# Integrated Volunteer Services Project:

## What we did, what we learnt and what happens next?

Partnership
age Cymru

# *Contents*

# Section 1: Outline of the project

## Who are we?

The Age Cymru Partnership consists of six separate charities from across Wales, who work under the same brand;

- Age Cymru;
- Age Cymru Dyfed;
- Age Cymru Gwent;
- Age Cymru Gwynedd a Môn;
- Age Cymru Powys;
- Age Cymru West Glamorgan.

This project brought us together to collaborate on the creation of partnership resources and policy around volunteering.

## Aims of project

The Integrated Volunteer Services project was an Age Cymru Partnership project funded by WCVA's Strategic Volunteering Grant which ran from January 2022-June 2022.

The project was established for several reasons:

### 1. To build collective capacity.

Each partner had different numbers of existing volunteers, one partner had around 300 whereas another was just starting their planning to recruit their first volunteers. We wanted to create a team of Age Cymru partnership volunteers who could move across the network supporting partners and projects who needed it;

### 2. To build collective capacity around volunteer management.

Some partners had a member of staff or several members of staff responsible for supporting volunteers and others had staff where it was only one part of their job to support volunteers. This meant that there had been inconsistency across the partnership around volunteer support. We wanted to create resources, documentation and volunteer peer mentor structures to create consistency and build the capacity of our volunteer leaders;

### 3. We wanted to facilitate a range of volunteer experiences.

There is currently best practice across the partnership of intergenerational and diverse volunteering. We wanted to share expertise to create a welcoming and inclusive offer. We also wanted to create something which is flexible and can meet the needs of volunteers who have competing priorities such as work, studies, or childcare.

### 4. Deliver a volunteering framework.

As part of the project, we wanted to deliver a one-page visual framework for volunteering. We wanted to create a commitment and guidelines to how we would work with each other, volunteers and how this work with each other and volunteers would help us to achieve our organisational missions and ambitions.

What we envisaged to be the key outputs

To achieve the core aims of this project we wanted to produce:

- A visual framework to be adopted and developed across the partnership;

- A process for passporting volunteers between partners;

- Standardised recruitment documentation and policy to aid the passporting process;

- Streamlined core induction training for all volunteers;

- Consistent volunteer policy and support procedures;

- A partnership volunteer communication plan;

- A peer mentor role for volunteers to compliment staff support;

- A common data set around volunteering.

## *Challenges we anticipated*

1. We knew that our aims were ambitious in the time frame we had available, so there was the risk that we wouldn't be able to achieve everything within the set timescales;

2. With any project, there's always the potential that volunteers and staff may be resistant to the changes we created as part of the project. To overcome this challenge, we planned to involve key staff members from across the partnership and volunteers in the process within co-productive working groups.

# Section 2: What we did

## What we did

After an initial two weeks of planning, we launched several different groups which met weekly over the course of the project. From February until April, we focussed on the Volunteering Framework, recruitment documents and processes and training resources. Then, from April until June we worked on our volunteer management and data collection processes. In June we began the roll out of the resources and documentation we'd created.

### The framework

To create the framework, we ran a focus group and a questionnaire. The focus group brought staff from across the partnership together to understand what we're doing well, where we see ourselves in the future and our vision for volunteering.

The questionnaire ran to ask volunteers for their perspectives – what they liked about volunteering with us, what we could be doing better and how they see their work impacting older people throughout Wales.

The research from this formed our one-page visual volunteering framework (see appendix image 1).

### Our other volunteering policies, procedures, and resources

To create these documents, we ran 3 working groups (recruitment, training, and ongoing support) with volunteer leaders from across the partnership. We reviewed existing documentation and improved on them, showing the documents and processes to volunteers from across the partnership for feedback before signing them off.

