

 **South & South East London Scouts**



**Transforming the Volunteer Journey**



**Readiness Checklist**

This readiness checklist is designed to assist your scout group to prepare for your migration to the new digital systems towards the end of April 2024. It lists all of the steps to complete to be prepared for when the new digital systems come online.

When we are talk about your readiness it's important to understand that the go-live of the new digital systems, structures and processes are not dependant on these tasks being completed locally. However, when these do go-live the more you have completed the easier and smoother your move to the new systems will be. UK HQ will provide lots of support post-migration however, there will also many queries that will only be able to be answered locally and this is why it's important to be able to track your readiness.

### **Supporting Information**

Each task has supporting information and links, we will update information on our web pages when any new resources or information becomes available, this is particularly important for some tasks as they might not be able to be fully progressed yet with the current resources available e.g. once user guides are available for the new digital systems.

## Our readiness for DATA MIGRATION from Compass to the new digital system

**Items that are IMPORTANT to have completed at least 4 weeks before data is migrated from Compass to the new membership system**

Dealing with these items prior to migration will significantly ease the path forward for you and your group

Action		Group Leadership Team's View of readiness status	Further information and support materials	Further Actions
M1	<p><b>Email addresses</b> In the new system email addresses will be used in two ways:</p> <ul style="list-style-type: none"> <li>As the unique username for an adults login to the digital system</li> <li>As the address that communications will be sent</li> </ul> <p><i>Readiness statement:</i> Every adult member of our group (including Occasional Helpers), has a unique personal email address and it has been added to their Compass record.</p>	This has been achieved for all adults in our Group (C)	<p>It's important that Compass is updated with personal and unique email addresses, for all members, as these will be used to login to the new digital system.</p> <p>Members without email addresses should be supported to create these locally or using the <a href="#">Digital Skills Tool</a>. Where this is not possible, there will be a proxy system available, the details of this will be shared when available.</p> <p>All Compass updates must be complete and recorded on Compass four weeks before migration.</p> <p><b>Useful links</b></p> <ul style="list-style-type: none"> <li><a href="#">Compass Update Guide</a> - Part B</li> <li><a href="#">Digital Skills Tool</a></li> </ul>	
		This has been achieved for the significant majority of adults in our Group but we still have work to do (G)		
		This has been achieved for some adults in our Group (A)		
		This has not yet been looked at (R)		
M4	<p><b>Appointments are at 'full'</b> Any roles not showing as 'full' at the point of data migration will be moved to the new system at their current stage in the current appointment process. It is important that all steps in the current appointment process which have been completed are updated on Compass.</p> <p><i>Readiness statement:</i> Compass is fully up to date for all steps in the current joining process for all adults in our Group</p>	This has been achieved for all adults in our Group (C)	<p>All Compass updates, including completed steps in the current appointment process, must be complete and recorded on Compass by four weeks before transition.</p> <p>A list of roles that are not yet at full status can be obtained using the Compass appointments report and can then be run through the Compliance Assistant. (which uses the output from the report and highlights potential issues in the appointments process, getting started, and compliance training)</p> <p><b>Useful links</b></p> <ul style="list-style-type: none"> <li>Compliance Assistant: <a href="http://www.tinyurl.com/comp-assist">www.tinyurl.com/comp-assist</a></li> </ul>	
		This has been achieved for the significant majority of adults in our Group (G)		
		This has been achieved for the some of adults in our Group (A)		
		This has not yet been achieved (R)		

## Items that will be USEFUL to have completed 4 weeks before data is migrated from Compass to the new membership system

Dealing with these items prior to migration will ease the path forward for your group

