

Review

Helping adults choose the right path

Review is the process used in Scouting to discuss how an adult is getting on with their role. It also helps you to agree with them what they are going to do in the future.

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This pack is made up of a number of stand-alone information sheets. The sheets within this pack are listed below, with a short description of the content of each.

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Arranging a review (FS 331007)

An outline of the preparation you will need to do to get the most out of the review process. Consideration of the outcomes of review you should consider for those that you review.

Conducting a review meeting (FS 331008)

How best to structure a review meeting; what to say.

Recording reviews (FS 331009)

Three ways to record reviews, together with pro-formas for you to use - formal notes, action plans, what went well and what difficulties occurred.

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Acknowledgements

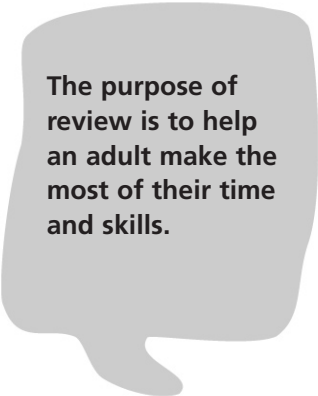
Thanks to all the contributors to *Valuing People: The Review Process*

Editor's note

Although in some parts of the British Isles Scout Counties are known as Areas or Islands and in one case Bailiwick, for ease of reading this material simply refers to County or Counties.

All resources referred to in this publication are available from the Scout Information Centre on 0845 300 1818 or www.scouts.org.uk/scoutbase.

Introduction to review



The purpose of review is to help an adult make the most of their time and skills.

What is review?

All of us work better if we know that what we are doing is right and that we are being supported. Review is the process used in Scouting to discuss how an adult is getting on with their role and to agree with them what they are going to do in the future. This could be either renewing their existing appointment, being re-assigned to another role, or retirement.

There are two types of review – formal and informal. These should take place for those with Warranted and Local Appointments. A formal review must be carried out at the end of the appointment period (as outlined in POR). However it is good practice to carry out an informal review of progress on an annual basis.

The purpose of review is to help an adult to make the most of their time and skills. Review is a chance to take stock, to discuss the support that an adult needs and to agree how that support can best be provided. It is also a chance to consider changes in role, if that is appropriate.

All adults in Scouting should have a regular review with their line manager. For those with different appointments in Scouting their line manager will also be different. Those who are line managers include the following: Group Scout Leaders, District Commissioners, District Explorer Scout Commissioners, County Commissioners, County Scout Network Commissioners, County Training Managers, Regional Training Managers, Chief Commissioners and the Chief Scout.

As a manager, you should establish a pattern of regular reviews. Set up a timetable so that people expect, and get used to, reviews at agreed intervals. Focus on the support aspects of the review process.

Agree the dates of review meetings early in the year along with your team and Executive meetings. To help this process happen, Appointment sub-Committees' secretaries will send the Review Form (Form AR) to an individual's line manager at least three months before their formal review is due. They will also notify the adult that their formal review is due.

Why we do reviews

Adults in Scouting need to be valued as individuals. They need to be appreciated; their feelings and concerns understood. If they feel valued, and if they feel that what they are doing is worthwhile, they are more likely to enjoy their Scouting and want to continue.

Reviews are a chance to recognise an adult's successes, their strengths and contribution.

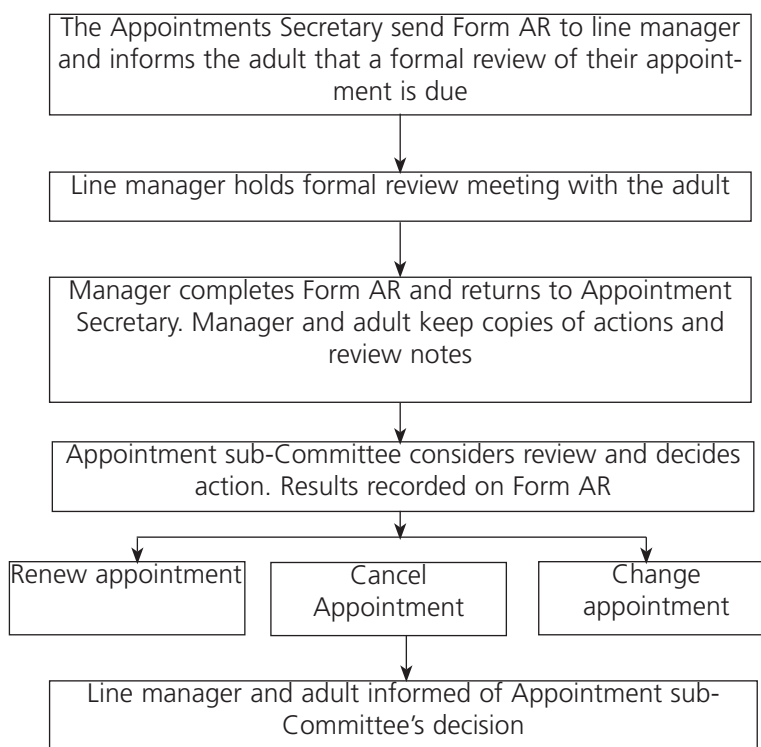
Reviews are a chance to recognise an adult's successes, their strengths and contribution. It is also a chance to provide support to them through difficulties. This can be a great boost to people. Review allows the manager to work with the adult to identify any actions needed to focus their work, and help them develop and be effective in their roles.

