Investing in Volunteers self-assessment
EXAMPLE with Tips for Assessors

Organisation:	Organisation X
IiV contact:	email@
Assessor:	Assessor Bloggs
Date submitted:	10.8.20XX

How to fill in the self-assessment (organisation guidance)

1. Review each of the practice statements under the following headings:
   - **Evidence of what is already in place** – identify what you already have that meets this practice. This may be:
     - Written documents; and/or
     - Systems and activities.
     - Please also refer to the guidance document for more detail about the type of evidence you might include. Remember that this list is not exhaustive as Investing in Volunteers is designed to be flexible to meet the needs of your organisation.
     - You are aiming for one or two pieces of evidence per practice, although you may not have any evidence yet, this is fine at this stage.
   - **Still to do** – identify any actions that you need to take or developments that you think you need to implement to meet the practice.
   - **Met / partly met / not met** – based on the previous two columns make an assessment of whether you think your organisations meets this practice or not.
2. Make sure you have completed the information on the front cover of the self-assessment: organisation name; name of the person who led on compiling the self-assessment and who is the main point of contact for IiV; the name of your assessor; and the date you are submitting your self-assessment and evidence.
3. Select the three pieces of evidence that you want to submit with your self-assessment. One of these should be your volunteer policy (or equivalent) if you have one; the other two should be evidence that you have referred to frequently in the self-assessment, for example volunteer handbook, role descriptions, problem solving procedure, information for potential volunteers, training or induction resources.
4. Now you are ready to email the completed self-assessment and three pieces of evidence to your assessor.

Before you start…..

As you have previously held the Investing in Volunteers award and are renewing, it would be helpful to hear how things have been in your organisation since first accreditation. Please provide a brief summary of how your volunteering programme has developed since the last assessment, including how you have addressed any development suggestions. It would be useful to know if there have been changes to your organisational structure, in particular in relation to how this may have impacted on the volunteering programme.

Two big changes since the last assessment are
- the procurement of a new CRM database, which we hope will facilitate better tracking of the volunteer journey and improved volunteer experience.
- we have introduced changes in how we involve volunteers, including processes with closer monitoring of who is volunteering when. This hasn't been universally popular, some volunteers have not wanted to stop volunteering, others don't like the tighter bureaucracy. Some changes will be permanent, others will ease off. It will be interesting to see the feedback when we send out our scheduled volunteers satisfaction survey.

We will use IiV as an opportunity to update/adapt our systems taking into account the opportunities and restrictions imposed by the above two changes. We also have a new team starting, and some new projects coming which will involve large numbers of volunteers and community engagement activities, the implementation of the Engagement Strategy, and the development of an Inclusion policy, all of which should have a positive effect on volunteering.

The development suggestions from last time included:

2.4: A lack of awareness of insurance cover by volunteers has been highlighted in this and the previous assessment. Given the active nature of much of the volunteers' activities awareness of insurance coverage would be particularly advisable.
Volunteers are told about insurance cover, but generally don't seem interested enough to retain the information! They do, however, comply with health and safety advice and risk assessments, all of which has been revamped and renewed recently, and we have tightened up our practices to ensure we can evidence that all volunteers have had this guidance before they start volunteering. This means all volunteers do know what to do to remain insured and, more importantly, safe. We also from time-to-time put "boring but important" style articles in our volunteer newsletter about subjects like this.

4.2, 4.3 and 1.4: The Guide on Recruiting and Managing Volunteers provides clear guidance on good practice. However, some volunteers interviewed highlighted a lack of consistency of volunteers' experience of how this is implemented. Particularly the exploration of motivation, the promotion of expense claiming and awareness of some internal materials such as the volunteer pack.
This was communicated to volunteers' supervisors. New volunteer processes will further help, developed in line with the new CRM,

5.5: Across all volunteers interviewed was a noticeable difference in the awareness of volunteers in receipt of the ORGANISATIONX quarterly magazine. The magazine provides news, information on events, celebrates the successes and an interview with a volunteer. ORGANISATIONX may want to consider circulating to all formal volunteers in recognition of their contributions.
The database was updated and all volunteers are now sent the quarterly magazine and our annual review.

Quality Area 1: Vision for volunteering

Volunteering is embedded within the overall vision, values, culture and aims of the organisation and its impact is recognised and communicated. Organisations understand why they involve volunteers

Standard – practices within each quality area		Evidence of what you already have and brief explanation of how this meets the practice	Still to do	Met/partly met/ not met
1.1	Volunteering is planned and reviewed in line with the organisation's vision, strategy, and values *Hint to assessor – you are looking for detail here of how volunteering is included in key organisational documents and thinking around vision and values, AND how it is reviewed.*	**ORGANISATIONX's 25 year plan (2018)** includes 10 themes with associated aspirations. Though volunteers contribute to most if not all themes, one is explicitly relevant: "Active communities: more people taking action" The commitment to invest in volunteering, in volunteer management skills and in inclusivity is clearly outlined. When developing the strategy, volunteers were consulted through surveys and workshops. ORGANISATIONX's **10-year strategy** (2021) breaks down the 25 year plan into a more manageable timeframe with regular review dates, and volunteers were involved. Annual plan and work programmes include specific volunteering outputs linked to themes in the 10-year Strategy and these are reviewed at least quarterly When creating volunteer opportunities, the roles always relate to a purpose which should show the role's place within ORGANISATIONX's vision and objectives. Each year we publish our annual report to members which shows some of the contribution that volunteering has made to achieving ORGANISATIONX's objectives.		Met

