

# FINDING OUT HOW VOLUNTEERS ARE GETTING ON.

The review process



[scouts.org.uk/review](https://scouts.org.uk/review)



# 01 THE PURPOSE

In Scouting, we use reviews to find out how our volunteers are getting on in their roles. They are useful because they offer an opportunity to:

- recognise the successes of our volunteers
- identify any support needs
- ensure that adults are happy and motivated in what they are doing, and if not, to consider changes to their roles

If carried out in the right way, reviews will help to make volunteers feel valued, supported and understood. They will also help you to ensure that the understand what you expect from them in their role.

## How often?

Formal reviews must be carried out for every adult in Scouting every five years. However, it is good practice to carry out an informal review of progress on an annual basis.

Reviews will normally be carried out by the line managers – see Table 1 of POR: The Appointment Process if you are unsure of who the line manager is for a specific role.

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# THE PROCESS



1 Six months before

The Appointments Secretary will send you the Appointment Review (AR) Form.

2

Three months before

The Appointments Secretary will inform the adult being reviewed of the upcoming review.

3

In adequate time

You should agree a date, time and location for the review.

4

After the review

You must complete the AR Form and return it to your Appointments Secretary. The Appointments Advisory Committee will consider the outcome.

## The outcome

There are three possible outcomes from a review. These are:

1. **Renewal:** they continue in their role (perhaps with some changes to their role description).
2. **Reassignment:** they are placed in a different role better suited to their skills, interests and availability.
3. **Retirement:** they leave Scouting.

Remember that the outcome will depend on what the individual wants and needs, as well as what you, as their line manager, feels is most appropriate.

# 03 THE MEETING

It's important at a review meeting to create the right atmosphere – you'll want to hold a relaxed, two-way discussion. Make sure that both you and the adult have enough time to discuss everything you want to (1–2 hours is usually about right) and that you won't be interrupted.

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

## Preparation

Before you meet, you might want to do one or more of the following:

- Talk to other adults to identify the individual's successes.
- Sensitive gather facts about any difficulties you are aware of.
- If necessary, think about alternative roles and tasks that could better suit their skills and abilities.

You should also make sure that you are clear about what you want to discuss and that you have your easy-to-understand, open questions prepared (see page 10 for more information about open questions).

# 04 WHAT TO COVER

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When preparing for the review meeting, ask yourself the following questions:

## **From the role description you agreed:**

1. Have the main tasks been carried out?
2. Has the relevant training been completed? If not, why not?
3. Has the role had to change during the review period for any reason?
4. Would you be happy for the role to remain the same?

## **From the goals you agreed during induction or at their last review:**

1. Have the goals been achieved?

2. Have the goals had to change during the review period for any reason?
3. What successes are you aware of?
4. Have there been difficulties that you are aware of?
5. If any of the goals haven't been met, were they realistic in the first place?

## **In the context of your development plan:**

1. How has the person contributed to the plan by achieving their goals?
2. What goals would you like to discuss for the next review period?
3. Would their skills be put to better use in a different role to help you achieve the development plan?

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# THE OVERALL PICTURE

Once you have asked yourself these questions, you should have a clearer idea about what you want the outcome of the review to be.

## Renewal:

- Would you like them to stay in their role?
- Are they effective in what they are doing?
- Are any changes needed to their role description?

## Reassignment:

- Would you like them to take on a different role?
- Could their skills be put to better use elsewhere?
- If they are not effective in their current role, could they perform better in another one?

## Retirement:

- Are there reasons why they should leave Scouting altogether?

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# THE MEETING THE AGENDA

An agenda for a review meeting should be flexible, but you may find it useful to use this standard framework.

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## **Introduction and scene setter**

- Put them at ease by using a positive tone.
- Re-cap on the purpose of the meeting, the agenda and timings.

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## **How things have gone since the last review**

- What has gone well? What are their successes? How have they as an individual, contributed? What are their strengths?
  - What difficulties have occurred? What are their views on issues and problems that have occurred?
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<p><b>How things are at present</b></p>	<ul style="list-style-type: none"> <li>• Are they happy in their current role (take into account time commitment, range of tasks, skills they are gaining, etc) or would they like a change?</li> <li>• Do they feel they are effective in what they are doing at present?</li> <li>• Do they feel they require any additional support or training?</li> <li>• Have they completed any required training? If not, what support do they need (if any) to complete it?</li> </ul>
<p><b>Options for the future</b></p>	<ul style="list-style-type: none"> <li>• Are changes required to the current role description?</li> <li>• Do you need to discuss options for different roles?</li> <li>• Do they need to consider leaving Scouting?</li> </ul>
<p><b>Agreeing future goals/action plans</b></p>	<ul style="list-style-type: none"> <li>• What are their ideas for development?</li> <li>• What needs to be achieved over the next 6–12 months?</li> <li>• When will the next review be held?</li> </ul>

If you are unsure about the way forward in relation to the goals you are agreeing, changes you are making to the role, support you are offering, agree to go away and explore options in order to give more thought to issues. Then meet again.

