

# St Giles

Turning a past into a future

## Supporting Volunteers with Lived Experience- A Best Practice Guide to Inclusion



## INTRODUCTION

Volunteers with Lived Experience can provide a unique perspective to service provision in that they have incomparable real-life experience of using services and overcoming adversity. They are often in a position to truly empathise with client groups and become experts by experience.

A Lived Experience Model refers to those with lived experience of overcoming adversity including issues such as addiction, experience of the criminal justice system, poor mental health, abuse, homelessness, and criminal exploitation, using their direct experience to move forward positively, nurture & support others with authenticity, and inform authentic & innovative service design.

Increasingly organisations in the public, private and third sector are recognising the impact of service user involvement, co-production and lived experience and its benefits in supporting service design, delivering community interventions and enhance service provision for its service users.

Desktop research found a wealth of support material is available for managing volunteers (many of which are referenced at the end of this report), but less is available specifically for managing and recruiting volunteers with Lived Experience.

This guide is designed to complement previous works by focusing on providing practical considerations when managing and supporting non-traditional volunteers with Lived Experience.

### **Volunteers with lived experience.**

Many volunteers with lived experience have highlighted their motivations to volunteer are driven by a passion to give back to people experiencing similar challenges they faced but also as a pathway to develop their skills, become work ready and gain meaningful experience to support transitions into paid work.

Many of the volunteers we have engaged with have reported that their rationale for volunteering and declaring their lived experience stemmed from a personal desire to positively use some of the biggest challenges they have faced in overcoming adversity to support or motivate members in their communities who are facing similar challenges.

The benefits of lived experience have also been highlighted by a large range of organisations that embrace service user involvement and co-production. With organisations citing the benefits of Lived Experience Models and the unique ability of lived experience volunteers being able to bring; a different perspective, empathy based on experience and a real understanding of what their clients are going through and the pressures they are facing, as having a positive impact on their service design and delivery.

A recent survey conducted across Wales highlighted that 60% of third sector organisations responding currently offer volunteering roles specifically to people with Lived Experience in capacities such as:

- Volunteer Peer Advisors
- Volunteer mentors
- Volunteer support workers
- Community Advocate

## **Purpose of this Guide**

Research conducted funded by the WCVA Strategic Volunteering grant found that whilst opportunities are provided a consensus amongst respondents indicated that they felt volunteers with Lived Experience required more support than traditional volunteers. A further volunteer centred evaluation also found that volunteers with lived experience found multiple challenges and barriers when engaging in volunteering activity.

In preparing this guide we acknowledge that volunteers with Lived experience like traditional volunteers will have various levels of previous experience and many will not require additional support other than that provided to traditional volunteers. It is also acknowledged that the type of support required would differ significantly depending on the type of lived experience of the volunteer and the role to be undertaken. This guide is therefore aimed at supporting volunteers with Lived Experience who have limited work experience, have been economically inactive and are actively seeking to develop their skills.

## **How to use this guide**

This guide is not designed to be a prescriptive guide to managing volunteers but instead aims to highlight barriers that may be faced from the perspective of volunteers with lived experience looking to re-engage in meaningful activity through volunteering.

We seek to outline areas of consideration for organisations seeking to be more inclusive to people with lived experience and provide some practical tips on small changes that can be made in support of a more inclusive approach. The practical tips within this guide have been informed by a group of volunteers with lived experience based upon their experiences in voluntary roles as part of person-centred research trial, and includes suggestions made directly by them and identified best practice from their experiences.

This guide is made up of 4 sections designed to support core areas of managing volunteers covering key topics including:

- Organisational culture and infrastructure
- Recruitment and Induction
- Volunteer Activity
- Support & development

## **ORGANISATIONAL CULTURE AND INFRASTRUCTURE**

Best practice within the voluntary sector recognises that to effectively support volunteers a clear strategic commitment and appropriate resource is imperative to the success of voluntary roles within organisations. Standards such as the Investing in Volunteer standards outline core considerations and best practice for organisations to fully embed meaningful volunteering opportunities within their work. Desk top research has also identified a wealth of support materials to support organisations develop and implement a volunteer strategy, some of which are highlighted at the end of this guide.