Standard – practices within each quality area		Evidence of what you already have and brief explanation of how this meets the practice	Still to do	Met/partly met/ not met
1.2	Volunteering is valued as part of the culture of the organisation and the benefits of volunteering are understood and communicated *Hint to assessor – need to see that the organisation knows why volunteers are involved and that their value is recognised*	ORGANISATIONX's Volunteer Policy lays out the benefits of volunteering, and this is articulated to all new staff at induction, whether they work directly with volunteers or not, and to volunteers through their registration pack. Both documents are due a two-year review, benefits could be refreshed in line with new projects and volunteer roles Volunteers are invited to the annual full-team meeting, at which the business plan for the year is presented through a series of talks and discussions. Volunteer stories feature in our membership magazine, volunteer newsletter and social media. An annual Volunteer Award ceremony is a feature of the Annual General Meeting, showcasing some of the significant contributions that year.	The Volunteer Policy and Volunteer registration pack are due a review now, and will be reviewed from perspective of volunteer, staff and organisation. Ensure the benefits of volunteering in all the various roles are included.	Partly met
1.3	The impact of volunteering in meeting organisation aims is understood and communicated *Hint to assessor – you need to be able to see that the organisation is measuring the difference volunteers make and promoting it*	The Annual Report will include some sort of statistic around volunteer involvement. This is in terms of numbers of volunteers and the hours donated. With the new database we will be able to provide better numerical information about volunteering, but this is not really *impact*. The Volunteer newsletter, member newsletter, and Volunteer Awards do all give some information about the impact of volunteering and our social media carries quite a few stories on volunteer impact. For example Facebook 15/05/22 carries a photo and story about how a volunteer transformed Z, and our CEO's video during	We may want to ensure this is more systematic as currently, although many staff and volunteers will be able to talk about the impact of volunteering, and how that relates to ORGANISATIONX's aims, our analysis, and communication of this can tend to be a little uneven. We perhaps don't evaluate or communicate the 'accidental' impact in meeting organisational aims – the skills, knowledge and connections volunteers develop are	Partly Met

Standard – practices within each quality area		Evidence of what you already have and brief explanation of how this meets the practice	Still to do	Met/partly met/ not met
		Volunteers Week 2022 really let everyone know the difference they were making. Project evaluations and end project information also give information on volunteer impact. Though not all projects do this.	used to influence other local activities.	
1.4	Volunteer involvement is reflected in management, financial and resource planning *Hint to assessor – you are looking for evidence that the costs of volunteer involvement are recognised and included in both budgets and staffing*	At Board level, there is a specific role, The Convenor of the Volunteers Forum, who has particular responsibility for volunteers. The Volunteers Officer has the overview of volunteering. She and an Admin assistant are funded through core funding. Project funding applications will always include funding for volunteering where relevant, and there have been funding bids specifically for volunteers, for example volunteer training. Planning for volunteers is included within the project set-up checklist to ensure they are considered from the very start of a project. Each project will have its own budget line for volunteer costs such as training, expenses and equipment. There is a clear expenses policy for volunteers' out of pocket expenses which is detailed in the Volunteer Information Pack and the Volunteer Management Handbook.		Met

Quality Area 2: Planning for volunteers

People, policies and procedures have been put in place to ensure volunteering is well-managed

Standard – practices within each quality area		Evidence of what you already have and brief explanation of how this meets the practice	Still to do	Met/partly met/ not met
2.1	There are specific and proportionate systems and processes for volunteer involvement that are regularly reviewed *Hint to assessor – you need to be sure that they have volunteer specific policies and procedures that are up to date, so you need to see some detail here of what they have got and when they were last reviewed.*	The Volunteers Policy sets out the principles under which volunteers are engaged and how they will be managed. There is a Volunteer Management Handbook, and a "Quick Guide" which is a sort of precis of the handbook with active links to all documentation, in particular all the procedures around recruitment, support, induction, training, dealing with problems As a result of the Covid crisis, we have a new set of guidance for volunteer supervisors with supporting checklist, and covid guidance for volunteers along with adapted risk assessments and daily record sheets. This currently supersedes all other guidance. It has been communicated to all staff, described in the volunteer newsletter, and all volunteers restarting their volunteering are re-registered and given the appropriate information. Health and Safety, GDPR and Safeguarding policies also cover volunteers. The Inclusion Equality and Diversity strategy very much includes volunteers. ORGANISATIONX will be developing its own EDI policy from this.	The Volunteers Policy is due for review Volunteer Registration Pack due for review. Covid guidance had to be put in place very quickly with little consultation over how it works for staff and volunteers "on the ground," but has had real positives in terms of data management and covid security. We also have a new database with greater management capability. We plan to use the IiV process to help review guidance and database capability, decide what is helpful and proportionate to keep long-term and amalgamate into our existing processes.	Partly met

