

SUPPORTING THE JOURNEY.

**The Appointment Process:
Guide for Managers**



scouts.org.uk/appointment

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 publication simply refers to County/Counties. In Scotland there is no direct equivalent to County or Area. In Scotland, Scouting is organised into Districts and Regions, each with distinct responsibilities. Some 'County' functions are the responsibility of Scottish Regions, whilst others lie with Scottish Districts. The focus of responsibility is outlined in Scottish variations from *Policy, Organisation and Rules (POR)*.

Criminal Records check

All adults in Scouting must go through a series of safeguarding checks to ensure they are safe to work with children and young people. The safeguarding checks are known in different countries by different names, as follows:

England and Wales: Criminal Records Bureau (CRB)

Scotland: Disclosure Scotland (DS)

Northern Ireland: Access Northern Ireland (ANI)

For ease of reading, this resource refers only to 'Criminal Records check', to cover all of the above. More information on issues relating to safeguarding and Criminal Records checks can be found at www.scouts.org.uk

Further information

For further information on any of the contents in this booklet, please contact the Scout Information Centre on 0845 300 1818 or visit www.scouts.org.uk. Always refer to *POR: The Appointment Process* for definitive information on the detail of the appointment process.



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1. INTRODUCTION

The line manager plays an important role in guiding and supporting adults through the appointment process.

Appointment process: Guide for managers

This booklet is designed to explain and support the roles of both the line manager and of the relevant commissioner/body responsible for approving appointments in the appointment process. It is split into two parts, with Chapters 2-6 focusing on the responsibilities of the line manager and Chapter 7 on the responsibilities of the relevant commissioner/body. This resource should be read alongside the publication *Guide to Appointing Adults*, which contains more detail about the appointment process itself. It is recommended that you read the *Guide to Appointing Adults* before reading this role-specific material.

The role of the line manager

Newly appointed adults are more likely to settle into their role and deliver more effective Scouting to young people if they feel welcomed and supported from the beginning. The line manager plays an important role in this, as they are responsible for supporting the appointment of adults and guiding them through the appointment process. They should be able to answer any questions that they have about the role and the appointment process and to ensure that they have the necessary information and support to start and continue in the role effectively.

Details of who the line manager is for each role are laid out in Table 1 in *POR: The Appointment Process*. Depending on local circumstances, there may be a more appropriate person to take on this role. This decision should be undertaken in consultation with people locally.

The role of the relevant commissioner/body

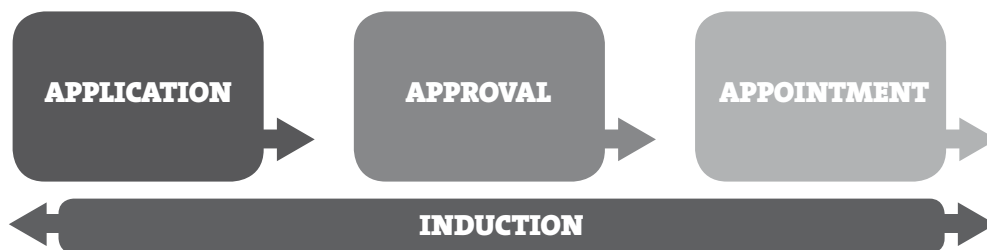
As a line manager, you may also be the relevant commissioner or body responsible for approving certain appointments. The role of the relevant commissioner or body is to satisfy him/herself that an adult is suitable for a particular role in Scouting. An essential part of this involves making sure that the appointment process has been carried out in the correct manner. You will also be responsible, with the support of the Appointments Advisory Committee, for making decisions about whether to appoint if any approval checks are unsatisfactory.

Details of who is the relevant commissioner or body for each role are laid out in Table 1 in *POR: The Appointment Process*.

2. APPLICATION

As a line manager, you are responsible for agreeing the role description and ensuring that the adult is aware of their responsibilities.

As you will know, there are four stages in the adult appointment process, as outlined in the diagram below.



The next few chapters take each stage in turn and outlines some of the things that you will need to consider at each stage of the process, starting with 'application'.

There are a number of resources that you might need during the application stage. You will always need an AA Form and depending on whether the adult is new to Scouting or not, you may also need:

- a *Young People First* 'yellow card'
- a *Key Policies* card
- a *Quick Reference Guide to the appointment process*
- the relevant Criminal Records check form

Depending on local circumstances, you may be able to request these from your Appointments Secretary. If not, you can order them from the Scout Information Centre.