However, from our work with Volunteers with Lived Experience it is recognised that some volunteers (specifically those with limited prior work experience and more complex social backgrounds) may require further support mechanisms, investment, and adapted practices by organisations to; become more inclusive, embed a Lived Experience Model into volunteering practice and/or support Volunteers with Lived Experience. Further development to support organisations in Wales develop and implement a Lived Experience Model is currently being designed with further work being invested to build on independent research recently conducted.

As previously outlined the scope and focus of this guide is to provide a summary of emerging challenges and barriers faced directly by volunteers with lived experience with limited work experience and suggest practical tips that could be adopted as part of wider scope of work.

In relation to organisational culture and infrastructure the most discernible challenge reported was the organisational preparedness and understanding around levels of support. From the volunteer perspective this transpired into providing a meaningful experience in which the organisation had a clear view of how lived experience would be integrated into their service in terms of context such as: roles (formal or informal volunteering), level of engagement (service design or delivery) and working practices that provided person centred support.

The table below summaries identified challenges and barriers by volunteers with lived experience in relation to organisational culture and infrastructure based on their direct experiences. The provision of person-centred support features later in this guide.

<i>Identified Barrier/ Challenge</i>	<i>Positive Action for best practice</i>
<i>Embedding a Lived Experience Model within Volunteering</i>	<ul style="list-style-type: none"> <li>• Clearly defined volunteering strategy and infrastructure</li> <li>• Set definition of what ‘Lived Experience’ is within the organisation context.</li> <li>• Creation of a Lived Experience Model that outlines how lived experience will be incorporated and embedded within the organisation to design levels of integration, purpose, appropriate roles, remuneration and type of volunteering activity.</li> <li>• Create and resource an infrastructure to manage &amp; support volunteers with lived experience.</li> <li>• Identify the level of support that may be required for volunteers to undertake their roles and design a suitable package of support, that includes role related skills and pastoral support arrangements.</li> </ul>
<i>Attitudes and stereotypes towards people with Lived Experience</i>	<ul style="list-style-type: none"> <li>• Create a safe environment to share lived experience.</li> <li>• Promote the value of lived experience within your organisation.</li> <li>• Use client case studies to demonstrate how your organisations uses lived experience.</li> <li>• Share the impact and benefits of volunteers with lived experience.</li> </ul>

## **RECRUITMENT & INDUCTION**

The following section explores the challenges and barriers identified by Lived Experience volunteers in relation to accessing volunteering opportunities, securing volunteering roles and progressing through recruitment and induction procedures.

In the main identified challenges fell within 3 primary areas.

- The ease of finding relevant meaningful opportunities
- The Application & Interview procedures
- Organisational Onboarding & Induction procedures.

### **The ease of finding relevant meaningful opportunities**

Volunteers engaged with reported that due to substantial amounts of time of economic inactivity, identifying pathways that supported their personal desire to turn their past experiences of adversity into a positive and continue their personal development, had been challenging. Most had either been suggested volunteering by specialist services or had found out about it through their own engagement with a particular organisation as a service user that offered volunteering. However, the majority highlighted before these types of exposure, they weren't aware of opportunities to use their lived experience positively or how to find volunteering roles available.

### **Application & Interview Process**

After periods of economic inactivity volunteers with Lived Experience identified multiple barriers and challenges, when attempting to secure volunteering opportunities which mainly stemmed from; a lack of experience applying for roles, low levels of personal confidence and a lack of digital and IT skills. In addition, HR practices that requested criminal checks, histories of past experience and references all contributed to a sense of exclusion and fear of rejection.

### **Onboarding & Induction procedures**

Similarly, to the above Onboarding & Induction procedures were also a significant challenge for those with limited work experience. In the main these focused around; a lack of awareness and understanding of HR practices, limited exposure to corporate expectations and a fear of the traditional learning processes. Many volunteers thus reported that they had been overwhelmed and not clear on what was expecting of them.

