**Ticking all the boxes – Trainer’s notes**

What is the ‘Ticking all the boxes’ workshop?

*Ticking all the boxes* is a workshop that has been developed to support Appointments Secretaries in using the online tools at www.scouts.org.uk (in the area previously known as My Backpack). It should be seen as supplementary training for those who have completed Module 37, *Advising on Adult Appointments*, and feel that they would benefit from some additional support in using the online tools to carry out their role in line with the new appointment process.

What is the format of the workshop?

The workshop can be delivered in a number of ways to suit the needs of your participants. You could deliver it as a course, in a small group, or as one to one training. There are three sessions that make up this workshop:

- **Session 1**: Your role in the appointment process (25 mins)
- **Session 2**: Using the online tools (1 hour 15 mins)
- **Session 3**: The review process & support for your role (25 mins)

You can pick and choose which sessions you want to run based on the needs of the participants. Alternatively, you can run all three sessions one after the other. You will find the objectives for the workshop below, along with an outline of which session will cover each objective.

Depending on the number and experience of the participants, these sessions may need to be preceded by introduction and/or integration sessions. Ideas can be found on www.scouts.org.uk/trainersresources.

**Does the training need to be validated?**

No. The workshop is an additional piece of training to support those who need it, and is therefore separate from the Adult Training Scheme and from Module 37. It will, however, count as ongoing learning for anyone who attends the workshop.
Objectives

By the end of the workshop, participants will be able to:

1. Describe their role in the appointment process, including:
   a. checking that AA Forms are correctly completed (Session 1)
   b. progressing applications when a check is unsatisfactory (Session 1)

2. Administer the appointment process effectively, using the online tools to:
   a. add new members and roles (Session 2)
   b. track the progress of adult applications (Session 2)
   c. edit roles when they are cancelled or have been reviewed (Session 2)
   d. access reports outlining the progress of applications (Session 2)

3. Describe their role in administering the review process. (Session 3)

4. Identify where further support can be found, both human and material (Session 3).

Planning considerations

The participants on this workshop may have different levels of computer literacy. Some may be fully computer literate, whereas others may need some assistance with using the basic functions of a PC. If you know in advance that there will be some who will require assistance, you may want to arrange for a facilitator to sit with them during the workshop. Alternatively, you could pair them up with someone who has a bit more experience and ask them to work together.

It is recommended that you have no more than two participants per computer, and that (where possible) participants have all registered on www.scouts.org.uk in advance of the workshop. It is also advised that you check the speed of the internet at the venue you use. If it is particularly slow, you may need to amend the timings of the sessions, or prioritise the content of the workshop.

Resources

To deliver this workshop in its entirety, you may need the following:

- Flip chart paper
- Sticky dots
- Post-it notes
- Pens
- *At a Glance* Quick Reference Guide to the appointment process
- Table 1 from *POR: The appointment process*
- AA Forms (handouts)
- Computers with access to the internet (at least one for every two participants)
- Laptop
- Projector

Additionally, the following items may be helpful:

- Appointment Process support materials
  - Guide for Appointments Secretaries
  - Guide to Appointing Adults
- Module 37 Trainer’s Notes

These resources can all be downloaded from [www.scouts.org.uk/appointment](http://www.scouts.org.uk/appointment).
Introduction

Trainer’s note
To help you gauge the level at which the workshop should be pitched, you may find it useful to ask participants to complete a simple exercise as they arrive. Write the following statements (based on the sessions you have decided to run) on flip chart paper (one statement per piece of flip chart paper) and have them displayed around the room:

- I am confident in adding new members using the online tools at scout.org.uk
- I am confident in using the online tools at scouts.org.uk to track the progress of adults through the appointment process
- I am confident in using the online tools at scouts.org.uk to cancel appointments and change review dates
- I understand the role I play in the appointment process
- I understand the role I play in the review process
- I know where I can get further support for my role

Ask participants to record how much they agree with the statement. You could do this in a number of ways (i.e. drawing a target and placing a sticky dot closer to the middle if they agree; drawing a ladder and writing their name further up if they agree).

You could then come back to this at the end of the workshop and ask them to record how far they agree with the statement after the training they have received. To measure how far the participants have progressed, ask them to use one coloured dot the first time and a different coloured dot at the end. Presenting them with visual proof of their progress at the end might be appropriate.

Trainer input
Explain to participants that this workshop is designed to complement Module 37, Advising on Adult Appointments. Outline the objectives of the workshop, based on the sessions that you have decided to run.
Session 1: Your role in the appointment process (25 mins)

Trainer input (5 mins)
Briefly outline the appointment process using the *At a Glance* quick reference guides (giving out copies might prompt people to remember the steps of the process later) and emphasise that the Appointments Secretary has a key role in making sure that the process is carried out efficiently. Highlight that the Appointments Secretary is often the one responsible for moving the appointment smoothly through the process, ensuring that approval checks are completed in an appropriate time frame.

It might be appropriate to briefly cover the changes to the appointment process. One key change between the two processes is that Appointments Secretaries now need to be able to use the tools at www.scouts.org.uk to input details: there will be no ‘paper-route’ after October 5th 2009.

Hand out Table 1 from *POR: The Appointment Process* and explain that this is a handy reference outlining the appointment process for each role, with details about the minimum Membership requirements.