Standard – practices within each quality area		Evidence of what you already have and brief explanation of how this meets the practice	Still to do	Met/partly met/ not met
		We review policies on a two year cycle so some key ones are due now		
2.2	Relevant people in the organisation are aware of systems and processes relating to volunteering and why they are important *Hint to assessor – you are checking to make sure that everyone who has involvement with volunteers and volunteering is aware of the policies and procedures in place and they are consistently applied.*	All staff receive induction in volunteering which introduces them to systems and processes. There is a volunteer managers handbook and in-house training for volunteer supervisors which covers best practice in volunteering as well as our own systems and processes. Updates are emailed to volunteer supervisors and additional support offered from the volunteers officer. Systems are explained to volunteers via the website, the volunteer handbook, induction, training and on-going supervision, depending on the system/process/role under discussion. Changes are articulated through the newsletter and/or via the volunteer supervisor.		Met
2.3	There are designated people responsible for volunteers and volunteering that have experiences, competencies and attributes for the role *Hint to assessor – you want to see here that responsibility for volunteering is assigned to someone and that they have*	A part-time Volunteers Officer oversees volunteering within ORGANISATIONX, supported by a full-time volunteering assistant. There are a number of mechanisms for keeping up to date, such as subscribing to sector newsletters, regular meet-ups with volunteer managers across the sector, attending external events such as Volunteer Fairs and external training. There are a number of members of staff with responsibilities around volunteer management and	We've not done in-house training for a while and ideally want to update the course, and look at whether to split it into sections and hopefully offer qualifications in volunteer management and task leadership. We also need to consider if there is anything else that would be valuable for volunteer supervisors ongoing, and how best to deliver it.	Partly met

Standard – practices within each quality area		Evidence of what you already have and brief explanation of how this meets the practice	Still to do	Met/partly met/ not met
	training/experience, as well as capacity.	supervision. These responsibilities are included on job descriptions and referenced in person specifications. Once recruited, they will have a volunteering induction, be invited to the in-house volunteer management training, and receive on-going support from the Volunteers officer as required. Additional training in aspects of volunteer management would be identified through the appraisal process and ongoing management. We also have some voluntary volunteers supervisors who are given additional support and training as appropriate for the role. Volunteers all have a named supervisor (identified in writing on their role description) and are informed that they can also go to the Volunteers Officer should they need additional support or help.		
2.4	Systems are in place to ensure the management of risk, safeguarding, health and wellbeing and protection of volunteers, the organisation, and others *Hint to assessor – you need to be clear about how they manage risk (specifically around volunteer roles), health and safety, have*	We have robust Health and Safety, Safeguarding and GDPR policies and procedures which have been communicated to staff and volunteers through staff meetings, Volunteers Forum, dissemination of policies, guidance and codes of conduct, and through training. All volunteer roles are covered by risk assessment which is communicated appropriately to volunteers. Additional recruitment checks and training or guidance is given when roles involve access to any personal data or working with children. Risk Assessments are adapted to reflect involvement of	As historically, volunteers have not always shown themselves to be very aware of what insurance cover there is (though are generally very good with following H&S systems) we could consider sending volunteers this information annually as a reminder. We need to ensure we have robust processes that are easy for supervisors to implement which volunteers feel the benefit	Met

Standard – practices within each quality area		Evidence of what you already have and brief explanation of how this meets the practice	Still to do	Met/partly met/ not met
	properly considered safeguarding, insurance, data protection,	vulnerable people (eg children) and we do individual risk assessments for volunteers with specific risk factors (eg pregnancy, some disabilities, some health conditions). Volunteers are covered by Employers and Public Liability Insurance and, where relevant to the role, personal indemnity insurance. Volunteers are informed at induction and via the Volunteer in Information pack that if they have any concerns they can talk to their supervisor or the Volunteers Officer. The Volunteers Officer is also one of the Designated Safeguarding Officers. ORGANISATIONX is in the process of implementing a Mental Health First Aid scheme for the organisation. The Volunteers Officer and Volunteers Assistant are Mental Health First Aiders as is the person who has been recruited to be their team leader.	of without being bogged down with the bureaucracy	
2.5	There are problem solving procedures to deal with issues raised by or about volunteers *Hint to assessor – you need to be content that there are procedures for dealing with problems both caused by volunteers (including performance issues) or issues raised by volunteers and that these are quite distinct from their staff personnel policies (ie grievance and discipline).*	Problem solving procedures are detailed in the Volunteer Managers Handbook and explained in the Volunteer information pack. If a volunteer has a problem and wants to complain then this is where they will find out what to do. If a volunteer causes a problem or is just not doing what we expect then there is a clear procedure outlined here.	A development point from previous assessments, volunteers seem not to remember they have these procedures when it comes to assessment so we may need to review the way it is communicated to volunteers. As above, we could consider annual reminders to volunteers, perhaps through the newsletter, and ensure vol supervisors cover it in their inductions and reviews.	Partly Met