The following table identifies the specific challenges faced and provides positive action from best practice that could enable more inclusivity for Volunteers with Lived Experience and those with limited experience of entering professional work environments.

<i>Identified Barrier/ Challenge</i>	<i>Positive Action for best practice</i>
<i>Knowing where to look for opportunities</i>	<ul style="list-style-type: none"> <li>• Market &amp; publicise opportunities on accessible platforms such as:</li> <li>• Social media</li> <li>• Volunteering Wales</li> <li>• Community hubs</li> <li>• Specialist services</li> </ul>
<i>Accessibility of Digital application forms</i>	<ul style="list-style-type: none"> <li>• Provide application forms in more than one accessible format (Online, Paper, Mobile Device compatible).</li> <li>• Include links and contact details to designated team members for technical support.</li> <li>• Identify possible resources to enable completion of applications within local centres and offices (such as providing access to IT equipment)</li> <li>• Keep application forms as simple as possible.</li> </ul>
<i>References &amp; Referees linked to past employment</i>	<ul style="list-style-type: none"> <li>• Include clear headings and guidance on alternative reference options such as character references for those with no work history.</li> <li>• Provide space on the application to capture, personal attributes, motivations, and</li> </ul>

	<p>transferrable skills rather than just work experience.</p> <ul style="list-style-type: none"> <li>• Provide guidance to applicants that outlines what to include in instances of no previous work history.</li> </ul>
<p><i>Reliance on DBS as method of acceptance</i></p>	<ul style="list-style-type: none"> <li>• Provide clear guidance to applicants on why DBS Checks are required, their purpose and how they will be used in the offer process.</li> <li>• Provide opportunity for applicants to disclose criminal convictions and provide commentary in relation to their circumstances now rather than just a historic snapshot.</li> <li>• Implement Safer Recruitment principles and practices that manage risk rather than risk adverse.</li> <li>• Use DBS as a risk assessment tool and opportunity for a conversation; how long ago the offence was, relevance to the role, would the offence have a negative impact on the clients or their ability to do the role?</li> <li>• Consider whether a DBS is necessary as not all volunteer activity may be eligible.</li> </ul>
<p><i>Limited Interview Experience and knowledge of interview processes</i></p>	<ul style="list-style-type: none"> <li>• Provide clear guidance to applicants on what the interview process will look like. If activities may be required provide upfront guidance on expectations.</li> <li>• Offer applicants an informal chat to ask any questions they may have such as ‘what I</li> </ul>



	<p><i>should wear? what will I be asked to do? where will the interview be held?'</i></p> <ul style="list-style-type: none"> <li>• Provide role profiles of the people interviewing.</li> <li>• Consider the necessity of a formal interview procedure.</li> <li>• Design interview questions to consider limited prior experience by focusing on; what they think they can bring or why they are suitable for the role, their motivations for applying rather than asking for examples of things they have done.</li> <li>• Consider the interview a learning experience to find out more about volunteer needs.</li> </ul>
<p><i>Knowledge of HR recruitment practices required after interview and before a formal start date</i></p>	<ul style="list-style-type: none"> <li>• Clearly explain the onboarding stages so Volunteers are aware the process can be long.</li> <li>• Keep in touch with volunteers throughout the process and provide status updates on progression through the process.</li> <li>• Clearly explain possible delays to starting such as relevant vetting and DBS checks, reference checks and risk assessments setting realistic timescales for anticipated completion.</li> <li>• Where photo ID may be required be clear on available support that can be provided to apply for photo ID.</li> <li>• Identify ways to keep new volunteers engaged such as adding them to distribution lists for newsletters, updates and campaigns.</li> </ul>

*Induction procedures*

- Provide new starters with a guide to their induction prior to the first day. A volunteer handbook can also be provided to highlight the volunteer role and responsibilities.
- Clearly outline what the induction will look like, how it will be structured, who it will be completed by and what will be included. The induction should be proportionate to the volunteer activity and intensity of role.
- Structure the induction over an appropriate time frame to reduce possibility of overwhelming volunteers.
- Adopt a person-centred approach to induction that inducts the volunteer into the organisation, gives them the skills and knowledge to do the role and provides shadowing opportunities before undertaking the role.
- Ensure staff responsible for completing the induction have the appropriate time and resources to provide a good quality induction.
- Incorporate skills for work into the induction such as IT skills, workplace etiquette, professional boundaries, and codes of conduct.
- Revisit induction plans and tailor the pace to the individual, recognising some individuals may need more support or further training.
- Consider the individuals learning style and check for understanding.

