

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)

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?)
----------------------------	--------------------------	------------------------------------

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			