Action		Group Leadership Team's View of readiness status	Further information and support materials	Further Actions
M6	<p><b>Role titles</b> Having accurate roles in Compass will make sure that members are accurately migrated to the new digital system.</p> <p>Readiness statement:</p> <ul style="list-style-type: none"> <li>The current role for all adults in our Group are correct and up to date.</li> <li>Our current Occasional Helpers are accurately recorded on Compass.</li> <li>Out of date roles have been closed.</li> <li>Occasional Helper that are no longer helping out or are no longer needed have been closed.</li> </ul>	This has been achieved for all adults in our Group (C)	<p>Each member role, including Occasional Helper roles, should be up to date on Compass – this includes the closure of any roles that are no longer required.</p> <p>For Occasional Helper roles that are still required, it would be useful to add an end-date to the role record that is no more than 36 months (3 years) after the role start date.</p> <p>All Compass updates must be complete and recorded on Compass four weeks before migration.</p> <p><b>Useful links</b></p> <ul style="list-style-type: none"> <li><a href="#">Compass Update Guide</a> – Part D</li> </ul>	
		This has been achieved for the most of adults in our Group (G)		
		This has been achieved for the some of adults in our Group (A)		
		This has not yet been achieved (R)		
M8	<p><b>Personal details</b> Personal details for a member will be migrated to the new digital system. Making sure these are up to date will mean members' records will be accurate on the new system. This includes Occasional Helpers roles.</p> <p>Readiness statement: The personal details for all adults in our Group with a role on Compass, including Occasional Helpers, are up to date on Compass. This includes managing merging any duplicate records for volunteers, where applicable.</p>	This has been achieved for all adults in our Group (C)	<p>Any duplicate records held for volunteers should be merged into a single record to prevent any duplication in the new system.</p> <p>All Compass updates must be complete and recorded on Compass four weeks before migration.</p> <p><b>Useful links</b></p> <ul style="list-style-type: none"> <li><a href="#">Compass Update Guide</a>- Part A &amp; C</li> </ul>	
		This has been achieved for most of adults in our Group (G)		
		This has been achieved for some of adults in our Group (A)		
		This has not yet been achieved (R)		

Action		Group Leadership Team's View of readiness status	Further information and support materials	Further Actions
M10	<p><b>Section organisation records</b> Section organisation records on Compass can be updated by Group Scout Leaders and District Commissioners.</p> <p>These should accurately reflect the current section details for Squirrels, Beavers, Cubs, Scouts, Explorers and Network.</p> <p><i>Readiness statement:</i> The organisation records for each section in our group (Squirrels, Beavers, Cubs, Scouts) have been updated on Compass in readiness for the migration</p>	This has been completed for all of our sections (C)	<p>Please note: organisation records for Scout Active Support Units will not be migrated to the new system.</p> <p>All Compass updates must be complete and recorded on Compass four weeks before migration.</p> <p><b>Useful links</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Compass Update Guide</a> - Part G</li> </ul>	
		This has been completed for most of our sections (G)		
		This has been completed for some of our sections (A)		
		This has not yet been achieved (R)		
M3	<p><b>Getting Started modules</b> Getting Started training modules not showing as complete and validated will NOT be migrated to the new system.</p> <p><i>Readiness statement:</i> We are confident that, wherever possible, all Getting Started modules have been validated and recorded on Compass</p>	This has been achieved for all adults in our Group (C)	<p>Any modules NOT shown as validated in Compass will not be migrated to the new digital system. For 'Getting Started' modules, this will mean the member will be required to complete the relevant Growing Roots learning.</p> <p>All Compass updates must be complete and recorded on Compass four weeks before migration.</p> <p><b>Useful links</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Compass Update Guide</a> - Part E</li> <li>• Current information on Growing Roots learning can be found at <a href="https://tinyurl.com/scouts-learning">https://tinyurl.com/scouts-learning</a></li> </ul> <p>More information will be added once known</p>	
		This has been achieved for the significant majority of adults in our Group (G)		
		This has been achieved for the some of adults in our Group (A)		
		This has not yet been achieved (R)		