	<ul style="list-style-type: none"><li>• Consider the appropriateness of mixed training sessions that have a mix of paid staff and volunteers.</li><li>• Consider the appropriateness of discussing personal lived experience and appropriate circumstances and how to share this with colleagues and clients.</li></ul>
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### **VOLUNTEER ACTIVITY**

Within the scope of this work Volunteers with Lived Experience highlighted three key motivations for entering volunteering.

- A passion to give back to current service users going through similar challenges and adversity they have overcome.
- To gain experience and work ready skills to support progression into paid work in the future.
- To support continuation of a positive pathway

Volunteers with lived experience identified that in practice their experiences, motivations and expectations were challenged by several factors. These factors included:

- Appropriateness of the role and the sense of meaningful activity
- Supervision & Support
- Financial constraints

Volunteers highlighted that in some cases although organisations had recognised the value of Lived Experience and informed volunteers that they could positively use their lived experience to support others, in practice this was limited. Volunteers felt that organisations needed to be more transparent earlier in recruitment process to clearly communicate the levels of engagement within the role in practice and ensure role profiles and expectations were clearly defined and aligned with the practical experience.

Similarly in relation to Supervision & Support best practice highlighted that how volunteers felt about their volunteering experience was influenced by the supervision and support they received. Volunteering activity that is well structured, planned in advance and resourced effectively provided more meaningful experiences as the volunteers were well informed of what they would be doing each day, knew how they could access additional support and were able to learn directly from paid staff. In addition, another

primary factor was the organisations’ ability to support volunteers with lived experience with limited experience in the work environment undertaking roles activities that aligned with their ability to undertake the role, motivations and expectations for engaging in volunteering.

The impact of finance on the ability to volunteer was a discernible factor in which organisations practices and processes in relation to remuneration were identified as a significant challenge. Many volunteers have highlighted that difficulties in reimbursement for travel sometimes meant that they had to cancel planned volunteering days as they were unable to afford the travel.

The table below highlights barriers reported by volunteers in relation to the above 3 experiences and sets out considerations and best practices that could be adopted.

<i>Identified Barrier/ Challenge</i>	<i>Positive Action for best practice</i>
Suitability of volunteering roles in practice	<ul style="list-style-type: none"> <li>• Clearly defined roles for volunteers are in place with structured pre-planned activity resourced.</li> <li>• Staff supporting volunteers are familiar with legal requirements and organisational practices for recruiting, hosting, and supporting volunteers.</li> <li>• Roles in practice are compliant with what constitutes volunteering and the differences to be maintained between volunteers and paid staff.</li> <li>• Volunteer hours are matched to demand or available meaningful activity ensuring volunteers feel they have been productive.</li> </ul>
<i>Managing expectations with volunteers</i>	<ul style="list-style-type: none"> <li>• Ensure volunteers are informed of volunteering legal practices, organisational restrictions and why they won’t have the same levels of role activity, training, and access to information as paid staff prior to starting a position.</li> </ul>

	<ul style="list-style-type: none"> <li>• Ensure volunteers are well informed of their rights when undertaking volunteer roles. (i.e., claiming benefits while volunteering)</li> <li>• Recruiting managers are trained and have a clear understanding of legal rights and responsibilities for recruiting volunteers.</li> </ul>
<p><i>Supporting people with Lived Experience</i></p>	<ul style="list-style-type: none"> <li>• Organisation has a clear understanding of the potential additional support needs that people with lived experience may have.</li> <li>• Procedures are in place to safeguard volunteers who may have experienced Trauma (i.e., access to clinical supervision, training on self-care and triggers, Trauma informed practice)</li> <li>• Links and partnerships are set up with specialist support organisations for support if unable to provide internally.</li> <li>• Training and development are provided to volunteers (see following section).</li> <li>• Supervision arrangements are in place to support volunteers and dedicated mentors have accountability for completing and understanding of the level of support required.</li> <li>• Providing an element of choice with activity they want to partake in and frequency. Allows volunteers to move at their own pace.</li> </ul>
<p><i>Financial ability to support volunteering</i></p>	<ul style="list-style-type: none"> <li>• Organisation has a clear understanding of volunteer rights, rewards and benefits in kind and their impact.</li> </ul>

