

# TICKING ALL THE BOXES.

The Appointment Process:  
Guide for Appointments Secretaries



[scouts.org.uk/appointment](https://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](http://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](http://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 Appointments Secretary plays an important role in administering the appointment of adults within the District or County.**

## **APPOINTMENT PROCESS: GUIDE FOR APPOINTMENTS SECRETARIES**

This booklet is designed to explain and support the role of the Appointments Secretary both in the appointment process and in other areas of the Adults in Scouting model (i.e. reviews). It 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.

### **Support for using tools at [www.scouts.org.uk](http://www.scouts.org.uk)**

As the online tools used for administering the appointment process are constantly developing and changing, the user guide to support you with this part of your role can be accessed at [www.scouts.org.uk/appointment](http://www.scouts.org.uk/appointment). This user guide will be regularly updated with any new developments or functionality.

## **THE ROLE OF THE APPOINTMENTS SECRETARY**

The Appointments Secretary is responsible for three key things:

- **Administering in a timely manner the appointment process within the County/District**  
This will include recording adult applications using the online tools at [www.scouts.org.uk](http://www.scouts.org.uk), sending for references, arranging approval meetings, ensuring relevant checks are processed, reviewing the progress of applications and passing on certificates of appointment for local presentation.
- **Creating and maintaining records of all appointments within the County/District using the online tools at [www.scouts.org.uk](http://www.scouts.org.uk)**  
This includes recording changes made to appointments and the cancellation of appointments.
- **Administering the review process in the County/District**  
This will include informing both the appointment holder and the person undertaking their review when a review is nearly due, issuing the relevant forms to be completed and checking that the forms are returned in the required timescales.

The full role description for the Appointments Secretary can be found in the Appendix in the *Guide to Appointing Adults*.

## **ROLE SHARING**

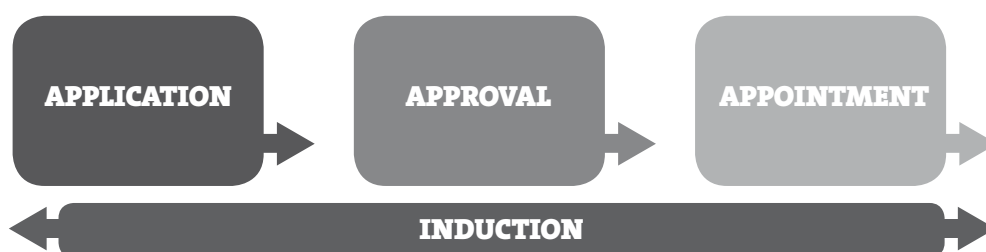
Depending on the size of your District or County, or on the amount of time you wish to volunteer, you may find the role of Appointments Secretary more manageable by sharing the responsibilities between two or three people.

Some suggestions of how the responsibilities of the Appointments Secretary can be shared (based on existing local case studies) are included in the final chapter of this booklet. If you are interested in sharing the responsibilities of your role, discuss your ideas with the Appointments Chairman.

# 2.YOUR ROLE IN THE APPOINTMENT PROCESS

**‘Administering in a timely manner the appointment process within the County or District.’**

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



This chapter outlines some of the things that you will need to consider at each stage of the process.

You will notice throughout that one of your key responsibilities is to ensure that you use the online tools at [www.scouts.org.uk](http://www.scouts.org.uk) effectively. It is important that records are updated with any progress made through the appointment process, so that provisional and full appointments are generated without delay.

**Note:** The detail in the following sections relate to the approval checks being satisfactory. For information about what to do when any checks are unsatisfactory, refer to Chapter 3.

## 2.1. APPLICATION

### RESOURCES FOR THE APPLICATION STAGE

Depending on local circumstances, you may be the point of contact for line managers requesting Adult Application (AA) Forms. If this is the case, when you are asked for one, you may want to consider whether the form is for someone who is brand new to Scouting, or whether it is for someone who is changing roles or taking on an additional appointment.