2.1. AGREEING THE ROLE

When a new adult decides to get involved in Scouting, the first thing that they will need to do is discuss and agree the role that they are going to take on.

It may be that the adult is clear about the role that they want to do, in which case you can have a discussion around one of the example role descriptions available on www.scouts.org.uk. These role descriptions are just a starting point and you can adapt and edit them as required. You might also want to have a discussion around their predecessor's role description: were there things that their predecessor did that the new applicant does not have time for, or are there things that their predecessor didn't do, but the new applicant would like to take responsibility for? Whatever your discussions, the outcome should be a clear role description created specifically for the adult so that they are clear about what they will be doing.

If the adult is new to Scouting, or has not been involved for a long period of time, your discussion might be based around their interests and what they are hoping to get out of Scouting. In this case you will need to support them in finding the right role for them. One outcome may be that they will end up taking on a role in which you will not be their line manager. If this is the case, you should make sure that you put them in touch with their potential new line manager.

In both cases, you will need to agree on what their role will be, taking out or adding responsibilities as you both see fit. Remember to be flexible with the role, taking into account that most roles can be shared between two or more people if needs be.

2.2. EXPLAINING THE TRAINING REQUIREMENTS

When discussing the role, remember to discuss the training requirements, ensuring that the adult is willing to complete any training required. You can find details of the minimum training requirements for each role in the *Adult Training Scheme* publication. Depending on why they are joining Scouting, you may want to promote the external recognition options that are available on completion of their training. Again, this information is available in the above publication, available to download from www.scouts.org.uk.

You can explain the principles of the Adult Training Scheme as set out in *Adult Training Scheme* emphasising in particular that there are a variety of methods to complete training and that prior learning is recognised. If they have any questions about the training that you are unable to answer, remember that there will be others locally who can help (i.e. Training Advisers or Training Managers).

2.3. EXPLAINING THE PURPOSE, PRINCIPLES AND POLICIES

It is important that any new adult to Scouting is aware of and willing to uphold the values and policies of The Scout Association. To ensure that they are aware of these, talk them through the *Key Policies* card and 'yellow card', and briefly explain each policy, the Purpose and the Principles.

To help you with these discussions, you might find it useful to read through Factsheet FS 140099 *Background to the Purpose and Principles*. If the new adult asks any questions that you are unsure about, there are likely to be people locally who can help you with the answers, or alternatively, you can always phone the Scout Information Centre.

2.4. EXPLAINING THE APPOINTMENT PROCESS

To make sure that the adult is comfortable with the appointment process, discuss the *Quick Reference Guide to the appointment process*. Outline the four stages of the process and in particular, highlight the approval checks that they will be required to complete.

If they are taking on a role which requires them to be a charity trustee (a member of the Executive Committee), you should make them aware of this and explain what this means.

You can find more information about the approval stage of the process for different roles and about the roles which hold charity trustee status in Chapter 4 of the *Guide to Appointing Adults*.

2.5. COMPLETING THE AA FORM

Once you have agreed on the role description, you should help the adult complete the AA Form and Criminal Records check form (where relevant). Some of the things you will need to bear in mind are:

- **Membership requirement:** the adult will have to select whether they want to be a Member, Associate Member or Non-member. All roles have a minimum membership requirement which can be found in Table 1 in *POR: The Appointment Process* and you will need to ensure that they tick the correct box on the AA Form.

Note: the key difference between Members and Associate Members is that Members are required to make the Scout Promise.

If an adult has no membership requirement for the role they are taking on, they can still opt to become a Member and should be encouraged to do so.

- **Declarations:** All adults will need to sign to say that they have read and understood the information on the AA Form. If they are taking on a role that requires them to be a charity trustee, ensure that they have read the information outlining the requirements for those holding trustee roles.

You will also need to make sure that you sign the AA Form to say that you support the application and will ensure that an induction takes place.

Once the forms have been completed and signed, you should ensure that they are handed to the Appointments Secretary as soon as possible to be processed. Leave the applicant with the *Key Policies* card, the 'yellow card' and the *Quick Reference Guide to the appointment process*.