The benefits of review


If reviews are carried out well with individual team members, the results are:

- a well-motivated team, that feels valued, supported and understood
- a team who knows what is required from them in their role and who have identified development needs and plans to deliver
- adults who stay longer in Scouting, because they have a manageable workload, their ideas and concerns listened to, and an agreement on the way they should take things forward
- better use of human resources since it allows planning to put the right people in the right roles, based on their ability and suitability
- better quality Scouting, because people have a clear focus for their roles.

The formal review process



Preparing a review meeting



When choosing a venue, think about distance, comfort, accessibility and refreshments.

Preparation helps both parties gain the most from the review. Below are some ideas that might help.

Where to hold a review

The review should be a relaxed discussion. The location therefore needs to be comfortable and private enough so that you will not be disturbed. A meeting held in a back room in a cold Scout Headquarters with the noise of a Troop meeting in the hall next door for example, is not ideal. Considerations when choosing a venue might be distance, accessibility, refreshments, likelihood of interruptions, and comfort.

When to hold a review

Reviews should be held at least once a year. However this depends on the level of support that the individual needs and wants.

The review should be held at a date and time that you have agreed with the individual. Plan in enough time to discuss everything in a relaxed way. Some guidelines are as follows:

- Plan a meeting for when the adult is likely to be alert and able to focus – not after their Section meeting, for example.
- Allow at least two hours for the meeting to ensure that you cover everything you both want to.
- Make the person feel valued by ensuring there won't be any interruptions, i.e. don't schedule another urgent appointment immediately after it.

Preparation

Preparation will be the key to a successful review. This section gives you a checklist of things to do and consider when preparing for the review.

Arrange the meeting

- Agree the time and place for the review an appropriate time in advance.
- Explain that it will be a relaxed two-way discussion to look at how things have gone so far and what will happen in the future – renewal, retirement or retirement.
- Book the venue (if necessary).

Do some research

- Talk to other Leaders and adults to identify the individual's successes. If there are any difficulties of which you are aware, sensitively gather facts about these as well.
- If there is a possibility that the adult may like to take on another role in Scouting, then you should gather some information on the options available.

Think about what should be covered during the meeting

Start with a copy of the role description you agreed:

- Have the main tasks as outlined been carried out?
- Has the role had to change during the review period for any reason?
- Are you both happy for this role to remain the same?

Looking at the targets or goals you agreed in the induction process:

- Have the targets been achieved?
- Have the targets had to change during the review period for any reason?
- What successes are you aware of?
- Have there been any difficulties that you are aware of?
- Were the targets realistic?

Looking at the Group/District/County Development plan:

- How has the individual contributed to the plan in achieving their goals?
- What goals or targets would you like to discuss for next year?
- Are there other roles where this individual would be better placed to help you achieve the development plan?

(Guidance on setting goals can be found in *Induction: Starting Adults in a New Role*.)

Overall picture:

- Would you like this person to stay in their role? Are they happy and effective in what they are doing?
- Would you like this person to take on another role? – This could be an option if:
 - a) there is a specific role you would like them to fulfil, or
 - b) they are not effective in their current role, but would be able to do a different one well.
- Are there reasons why this person should leave Scouting altogether? This could be because they need to take a break, or their behaviour is incompatible with Scouting values. (Further guidance can be found in POR and in *The Appointment Process: Guidelines for Appointments sub-Committees*).

Renewal of role

This option is appropriate if the person is in the best role and they are happy to continue. In this case, the reviewer should:

- agree goals for the next 6 to 12 months
- agree any support actions, along with when they will be delivered, and who by
- agree a date for next review (it can always be changed nearer the time).

If this decision is taken as part of a formal review, the recommendation to renew and the reasons for this should be recorded on the Form AR and sent to the Appointments sub Committee for their consideration.

