug annually.	UNIT LEADER: _____ COR/CRUR: _____	<input type="checkbox"/> HAS UNIT PLAN DATE COMPLETED: _____ DATE SUBMITTED: _____	<input type="checkbox"/> PACK: Plan at least 7 PACK MEETINGS per year AND at least 1 DEN MEETING per month. <input type="checkbox"/> TROOP: Plan at least 16 TROOP MEETINGS and at least 4 PATROL LEADERS' COUNCIL meetings annually.
	3	Annual Budget	Unit has a WRITTEN BUDGET by Aug annually.	FUNDRAISING CHAIR: _____	<input type="checkbox"/> HAS UNIT BUDGET DATE COMPLETED: _____ <input type="checkbox"/> POPCORN/SYRUP <input type="checkbox"/> MONEY-EARNING APP	<input type="checkbox"/> Annual Budget is completed and submitted to Unit Commissioner by AUGUST 30.
<b>PEOPLE</b>	4	Adult Leadership Positions	Unit has KEY LEADERSHIP positions filled, and grows to fill many of the RECOMMENDED positions.	TRAINED: <input type="checkbox"/> CMTE CHAIR <input type="checkbox"/> UNIT LEADER <input type="checkbox"/> COR/CRUR	<input type="checkbox"/> 100-Point Form Used # of Forms Collected: _____	# of KEY 3 + DIRECT-CONTACT LEADERS: _____ # of COMMITTEE MEMBERS from "MANAGEMENT" Step (listed at left): _____ / 7
	5	Position Specific Training	Unit Adult Leadership is TRAINED for their Position, with special focus on DIRECT-CONTACT leadership.	TRAINING COORDINATOR: _____	Have all DIRECT-CONTACT leaders trained within 6 months of registration.	CURRENT POS-SPECIFIC TRN: _____ %
	6	Charter Renewal & Member Retention	Unit processes MEMBERS through recharter, and RETAINS a significant portion of youth members annually. CHARTER ORG is actively interested in the health of the Unit.	DATE OF COR MEETING w/ COMMITTEE: _____	<input type="checkbox"/> RECHARTER COMPLETE DATE COMPLETED: _____	UNIT RETENTION: _____ %
	7	Graduation / Transition	Unit(s) successfully TRANSITION WEBELOS to SCOUTS BSA program.	WEB DEN LEADER: _____ Mtgs Attended: (date) 1. _____ 2. _____	JOINT PACK/TROOP EVENT DATES: _____ _____ _____	At least 60% of active ARROW OF LIGHT Webelos transition to a SCOUTS BSA TROOP; Troop welcomes at least 6 new Scouts crossing over annually.

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<b>PERFORMING</b>	8	Recruitment	Unit is sustainable by ACTIVELY RECRUITING new youth and families each year.	MEMBERSHIP CHAIR: _____	JOINING EVENT DATES: _____ _____ _____	MEMBERSHIP DEC LAST YEAR: _____ MEMBERSHIP DEC THIS YEAR: _____ GROWTH RATE*: _____ % <i>*(THIS YEAR - LAST YEAR) / LAST YEAR</i>
	9	Advancement	Unit helps support Scout achievement through an active ADVANCEMENT program.	ADVANCEMENT CHAIR: _____	<input type="checkbox"/> ANNUAL PLAN INCLUDES ADVANCEMENT PLAN	ADVANCEMENT RATE: _____ %
	10	Communication	Unit supports Scout & family participation by EFFECTIVELY COMMUNICATING events/meetings to membership.	COMMUNICATIONS CHAIR: _____	<input type="checkbox"/> BEASCOUT PIN UP TO DATE BY AUGUST 1.	<input type="checkbox"/> CALENDAR/EVENT LIST ACCESSIBLE?
	11	Service	Unit engages Scouts in SERVICE TO THE COMMUNITY through planned & promoted projects that are reported through Internet Advancement/Scoutbook.	SERVICE CHAIR: _____	DATES OF SERVICE PROJECTS: _____ _____ _____	COMMUNITY SERVICE HOURS REPORTED: _____
	12	Activities & Camping	Unit provides OUTDOOR PROGRAM OPPORTUNITIES with a well-rounded combination of day activities, short-term camps, and long-term camps (if applicable) with high attendance from youth members.	CAMPING CHAIR: _____	<input type="checkbox"/> PACK: ANNUAL PLAN* INCLUDES 4 DAY-OUTINGS & 1 OVERNIGHT  <input type="checkbox"/> TROOP: ANNUAL PLAN* INCLUDES 7 CAMPOUTS & 1 WEEK OF LONG-TERM CAMPING.	PACK: _____ % ATTENDED 2 OUTINGS  TROOP: _____% ATTENDED AT LEAST ONE CAMPOUT _____% ATTENDED WEEK LONG CAMP

*\*This can include participation in Council-organized events.*

The "Unit Performance Objectives" (UPO) are designed to guide a Unit's planning to ensure consistent, quality Scouting programming throughout Lake Erie Council. Units will use each of the 12 Standards as guideposts for success; Unit Commissioners and other supporting volunteers and professional staff will engage in constructive discussion Quarterly with each Unit to track progress and offer assistance in Units meeting their goals within the UPO set. Chartered Organization Representatives will assess their Units at the end of the "calendar year" (January-December) on their progress in putting the Standards and their associated MANAGEMENT and METHOD actions into practice; Units will also measure themselves annually using the METRIC listed for each Standard. Council Service Executives will offer guidance and support through Commissioners to assist Units in improving their scores each year. Units will be said to "meet standard" if they achieve the following:

**Unit completes the MANAGEMENT + METHOD listed for each Standard - OR - Unit achieves the desired METRIC listed for each Standard.**

Units completing ALL THREE (Management, Method, & Metric) will be recognized as a high-performing or "STAR" Unit.