3. APPROVAL

Ensure that the adult is kept up to date with progress and that they feel supported through the appointment process.

3.1. THE PERSONAL ENQUIRY

Once the initial check has been made against records at Headquarters, the adult can start getting involved in their role in a supervised capacity. It is your responsibility to ensure that they do not have unsupervised access to young people until their provisional appointment has been confirmed, informing the relevant section leaders if necessary, and that minimum safety standards are met.

You will be able to check the status of an adult's appointment by logging in to www.scouts.org.uk, finding their record and checking the 'Appointment' screen on the 'Roles' tab.

It is also your responsibility to ensure that they are not thrown in at the deep end. At this point, the adult may not have had sufficient information or training about the new role to carry out its functions comfortably. If this is the case, make sure that they are supervised in this sense as well.

Once the Criminal Records check has come back as clear, they can then start getting involved in their role in an unsupervised capacity. However, you will need to ensure that they are comfortable with this and if they have any concerns, to ensure that they have support in their role until they are confident with what they are doing.

3.2. REFERENCES

To speed the process up, you could mention to the new adult that it would be helpful if they could ask their referees to respond as soon as possible after they receive the Reference (RF) Form. Often, this is one of the stages in the process that holds up the application.

3.3. APPROVAL FROM THE APPOINTMENTS ADVISORY COMMITTEE

You should explain the purpose of this meeting to the adult and ease any concerns that they may have. Explain that the meeting is about ensuring they are aware of the responsibilities of the role they are taking on and making sure they understand and accept the values and policies of the Association.

Although you are not able to be one of the three committee members at the approval meeting, you may decide to accompany the adult to the meeting and introduce them to the members of the committee.

If the adult has any additional needs and requires someone else to be present (i.e. a signer/interpreter), inform them that this is allowed.

3.4. SPONSORING AUTHORITIES

If your Group or section has a sponsorship agreement, you will need to ensure that any requirements as part of this agreement are adhered to. If a sponsorship agreement is in place, you should inform the adult of this and explain the role of the Sponsoring Authority in the appointment process.

3.5. APPROVAL FROM THE RELEVANT COMMISSIONER OR BODY

In order to approve the appointment, the relevant commissioner or body may wish to discuss the adult and their suitability for the role with you, as their line manager. In some cases, you may be the relevant commissioner approving the appointment, in which case you should notify the Appointments Secretary of your approval, either by signing and returning the AA Form to them, or by another agreed method (i.e. telephone or e-mail).

Note: If you are both the line manager and the relevant commissioner/body, you only need to sign the AA Form once.

4. APPOINTMENT

As a line manager, you are responsible for ensuring that any *Getting Started* training is completed within five months.

4.1. GETTING STARTED

Depending on the role that the adult is taking on, they may need to complete *Getting Started* training. As the line manager, it is your responsibility to ensure that this training is completed within the required time period. Remember that if you are unsure about the progress of their training, you can always contact your Local Training Manager (or Assistant District Commissioner (Adult Training) in Scotland) who will be able to help you.

It will depend on local circumstances as to who will inform the Training Manager of the new adult to ensure that a Training Adviser is allocated (if required) and that the relevant training is made available.

The adult has five months from the date of the provisional appointment to complete this training. As soon as it is completed, the adult can be issued with a full appointment.

If the training is not completed within the five month period, you should review the situation with the adult. If there is an acceptable reason as to why the adult has not completed training (i.e. the training has not been made available or work/life commitments have prevented them from being able to complete it), then you may decide to extend the provisional appointment for a further five months. The provisional appointment can only be extended once.

If the training has not been completed and there is no acceptable reason as to why (i.e. they don't agree with the need to do training or do not want to do it), then the appointment should be cancelled.

Whatever your decision, you should inform the Appointments Secretary so that the relevant updates can be made to the adult's record on www.scouts.org.uk.

4.2. PRESENTATION OF APPOINTMENT CERTIFICATES

Once the full appointment has been issued, the Appointments Secretary (or designated certificate recipient) will be sent an appointment certificate. The certificate will then be passed to the relevant person locally (which may be you, as the line manager) to present on a suitable occasion. At this stage, an appointment card will also be sent directly to the adult.

You should use this opportunity to ensure that the adult makes the Scout Promise, if required for their role.

5.INDUCTION

The process of induction should start when you have your initial discussion with the adult, and continue through until after the full appointment is issued.