Re-assignment

Successful Scouting is achieved when the right people are in the right roles ('round pegs in round holes'). The option of re-assignment should always be considered. Where could the adult's skills be of best use to Scouting? Where would the adult be happiest?

Even if the adult seems indispensable in their current role, it may be better to move them if they would be better suited or happier elsewhere. Sometimes, a new challenge is all that is needed to motivate someone who has been doing a role for some time. This can also create opportunities for others.

Remember that re-assignment also includes the option of giving more informal support. They could continue to support Scouting as a member of the Scout Fellowship, or in another support role. Their skills can still be used, but at a level of commitment that they are happy with giving.

If re-assignment is agreed as the right outcome:

- get agreement on action plans to make the move, it can't happen overnight
- identify what support and training the adult will need
- discuss how the space left by the adult may be filled.

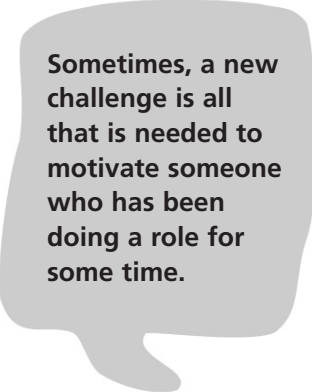
It is important that the reviewer does not commit to things that they cannot deliver. If appropriate, agree to go away and explore options then meet again.

If an individual is to be re-assigned, the individual's current appointment should be cancelled, and the new line manager should initiate the appointment process for their new role.

If the decision to re-assign an adult to another appointment comes as part of the formal appointment review, this and the reasons for it should be recorded on Form AR for the Appointments sub Committee's consideration. The line manager working with the Appointment Committee can then help the adult to be appointed to the new role.

Retirement

There are occasions where it is clear that someone needs to retire from their active Scouting role. This may be due to personal commitments, health or an inability to perform or meet the training/learning requirements. This outcome should not be



Sometimes, a new challenge is all that is needed to motivate someone who has been doing a role for some time.

seen as a comment on their commitment. The retirement could take the form of a sabbatical with the option to return when the circumstances have changed.

If retirement is being considered due to time pressures alone, remember that there are options for more flexible ways to be involved in Scouting. The outcome could be re-assignment to a supporter role rather than the individual leaving completely.

If the retirement is because of poor performance, it is important to discuss this and the reviewer should endeavour to get agreement from the adult about the problem. Retirement is the only appropriate outcome in these circumstances.

It is important, where appropriate, to leave the door open for the adult to come back when their circumstances change. The 'manager' must ensure that they are kept in touch and invited to Scouting events. Many good Leaders have left at one time or another and returned – so it can be useful to agree action plans for retirement.

If this decision is reached as part of a formal review (at the end of the appointment) the Appointment sub-Committee should be informed of this decision and the reasons for it on Form AR. The Committee can then consider this recommendation and cancel the adult's appointment, if appropriate.

If this decision is reached as part of an informal review (during the appointment), the procedure for suspension or cancellation of the appointment should be followed. (Further guidance can be found in POR and in *The Appointment Process: Guidelines for Appointments sub-Committees.*)

Agenda

Once the information has been gathered preparations of an outline agenda for how you will run the meeting can begin.

A general agenda could use the headings given below:

- Introduction and scene setter
- A look at how things have gone since the last review
- A look at present position, what are the needs going forward
- Options for the future
- Agree action plans
- Date of next review

Ensure you are able to cover everything you want to say during the meeting. More advice on the meeting itself can be found in the section: *Conducting a Review Meeting.*

Conducting a review meeting

When holding a review meeting, use the agenda that has been produced during the preparation as a framework. Remember that it is important to be flexible enough to adapt your agenda based on how the discussions in the meeting go.

Opening

The first few minutes are critical in setting the scene. Always start off by putting the other person at ease. It is important to begin with a positive tone. You could for instance pass a comment on something good that happened recently, for example: *"I hear the Pack visit to the Police Station went well."*

Set the scene by going over the purpose of the meeting again. Outline the agenda that you propose to follow and the approximate timing. Check that the individual is happy with the agenda.

How have things gone?

Review is about looking at the past to plan for the future.

Start by looking at what went well. Review some of the key successes, and in particular their strengths and contribution to this. Explore how these could be used to good effect in the future. Encourage them to come up with ideas on future development.

Move on to look at what difficulties have occurred. Listen to their views on issues and problems that have occurred. It is important to approach these with an open mind. Recognise feelings and emotions, but explore facts. Good preparation will help with this. The tone should be supportive with an aim to agree a way forward.