Action	Group Leadership Team's View of readiness status	Further information and support materials	Further Actions
<p>M11</p> <p><b>Wood Badge training modules (after Getting Started)</b>            Training modules and validation for leaders and training modules and validation criteria for managers and supporters not showing as complete &amp; validated on Compass will NOT be migrated to the new system.</p> <p>Readiness statement:            Working with the District Local Training Manager and Training Advisers (or the new District Volunteer Development Team) our group is confident that all validated modules for the adults in our Group have been recorded on Compass</p>	<p>This has been achieved for all adults in our Group (C)</p> <p>This has been achieved for most of adults in our Group (G)</p> <p>This has been achieved for some adults in our Group (A)</p> <p>This has not yet been achieved (R)</p>	<p>Any modules or validation criteria for managers and supporters not shown as validated in Compass will not be migrated to the new digital system.</p> <p>All Compass updates must be complete and recorded on Compass four weeks before migration.</p> <p><b>Useful links</b></p> <ul style="list-style-type: none"> <li>• Validation guides can be found at: <a href="http://www.tinyurl.com/learning-guides">www.tinyurl.com/learning-guides</a></li> <li>• Current information on Growing Roots learning can be found at <a href="https://tinyurl.com/scouts-learning">https://tinyurl.com/scouts-learning</a></li> </ul>	

## Items that will be IMPORTANT to have completed shortly before the date of migration

Dealing with these items prior to migration will significantly ease the path forward for you and your Group

Action	Group Leadership Team's View of readiness status	Further information and support materials	Further Actions
<p>P2</p> <p><b>The new teams structure</b> A core part of the changes to our volunteer experience is centred on the building of new teams. Consider how you'll put our new structure in place in your group and who might be leading the new teams created. Think about how to embed our task-based approach, and new ways of volunteering together.</p> <p><i>Readiness statement:</i> Our Group has:</p> <ul style="list-style-type: none"> <li>• have agreed their new teams structure, including any sub- teams or the group leadership team (if required)</li> <li>• appointed Team Leaders for these each of our sections</li> <li>• started to work towards implementing the team description for each team</li> </ul>	<p style="text-align: center;">Complete (G)</p> <hr/> <p style="text-align: center;">Working on it (A)</p> <hr/> <p style="text-align: center;">Not yet started (R)</p>	<p>Look at how people could join your team in a way that works with their skills, interests, and availability, and that meets the needs of your local area and young people.</p> <p>You can then agree what your new team structure will look like and start working towards the team descriptions for each team. It's important to note when doing this work:</p> <ul style="list-style-type: none"> <li>• Which roles will and will not automatically migrate across to a team leader or team member (or lead volunteer) role in the new system</li> <li>• Group based scout active support units (GSASU), will no longer exist and will become a sub-team (or sub-teams), of the group leadership team. In some cases, it might be appropriate for key members of the GSASU to become members of the main group leadership team, these teams will not automatically migrate across as sub-teams.</li> <li>• Sub-team creation requires the prior approval of the group leadership team</li> </ul> <p><b>Useful links</b></p> <ul style="list-style-type: none"> <li>• Details about our new teams structure can be found at <a href="http://www.southlondonscouts.org.uk/teams">www.southlondonscouts.org.uk/teams</a></li> <li>• Details of team descriptions, support to help you make changes to your teams and to help people find the right team along with Information about which roles will and won't automatically migrate can be found in our guide <a href="http://www.southlondonscouts.org.uk/team-guide">www.southlondonscouts.org.uk/team-guide</a></li> <li>• <a href="#">Constructive conversations</a> A useful guide to help you hold good conversations, especially for difficult topics</li> </ul>	