If the applicant is new to Scouting, you will need to ensure that you send out all of the application resources for a new adult. These include:

- **an AA Form; a yellow card; a Key Policies card; and a Quick Reference Guide to the appointment process** (these items can be ordered together as one item (*New adult application resources* - item code AAR) from the Scout Information Centre and all items are free of charge)
- **the relevant Criminal Records check form**

If the adult is changing roles or taking on an additional appointment, they may already be familiar with the key policies of the organisation and may, therefore, only need an AA Form.

## CHECKING THE AA FORM

When you receive the completed AA Form, you will need to check:

- that all of the personal details have been added to the form (if you have received a Criminal Records check form, you should make sure that the details are the same on both forms);
- that referees have been supplied where necessary;
- that the correct level of membership has been ticked (i.e. Member, Associate Member or non-Member). You can find details of minimum membership requirements in Table 1 in *POR: The Appointment Process*;
- that the Declarations have been signed; and
- that any special needs have been noted.

Once the form has been checked, you can add the personal details and the role details on to [www.scouts.org.uk](http://www.scouts.org.uk). All new roles will be added as pre-provisional appointments. At this point, you should also inform the relevant commissioner/chairman and/or Training Manager if this is the local practice.

## 2.2. APPROVAL

Depending on the role that the adult is taking on, and on whether the adult is new to Scouting or not, one or more of the following approval checks will need to be completed. Details about which methods of approval are required in different circumstances can be found in the *Guide to Appointing Adults*.

### PERSONAL ENQUIRY

If a Criminal Records check is required (either because the adult is new to Scouting or because their existing check is no longer valid), you will need to send the Criminal Records check form to the Confidential Team at Gilwell Park.

You may choose to record the date of when you sent the forms to Headquarters on [www.scouts.org.uk](http://www.scouts.org.uk). The system will automatically update when the initial check against records at Headquarters and the Criminal Records check have been satisfactorily completed.

### REFERENCES

If references are required for the role, you will need to send the Reference (RF) Form to the referees stated on the AA Form.

When they have been returned and are satisfactory, you can update [www.scouts.org.uk](http://www.scouts.org.uk) with this information.

### APPROVAL FROM THE APPOINTMENTS ADVISORY COMMITTEE

If an approval meeting is required, you will need to arrange this with three members of the Appointments Advisory Committee.

When doing this, you should:

- try to ensure that a diverse panel is put together (i.e. age, sex, background, culture), bearing in mind the adult they will be meeting. Depending on the make up of your local community, this may or may not be possible;
- make sure that the three members of the committee are provided with the relevant information from the AA Form, along with the role description that they have agreed with their line manager (where possible);
- try to arrange the approval meeting around the adult's availability and preferences (thinking about the date, time and location of the meeting);
- consider how you contact the applicant – a phone call is usually the most appropriate method, during which you can explain the purpose of the meeting, addressing any concerns or apprehension that the adult may have;
- ensure that any arrangements, once agreed with the adult and the three members of the committee, are confirmed by e-mail or letter. Ensure that any relevant information is included in this communication (including, but not limited to, start time, expected length of meeting, map of location, names of the three committee members, a contact number for the day/evening of the meeting and information about the purpose of the meeting). It is also a good idea to inform the line manager; and
- consider the venue that you are using (is it accessible, are there parking facilities, are there tea/coffee making facilities etc.?).

You may choose to keep a record of the dates of approval meetings and who attended. This way, if you haven't heard an outcome within the following couple of days, you can give one of the three members a call and find out what was agreed.

When the adult has been approved, you should update [www.scouts.org.uk](http://www.scouts.org.uk) with this information.

## **APPROVAL FROM THE RELEVANT COMMISSIONER OR BODY**

The AA Form will need to be signed by the relevant commissioner or chairman of the relevant body.

Depending on local circumstances, different arrangements may be in place for how you are notified of this approval. For instance, you may be informed of approval by an e-mail or a telephone call in place of signing the AA Form.