	<ul style="list-style-type: none"><li>• Remuneration practices are accessible remotely and in person.</li><li>• Funds are allocated and available to enable instant remuneration (Supervising staff are able to deal with critical remuneration at a local level).</li><li>• Volunteer agreements clearly set out the type of remuneration they will receive and how to access it. It also clearly sets out areas in which finances cannot be provided.</li><li>• Volunteers have been informed of financial implications prior to starting.</li><li>• Guidance is available to Volunteers on how to check levels of volunteering is within their benefit claim requirements to avoid potential penalties.</li></ul>
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### **Support & Development**

Just as with paid staff, a volunteer's ability to undertake a role and deliver on expectations to a high standard is greatly impacted by their personal skills. For volunteers with lived experience that have overcome adversity and have limited work experience, the personal value gained from volunteering was instrumental in improving not only their mental health but a major factor in improving their personal circumstances. Volunteering and the personal benefit it had to their wellbeing was reported as being a key enabler and had supported them to:

- develop and learn new skills,
- gain meaningful work-related experience.
- Increase their confidence and wellbeing.
- Access opportunities for paid work

However, most volunteers within this scope of work highlighted that they would have benefitted from further support in professional development areas that had been either a been significant challenge for them or a barrier to their progression and experience. These barriers included:

- No prior work experience or exposure to expected work environment behaviours, code of conducts and organisational management procedures in a professional setting.
- Neurodiversity support
- Self-care and risk of retraumatising
- Tailored In work support and development.

<i>Identified Barrier/Challenge</i>	<i>Positive Action for best practice</i>
<p>Limited work experience in a professional setting</p>	<ul style="list-style-type: none"> <li>• Incorporate sessions on the wider organisation into volunteer inductions (including overviews of the role and functions of core central services such as HR, Finance &amp; IT Support teams, Organisational Leadership &amp; Governance)</li> <li>• Provide awareness sessions of the wider service delivery (Overviews of other projects and services)</li> <li>• Provide opportunities to shadow a wide range of roles outside of service delivery.</li> <li>• Provide guidance and training on organisational culture, Equality &amp; Diversity, Safeguarding, Professional boundaries, Communication, and interpersonal skills)</li> <li>• Identify local training providers that offer specialist training such as Digital literacy and literacy and numeracy skills.</li> </ul>
<p><i>Support for volunteers with Neurodivergent conditions</i></p>	<ul style="list-style-type: none"> <li>• Develop work related strategies for Neuro inclusivity by creating a safe environment that positively promotes support available.</li> </ul>

	<ul style="list-style-type: none"> <li>• Upskill staff with line management responsibilities on neuro inclusive practice, adapting working practices and how to better support individuals.</li> <li>• Provide working guides on how to use digital software such as Microsoft 365 dictate, Immersive reader or read out loud functions.</li> </ul>
<p><i>Managing self-care, triggers &amp; risk of retraumatizing</i></p>	<ul style="list-style-type: none"> <li>• Identify wellbeing support needs within safer recruitment practices. (i.e., levels of support, previous experiences, mental health and current emotional wellbeing are assessed, and preventative actions put into place for managing and supporting at risk volunteers).</li> <li>• Risk of retraumatizing has been considered when designing roles for people with Lived Experience and appropriate safeguards put in place.</li> <li>• Upskill managers on identifying, managing, and supporting possible triggers (Trauma Informed Practice)</li> <li>• Incorporate training sessions for volunteers on self-care techniques, emotional resilience and supporting individuals who have experienced Trauma and Mental Health First Aid.</li> <li>• Wellbeing support procedures include volunteers providing support such as access to clinical supervision, referrals to specialist services.</li> </ul>