Action		Group Leadership Team's View of readiness status	Further information and support materials	Further Actions
P2	<p><b>The new teams structure</b> A core part of the changes to our volunteer experience is centred on the building of new teams. Consider how you'll put our new structure in place in your group and who might be leading the new teams created. Think about how to embed our task-based approach, and new ways of volunteering together.</p> <p>Readiness statement: Our Group has:</p> <ul style="list-style-type: none"> <li>• have agreed their new teams structure, including any sub- teams or the group leadership team (if required)</li> <li>• appointed Team Leaders for these each of our sections</li> <li>• started to work towards implementing the team description for each team</li> </ul>	Complete (G)	<p>Look at how people could join your team in a way that works with their skills, interests, and availability, and that meets the needs of your local area and young people.</p> <p>You can then agree what your new team structure will look like and start working towards the team descriptions for each team. It's important to note when doing this work:</p> <ul style="list-style-type: none"> <li>• Which roles will and will not automatically migrate across to a team leader or team member (or lead volunteer) role in the new system</li> <li>• Group based scout active support units (GSASU), will no longer exist and will become a sub-team (or sub-teams), of the group leadership team. In some cases, it might be appropriate for key members of the GSASU to become members of the main group leadership team, these teams will not automatically migrate across as sub-teams.</li> <li>• Sub-team creation requires the prior approval of the group leadership team</li> </ul> <p>Useful links</p> <ul style="list-style-type: none"> <li>• Details about our new teams structure can be found at <a href="http://www.southlondonscouts.org.uk/teams">www.southlondonscouts.org.uk/teams</a></li> <li>• Details of team descriptions, support to help you make changes to your teams and to help people find the right team along with Information about which roles will and won't automatically migrate can be found in our guide <a href="http://www.southlondonscouts.org.uk/team-guide">www.southlondonscouts.org.uk/team-guide</a></li> <li>• <a href="#">Constructive conversations</a> A useful guide to help you hold good conversations, especially for difficult topics</li> </ul>	
		Working on it (A)		
		Not yet started (R)		



Action		Group Leadership Team's View of readiness status	Further information and support materials	Further Actions
	<p><b>Section assistants</b> Section assistants also become team members, in their relevant squirrels, beavers, cubs or scouts, section team.</p> <p>They'll still work with the other members of their team to deliver great programmes to young people, and they can take on one or two (or more), of the shared team tasks (based on their skills, interests, and availability).</p> <p>Readiness statement: We have had a conversation with all of our section assistants, and they are aware of the benefits of becoming a team member and the mandatory Growing Roots and First response learning they will need to complete.</p>	This has been achieved for all adults in our Group (C)	<p><b>Useful links</b></p> <ul style="list-style-type: none"> <li>• Details about our new teams structure can be found at <a href="http://www.tinyurl.com/scouts-teamwork">www.tinyurl.com/scouts-teamwork</a></li> <li>• Details of team descriptions, support to help you make changes to your teams and to help people find the right team along with Information about which roles will and won't automatically migrate can be found in our guide: <a href="https://tinyurl.com/scout-teams">https://tinyurl.com/scout-teams</a></li> <li>• <a href="#">Constructive conversations</a> A useful guide to help you hold good conversations, especially for difficult topics</li> </ul>	
		This has been achieved for the significant majority of adults in our Group (G)		
		This has been achieved for the majority of adults in our Group (A)		
		This has not yet been achieved (R)		
P5	<p><b>Our local processes</b> The new systems will provide support to several current scouting processes this may affect a number of group, district and county processes that are currently in place supporting these.</p> <p>Readiness statement: The changes to local processes have been communicated in our group.</p> <p>Note: You might not be able to fully complete this task just yet</p>	Complete (G)	<p>Several of our current district and county processes will be impacted by the changes to our volunteer experience. This includes processes such as:</p> <ul style="list-style-type: none"> <li>• Local mailing lists</li> <li>• Permit applications and approval</li> <li>• Good service awards applications</li> <li>• Appointment processes</li> <li>• Dashboards and reporting</li> <li>• Nights Away Notifications and authorisations</li> </ul> <p>This means some group, district and county processes which have local processes set-up to help complete them will need to change.</p> <p>It's important to review which of these local processes will change and make sure these are communicated to your teams so that when the new digital system goes live, everyone can continue to deliver scouts locally.</p> <p><b>Useful links</b></p> <ul style="list-style-type: none"> <li>• Guides and detailed information on how these processes will work in the new digital system are being developed by UKHQ now and will be linked here once available.</li> </ul>	
The District and County are working on it (A)				
Not yet started (R)				