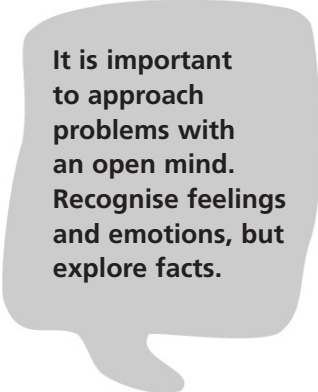
In both cases, discuss any goals that have been previously set and whether or not they have been achieved.

Finish by confirming their successes, and the things that you value about their contribution.

This is commonly known as a 'feedback sandwich', sandwiching difficulties between successes. It helps the individual to feel positive about the meeting.

When giving feedback, either positive or negative, have a clear idea about what you want to say. Remember that your comments should be based around *what they have done* not who they are. Start with a general statement, and remember that you are expressing what you have observed, they may see it very differently (particularly if you are giving negative feedback).

Examples might be: *"One thing that I noticed this year is that you seemed to work really well with other people in the District team"* or *"It seems that you have found it difficult to plan the programme for the Pack at times."*



It is important to approach problems with an open mind. Recognise feelings and emotions, but explore facts.

This approach will help to set the scene. It is important to let people know that you either have a broad concern, or are broadly happy with their performance in this area. Otherwise specifics can be too easily explained away.

Once you've done this, make a statement about specific examples that illustrate your opinion. Using statements such as *"what I expected was..."* and *"what I saw was..."*, will help you to explain that what they have done either has or hasn't met your expectations.

Examples might be: *"One of your goals for this year was to fundraise for the next phase of the campsite project, and I hoped that you would involve the District in it. You did a fantastic job of getting everyone on board, and in getting the young people involved in the activities – which was much more than I expected."*

Or: *"We agreed that you would get together with the other Leaders to plan the Pack programme a term in advance, but the plans for the spring and summer terms weren't together until a few weeks in."*

Encourage the discussions to be focussed on identifying general problems (based around specific incidents). This way, plans for resolving them can be put in place.

The way forward

Based on the discussions so far, it is important to discuss and agree the way forward. Some points to consider are as follows:

- Is the adult happy in their role?
- Is the adult effective in their role?
- Does the adult need support or training to help them?
- Would the adult like to take on another role?
- Is there a role in which the adult could offer more to Scouting?
- Is there a reason why the adult needs to take on a less or more active role?

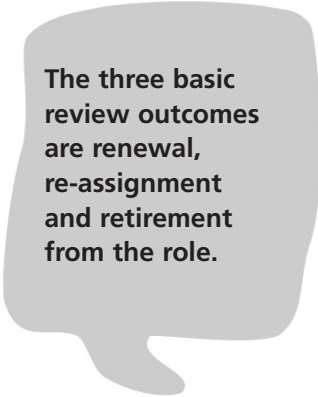
Consider these questions, and any others that are appropriate, with the adult. The aim should be to agree the way forward. There are three basic options: renewal of current role, re-assignment to a new role, and retirement from the role.

At this point, if appropriate, you should agree the details of their role description and goals for the next year. More information on goal setting is available in *Induction: Starting Adults in a New Role*.

It is important that you do not commit to things that you cannot deliver. If appropriate, agree to go away to explore options and meet again.

Record the outcome

It is always a good idea to make a record of what was agreed, so that you both have a clear understanding of what was discussed and the way forward. You may also want to refer to it at your next review. More information on this is available in the section: *Recording Reviews*.



The three basic review outcomes are renewal, re-assignment and retirement from the role.

Recording reviews

It is a good idea to record the outcomes of informal reviews so that both you and the adult are clear on what has been agreed and so it can be referred to at a later date - at the next formal or informal review.

The outcomes of formal reviews have to be recorded on Form AR, including the line manager's recommendations (renewal, re-assignment or retirement) and information to support the recommendation.

An example Form AR is on page of this Section, but the Appointments Secretary will send you a copy when a formal review is due.

It is a good idea to record in more detail for formal reviews what you have agreed, especially if the recommendation is that the adult's appointment is to be renewed and they are to carry on in their current role. In this case, you will need to record goals, actions and any support you have offered to give.

Three ways of recording reviews are suggested below. Which one you choose will depend on which you and the person being reviewed feel most comfortable with.

However you choose to record your decisions, a copy should be kept by both you and the adult being reviewed.

Formal notes

Formal notes should record all discussions covered, including successes, difficulties, the way forward, support and training required, and the date of the next review meeting. It's easier if you make notes in the form of bullet points rather than full minutes and will be clearer to look through at a glance.

A blank pro-forma for writing notes is on page 3.

