



HOW TO CONDUCT APPRAISAL INTERVIEW

And create a good adult development plan

Why is it Needed

Adults appreciate a personalized evaluation that provides recognition of their achievements and contribution to the organisation, and brings clarity to the requirements and expectations of their role. Adults in Scouting (AiS) need an opportunity to reflect on their commitment and what they do in Scouting.

The Appraisal Interview is a two-way process in which both interviewer and interviewee identify what is going well, what needs to be done, and what could be improved, and to understand and address major differences in perspectives between them. It should be done from a developmental perspective. It also serves as an informal opportunity to look at personal development which may not necessarily be associated with the Scouting job or role but would assist the interviewee both personally and professionally. An Appraisal Interview may also be appropriate for specific work units or task force-member-type responsibilities.

What is it

The Appraisal Interview is part of the AiS Review process. It is based on an analysis of responses received through a Performance Appraisal Review (example – Adult Development Plan (Appraisal) document. Your National Scout Organization (NSO) should have this or a similarly named form which the AiS will complete before the planned interview. While the interview is a formal process, it is conducted informally.

Although the Appraisal Interview can be a casual chat over a cup of coffee, it is important that the interview takes place within a regular timeframe as agreed by the NSO and the adult, that it is documented, and that an mutually agreed action plan and new goals for the future result are jointly established.

All information discussed or collected through this process is confidential and shared only among the parties involved. There may be a need to inform other Team members but only the end outcome and not details of the discussion. This 'need to know' is particularly relevant if the outcome is reassignment or retirement or where team output could be affected.

How is it Used

When conducting the appraisal interview, suggested steps can be followed:

1. Invite the adult to a Performance/Feedback Interview
 - a. Arrange a mutually convenient time and place well in advance, or a suitable virtual meeting using Skype or Zoom or WhatsApp, etc.
 - b. Encourage the adult to review their performance in their job or role before your meeting.



- c. Ask them to complete the *Appraisal* document, or whatever document your NSO uses, with honesty and openness.
 - d. Get them to consider progress, achievements, future planning, and possible opportunities.
 2. Think about the Interview and the Focus of Discussion
 - a. Focus on areas of performance with emphasis on acknowledgement and appreciation of success. Outline areas for improvement and any aspects of performance that the adult wants to share and talk about.
 - b. Gently steer the discussion to the next question if the adult exceeds the allotted time for a question. Reflect on and summarize what was said and use it to move forward.
 - c. Make the interview informal, but structured and take good notes. While formal in approach and structure, the interview is conducted in a relaxed style. Written outcomes will provide adults with a record that can be referred to if necessary. Note relevant information and any factual data as it was spoken. Don't make assumptions or make judgements.
 3. Set the Scene
 - a. Time, place, and atmosphere are critical, even if conducting a virtual review.
 - b. Create a private, comfortable, relaxed, quiet, non-threatening environment where you won't be interrupted.
 - c. Be unhurried, informal, friendly, and without physical barriers.
 - d. Aim to be fair, objective, purposeful, and encouraging, supportive, and motivating.
 - e. Be prepared not just to talk but to listen carefully; this not only shows respect to your interviewee, but also saves both of you precious time.
 4. Conduct the Interview
 - a. Welcome the adult to the meeting or call, be warm and friendly.
 - b. Remind the adult of the purpose of the review and confidentiality of the process.
 - c. Walk through the review document responses together. Have a conversation around each area and listen attentively, reflecting on what you hear to ensure clarity and responding appropriately. Take notes.
 - d. Keep your body language neutral and make notes continuously. Nod, smile, and encourage the adult throughout the interview. Use silence (even up to 10 seconds) to encourage them to expand on short answers; ask if they would like to say any more or if they would prefer to move on.
 - e. Use open questions but seek additional information if required. Choose your words carefully. Not everyone might be using their native language. If the adult has difficulty thinking of examples, ask them to think about an example they have already provided and consider its relevance. Ask in-depth questions to seek additional information, clarification and better understanding. Simple conversational probes can be effective, such as: Tell me more about... Can you give me an example when... How does this affect you, make you feel?... How do you handle ____?
 - f. Let the adult speak openly and freely. Highlight and take note of achievements, successes, and accomplishments that the adult is proud of. Show equal interest

- in all aspects of an issue and try not to show approval or disapproval, agreement or disagreement through your words, gestures or facial expressions. Do not challenge answers or engage in uncontrolled debate with the adult.
- g. Talk about areas of weakness and any disappointments experienced and explore possible causes or reasons for these.
 - h. Identify any misunderstandings and reasons why any disagreement or misinformation may exist and talk about how these can be corrected.
 - i. Ask about potential ideas for improvement, discussing new goals for the next period.
 - j. Highlight the support that can be provided through a direct, personal approach by the adult, or other commitment support by your or the NSO related to the job/role (like coaching, mentoring, specific guidance). Agree a suitable action plan with updates ongoing progress.
5. Consider Decisions for the Future
 - a. Ensure that the adult understands the (1) continue the engagement (renewal), (2) change jobs/roles (reassignment), or (3) step down from the job/role (retirement).
 - b. Ask the adult about their preferred option.
 - c. Share your decision proposal in case their opinion differs from yours. Discuss the outcomes and come to an agreement. The interview is the time to share different perspectives and discuss valuable learning experiences for both parties.
 6. Conclude the Interview
 - a. Conclude the interview by reviewing the agreed action plan details and outlining any further steps relevant.
 - b. Highlight positive elements.
 - c. Thank the person and close the interview positively.



Appraisal Interview Cycle



Immediately after the appraisal interview, spend some time reviewing and completing your notes. If you are doing more than one appraisal interview at a time, be organised and prevent mixing up interviewees.

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