Action		Group Leadership Team's View of readiness status	Further information and support materials	Further Actions
P6	<p><b>Support process following migration</b> The new systems will affect many processes and adults across the County, including in your District.</p> <p>There needs to be a support process in place to support all volunteers in their use of the new processes and the new systems.</p> <p>Readiness statement: All adults in our Group are aware of the County support process(es) and how to use them locally.</p> <p>Note: You might not be able to fully complete this task just yet</p>	Complete (G)	<p><b>Useful links</b></p> <ul style="list-style-type: none"> <li>Our county guide and detailed information on how local support will be provided in eimg developed by our county transformation team and will be published once available.</li> </ul>	
		Working on it (A)		
		Not yet started (R)		
P7	<p><b>Post-migration updates readiness</b> When the new digital system goes live, you may need to add some information about your new team structures and make sure everyone is listed in the right teams.</p> <p>Readiness statement: We know the plan to ensure that roles are updated in the new digital system shortly after migration, including any part we need to play in that update.</p> <p>Note: You might not be able to fully complete this task just yet</p>	Complete (G)	<p>When the new digital system goes live, you may need to add information about your new team structures and make sure everyone is listed in the right teams.</p> <p>This is particularly important for:</p> <ul style="list-style-type: none"> <li>Roles that have no corresponding team on the new system.</li> <li>Volunteers whose roles will change when moving to the new system e.g. if someone moves sections</li> <li>Ensuring that all team leaders and any sub-team leaders are correctly recorded</li> </ul> <p><b>Useful links</b></p> <ul style="list-style-type: none"> <li>Information for how this can be done, and who will be able to do this will be shared once available, to enable you to agree how this will be done locally.</li> </ul>	
		Working on it (A)		
		Not yet started (R)		

## Items that it will be USEFUL to have completed shortly before the date of migration

Dealing with these items prior to migration will ease the path forward for you and your Group

Action		Group Leadership Team's View of readiness status	Further information and support materials	Further Actions
P8	<p><b>Our volunteers know their future role title and team</b></p> <p>While it's important that any of your adults that will not automatically migrate directly to the new system have a conversation about their future team, it will be very useful for you to make sure that you have had a discussion with all your team about what the change will mean for them and what their new team and title will be, along with relevant information on the wider changes to our volunteer experience. This will help to reduce any uncertainty.</p> <p>Readiness statement: We have had a discussion with all our adults who have a 'member role' on Compass (so not Occasional Helpers), about their future role title and team.</p>	This has been achieved for the significant majority of adults in our Group (G)	<p>Section leaders, assistant section leaders and section assistants all become part of their relevant squirrels, beavers, cubs or scouts, section team (as team leaders or team members).</p> <p>They'll still deliver great programmes to young people, but they'll share tasks between them (according to their skills, interests, and availability), rather than using fixed role descriptions and a hierarchy that determines who does what.</p> <p><b>Useful links</b></p> <ul style="list-style-type: none"> <li>Details about our new teams structure can be found at <a href="http://www.tinyurl.com/scouts-teamwork">www.tinyurl.com/scouts-teamwork</a></li> <li>Details of team descriptions, support to help you make changes to your teams and to help people find the right team along with Information about which roles will and won't automatically migrate can be found in our guide: <a href="https://tinyurl.com/scout-teams">https://tinyurl.com/scout-teams</a></li> <li><a href="#">Constructive conversations</a> A useful guide to help you hold good conversations, especially for difficult topics</li> </ul>	
		This has been achieved for the majority of adults in our Group (A)		
		This has not yet been achieved (R)		
<p>Several processes will change with the introduction of the new digital system. It's important that this has been well communicated to all the teams in your Group, to make sure after migration, as many volunteers as possible understand and are ready to use the new processes which will improve their volunteering experience.</p>				
P10	<p><b>Permit applications process</b></p> <p>Readiness statement: The new processes for permit applications are known in all of our sections and they are aware about how the new processes will operate.</p> <p>Note: You might not be able to fully complete this task just yet</p>	This has been achieved for the significant majority of adults in our Group (G)	<p>This is particularly important for those who have an approver role in the processes.</p> <p><b>Useful links</b></p> <ul style="list-style-type: none"> <li>Guides and detailed information on how this process will work in the new digital system are being developed now and will be added to our web pages once available.</li> </ul>	
		This has been achieved for the majority of adults in our Group (A)		
		This has not yet been achieved (R)		