Standard – practices within each quality area		Evidence of what you already have and brief explanation of how this meets the practice	Still to do	Met/partly met/ not met
2.6	Records of volunteer involvement are maintained in line with data protection *Hint to assessor – you just need to be clear that organisations are following GDPR guidelines and that volunteers are included in their policy*	We have a new CRM which holds volunteer data centrally. Only the volunteer team has access, We only collect the data that we need in order to manage our volunteers safely and effectively and to report on volunteering involvement. This may vary according to role, for example for volunteers working with children we would ask for references and DBS check where eligible. We have a retention policy and only keep what we absolutely have to. The Volunteers Officer was part of the GDPR working group that developed the data protection policy, and all systems are set up in line with GDPR. Where a volunteer role involves handling data, volunteers are given support and guidance to do this safely and sign a code of conduct. The volunteer registration pack explains what records are kept		Met

Quality Area 3: Volunteer inclusion

There is a positive approach to inclusion, equity and diversity and a proactive approach to making volunteering accessible

Standard – practices within each quality area		Evidence of what you already have and brief explanation of how this meets the practice	Still to do	Met/partly met/ not met
3.1	The organisation is inclusive and managed in a way that encourages the involvement of and is welcoming to a wide range of people *Hint to assessor – you are looking for evidence that they take inclusion, equity and diversity seriously eg culture, policy, promotion and actions*	Our sector lead has last year published its Equality Diversity and Inclusion Strategy with the view to improving representation within our field. ORGANISATIONX plans to adapt and adopt the strategy and create our own Inclusion policy which will supersede the existing but inadequate Equal Opportunities Policy. Ensuring that ORGANISATIONX is fully inclusive is a key outcome within our Ten-Year Plan and a clear objective within our Engagement Strategy. One of our identified core values is "Everyone Counts" and there is an obvious desire to be inclusive within ORGANISATIONX. The Volunteers Policy, the Volunteer Information Pack, the Volunteer Managers Handbook and the website all talk about four principles of volunteering, one of which is Diversity. Volunteer roles and information encourage staff to think about how to be inclusive when developing roles and encourage volunteers to ask for any adaptations they need. The extent to which this actually happens in practice is uncertain, but supervising staff do usually accept volunteers as they are and make adaptations for them when they can.	Volunteer survey to find the current demographic of active volunteers. Analyse recent data gathered at recruitment and identify gaps Consider new ways to reach under-represented groups Develop ORGANISATIONX's own Inclusion policy Review images and messages on the website, social media and ORGANISATIONX magazine: Consider how we can turn desire into action in terms of adapting roles for volunteers/ targeting them for underrepresented groups, and understanding how we could be inadvertently putting people off, particularly where it comes to hidden disabilities and differences	Partly met

Standard – practices within each quality area		Evidence of what you already have and brief explanation of how this meets the practice	Still to do	Met/partly met/ not met
		Volunteers have often spoken of ORGANISATIONX being inclusive and welcoming, although these are of course the ones who have got through the door. Looking at our website, facebook and twitter feed, aside from on the volunteer page there is no particular statement about inclusivity. Where we have photographs of people, there is some visible diversity in terms of ethnicity, gender and age. However, our key banner could be one of the least diverse images we have! We collect diversity data at the point people register an interest in volunteering, which enables us to identify underrepresented groups. The most recent results have yet to be analysed. Also this only covers people who have recently expressed an interest in volunteering who may or may not go on to actively volunteer. We will do a diversity survey of current active volunteers to look at any discrepancy. Our problem-solving procedures state clearly that "Discriminatory behaviour towards or by a volunteer will not be tolerated".		
3.2	There is a proactive approach to increasing volunteer diversity, addressing under-representation, and including targeted groups as	Our target audience for volunteering is the population of our county. Volunteers come from ORGANISATIONX's membership and from the wider community. Every few years we look at the make-up of our county's population and compare it with the diversity data we	We do need to look at this further in a systematic and soul-searching way, including analysing the current situation properly and looking at specific actions eg -Look at the use of social media in recruiting more – what groups can	Partly met