5.1. WHO IS RESPONSIBLE FOR INDUCTION?

As a line manager, you are responsible for ensuring that an induction takes place. It may be that the induction is carried out by you, or you may feel that there is someone more appropriate to carry out this function locally. If you are unsure whether you are responsible for the induction for a specific role, refer to Table 1 in *POR: The Appointment Process*.

5.2. WHAT DO WE MEAN BY INDUCTION?

The induction of adults is very important, in particular to ensure that the new adult settles into their new role and is able to deliver good quality Scouting from early on. It is a key part of the line manager's responsibilities. The process of induction allows an adult volunteer to develop into their role and to help them feel confident and willing to continue. Induction is about developing a culture of good support, so that an adult new to Scouting, or to their role, is not left feeling that they've been thrown into the deep end. A good induction will also encourage adults to stay in Scouting: if they feel supported and have someone on hand to ask questions, it is more likely that people will stay involved, even when situations might be challenging.

Induction happens in parallel with the first three stages of the appointment process and may continue after the full appointment has been issued. If you are responsible for an induction, you should think about how best to induct each adult for whom you are responsible.

5.3. SUPPORT FOR INDUCTION

There are a number of resources available to help you in preparing for an induction and putting together an induction plan. These include:

- *Induction: Starting Adults in a New Role* which contains guidance on the things you need to consider when preparing for an induction;
- *Induction Pack Template*, a downloadable resource (from www.scouts.org.uk/appointment), that allows you to create a tailored pack for appointments at Group level; and
- Experience from other volunteers who have carried out inductions locally in the past. You may find that there is existing material locally that can be tailored to your needs.

It is also worth remembering that a welcome pack will automatically be sent to a new adult when they are issued with a provisional appointment. This pack contains the basic information about what Scouting is, what we do and how the Association is structured. If you would like to see a copy of this to find out how best to complement the welcome pack with a local induction, you can request a copy from the Scout Information Centre.

6. WHEN THE PROCESS IS COMPLETED

It is important to maintain your support for an adult throughout their time in Scouting to ensure that they always feel valued and supported.

Aside from regularly catching up with adults that you directly support, you will need to arrange regular reviews of their appointment (usually annually). There is also a formal review of the appointment which you are required to carry out at least every five years.

The review date should be agreed between yourself and the adults you support. It is likely that the length of time that will pass between appointment and review will be different for each adult. For instance, you may have some who will want a review after one year, some who will want a three year review and some who will be happy to formally review the appointment after five years.

6.1. WHAT DO WE MEAN BY REVIEW?

Review should be seen as an opportunity for an adult to have their role and situation reviewed. There are three possible outcomes of a review:

Renewal: where the adult is happy in their current role and you both agree to renew the appointment for a certain period of time (no longer than five years). The renewal may require a change in role description if the adult would like to either take on or give up some responsibilities.

Reassignment: where you both agree that the adult should take on a different role. This could be for a number of reasons, including a change in the adult's interests or personal circumstances.

Cancellation: where the adult decides that they would like to take a break from Scouting or where you agree that the role should be cancelled for any other reason.

Whatever the outcome of a review, you should ensure that you complete the Appointment Review (AR) Form and send this on to the Appointments Secretary to make the necessary updates to www.scouts.org.uk.

6.2. SUPPORT FOR REVIEW

For more information on the review process, and for support in carrying one out, see the publication *Review: Helping Adults Choose the Right Path*. Depending on the nature of the review, you may also wish to speak to your line manager for support and guidance.

7. APPROVING ADULT APPOINTMENTS

(FOR THE RELEVANT COMMISSIONER OR BODY)

If you are responsible for approving appointments, you will need to satisfy yourself that the adult is suitable for Scouting and for their chosen role.

As a line manager, you may also be the relevant commissioner or body responsible for approving appointments. Full details of who can approve each appointment can be found in Table 1 in *POR: The Appointment Process*.

If you have this responsibility, the effectiveness of your appointment process locally will probably determine how you go about satisfying yourself of an adult's suitability for Scouting.