Action		Group Leadership Team's View of readiness status	Further information and support materials	Further Actions
P11	<p><b>Nights Away authorisations</b></p> <p>Readiness statement: All of our sections are aware of the new authorisations for nights away events.</p> <p>Note: You might not be able to fully complete this task just yet</p>	This has been achieved for the significant majority of adults in our Group (G)	<p>This is particularly important for those who have an approver role in the processes.</p> <p><b>Useful links</b></p> <p>Guides and detailed information on how this process will work in the new digital system are being developed now and will be added to our web pages once available.</p> <p><b>Useful links</b></p> <ul style="list-style-type: none"> <li>Guides and detailed information on how these processes will work in the new digital system are being developed now and will be linked here once available.</li> </ul>	
		This has been achieved for the majority of adults in our Group (A)		
		This has not yet been achieved (R)		
P12	<p><b>Good service award processes</b></p> <p>Readiness statement: The new processes for Good Service Awards are known to all volunteers in our Group.</p> <p>Note: You might not be able to fully complete this task just yet</p>	This has been achieved for the significant majority of adults in our Group (G)	<p>This is particularly important for those who have an approver role in the processes.</p> <p><b>Useful links</b></p> <ul style="list-style-type: none"> <li>Guides and detailed information on how this process will work in the new digital system are being developed now and will be added to our web pages once available.</li> </ul>	
		This has been achieved for the majority of adults in our Group (A)		
		This has not yet been achieved (R)		
P13	<p><b>Dashboards and reporting readiness</b></p> <p>As part of the new digital system, Lead Volunteers and Team Leaders will have access to new and updated dashboard and reporting to support volunteers.</p> <p>Make sure they have a good understanding of how these will work will help to allow a smooth migration.</p> <p>Readiness statement: I understand the new processes to access dashboards and reporting from the new systems.</p> <p>Note: You might not be able to fully complete this task just yet</p>	This has been achieved for the significant majority of adults in our Group (G)	<p><b>Useful links</b></p> <ul style="list-style-type: none"> <li>Guides and detailed information on how this process will work in the new digital system are being developed now and will be added to our web pages once available.</li> </ul>	
		This has been achieved for the majority of adults in our Group (A)		
		This has not yet been achieved (R)		

Action		Group Leadership Team's View of readiness status	Further information and support materials	Further Actions
P14	<p><b>POR effective from the point of migration</b> From the point of migration, the 'October 2023' edition of POR will apply. Making sure this is well communicated in your area will help to make sure the up-to-date policies and rules are being followed. Until then, the July 2023 edition of POR applies.</p> <p>Readiness statement: Key volunteers in our Group are aware of the new "January 2024" edition of POR, (which will be available by the end of November 2023), which applies from the date we can access the new digital system (1<sup>st</sup> May 2024).</p> <p>Note: You might not be able to fully complete this task just yet</p>	This has been achieved for the significant majority of adults in our Group (G)	<p>Useful links</p> <ul style="list-style-type: none"> <li>POR: January 2024 edition (Link will be provided asap)</li> </ul>	
		This has been achieved for the majority of adults in our Group (A)		
		This has not yet been achieved (R)		