	Standard – practices within each quality area	Evidence of what you already have and brief explanation of how this meets the practice	Still to do	Met/partly met/ not met
	part of the organisation's overall inclusion, equity and diversity aims *Hint to Assessors – you are looking for evidence that they have a considered approach to EDI that dovetails with the wider organisation's EDI policy, that they are mindful of the communities from which volunteers might potentially come, and have considered how to engage with those communities in order to make volunteering accessible – they know which communities are underrepresented and are taking steps to address that.*	have gathered on people registering an interest in volunteering. We have a variety of different volunteer roles requiring different skills and abilities, within most of which further adaptations can be made as needed, and between all those roles we hope that there are opportunities open to everyone in the target group. Barriers include transport, the awareness that volunteering with ORGANISATIONX can be for them even if not physically fit, the ability to volunteer from home, staff time to develop more inclusive roles. We do pay out of pocket expenses, however volunteers can be reluctant to take this up. We normally encourage car sharing though Covid has stopped that. This has already had an impact on diversity, not least because many sites are inaccessible by bus. We also make it clear people work at their own pace, offer to buddy up volunteers to help those who feel uncertain and various other adaptations as needed. We could be more proactive about this and remove the need for volunteers to ask. The results of our diversity survey influences where we advertise our volunteer opportunities, and we build up lists of possible places to advertise. We have also had various projects that target specific audiences, such as X1, X2 & X3. When designing a volunteer role, all roles have to include a section on "what's in it for the volunteer" which considers what might attract volunteers to that role.	we @ and what # can we use that will help? -Think through how we ensure people without internet or social media can still find out about volunteering - Expanding weekend, small scale and from home volunteering - think through recruitment deadlines – sometimes it is first come first served which could disadvantage some people - create a culture where claiming expenses is the norm. ORGANISATIONX has a Carbon Plan – our Facilities Manager wants more volunteers to claim travel expenses as a means for him to calculate our carbon footprint, and this could be a way to make it feel easier for volunteers to claim. Implement the Engagement Strategy.	

Standard – practices within each quality area		Evidence of what you already have and brief explanation of how this meets the practice	Still to do	Met/partly met/ not met
		However, currently our approach is perhaps piecemeal, and we may want to consider how it fits with wider engagement – will volunteering have different target audience to other engagement activities, could other engagement activities lead on to volunteering etc. The Engagement Strategy states that we will **"Prioritise inclusion", h**owever, this is a very new strategy that has not yet been implemented.		
3.3	Information about volunteering opportunities is made as widely available as possible using a range of methods and there is active engagement with a diverse range of people *Hint to assessor – you would expect to see a range of recruitment approaches.*	When there is a volunteer vacancy, the volunteer supervisor works with the volunteer team to recruit to fill it. Methods vary according to the role and the target audience. Roles are added to the website. We email a list of people who have opted in to hear about volunteer opportunities and organisations and groups that we have collated over time who will also get the word out for us. We regularly send a printed list of volunteer opportunities to a growing number of people who didn't provide an email address. Existing volunteers receive information about new roles with their newsletter which is emailed to most and posted to those without internet. Most roles are filled in this way, but we will pursue additional routes for specific roles e.g. posters, approaching colleges, volunteer fairs, special interest groups.	We need to check that all the volunteer brokerage-type organisations are still on our mailing list, and check this list is comprehensive and reflects targets identified in diversity analysis. We also need to look closely how we deal with people who have difficult accessing the website for whatever reason, and ensure we have workable alternatives.	Partly met

Standard – practices within each quality area		Evidence of what you already have and brief explanation of how this meets the practice	Still to do	Met/partly met/ not met
3.4	Where possible there is a wide range of accessible opportunities that can be adapted throughout the volunteer's journey *Hint to assessor – thought has been given to opportunities that attract a range of different people and that consideration has been given to adapting roles to accommodate different needs and interests*	We have a variety of different roles which support involvement of volunteers with different skills, abilities and availability. Roles and activities are often adapted to suit the individual volunteer. We always make clear that they do not have to do anything they don't wish to and have ongoing conversations with them about what they want from their volunteering to meet or develop their skills and motivation, and about what they need to stay involved and, where possible, adapt roles accordingly. For example, we have done risk assessments with volunteers who have complex disabilities to find out from them how we can meet their needs.	Consider how we can improve this and make it more systematic. The will is there but sometimes not the time to think about how to be more accessible, nor the belief or confidence that we have the time or expertise to cope with too much additional need. - could each task description have a section on 'accessibility' where the person devising it ticks boxes such as, Can do done remotely/and a specific grading on how physically demanding it might be, or similar in relation to disabilities. - What can the volunteer team do centrally to reduce the workload for delivery staff and thereby reducing barriers to involving volunteers.	Partly met

Quality Area 4: Recruiting and welcoming volunteers

It is easy for people to find out about opportunities, explore whether they are right for them, and get involved

Standard – practices within each quality area		Evidence of what you already have and brief explanation of how this meets the practice	Still to do	Met/partly met/ not met
4.1	People are clear about the opportunities available and the process to become involved *Hint to assessor – if you were a member of the public, is it easy for you to find out about volunteer opportunities with the organisation and is it clear what the recruitment and onboarding process is*	Volunteer opportunities and the process for becoming involved are all posted on the website, with links to the full role description. When we update the roles, we send an email to people who have expressed an interest through signing up to e-newsletters on the website. People can discuss the role with the role supervisor but can also discuss more generally with members of the volunteer team either by phone or email. For those without email, all these details are available via phone or post.	We are looking at how we deal with people who do not have easy internet access to ensure they are not disadvantaged, as everything has become far more internet-focussed over covid. (see quality area 3)	Met
4.2	Recruitment processes and checks are timely, fair, consistent, straightforward and appropriate *Hint to assessor- need to see that there is recruitment process that is proportionate to the role with realistic timeframes for responses.*	The general process for recruitment is set out on the website i.e. view the current opportunities and contact either the named project officer or the volunteer team. A registration pack consisting of role information and a basic registration of interest form can be downloaded. Each role identifies the recruitment process for that role which is proportionate to the role. Role descriptions enable volunteers to understand the role and give information about supervision, induction, training, and how to get involved. This is consistent within each role though can be vastly different between roles depending on things such as	We need to add a link to the enewsletter sign up on the volunteer page, ensure e-communications reiterate the process and consider what information, in addition to the list of opportunities, that we send those without ready internet access. Unless there is a deadline for a specific role, we do not publish a timescale for responding to	Partly met