# What we created

Over the course of the 5 months of the project, we created the following:

- An Age Cymru Partnership Volunteering Framework;

- Streamlined volunteer recruitment resources (application form, equality and diversity monitoring form, conversation about the role form, reference request form, role description template);

- A process by which we can passport volunteers between various partnership opportunities, a staff procedure and "How to" guides;

- A series of eight core training videos, PowerPoints and training booklets. We created various modes of undertaking the training facilitate various volunteer preferences;

- eLearning platform for the training including "How to" guides around using the platform;

- Training certificates and training feedback form;

- Cross-organisation volunteer support documentation (including volunteer communication plan, volunteer policy, volunteer exit documentation, a Peer Support Volunteer role and resources, a volunteer handbook, and an annual volunteer survey);

- Modes of collecting a common volunteer data set (recording volunteer numbers, hours, contact with older people, diversity of volunteers and volunteer satisfaction);

- A cross-organisational Volunteer Managers Network to continue the collaborative work this project started.
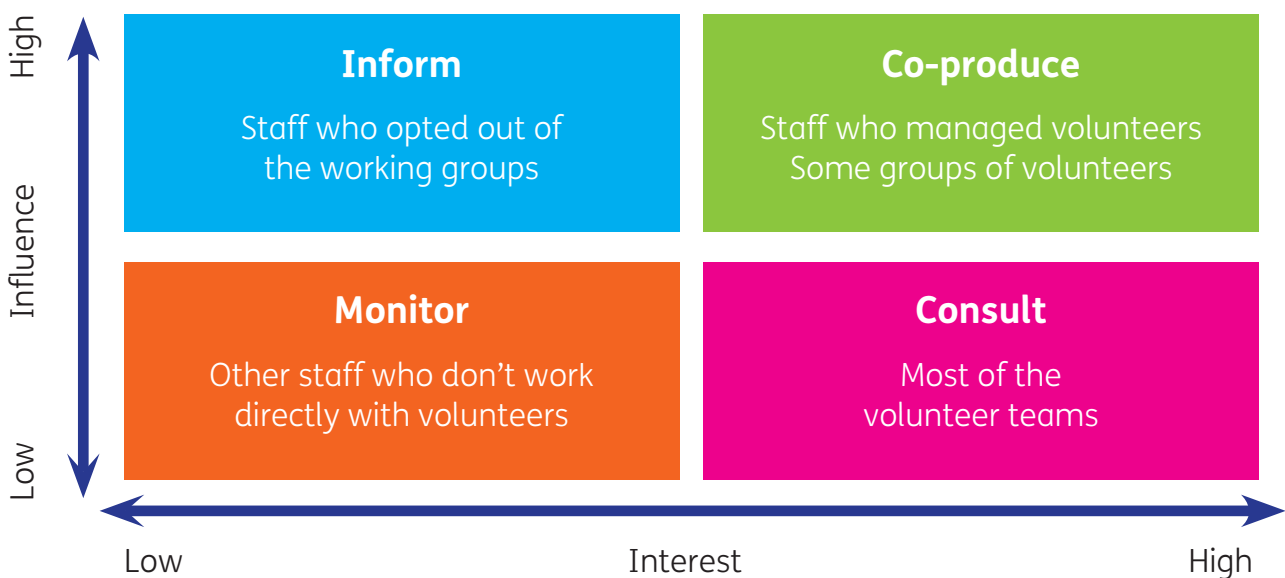
# *Section 3: What we learnt*

### 1. Co-production and consultation

Co-production is a term which describes the process of service users and providers working together collaboratively to reach an outcome.

From the beginning, we knew we wanted this project to be co-produced with key stakeholders who would be fundamental in influencing and leading for change within each organisation.

As part of the planning process, a stakeholder analysis was carried out to determine the most effective way to involve stakeholders.

## *Stakeholder analysis*



|  | |
|---|---|
| **Inform** <br> Staff who opted out of the working groups | **Co-produce** <br> Staff who managed volunteers <br> Some groups of volunteers |
| **Monitor** <br> Other staff who don't work directly with volunteers | **Consult** <br> Most of the volunteer teams |

(Vertical axis: Influence — Low to High. Horizontal axis: Interest — Low to High.)

It was identified the key groups to co-produce with, and work alongside, throughout this project would be the staff who lead on volunteering or manage volunteers. Bringing together their expertise, experience, and their knowledge of their volunteers would be crucial to making sure the documents created are fit for purpose and sustainable.

To ensure that these stakeholders were brought in from the beginning, I spent time meeting with the volunteering leads from across the partnership so I could get to know where their partner / project was in terms of volunteering, their strengths and current challenges.