There may also be local arrangements for who can approve appointments. The commissioner can, if they choose, nominate another person to be responsible for approving certain appointments. For example, they may prefer for the County Training Manager (or Assistant Regional Commissioner (Adult Training) in Scotland) to approve training appointments, or may nominate the Assistant District Commissioner for each section to approve sectional appointments.

You should clarify any local arrangements with the relevant commissioner to ensure that the appointment process runs smoothly in your District or County.

When you have received confirmation of approval from the relevant commissioner or chairman, you can update [www.scouts.org.uk](http://www.scouts.org.uk) with this information. It is worth remembering that commissioners also have access to update records on [www.scouts.org.uk](http://www.scouts.org.uk), so you may agree that they enter their approval directly on to the adult's record.

## **2.3. APPOINTMENT**

### **GETTING STARTED**

If the role requires *Getting Started* training to be completed, you should ensure that the Local Training Manager (or Assistant District Commissioner (Adult Training) in Scotland) is informed as soon as possible about the new appointment so that the *Getting Started* training can begin. You should also inform them when the adult is issued with a provisional appointment as they will then have five months in which to complete and validate the training.

It is worth remembering that Training Managers and Training Administrators also have access to update the *Getting Started* field on the appointment process screen on [www.scouts.org.uk](http://www.scouts.org.uk) to show that any required *Getting Started* training has been validated. You should agree between yourselves who is going to update this information as a full appointment will only be issued once this has been updated. An appointment card will then be sent to the adult and the appointment certificate to the designated person locally.

### **PRESENTATION OF APPOINTMENT CERTIFICATES**

When the full appointment has been made, you will be sent the appointment certificate that will need to be presented locally. It is your responsibility to pass this certificate onto the relevant person to ensure that the adult is formally presented with it and can make the Scout Promise (if relevant) in a timely manner.

Who the certificate is passed on to will be a local decision and, as Appointments Secretary, you should be aware of the practice within your District or County.

**Note:** Depending on local circumstances, you may not be the person who receives the appointment certificates. See Chapter 6 for more information about the flexibility of appointment certificate recipients.

## **2.4. INDUCTION**

Induction is something that happens throughout the appointment process and may continue after the full appointment has been made. It is about making sure that the adult receives any relevant information or support required to carry out their role effectively, meeting the people who they will be working with and/or supported by.

Induction is the responsibility of the adult's line manager, and depending on your role in the District or County, you may be asked to be involved in this induction or to support the creation of induction material for new adults.

# 3. IF THINGS GO WRONG

## It is important that you understand the process if things go wrong.

Depending on the situation, you could find that it is you, as the administrator of the process, who will be counted on to highlight when things go wrong and drive those responsible to make decisions. You may find that the Appointments Advisory Committee decide that the adult is unsuitable, or it may be that the references are deemed unsatisfactory. Whatever the reason, below is an outline of what to do if things go wrong.

As Appointments Secretary, it is your role to inform the applicant of all decisions made by the Appointments Advisory Committee, the chairman of the Executive Committee or the relevant commissioner. This will commonly be to inform the applicant that a suitable role has been approved.

In all the cases below, a decision will be made either to continue with the application, or to cancel the appointment.

If the decision is to continue with the application, you can update [www.scouts.org.uk](http://www.scouts.org.uk) with this information.

If the decision is to cancel the appointment, you will need to complete a Cancellation/Suspension (CS) Form and send full details to the Records Manager at Gilwell Park in a letter marked 'private and confidential'.

### 3.1. APPLICATION

If there is anything on the AA Form that you are unsure about or if there is anything that causes any concern, the AA Form should be referred to the Appointments Chairman. The chairman may then decide to meet with the rest of the committee and/or the relevant commissioner to decide what action to take.

### 3.2. APPROVAL

#### PERSONAL ENQUIRY

In the event of this initial check against records at Headquarters or the Criminal Records check being unsatisfactory, the relevant commissioner (or national headquarters in Scotland and Northern Ireland) may be informed and will be advised on how to proceed. Your commissioner should notify you of the decision that was made.