## Our Group's readiness for effective group governance

### Items that it is IMPORTANT to have completed 4 weeks before migration

Dealing with these items prior to migration will significantly ease the path forward for you and your Group

Action		Group Leadership Team's View of readiness status	Further information and support materials	Further Actions
G1	<p><b>Good governance for the change - risk management</b> Trustee Boards are responsible for effective risk management. The people, culture, and digital changes, particularly around the migration to the new system will lead to a number of local changes.</p> <p>These changes will come with some local risks to delivering Scouts – this might be through confusion over local processes, or in some cases volunteers choosing to step down from their current role.</p>	Yes (G)	<p>It's important that Trustee Boards have recognised these risks and identified the appropriate mitigations for these, as necessary. For instance, the use of this checklist to prepare for a smooth migration. It's important to note that while Trustee Boards should be aware that activity is taking place to mitigate against risk, they don't have to be carrying out all of the activity themselves.</p>	
		Working on it (A)		

Action		Group Leadership Team's View of readiness status	Further information and support materials	Further Actions
G1	<p>Readiness statement: Our Group Trustee Board has recognised on their risk register the risks relating to the roll out of the changes. And they have identified mitigations to manage those risks.</p>	Not yet (R)	<p>Useful links</p> <ul style="list-style-type: none"> <li>Current <a href="#">POR Chapter 5</a> (Details on the purpose and responsibilities of a Trustee Board)</li> </ul>	
G2	<p><b>Operational Leadership readiness</b> Lead Volunteers will be responsible for making sure their area is ready for the changes. As the new digital system, team structures and processes go live, lead volunteers will guide their area in how best to use them, locally.</p> <p>Readiness statement: As the Group's Lead Volunteer, I believe I am sufficiently prepared to lead these changes</p>	Yes (G)	<p>It's important that Lead Volunteers feel they have the information and support needed to perform this role in their local area.</p> <p>Useful links</p> <ul style="list-style-type: none"> <li>Everything you need to know can be found at <a href="http://www.tinyurl.com/volunteer-journey">www.tinyurl.com/volunteer-journey</a></li> </ul>	
		Working on it (A)		
		Not yet (R)		
<p><b>Items that it is IMPORTANT to have completed shortly before the date of migration</b> Dealing with these items prior to migration will ease the path forward for you and your Group</p>				
G3	<p><b>Trustee Board - purpose</b> It is important that Trustee Boards work to their new purpose. This will make sure that they are in line with charity regulation best practice (across all nations) and with the team-based volunteering changes. Trustee boards and their new purpose, came into effect with the April 2023 edition of POR.</p> <p>Readiness statement: I am confident (following input our Group Chair), that our Group Trustee Board is using the new Trustee Board purpose statement to guide its work</p>	Yes (G)	<p>Useful links</p> <ul style="list-style-type: none"> <li><a href="http://www.tinyurl.com/trustee-boards">www.tinyurl.com/trustee-boards</a> (What you need to know to move from Executive Committees to Trustee Boards)</li> <li><a href="#">POR Chapter 5</a> (details on the purpose and responsibilities of a Trustee Board)</li> </ul>	
		Working on it (A)		
		Not yet (R)		