Standard – practices within each quality area		Evidence of what you already have and brief explanation of how this meets the practice	Still to do	Met/partly met/ not met
		whether they will be working with children, handling money, holding a key, representing the organisation publicly, have access to any data etc. Our safeguarding policy and guidance sets out the process for criminal records checks, and how to determine whether a volunteer is in regulated activity, and how to determine if a role is eligible for a DBS check.	enquiries. This is something we could consider. We also want consider how best to streamline processes to ensure we provide no barriers to volunteers or to staff who might involve volunteers.	
4.3	Recruitment is a two-way process for volunteers to find out more and that considers how individual and organisational needs can be met *Hint to assessor- you want to see that the organisation is considering volunteer needs as well as organisation needs during the recruitment process…and that there is the opportunity for the volunteer to make an informed decision about whether to get involved*	We try to give a good flavour of what the role involves through the role description which is available on the website and volunteers can discuss roles with the supervisor or the volunteer team. Some roles have a formal interview process, most will have an informal chat, all will involve chatting to the volunteer about their reasons for volunteering during the induction phase and as an ongoing conversation through their time with us. We make it clear that volunteers are free to leave whenever they like, and in that sense they know they can just try out a role without committing themselves. Even so, for some roles we do build a bit more into the recruitment process. For example, roles with interviews specify that the first month or so is seen as a trial period. Potential volunteers can have a tour first and come for a shadow session before they sign up. Role descriptions identify the process for that particular role. Where the volunteers are not suitable for the opportunity, volunteer supervisors will usually	We may also want to consider what central support could be given if a volunteer isn't suitable once they've started (e.g. review, offer a more suitable role) as it can be awkward for the supervisor to broach this	Met

Standard – practices within each quality area		Evidence of what you already have and brief explanation of how this meets the practice	Still to do	Met/partly met/ not met
		signpost them back to the volunteer team to see if there are other opportunities that would be a better match. We also try to stay aware of other organisations in the county so we can signpost to other organisations that might be able to provide what the volunteer is looking for.		
4.4	Volunteers are provided with any necessary information, introductions and training for their role *Hint to assessor - you are looking for a robust induction process*	The induction process is explained in the Volunteer Manager's handbook and we have a suite of induction checklists available for use if required. The Information for Volunteer pack includes the Volunteers Agreement which lays out expectations, and some other information that may be reiterated at induction. All volunteers will receive an induction, though they may not call it this. All inductions will cover health and safety, people, comfort arrangements, what they are doing and why, and any policies, procedures, systems etc of which they need to be aware. How this is done can be very different, ranging from a 10 minute briefing at the start of a one off work party, to a series of more formal sessions over the course of several days which might include meeting different teams for fuller-time roles. For each role there should be a Role Description, Induction Checklist (for staff use, currently fairly generic) and volunteer handbook (usually the Information for Volunteers pack, but for some roles there is additional information eg the Local Group handbook, or an augmented Volunteer pack with extra project – specific information.	Update the handbooks and guidance (staff and volunteers) with changes arising from covid and IiV, and consider whether the Volunteer Information Pack is adequate for all the roles it currently serves. Tidy up the induction checklists and make sure we have a suitable suite to suit all roles. Explaining why they are undertaking the work, and how it fits into the bigger scheme of things, is the area of induction that volunteers report being sometimes overlooked.	Partly met

Quality Area 5: Supporting volunteers

Volunteers feel supported at all times, that they are a part of the organisation and that their contribution makes a difference

Standard – practices within each quality area		Evidence of what you already have and brief explanation of how this meets the practice	Still to do	Met/partly met/ not met
5.1	Volunteers feel appropriately supported in their role and able to discuss all aspects of their volunteering *Hint to assessor- you are looking for evidence of regular contact between staff and volunteers. All volunteers having a named goo-to person who is easily accessed.*	Every volunteer has a named supervisor and can also go to the Volunteers Officer. Supervisors get to know their volunteers fairly well, and will talk to them if they seem over-burdened. They become part of the team in which they are volunteering, with the additional support that generally brings. We have problem-solving procedures which all volunteers are told about when they register. It's also in the induction checklists. Volunteers seldom seem to remember they have been told about them though. However, they usually say they would talk to their supervisors or the Volunteers Officer, which is correct.	The volunteer survey will check all of these points. We may also want to give a higher profile to talking to volunteers about the kind of support and supervision they want, and record that we've done it. Volunteers often volunteer for several projects so one single supervisor may not recognise that they are overburdened. ORGANISATIONX is instigating an mental health first aid scheme; this should help people notice signs in volunteers that they be beginning to burn out. We can also improve our hours collecting – the new database can more easily flag up who is doing a lot of volunteer hours.	Partly met