These staff were invited to working groups to collaborate on the creation, design and provide constructive feedback on what was created. I asked them to think about the volunteers within their teams who would be high influence amongst their peers and invite those volunteers to join the working groups too.

# Challenges around co-production: Volunteers and co-production

As a team of staff who managed and support volunteers, we were all very keen from the beginning to invite volunteers to the working groups so they could create resources with us to ensure they met the needs of service users. We were aware that our volunteers like to know upfront the level of commitment being asked of them so we wrote detailed working group outlines so volunteers would be aware of what they were signing up to (see appendix 2).

All meetings happened virtually, due to it being a national project, and we thought that this would appeal to our volunteers as it added a layer of flexibility and wouldn't add the additional barrier of travel.

We also targeted volunteers who had been very involved in the development of their day-to-day volunteering role.

However, although volunteers were keen to participate they didn't join our working groups. We equally found this to be the case when we tried to run a focus group with volunteers to feed into our Partnership Volunteering Framework.

The main reasons for not wanting to join groups included;

- Just wanting to focus on their volunteering role;

- Not having time due to work / studies / childcare.

# Key learning:

1. We ended up asking volunteers how they would like to be involved and provide feedback on what we create throughout this project. Volunteers unanimously said they would like to fill in online questionnaires. These seemed to work well for getting quality responses and feedback from large numbers of volunteers which we used to develop resources and processes. On the questionnaire which fed into our Volunteer Framework, we received 66 responses, whereas if we'd run a focus group, we probably only have had 10-12 volunteers in attendance. Questionnaires helped us in casting a larger net when collecting volunteer views.

2. Even though we explained why we wanted them to be involved in the group and the benefits it would have for future volunteers, many of the volunteers wanted to just fulfil their volunteering role and trusted staff to create something for them. If there had been more lead in time, it would have been beneficial to spend time building an appetite for co-production for our volunteers including sessions around what co-production is and how it can benefit them.

# *Highlight of co-production: best practice sharing and relationship building*

Before the project began, a few of the members of the group had met briefly at Age UK networks, conferences and as part of other collaboratively projects. However, the working group meetings were the first time a lot of us had properly met.

Although all the members of the group were volunteering leads in their various organisations, each person came from different backgrounds and with levels of expertise. Some members came from a HR background, others came from a volunteer management background and had worked in volunteering at other organisations, we had project managers involved, and we also had some people who were new to their organisation. Bringing these differences together allowed us to see the resources through these varied lenses and create robust systems and processes.

Some partners had adopted various technologies with some success, and we built upon this expertise;

- One partner introduced us to Microsoft Forms for our volunteer recruitment and reference forms;

- One partner found a way to passport volunteer data via the online database we all used which helped us to create a simple and effective process to support the movement of volunteers between volunteering roles;

- One partner introduced us to an eLearning platform that had recently been piloted by Age UK and we ended up adopting this across the board for our core volunteer training.

The co-productive working through these working groups not only allowed us to share best practice but allowed us to identify other gaps. We started to notice that while we were building this bank of resources and support for volunteers, we needed to create this same support for our staff who work with volunteers to ensure the sustainability of our work. From this we developed a project outline to apply for funding to continue our work. I'll talk more about this in the final section of this report.

In our final meeting, here were some of the comments from staff who were involved in the project work regarding their highlights of being part of the co-productive working groups:

*"Sharing best practice was a highlight, I really appreciated being able to pick people's brains"*

*"In our organisation we are without a dedicated volunteer expert, I liked that I gained knowledge from others in the group with expertise"*

*"We haven't always collaborated before now, and we've all learnt different things from each other"*

## 2) Utilising external experts and research

Initially, we wanted to share and review what we had in place in our respective organisations. One of the core aims was to ensure our resources were accessible and inclusive. We were very aware that coming from similar organisations, and the majority of us being white women, we would only be reflecting on our documents through one lens. Therefore, we employed several methods to review what we had in place:

1.  Conducting research and reviewing feedback from our current volunteer teams;

2.  Reading research from volunteering organisations, such as NCVO;

3.  Attending groups and conferences such as WCVA's EDI and volunteering group, CVC volunteer manager's networks, Age UK training sessions and looking at other charity's resources.