If the process is effective, you should be informed of any issues that arise and be involved in making the relevant decisions along the way. However, if you have doubts about the effectiveness of the local process, or if you have any concerns or questions about the adult or the role they are taking on, there are a number of people who you can speak to who can help you make a decision. These include:

- **the Appointments Chairman:** who will be able to inform you of whether the appointment process was carried out correctly according to the rules and procedures of the Association and if there were any issues that arose throughout the process;
- **the Appointments Secretary:** who acts as the central point of contact in the appointment process (receiving references, arranging the approval meeting etc.);
- **the line manager of the adult:** who will be able to give you some background about the adult and about the role that they are going to take on; and
- **one of the three members of the approval meeting:** who will be able to give you their views on the person's suitability for the role.

In some circumstances, you may need to meet with the adult to make a final decision. Remember that if you are unsure about a person's suitability for a specific role, there are a number of options available to you including suggesting that they may be more suited to a different role, discussing the possibility of them sharing the responsibilities with someone else, or setting a short review date (i.e. one year) and ensuring that they have plenty of support during this time.

If you have any doubts about a person's suitability to join Scouting, you must err on the side of caution and not appoint. The welfare and safety of young people must be the overriding factor.

Delegating this responsibility

If you are a commissioner, you may decide to nominate one or more people in your District or County who can approve certain appointments (assuming that there are no doubts raised about suitability at any point in the appointment process).

Examples include, but are not limited to:

- Training Managers for training appointments
- Assistant District Commissioners for section leaders
- Deputy District/County Commissioners for any appointments

If you decide to nominate anyone to take on the responsibility of approving appointments, you will need to be confident that they will act in the best interests of the Association, as you will still be ultimately responsible for the appointment of suitable adults.

Any agreements made about who can approve which appointments locally should be communicated to the Appointments Advisory Committee, and in particular to the Appointments Chairman and Appointments Secretary.

Informing the Appointments Secretary

If you decide to approve the appointment, you should sign the AA Form and return it to the Appointments Secretary. Depending on local circumstances, you may agree on different arrangements for notifying the Appointments Secretary (i.e. by an e-mail or a telephone call instead of signing the AA Form).

8. APPENDIX

SUMMARY OF RESPONSIBILITIES IN THE APPOINTMENT PROCESS

Stage	Action
Application	<ul style="list-style-type: none"> • Provide an overview of the Purpose, Principles and policies of The Scout Association • Explain the appointment process • Agree the role description • Outline the training requirement for the role • Help the adult complete the AA Form and Criminal Records check form • Sign the AA Form as the line manager
Approval	<ul style="list-style-type: none"> • If possible, accompany them to the approval meeting
Appointment	<ul style="list-style-type: none"> • Encourage them to complete their <i>Getting Started</i> training • Present the appointment certificate, or attend the presentation where possible
Induction	<ul style="list-style-type: none"> • Ensure that a local induction plan is produced and followed • Provide any local information to support the national welcome pack

LINE MANAGER SUPPORT CHECKLIST

Use this checklist as a template which will remind you of the steps you need to follow in order to support adults through the appointment process.

An editable version can be found at www.scouts.org.uk/appointment.

Action	Completed
Provide an overview of the Purpose, Principles and policies of The Scout Association	
Explain the appointment process	
Agree the role description	
Outline the training requirement for the role	
Help the adult complete the AA Form and Criminal Records check form	
Sign the AA Form and send to the Appointments Secretary	
Ensure that adult attends an approval meeting, where required, and if possible, accompany them to this meeting to introduce them to the committee members	
Ensure that the adult has completed their <i>Getting Started</i> training requirement	
Ensure that the adult has an induction plan and that any local information has been provided	
Present the appointment certificate, or attend the presentation where possible	

OTHER RESOURCES TO HELP YOU WITH THE APPOINTMENT PROCESS

SUPPORT MATERIAL



The Appointment Process: Guide to Appointing Adults

The support material that should be read alongside this booklet, and includes detailed information about the appointment process for adults.

APPLICATION MATERIAL



The Adult Application (AA) Form

The form used for any adult beginning a new role in Scouting, changing roles or taking on an additional appointment.



The Quick Reference Guide

Explains simply the four steps of the appointment process.

Young People First – the ‘yellow card’

Explains the code of good practice for adults in Scouting regarding child protection procedures.

The Key Policies Card

Explains the key policies of The Scout Association.

These four items can be ordered together as one item (*New adult application resources* - item code AAR) from the Scout Information Centre. All items are free of charge.