Standard – practices within each quality area		Evidence of what you already have and brief explanation of how this meets the practice	Still to do	Met/partly met/ not met
5.2	Volunteers and everyone in the organisation who comes into contact with volunteers are clear about the scope of volunteer roles and what volunteers can expect from the organisation *Hint to assessor – clear boundaries ensure that volunteers are not exploited. There is a shared understanding of what experience volunteers should have.*	Our Volunteers Policy sets out how we work with volunteers, which is backed up by induction and the Volunteer Managers Handbook. Every role has a role description and a risk assessment which define the scope of the role along with the Volunteers agreement which is in the volunteer information pack. These things are all communicated to volunteers when they start during the induction process, and further clarified through ongoing supervision, review and discussions. We are always clear that volunteers have a choice and are careful to ensure they feel no obligation.	It may be useful to explore if there is more the volunteer team could do to support this – especially around ensuring volunteer supervisors are very clear about boundaries and communicating about them.	Partly met
5.3	Volunteers have the opportunity to discuss how they are doing *Hint to Assessors – you are looking for how the organisation actually listens to the volunteers and checks that they are ok*	Volunteers are able to have two-way discussions about how they are doing. The review process is mentioned at induction (staff and volunteer) and how to do it is covered more fully in the in house volunteer management training, and the Volunteer Management handbook. Volunteer management guidance states that all roles should include induction, training and regular review, but that the way this is done depends on the role. It states that supervisors should regularly ask volunteers how things are going. For many of our volunteers, a formal review meeting would not be appropriate. Supervision in some roles can simply involve observation and checking in with them from time to time, and chatting over a tea		Met

Standard – practices within each quality area		Evidence of what you already have and brief explanation of how this meets the practice	Still to do	Met/partly met/ not met
		break. For other roles, , very front-facing roles or working with children, there may be need for a sit-down chat, or a mop up discussion after an event.		
5.4	Volunteers have opportunities to express their views and ideas and to be involved in relevant decision making *Hint to Assessors – looking for evidence to see if volunteers have a voice*	On an organisational level, we hold a Volunteers Forum twice a year that is convened by the Board of Trustees specifically to ensure volunteers can express their views and to bring issues to the volunteers for their opinions when appropriate. For example, when developing the 25-year plan from which the 10-year strategy was derived, we held a "25-year plan special" Volunteers Forum, and also captured the views of volunteers through a questionnaire. On a team level, volunteers are able to express their views and ideas about their roles and the work they are doing. This could be informally discussing how to approach a particular task, or a slightly more formal approach. eg when management plans for a task are reviewed, volunteers have the opportunity to look at and comment on the plan before it is finalized.	We need to make sure we keep doing this well and consistently.	Met

Standard – practices within each quality area		Evidence of what you already have and brief explanation of how this meets the practice	Still to do	Met/partly met/ not met
5.5	Volunteers feel there is good communication between themselves and the organisation *Hint to assessor – you should be able to identify a range of different ways in which the organisation communicates with volunteers.*	On an organisational level, we send out a volunteer newsletter every couple of months and have the Volunteers Forum twice a year. If internal memos are relevant to particular groups of volunteers, they are forwarded. On a team level, some of the bigger volunteer teams have had their own conference. All volunteer supervisors keep in regular touch with their volunteers. Some of the groups have their own email list through which upcoming tasks and relevant opportunities and feedback is communicated (this may be done by a fellow volunteer). Day to day there is good communication between supervisors and volunteers, with regular discussion about the work.	Consideration should be given to how to communicate with volunteers who are not able to engage online. This may have slipped a bit during Covid. Volunteer satisfaction survey.	Partly met

Standard – practices within each quality area		Evidence of what you already have and brief explanation of how this meets the practice	Still to do	Met/partly met/ not met
5.6	There are systems for volunteers to have a positive and managed exit *Hint to assessor – you want to see that the organisation values volunteers' contributions and gains feedback on their experience. Also, you want to see how exits are managed in relation to keeping volunteers' details, mailing lists, opportunity to return, providing references etc.*	When a volunteer leaves, our process is to ensure we say thank you – with a gift, card or gathering if appropriate – and gather some feedback from the volunteer, preferably in person through an informal "exit interview" or via our survey monkey exit questionnaire. In practice, we receive very little feedback centrally from exit reviews. Where volunteers may need a reference, volunteer supervisors are expected to ensure sufficient information is held by the Volunteers Officer. It can be very difficult with some roles, especially relatively informal roles such as practical volunteer tasks as volunteers may just stop attending. Often when volunteers leave they still want to stay in touch, and we give the option of staying on the mailing list. We have a retention policy within our suite of data protection policies.	Look at how we are recording feedback from volunteers who leave, and how we are getting the information. Exit review questionnaires could be sent centrally from the volunteer team. Often volunteer supervisors do not tell the volunteer team that their volunteer has left. We need to check how clear we are with volunteers about how long we keep their data.	Partly met

