


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.

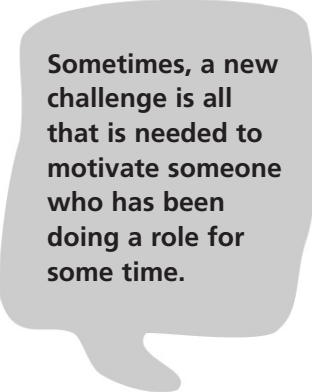
It is important that the reviewer does not commit to things that they cannot deliver. If appropriate, agree to go away and explore options then meet again.

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



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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.*