## Recording reviews

Always make sure that you have a record of what you have discussed and agreed so that both of you have a clear understanding of the way forward. This can then be used at the next review. Templates for recording notes, action plans and also the AR Form can be found online at [www.scouts.org.uk/review](http://www.scouts.org.uk/review)

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# THE CONVERSATION

After preparing for the review meeting, you will have your own thoughts and views about each individual's effectiveness. You may even have an idea about the outcome that you are hoping for. However, the purpose of the review meeting is to **discuss** how things are going, and not to **tell**.

To do this, you will need to ask **open questions** to find out their own, views on things. Open questions start with words such as 'why', 'how', 'what' and 'tell me about'. They are questions to which a simple 'yes' or 'no' reply is not appropriate.

## Examples

'Tell me about how you have found the past twelve months?'

'What do you see as your key successes since your last review?'

'You mentioned you have struggled to find new leaders – why do you think that is?'

Asking questions in this way will allow you to get a feel for how they see things going. Listen with an open mind, and take the opportunity to question further, or to give your thoughts on the same issues.

# 08 GIVING FEEDBACK

Giving feedback, especially when it is difficult feedback, can be a challenging task. Below are some tips to help make the experience as painless as possible for all involved.

## Your approach:

- **Find somewhere private:** No one wants to receive or give difficult feedback in front of others.
- **Own the feedback:** Ensure that you agree with the feedback you are providing and that you are not just saying it because someone else told you to.
- **Have a calm mind:** You're more likely to say something you don't mean or react poorly to something said to you if you're not in control of your emotions

## Delivering the feedback:

- **Get to the point:** Be compassionate, but deliver the feedback directly – do not drag out the conversation longer than is necessary.
- **Be honest:** Don't see it as 'bad' feedback; treat it as 'honest' feedback. Telling the truth is a show of respect, even if they don't like what they are hearing. Make sure they know that you are giving the feedback to help them to be more effective and successful.
- **Be specific:** Tell them what YOU have seen, heard or observed, focusing on behaviour that can change rather than on personality traits. Be descriptive and not judgemental and try not to rely on examples from other people. Remember that they may see the situation very differently.

- **Highlight the effect:** Focus on the consequences of their action or behaviour, whether it is intended or not, on themselves and those around them. Check they understand.
- **Express concern:** This will be more effective than expressing anger, frustration or disappointment.

## After you have delivered it:

- **Listen:** Once you have made your point, stop talking. Let them express their feelings and reactions to the feedback and listen with an open-mind.
- **Agree on how you will move forward.** Be clear about your expectations. Use phrases such as 'what I expected was...' and 'what I expect over the next 12 months is...'. If necessary, allow them time to digest the feedback and get back to you with an action plan.
- **Reaffirm your faith in them:** If appropriate to the outcome of the feedback, let them know they have your support in moving the situation forward.

## Examples of specific feedback

'It seems that you have found it difficult to plan the programme for the Pack at times.'

'One of your goals for this year was to fundraise for the next phase of the campsite project, but it seems that no fundraising activity has happened.'

'We agreed that you would start involving parents more in the Group, but this doesn't appear to have happened.'

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# WHAT NEXT?

## Renewal

If you are both happy for the role to be renewed:

1. Update the role description if necessary.
2. Agree goals for the next 6–12 months.
3. Agree on any support actions, including who will provide them and when.
4. Agree a date for the next review.
5. If you are carrying out a formal review, complete the AR Form and return it to your Appointments Secretary.

## Reassignment

If you agree that a change of role is the right outcome:

1. Agree on some plans for when the change will happen – it is unlikely to happen overnight.
2. Discuss any ideas about how the role that they are leaving may be filled.
3. Identify what support and training they will need.
4. Plan a date for an initial induction meeting for the new role.
5. Ensure that the Change of Role (CR) Form is completed.
6. If you are carrying out a formal review, complete the AR Form and return it to your Appointments Secretary.

## Retirement

If you agree that they should leave Scouting (even if just to have a break):

- If appropriate, leave the door open for them to come back and identify ways in which you can stay in touch with them while they are away.
- Ensure that the Appointments Secretary is informed so that they can cancel the appointment.
- If they are leaving because their performance or behaviour has been unsatisfactory, complete the Cancellation / Suspension (CS) Form.
- If you are carrying out a formal review, complete the AR Form and return it to your Appointments Secretary.

## Further support

Templates to help you record reviews, along with more support for carrying out difficult reviews can be found online at [www.scouts.org.uk/review](http://www.scouts.org.uk/review)

**Reviews have helped me to ensure that I have the right people in the right roles, and that they continue to receive the support they need.**

**John, Group Scout Leader**



**[scouts.org.uk/review](https://scouts.org.uk/review)**

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