Quality Area 6: Valuing and developing volunteers

Volunteers are valued and there are opportunities for volunteers to develop and grow through their experience

Standard – practices within each quality area		Evidence of what you already have and brief explanation of how this meets the practice	Still to do	Met/partly met/ not met
6.1	Volunteers feel their contribution is meaningful and rewarding *Hint to assessor – what are they doing to show volunteers that their contribution has an impact, how do they know if it is resulting in volunteers feeling this way?*	Volunteers are invited to share their motivations when they register to volunteer, and volunteer supervisors are encouraged to talk to their volunteers about this when they first start and during reviews to check that needs are being. We try to show their contribution is meaningful through newsletters, articles and the Volunteer Award. As well as in conversation with their supervisors, volunteers are able to voice how they feel at the Volunteers Forum. Every few years we will do a volunteer satisfaction survey. Volunteers were invited to contribute to the 25 year plan thereby ensuring volunteers contribute to the overall aims of the organisation.	The next volunteer satisfaction survey is now due, which will include questions around their feelings towards their role and its place in contributing to ORGANISATIONX's aims, and whether roles are meaningful to them. We do also need to just make sure all volunteer supervisors are still regularly checking in with volunteers around their motivation (which can change) and sense of satisfaction.	Met
6.2	Volunteers feel valued by and a part of the organisation *Hint to assessor – what are they doing to show volunteers they value them how do they know if it is working?*	Annual Volunteer Awards & celebration of volunteering at our AGM Invitation to participate in staff meeting Volunteers forum twice a year – convened by a member of the Board Smaller project-based volunteer events in some areas Social events – invitations to staff Christmas dinner, barbeque or outings, Christmas cards. Get well cards.	We will also be asking volunteers what makes them feel valued by and part of the organisation in the volunteers survey.	Met

Standard – practices within each quality area		Evidence of what you already have and brief explanation of how this meets the practice	Still to do	Met/partly met/ not met
		General thank yous, provision of tea coffee cake and catering for specific dietary requirements. Thank you cards, letters and emails. Mentions in newsletters and social media. Offer references if needed. Offer training as appropriate, and where they can, staff will respond to volunteers' interests Passing on compliments/feedback from others.		
6.3	The experiences, attributes and competencies that volunteers bring are recognised and they have opportunities to develop them *Hint to assessor – look for examples of volunteers who have brought specific talents and how they have been utilised; look for evidence of volunteers who have grown in confidence or skills*	We identify experiences, attributes and competencies that volunteers bring through the recruitment process and on-going conversations and try to make sure we use them. Different roles have different development opportunities. For example, some roles have significant or formal training and/or are designed to appeal particularly to those who are looking to develop skills Staff are responsive to their volunteers and will help them to develop informally, teaching them "on the job", signposting to other roles etc	Volunteer satisfaction survey	Met

Standard – practices within each quality area		Evidence of what you already have and brief explanation of how this meets the practice	Still to do	Met/partly met/ not met
6.4	Volunteers have the opportunity for connecting with and learning from other volunteers where appropriate *Hint to assessor – look for opportunities for volunteers to get together, or take part in organisational meetings or events*	Group volunteering is by its nature ideal for this, and it is encouraged by provision of refreshments and refreshment breaks, facilitating volunteers getting to know one another and share their interests, skills and knowledge, in a safe, healthy, friendly environment-with care, support and good humour Different projects may provide various social and learning events to help volunteers connect. Part of the rationale for the Volunteers Forum is to enable volunteers to meet one another and make connections. We often have presentations and guided walks at the forum, sometimes from staff, sometimes from volunteer. We invite volunteers to the annual Christmas dinner, and many projects/ work parties have their own Christmas gathering.	We could consider a volunteer role to ensure that we are being consistent about this and that the quieter volunteers are feeling included. This links with inclusivity.	Met
6.5	Volunteers' future aspirations are supported where appropriate *Hint to assessor - look for evidence of any ongoing training, the provision of references, promotion of relevant progression opportunities.*	We have provided a number of references for volunteers over the years, and occasional statements of achievements where requested. We try to identify with volunteers in advance whether they are volunteering for career development aims and are likely to need references, so as to ensure we have the right information. Volunteer supervisors talk to their volunteers about aspirations, and support/signpost if possible. This has included signposting to sources of sector job		MET

Standard – practices within each quality area		Evidence of what you already have and brief explanation of how this meets the practice	Still to do	Met/partly met/ not met
		information, looking over CVs, signposting to other roles, staff members or volunteers for developing specific skills etc. When we hear about training of interest to volunteers, we include it in the volunteer newsletter, and when we have new development roles or trainee positions within the organisation, we email all volunteers about it.		

Evidence submitted with the self-assessment:

1.	Volunteers Policy
2.	Volunteer Managers Handbook
3.	Information for Volunteers