Trainer’s note
You may need to familiarise yourself with the new appointment process. If this is the case, you can find information for trainers in the trainer’s notes for Module 37 (found at www.scouts.org.uk/trainersresources). Alternatively, the support materials (including the appointment process FAQs factsheet) for the appointment process can be found at www.scouts.org.uk/appointment.

Task (10 mins)
Explain that you are going to hand out three AA Forms from new volunteers in Fincham District, but that all the forms have not been correctly filled in. Split participants into small groups, and ask participants to spend 10 minutes looking through the forms. Ask them to make a note of any mistakes that they see.

Feedback (10 mins)
Ask each group for their thoughts on the mistakes on each form and draw out the key points relating to each one. The mistakes are:

- **Form 1** – no references have been provided, even though their previous role ended a couple of years ago meaning that they have had a break in service. Also, the Declaration has not been ticked by the applicant.
• **Form 2** – the applicant has ticked to say that they want to be an Associate Member, but the minimum Membership requirement for the role applied for is full Membership (see Table 1 in *POR: The appointment process*). Also, the line manager has not signed the form to say that they support the person’s application

• **Form 3** – the applicant has epilepsy. This is not a mistake on the form, but any special need such as epilepsy should be queried to ensure that their line manager is aware of any medical needs that they may need to be aware of. More information about special needs can be found in the factsheet section of [www.scoutbase.org.uk](http://www.scoutbase.org.uk).

**Trainer’s note**

You may find that participants find more mistakes in the forms than those detailed above. Acknowledge these responses, but bear in mind that some mistakes will be based around local or individual preferences. The most important thing is that they recognise the above points.
Session 2: Using the online tools (1 hour 15 mins)

Trainer’s notes
The PowerPoint slide show that accompanies these trainer’s notes are designed to be used in an interactive session. Each slide has trainer’s notes, and these can be seen at the bottom of the screen when PowerPoint is opened.

To print out the slide show with the notes, click ‘File’, then ‘Print’ and use the drop down box under ‘Print what’ to select ‘Notes pages’.

The session is designed to allow you to explain each element of the system, and then give participants the opportunity to try that element out for themselves.

If you do not have computers for the participants to use, you could talk them through the slide show. If you chose to deliver the session in this way, it is likely that it will only take around 30 minutes.

It is also worth noting that the timings above should be viewed as flexible and will depend on the experience of the participants. Those who are fully computer literate are unlikely to need to the full 1 hour and 15 minutes, for example.
Session 3: The review process and support for your role (25 mins)

Trainer input (2 min)

Explain to participants that they should all have heard of the process of review in Scouting, and that it is a process that is usually initiated by the Appointments Secretary.

Task (3 mins)

Ask participants the following question, explaining that they may be asked the same question by some line managers in their area:

- Why should we carry out reviews?

Display the question on a piece of flipchart paper, hand out blank post-it notes and pens, and ask participants to write their answers on post-its and add them to the flip chart paper. Highlight the differences between informal (i.e. the day to day communication by phone, email and in person that allows support to be given) and formal reviews (i.e. the formal review that needs to be done at the end of every appointment and recorded on Form AR) and the benefits of both approaches.

Feedback (5 min)

Draw out the key points from the answers that have been given. Responses should include that review is an opportunity to:

- find out if any further support is needed
- find out whether they would like to take on a different set of responsibilities
- to find out whether they would like to reduce their responsibilities
- look back over the past couple of years and reflect on what they have achieved
- discuss any difficulties that have occurred over the past few years

Highlight that by having these conversations, line managers will be ensuring that the volunteers they support are happy in their role and in Scouting. This should help them to retain the adults in the future.

Trainer input (15 mins)

Outline the review process using the final PowerPoint slide. Explain that:

- Three months before the appointment review is due, the Appointments Secretary will send an Appointment Review Form (AR) to the adult’s line manager in Scouting.
- The manager will organise and hold a review meeting with the adult. They will then complete the review section of the form which covers relevant training, ongoing learning and the recommendation regarding the appointment.
The form is then returned to the Appointments Advisory Committee, who will consider the outcome of the review along with the relevant Commissioner.

If the decision is that the appointment will be renewed, this will be for a specified period as agreed with the adult (no longer than 5 years). The Appointments Secretary should at this point update the review date online.

If re-assignment is recommended a new AA Form should be completed and the appointment process should be followed. More information about the appointment process for change of roles can be found in the appointment process support materials in the Guide to Appointing Adults.

If retirement is the recommendation, the Appointments Secretary will cancel the appointment using the online tools. If it cancelled for an unsatisfactory reason, a Cancellation/Suspension Form (CS) will need to be completed and returned to the Confidential team at Gilwell Park.

Conclude the session by outlining where they can find further support for their role:

- Local support (Appointments Chairman; Chairman of the Executive Committee; District/County/Area/Regional Secretary)
- Support materials available online (www.scouts.org.uk/appointment)
- Information Centre (info.centre@scout.org.uk or 0845 300 1818)
[County/Area/Region] Workshop – [Date] Feedback

Thank you for participating in this workshop! Please complete the below – your feedback will help us to develop and improve these workshops for the future.

Did the workshop cover what you expected it to?
If not, were there other topics or areas that weren’t covered that you would have found useful?

Which aspect of the workshop did you find most useful for your role, and why?

Which aspect of the workshop did you find least useful for your role, and why?

Has this workshop affected the way that you will carry out your role in the future?
If yes, how?

If there are any other comments you would like to make, please write them here.