In some circumstances Headquarters may decide that an individual cannot be appointed. Again, your commissioner should inform you if this is the case.

#### REFERENCES

**No response from referees:** If after a reasonable period of time you have not received a response from one or both of the referees, the adult should be informed and asked to nominate another referee. If after a reasonable period of time references have still not been received, you should refer this to the relevant commissioner who, together with the Appointments Advisory Committee, should decide on which course of action to take.

**Unsatisfactory references:** If you have any concerns about the references or if they establish **any** doubt as to the adult's suitability for the role, these should be referred to the relevant commissioner who, together with the Appointments Advisory Committee, will decide on what action to take.

If the decision is to appoint, you can update the adult's record using the online tools at [www.scouts.org.uk](http://www.scouts.org.uk).

If the decision is not to appoint, you **must** send the references along with any other relevant information regarding the decision not to appoint to the Records Manager at Headquarters in a letter marked 'private and confidential'.

## **APPROVAL FROM THE APPOINTMENTS ADVISORY COMMITTEE**

In the event of the three members of the Appointments Advisory Committee being undecided, or deciding that the adult is not suitable for the role, the relevant commissioner will be informed. Depending on local circumstances, the role of informing the relevant commissioner will either be yours, or one of the three members who met the adult.

The relevant commissioner, together with the Appointments Advisory Committee, will decide on what action to take. If a decision cannot be reached, the chairman of the relevant Executive Committee should make the decision.

If the decision is to appoint, the Appointments Secretary will then update the adult's record using the online tools at [www.scouts.org.uk](http://www.scouts.org.uk).

If the decision is not to appoint, any notes from the approval meeting, along with any other relevant information regarding the decision not to appoint **must** be sent to the Records Manager at Headquarters in a letter marked 'private and confidential'.

# 4. APPOINTMENT REVIEWS

**All adults in Scouting will take part in regular reviews – it is your responsibility to support the administration of this process.**

## 4.1. THE REVIEW PROCESS

Any adult taking on an appointment in Scouting will have a review of this appointment with their line manager at least every five years. The review is an opportunity for the adult and their line manager to discuss whether they are still happy in their role, whether they would like to continue, whether they would like to change roles or take on more/less responsibilities, or whether they would like to take the opportunity to end their role and leave Scouting.

It is your responsibility to keep track of which adults have upcoming reviews and inform the adult's line manager. You can do this by running the appropriate report (called *Appointments – Review Due in the Next Six Months*) using the online tools at [www.scouts.org.uk](http://www.scouts.org.uk). Here, you can also run a report to identify adults whose review dates have passed, or those who do not have a review date on their record (called *Appointments – Review Due*). Details of how to access these reports can be found in the *Appointment Process User Guide* (details of where to find this resource are in the Appendix).

To start the process, you should issue the *Appointment Review (AR) Form* to the person undertaking the review (normally the line manager) six months before the upcoming review is required. You should then inform the appointment holder of the upcoming review three months before the review date, explaining that their line manager will be in touch to arrange a suitable date and time.

You should ensure that the AR Form is returned in the required timescale, and once received, should inform the Appointments Advisory Committee of the recommended outcome as stated by the line manager on the form. The committee can then consider this outcome and make any recommendations based on their discussions.

## 4.2. THE OUTCOME OF A REVIEW

The outcome of a review will either be:

- renewal;
- reassignment; or
- cancellation.

Whatever the outcome, you should ensure that the appropriate action as outlined below is taken.

**Renewal:** the review date should be updated on [www.scouts.org.uk](http://www.scouts.org.uk).

**Reassignment:** an AA Form should be issued to the line manager who should ensure that this is completed and returned to you. The appointment process for the new role will follow the guidance given for changes of appointment in Chapter 4 of the *Guide to Appointing Adults*.

