Annual role review – Explanatory Notes

EXPLAINING THE PROCESS

The ‘Annual role review’ is the formal process conducted on an annual basis as part of the People Management Framework for all roles in Guiding. The conversation is conducted by the District Manager with each Leader in her district, by the Region Manager with District Managers and Region team members in her Region, and by the State Commissioner or delegate with members of her State team.

The purpose of the process is to connect with, and provide regular support to each Leader and Manager, to enable her to reflect on how she is going, and how she can continue to learn and develop in her current role. She should feel respected and valued, and able to have the work she is doing validated. There should be a clear understanding of what is going well, and areas for improvement. At the end of the process the person would ideally feel engaged, motivated and inspired in their role.

Ideally the role review happens through a conversation with the person, during which some notes would be written into the boxes on a template. It is not necessary to follow the template exactly, however, please use the questions as a prompt. It is important to ensure that all aspects of the member’s role are discussed, allowing feedback to be delivered, issues to be raised, and any problems to be addressed promptly. Succession planning should be part of the process. Managers must ensure they finish the conversation on a positive note. Additional process tools in the form of short video clips are available here: (URL to be added)

EXPLAINING THE TEMPLATE

The first section is titled ABOUT ME. This is where we see a self-assessment take place by asking the leader or manager to comment on how she thinks she is performing in the role. What she thinks are some key achievements, some key learnings, and some key moments in time that really make or break her role.

1. How are you feeling about your role and your overall experience within Guiding?
   This question helps ascertain the overall satisfaction and engagement level the volunteer has with the organisation, and sets the tone for where the focus needs to go for the rest of the discussion. If it is a negative response then more emphasis should go on determining issues and ways to resolve; if it is a more positive response then focus becomes more about new challenges and goals.
2. What do you consider to be your key highlights and achievements over the past year?
   These can be anything that is relevant for the volunteer. Explore further where possible to gain a greater understanding of what motivates them and what areas give satisfaction. Another good question is - how the person like does to be recognised and rewarded for achievements? Everyone has different preferences in this regard.
3. Reflecting on the position description for the role, do you find it accurately represents all that you do? Please give details:
   If there are significant differences and / or additional workload, discuss how this can be brought back into a more manageable level. If the volunteer is holding more than one primary role, discuss steps to resolve.
4. What elements of your role do you most enjoy and why?
   A good way to ascertain particular strengths and preferences. Generally people enjoy what they are good at - Volunteering is meant to be fun and rewarding so the more enjoyable elements the better.
5. What elements of your role do you find most challenging – and how can we better support you in these?
Another question to ascertain preferences, and determine areas where people may lack confidence or feel like further training and/or direct support would assist. May also be things like administrative or repetitive tasks – if that is the case a good opportunity to discuss different ways of doing things and sharing tasks within the role.
6. How do you believe you are managing the administrative requirements of your role e.g. finance, membership, risk, or compliance with policies and procedures?
This question reflects the volunteer’s assessment of whether requirements are understood and being met, also important to discuss the purpose, different ways of achieving the outcomes required, and what support is required/ by whom.
7. In what ways are you contributing to the implementation of the Australian Guide Program?
Whether working directly with youth members or not, this is a key way of assessing the focus and adaptation of both Leaders and Managers to their new role.
8. Reflecting on our Guiding values e.g. in the Promise and Law, and Code of Conduct, how do you feel they relate to you in a practical level?
Here you want to see that there is knowledge of the values, and what they mean to the individual. This is also about personal growth in Guiding - some examples would be great.

The second section is titled PEOPLE AROUND ME. This is where we can widen the discussion to include relationships with anyone else involved with the volunteer and her role. We want to confirm that all stakeholders are engaged and contributing to the growth and development of the girls. This is certainly the place for her to raise her hand and identify key people or key issues that are causing concern.

1. Please comment on relationships with your team/s e.g. Unit/ District/ Region/ Support group and parents, as well as state office and wider community:
Self evident – what is going well, where have relationships been built/reinforced, where is input still needed?
2. What are some of the issues you have faced, and how have you felt these were handled?
How could we have better assisted you in dealing with these?
Allow as much time for discussion as needed. Relationships with others can be tricky, particularly in a new role. It is also important to look at strategies for the future.

The third section is titled WAY FORWARD. Ideally this would be the time to raise any areas that could do with a helping hand and identify some specific training or mentoring that might assist, both formally and informally.

1. What are you key goals for the next year? How can we help you to achieve these?
Goals are important to ensure progress. They can be linked to things like personal development, region plans, outcomes for girls, membership growth, AGP, progression, peak achievement, camps, patrol system etc. Goals should be SMART – Specific, Measurable, Achievable, Realistic and Timely. Be sure to identify areas of support that will help the goals to be achieved - could be training, mentoring, partnering with others etc.
2. Are there any particular roles or opportunities you have identified within Guiding that you would like to explore further? This could include other Unit / District / Region / State positions, participation on Committees, Board etc
This is an opportunity to find out other interests the person may have, and to help them establish a pathway to achieve them. If you are unsure of how to get there, make it one of your actions to find out more and come back to the person e.g. if they want to know more about joining Boards and committees etc – you can get info from someone at state level.
3. What sort of training/experiences/opportunities do you feel would benefit you in the next year? How can we assist you with these?
Review the learning log to ensure there is an understanding of the value of it and determine areas that can be focussed on for the coming year. If the person has indicated areas where support is needed then use this time to ascertain in practical terms how it can be achieved.
4. Is there anything that you would like to discuss that we haven’t already covered e.g. succession planning when it is time to move on to another role?

Any other comments, thoughts, agreed actions and/or next steps:
Document any actions that are going to be taken, by who and by when. Most importantly, don’t forget to follow up! The biggest mistake with such a process is when people have taken the time to complete it but nothing changes and/or there is no outcome as a result!