## These helped us develop our resources in various ways;

•  As part of the process of developing our Volunteer Communication plan, we wanted to understand the varied motivations of our volunteer team to ensure we had these in mind when communicating. Through reviewing volunteer interview forms, we came up with six basic motivations of our volunteers that we need to consider when tailoring communications. This is something we are hoping to develop further in the future with additional research;

•  Research from organisations such as NCVO taught us that our volunteering processes needed to have an element of flexibility and be competitive, as one of the key reasons people don't volunteer is perceived time commitment. Due to this research, we developed training that could be completed on an eLearning platform so that we could accommodate volunteers who may not have capacity to attend face-to-face induction training due to work, childcare or studying;

•  At conferences, training, and network meetings we met experts who looked at our documentation for us and gave us tips as to how we could improve it. Thanks to the experts we spoke to, we learnt simple improvements that would make a huge difference – for example, we changed the order of some of the questions on the Equality and Diversity monitoring form because we learnt that research shows people are more likely to answer certain questions if they come after other questions. This will help us to get a clearer picture of the diversity of our volunteering teams and help us actively work to improve this picture going forward.

# *Our critical friends*

To get a more diverse perspective on our volunteering documentation from the beginning, we showed our documentation to a critical friend from outside the organisation. It could've been someone from another organisation or a friend / family member. We asked them:

- What do they like about our process / documents?

- If anything, what about the process / documents would put them off volunteering with us?

- Is there anything missing from our processes that they think would be useful as a new / prospective volunteer?

From the consultation using the critical friend process, we gathered some key learnings which we were then able to apply when reviewing and improving our documents:

1. A simple change we were able to make was adjusting all of our documents to large print and off white to support people with Dyslexia or visual impairments. We also added voice recordings to our online application forms, so that people with visual impairments could listen to the question rather than read if that was a better option for them.

2. We added an option for people to let us know their preferred pronouns at the point of application. We also included in our recruitment and selection policy a segment on how to support volunteers with sensitive DBS checks for transgendered applicants.

3. We were more mindful around accessibility— we included an accessibility statement section in our volunteer role profile template. We also created opportunities for volunteers to flag with us any disabilities or illnesses they have and how we can support them while volunteering with us on the application form or at the point of interview.

# Section 4: What happens next?

Although this project has come to an end, this is only just the beginning for our collaborative working around volunteering. Throughout the course of the project, it became clear that there was an additional piece of work we wanted to undertake collaboratively. As we'd successfully coproduced volunteer resources and policy around volunteering, we knew we wanted to undertake a piece of work to support the staff who work with volunteers.

Together, we have planned the next phase in our work – a suite of support for staff who work with volunteers. This will include:

- An induction / training package for staff who work with volunteers;

- A volunteer audience insights resource to help us create bespoke communications to our volunteer teams;

- A practical toolkit to accompany the framework, with best practice examples of how it's been translated by projects and partners;

- We want to create a volunteer role to sit on the network with us and be the voice of existing and prospective volunteers when we develop additional resources and support. We hope this role will help us to build an appetite for coproduction amongst our volunteers.

We hope this will not only imbed the work created from this project, but also build the confidence of our staff who work with volunteers (particularly those who are new to working with volunteers) and, ultimately, continue to improve the volunteer experience.

This piece of work will not only bring together the existing skills and expertise of our staff who work with volunteers to share across the partnership, but we will look outward to see what we can learn from other organisations and hopefully we can continue to share what we learn with the sector.

## Age Cymru Partnership

### Vision statement:

The Age Cymru Partners, in collaboration, will plan, welcome, train, and support a diverse and flexible volunteering team who will work together with staff to create an age friendly Wales.

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## Our staff will work together to...

- Create simple, consistent, and flexible recruitment, induction, and support processes for volunteers;
- Create and use cross-organisational networks to plan, recruit, communicate and evaluate together;
- Ensure that staff and volunteers work together across the partnership as a unified and cohesive team;
- Ensure that we know our volunteers and give them varied experiences and opportunities to build and utilise skills;
- Be inclusive and proactively look outward for innovative ways to welcome a diverse team;
- Be reflective, share best practice, and listen to volunteer voices to improve what we do and how we do it.