	<ul style="list-style-type: none"> <li>• Develop flexible practices to provide holistic support for complex needs such as allowing volunteers to take a break or switching roles should they need to.</li> </ul>
<p><i>Tailored In Work Support &amp; Development</i></p>	<ul style="list-style-type: none"> <li>• Incorporating individualised training needs into volunteer development plans through goal setting with volunteers.</li> <li>• Include volunteer development priorities within organisational learning and development strategies.</li> <li>• Set up partnerships and referral links to signpost volunteers to services for further development or access to accredited qualifications.</li> <li>• Implementing formal coaching and mentoring practice for volunteers to access, encouraging buddying and shadowing</li> <li>• Upskilling volunteer supervisors and mentors to facilitate effective coaching.</li> <li>• Dedicating time and resources for volunteer supervisors to undertake development support with volunteers including opportunities to show volunteers how to put their training into practice.</li> <li>• Signposting volunteers to paid employment opportunities in other organisations and supporting volunteers to prepare for paid employment including employability skills.</li> </ul>

## SUMMARY

We hope the barriers and challenges highlighted in this guide provide organisations considering implementing a Lived Experience Volunteering Model with insight and practical considerations to support their volunteers achieve meaningful experiences.

We Thank our funder the WCVA, Partners Organisations in Wales and the many volunteers with Lived Experience that have informed this guide for their honest feedback on their personal experiences and their participation in the workshops to discuss their challenges and for sharing their experiences with us. Like all guides we recognise that some of suggestions in this guide will not suit every organisation, but we hope the experiences of our volunteers will be of use to you. We also acknowledge that there are so much more organisations have asked for to support them become more inclusive in their approaches to Lived Experience and Volunteering.

As an organisation that is passionate about championing the impact of Lived Experience in service delivery across all sectors we will continue to build on the insight and learning we have gained to share best practice across Wales.

Links to further resources & general support materials

<p>What is Volunteering, Volunteer Support &amp; Volunteer Management</p>	<ul style="list-style-type: none"> <li>• National Council for Voluntary Organisations (NCVO) - <a href="#">NCVO   NCVO</a></li> <li>• Wales Council for Voluntary Action - <a href="#">Volunteering - WCVA</a></li> <li>• Investing in Volunteer Standards <a href="#">Download the standard - Investing in Volunteers</a></li> <li>• <a href="#">Volunteer opportunities, rights and expenses: Pay and expenses - GOV.UK (www.gov.uk)</a></li> </ul>
<p>Trauma Informed Practice</p>	<ul style="list-style-type: none"> <li>• <a href="#">Trauma-informed approaches - NPC (thinknpc.org)</a></li> </ul>
<p>Safer Recruitment</p>	<ul style="list-style-type: none"> <li>• <a href="#">Safer Recruitment Consortium training information</a> <a href="https://www.gov.uk/government/news/new-hiring-toolkit-supports-care-providers-with-safer-recruitment">https://www.gov.uk/government/news/new-hiring-toolkit-supports-care-providers-with-safer-recruitment</a></li> </ul>
<p>Guidance for supporting Lived Experience of homelessness</p>	<p><a href="#">The Wallich   Welsh Homelessness and rough sleeping Charity</a></p>
<p>Guidance for supporting Lived Experience of Domestic Violence</p>	<p><a href="#">Home - Women's Aid (womensaid.org.uk)</a></p>
<p>Guidance for supporting Lived Experience of Substance Addiction and Recovery</p>	<p><a href="#">Adferiad Mental Health and Addiction Support Services</a></p>
<p>Guidance for supporting Lived Experience of the Criminal Justice System</p>	<p><a href="#">Criminal Record Advice, Information and Guidance   Nacro</a></p>
<p>Guidance for supporting Lived Experience of Mental Health</p>	<p><a href="#">Mind Cymru - Mind</a></p>