**Cancellation:** the appointment should be cancelled on [www.scouts.org.uk](http://www.scouts.org.uk). If the appointment is being cancelled for an unsatisfactory reason, you will need to complete a *Cancellation/Suspension (CS) Form* and send full details to the Records Manager at Gilwell Park in a letter marked 'private and confidential'.

# 5. WORKING WITH OTHERS IN YOUR ROLE

**To help make the appointment process and review process run smoothly, you will need to establish a good working relationship with a number of people locally.**

## **5.1. APPOINTMENTS CHAIRMAN**

- Keep them informed of progress relating to the appointment and review processes.
- Keep them informed of any issues, hold-ups or unsatisfactory outcomes of both processes.
- Support them in arranging meetings of the Appointments Advisory Committee and ensuring that any relevant information for the meeting is made available.
- Liaise with them to arrange approval meetings.

## **5.2. APPOINTMENTS ADVISORY COMMITTEE MEMBERS**

- Have a good relationship with the members so that you can arrange approval meetings quickly and be informed of the outcome of these meetings in a timely manner.

## **5.3. APPLICANT**

- Liaise with them throughout the appointment process, keeping them informed of any issues or delays in the appointment process.
- Ensure that they are put at ease about the approval meeting and are clear about the purpose of this meeting.

## **5.4. LOCAL TRAINING MANAGER**

- Keep them informed of any new adults or adults changing appointments so that *Getting Started* training can be initiated and so that they can inform you when the training has been validated.

## **5.5. LINE MANAGER**

- Have a good working relationship with them so that you can ensure that the appointment and review processes are carried out correctly and in a timely manner.

# 6. SHARING YOUR ROLE

**Depending on the time you have available to help, you may be interested in the following ideas to help you share the responsibilities of your role.**

There is no right or wrong way to share the role of the Appointments Secretary. If you are interested in sharing the responsibilities, you should speak to the Appointments Chairman or the relevant commissioner about your options. The options below are based on some examples that are currently in practice across the UK.

In all cases, the role of 'District/County Administrator' is used for those supporting the Appointments Secretary to give them the correct access to the online tools at [www.scouts.org.uk](http://www.scouts.org.uk). No matter which option you choose, whether it is one of the below or a different one based on your needs and interests, it will be important that there is effective communication between those who share the role of Appointments Secretary.

## **6.1. PAPER AND ONLINE PROCESSES**

If you are unable to use, or do not have access to a computer or the internet, you may wish to split the role of the Appointments Secretary according to these needs.

In this case one of you would be responsible for ensuring that the AA forms are distributed locally, that references are sent for, that approval meetings are arranged and that certificates are passed to the relevant person locally. The other will be responsible for updating [www.scouts.org.uk](http://www.scouts.org.uk) with any new information to progress the appointment process online, and also for providing any reports relevant to managing the appointment process.

## **6.2. APPOINTMENT PROCESS AND POST-APPOINTMENT PROCESSES**

In this case, you could split the post based on the initial appointment process, and the ongoing and future processes that will need to be completed.

One could be responsible for the initial appointment process and Criminal Records check, and the other could be responsible for ongoing Criminal Record checks and the review process.

## **6.3. APPOINTMENTS AND CRIMINAL RECORD CHECKS**

In this case, you could share the responsibilities based on appointment related issues (i.e. appointments and the review process) and the Criminal Record checks (initial and ongoing).

## **6.4. APPOINTMENT CERTIFICATES**

You can also nominate someone else in the District/County to receive the appointment certificates and distribute them locally. To do this, just add the role of 'District/County Appointment Certificate Recipient' to the person's record whom you wish to nominate.

# 7. APPENDIX

## 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.



#### **The Appointment Process User Guide**

Step-by-step guidance on how to use the online tools at [www.scouts.org.uk](http://www.scouts.org.uk) to administer the appointment process.

This resource is available to download from [www.scouts.org.uk/appointment](http://www.scouts.org.uk/appointment) or to purchase from the Scout Information Centre.

### 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.