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## Our staff will work with volunteers to ensure they...

- Feel welcome, empowered, and supported and support the staff that they work with;
- Feel part of a large Age Cymru Partnership community and local communities throughout Wales;
- Have a voice; be consulted, collaborated with, and will coproduce new services, projects, and opportunities;
- Know what's going on across the partnership and have the tools, skills, and training to easily move between opportunities;
- Feel valued, listened to, and celebrated for the work that they do;
- Be intergenerational and diverse. They will share their skills and experiences with each other and older people they work with.

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## Our volunteers will work with older people to ensure they...

- Feel less socially isolated, part of their communities and part of the communities we build for them;
- Feel empowered, confident and know what and who can support them, especially in times of crisis;
- Feel safe and live free from abuse;
- Have improved mental and physical wellbeing;
- Overcome barriers through giving them a voice;
- Have fun, friendship and feel heard.

# *Working groups outline*

**Name of working group:**

Volunteer recruitment

**Members of the group:**

Bryony Darke and staff and volunteer representatives from Age Cymru/Age Cymru brand partners

**Lead member (if applicable):**

Bryony Darke

**Aim of the group:**

- To review the existing volunteer recruitment processes and documents across Age Cymru and the brand partners and review them to streamline and create a standardized approach and resources.
- To create a passporting process and guide.
- To establish Volunteer Recruitment Network

**Time commitment:**

- 5x 2-hour meetings from beginning of Feb to beginning of March
- Commitment to undertake work outside of the group
- Optional involvement in the volunteer focus group

| Actions / outputs of the group | By when |
|---|---|
| - Standardized application form and EDI form<br>- Standardized interview form<br>- Standardized reference forms<br>- Standardized recruitment and selection policy to staff handbook on volunteer recruitment (inc. standardizing DBS checks and recording, and what documentation to store on Charity Log)<br>- Run focus group with volunteers to gain final feedback ahead of sign off | Mid-April |

| Itinerary of meetings/deadlines: | | |
|---|---|---|
| **Meeting date/time** | **Objectives of meeting** | **Work required between meetings** |
| Meeting: 14/02/2022, 2-4 | • Introduce the work of the group<br>• BD to go through report of what already exists<br>• Group feedback on what exists and create actions to standardize | BD to standardize an application form, EDI form, interview form and reference forms based on actions |
| Deadline: 17/02/22, midday | • BD to send standardized documents to group for comment.<br>• BD to send existing recruitment policy for discussion.<br>• BD to send rationale for Passporting for discussion. | |
| Meeting, 21/02/22, 2-4 | • Review and comment on recruitment and selection policy.<br>• Creative mapping of passporting process.<br>• Actions to be delegated for passporting guide. | • Staff to work on their parts of passporting and send to BD by midday 28/02<br>• BD to advertise for focus group volunteers<br>• BD to make edits to recruitment and selection policy |
| Deadline: 28/02/22 midday | • BD to send working group passporting docs and edited recruitment and selection comment ahead of meeting | |
| Meeting: 02/03/22, 2-4 | • Feedback on docs sent ahead of meeting<br>• Planning questions for volunteer focus group and who wants to support on focus group work | • BD to make final edits to docs based on meeting |

| | | |
|---|---|---|
| Deadline: 04/03/22 | • BD to send documents for volunteer feedback to focus group ahead of meeting | |
| Focus group: 07/03/22, 2-3 | • Volunteer to comment on usability and accessibility of documents<br><br>• Volunteers to comment on their experiences of recruitment | |
| Meeting: 11/03/22, 2-4 | • BD to feedback information gathered from focus group and create actions to finalize documents | • Staff members to finalize documents based on feedback and send to BD |
| Deadline: 16/03/22 | • Final documents completed and sent to BD for sign off<br><br>• BD to send off for translation | |
| Final meeting: 18/03/22, 2-4 | • Group sets out terms of the Volunteer Network Group decided | • BD to send out terms of network group to working group members |

**When will the work of this group be completed?**

When final documents have been completed and signed off and network group created to continue work