Action		Group Leadership Team's View of readiness status	Further information and support materials	Further Actions
G4	<p><b>Trustee Board and its constitution</b></p> <p>Every charity must have a governing document; in Scouts we call this a constitution. The constitution is formally adopted through the charity's Annual General Meeting (AGM) and it's good practice for it to be re-adopted at every AGM.</p>	Yes (G)	<p><b>Useful links</b></p> <ul style="list-style-type: none"> <li><a href="http://www.tinyurl.com/trustee-boards">www.tinyurl.com/trustee-boards</a></li> </ul>	
	<p><b>Readiness statement:</b></p> <ul style="list-style-type: none"> <li>We (the Group Chair and Group Lead Volunteer), are confident that our Group Executive Committee has renamed as Trustee Board (including on its governance documents, agendas and minutes)</li> <li>We can answer "yes" to the 2024 census question "Has your Group formally adopted (at an AGM) a constitution for your Group?"</li> </ul>	Working on it (A)		
		Not yet (R)		
G5	<p><b>Trustee Board - membership</b></p> <p>To continue to align with charity regulation best practice (across all nations) changes on Trustee Board membership will come into effect after the first AGM after you've migrated to the new digital system.</p> <p>It's important that Trustee Boards are aware of what these changes and how they will be adopted locally.</p> <p><b>Readiness statement:</b></p> <p>We are aware of the Trustee Board membership changes that will apply from our first AGM after migration (from our 2024 AGM)</p> <p>Note: You might not be able to fully complete this task just yet</p>	Yes (G)	<p><b>Useful links</b></p> <ul style="list-style-type: none"> <li>Our web pages and Moving to Trustee Boards guide will be updated during December</li> <li>The recording of the national Chairs briefing will be linked to our trust board web page <a href="http://www.tinyurl.com/trustee-boards">www.tinyurl.com/trustee-boards</a> (by the end of November 23)</li> <li>Additional national resources including an annual planner are in development and will be linked to our web pages when available</li> </ul>	
		Working on it (A)		
		Not yet (R)		

## Items that it is IMPORTANT to have completed shortly before the date of migration

Dealing with these items prior to migration will ease the path forward for you and your Group

Action		Group Leadership Team's View of readiness status	Further information and support materials	Further Actions
<p><b>Welcome conversations</b></p> <p>We are moving to a much warmer way of welcoming new adults, and this means changes to our appointment process. This will include a welcome conversation in place of the formal appointments panel meeting. Conversations will be group led and will happen where the new adult volunteers.</p> <p>Readiness statement: We understand the new welcome conversation process and are aware of the steps we need to take to welcome new adults in our group</p>	Yes (G)	<ul style="list-style-type: none"> <li>Details about our transitional and 'go live' local welcome conversation process can we find at: <a href="http://www.tinyurl.com/local-wel-conv">www.tinyurl.com/local-wel-conv</a></li> </ul>		
	Working on it (A)			
	Not yet (R)			
Action		Group Leadership Team's View of readiness status	Further information and support materials	Further Actions
<p><b>Welcome conversation accreditation</b></p> <p>Accreditations are the way we share some tasks and responsibilities (that need permission), on the new membership system.</p> <p>Anyone in your Group that is going to help with welcome conversations will need a 'Welcome Conversation Volunteer' accreditation. The accreditation can be granted once they have completed the very short online welcome conversations learning.</p> <p>Readiness statement: We have decided who will be part of our welcome conversations with new volunteers and they have completed the welcome conversations elearning ready to receive the accreditation when we move to the new membership system</p>	Yes (G)	<p><b>Useful links</b></p> <ul style="list-style-type: none"> <li>The welcome conversation elearning helps volunteers to understand what they need to do to become a Welcome Conversation Volunteer and be given the welcome conversation accreditation on the membership system. You can view it at <a href="http://www.tinyurl.com/welcov">www.tinyurl.com/welcov</a></li> <li>More information about the welcome conversations volunteer accreditation can be found at <a href="http://www.tinyurl.com/scout-teams">www.tinyurl.com/scout-teams</a></li> <li>Details about our transitional and 'go live' local welcome conversation process can we find at: <a href="http://www.tinyurl.com/local-wel-conv">www.tinyurl.com/local-wel-conv</a></li> </ul>		
	Working on it (A)			
	Not yet (R)			