Action plan

An action plan is a summary of the goals that you have agreed, and how they will be achieved. Remember to have only three or four goals so that the individual can focus their work towards a few things. Prioritise the goals, and be realistic about what can be achieved within the time.

Example:

Agreed goals

Person: _____ Agreed date: _____ Agreed with: _____

Goal	in 3 months...	in 6 months...	in 12 months...	Lead person	Who do I need to work with?	Who else can help?

A blank pro-forma of this plan is on page 4

What went well? / What difficulties occurred?

This is a tool for reviewing how things have gone. You should focus on what has gone well first, and then move on to look at the difficulties that have occurred. This is because it can be so easy to focus all your time on things that have gone wrong, leaving no time to look at the successes.

Each stage is important in its own right. Start with listing all the things that have gone well, then move on to thinking about why each one went well, and what can be done next time.

Move on to listing where difficulties occurred, why they occurred, and what can be done next time.

The column 'Next time' should be self-explanatory if you take it as an action plan for next year.

Example for a GSL:

What went well / what difficulties occurred?

Person: *Bob Cross*

Agreed date: *May 2004*

Agreed with: *Jenny Davies*

What went well?	Why?	Next time / this year?
<i>Colony has grown from 15-24.</i>	<i>Recruited two Colony Assistants Took all kids from Waiting List.</i>	<i>Recruit two more adults to increase numbers in Cubs from 23 to 36.</i>
<i>Fundraising</i>	<i>Good Executive Committee/ Gift Aid</i>	<i>Ask treasurer to stand for re-election</i>
<i>Family camp</i>		
What difficulties occurred?	Why?	Next time / this year?
<i>Running the Cub Pack</i>	<i>Gill has been ill this year.</i>	<i>Arrange for Scout Fellowships to help at Pack Evenings until Christmas.</i>
	<i>Bob Cross</i>	<i>Jenny Cooper</i>

Notes of the review meeting

Name _____ Date _____

Agreed with _____

Last year

What were the successes last year?

What difficulties were encountered last year, and why?

The way forward

Future role

Main tasks/goals for this year:

- 1.
- 2.
- 3.

Support/training required:

Any other actions:

Date of next review:

Notes of the review meeting

Agreed goals

Person: _____ Agreed date: _____ Agreed with: _____

Goal	in 3 months...	in 6 months...	in 12 months...	Lead person	With whom do I need to work?	Who else can help?

What went well? / What difficulties occurred?

Person: _____ Agreed date: _____ Agreed with: _____

What went well?	Why?	Next time / this year ...

What difficulties occurred?	Why?	Next time / this year ...



Appointment Review Form (Form AR)

Review is the process used in Scouting to discuss how an adult is getting on with their role and to agree with them what they are going to do in the future. This could be a renewal their existing appointment, being re-assigned to another role, or retirement.

This form is to be used as part of the formal review process at the end of someone's appointment.

1. Section A is filled in by the Appointments Secretary and sent to the Group Scout Leader, Commissioner or Manager who is to carry out the review. They also notify the individual concerned.
2. Section B is filled in by the Group Scout Leader, Commissioner or Manager who has carried out the review.
3. Section C is filled in by the Appointments sub-Committee once a final decision has been made.

Section A To be completed by the Appointments Secretary.

About the individual

Name _____

Position _____ Date of appointment _____

Group _____

District _____ County/Area _____

Please complete the review by: _____

Please return
this form to

Name and address of Appointments Secretary

Section B

To be completed by the Group Scout Leader, Commissioner or Manager.

Contact the individual to arrange a review meeting. Allow about two hours to make sure you have plenty of time, and make sure you prepare what you want to say. The publication *Review: Helping Adults Choose the Right Path* has more information on how to prepare and carry out a review meeting.

About the review

Date review was carried out:

Recommendation following review:
(delete as applicable)

Reason for the recommendation:

Renewal for _____ years	Reassignment to _____	Retirement
Reason for the recommendation:		

For Warranted Appointments only

First Aid certificate - date of expiry: _____

Number of hours of ongoing learning undertaken since the last formal review: _____

Once completed, return to the Appointments Secretary at the address over the page.

Section C

To be completed by the Appointments Secretary.

Final outcome

Outcome: (delete as applicable)

Renewal for _____ years	Reassignment to _____	Retirement (Form CS completed?)
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Reassignment will require further actions to be completed (such as cancelling existing appointment, identifying a suitable role, and starting the new appointment processes etc.).

Agreed actions:	By whom	By when	Complete
1.			
2.			
3.			
4.			
5. GSL, Commissioner or Manager informed of outcome			
6. Individual informed of outcome			