INVESTING IN VOLUNTEERS FINAL REPORT

Example Advocacy

20XX

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Summary information

IiV host organisation	Volunteer Now
Assessment date(s)	5th & 7th April 20XX

Assessor	Jo Smith
Name of lead assessor	Freddie Bloggs
New assessment/renewal	1st Renewal
Assessment outcome	Met with Conditions

Post conditions assessment [delete this section if not required]

Assessment date	10th July 20XX
Assessment outcome	Met

About the organisation

Example Advocacy was established in 1992 to provide support and a voice for people with learning disabilities living in the counties of Shire, Land and Dale. The organisation was based on the American model of citizen advocacy with a small staff team supporting volunteer advocates. When Example Advocacy was first assessed in 2016 there were four staff and 12 advocates.

Since the last assessment, the organisation has grown to encompass a broader range of people with advocacy needs such as people with dementia or Alzheimer's, people with a physical or sensory impairment or long-term health condition, older people, and the carers of people with learning disabilities. Growth has also included being one of only seven Department of Health funded pilots for Independent Mental Capacity Advocacy and being one of the first organisations in the country to be commissioned to provide support to people who have been refused continuing healthcare funding or who have had that funding withdrawn. The organisation now employs 19 staff and currently has 66 volunteers. There is a board of 7 trustees.

The majority of staff are managed directly by the chief executive including the part time (16 hours) volunteer development manager (VDM) who is responsible for all aspects of volunteering from recruitment through to matching and ongoing support and supervision. This is a new post, introduced since the last assessment.

The majority of volunteers are volunteer advocates, there are also four volunteer administrators, a volunteer working on publicity, and next year there will be a small team of volunteers focussing on corporate fundraising. The organisation has both paid and volunteer advocates – paid advocates are deployed to the more complex cases such as those that are part of Independent Mental Capacity Advocacy; volunteers are generally deployed to less complicated cases.

The nature of advocacy has changed within the sector and therefore within the organisation since the last assessment. Referrals used to be of people with 'moderate' needs, now the service is aimed at people with 'crisis or critical' needs. Originally advocates had a quasi-befriending role that was often long term, now advocates work on specific issues with their 'partner' (service user) and therefore engagement is generally shorter term.

Example Advocacy has three operational bases – one in each county. Volunteers are coordinated from the head office in Shire, but obviously undertake their roles out in the community.

How the organisation was assessed

The assessment took place over the equivalent of two days.

One day was spent at Example Advocacy's head office in Shire, the remainder of the time comprised telephone and video conference interviews during the rest of the week to provide coverage of all three counties and to give flexibility, ensuring volunteers who were not able to travel to the Head Office were included.

The organisation supplied a list of all volunteers from which a sample was selected that covered all three roles, and all three counties. The majority of the volunteers are in the county of Shire and this was reflected in the sample. The sample also included long standing volunteers, including two that have been with the organisation since it was established, and newly recruited volunteers from the last induction course that ran three months ago.

Overall 20 volunteers were interviewed: 17 advocates, two administrative volunteers and the volunteer supporting publicity. The two administrative volunteers were interviewed as a pair; there were two groups each of four advocates. All other interviews were by telephone/online.

Staff were selected to include those working directly with volunteers, those in management roles, and staff who work alongside volunteers. These were the CEO, the VDM, the office manager, and two of the paid advocates. All were interviewed individually - the VDM and office manager in person, whilst onsite, the rest by telephone/online.

One of the trustees was also interviewed by telephone.

The assessment approach was in line with the sampling guidance.

Number of sites, branches, locations:	3
Number included in interview sample:	3

Number of volunteers:	66
Number interviewed:	20
Number as % of total:	30%

Number of volunteer roles:	3
Number of roles sampled by interview:	3
Number as % of total:	100%

Number of staff:	19
Number interviewed:	5
Were trustees interviewed?	Yes

Written evidence

At self-assessment: The strategic plan; the latest annual report; the volunteer policy.

At assessment: Re-drafted versions of the problem-solving procedure, the recruitment procedure, and the expenses policy; health and safety and risk management policies; demographic analysis statistics; and website.

Meeting the standard

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

Practice		Met
1.1	Volunteering is planned and reviewed in line with the organisation's vision, strategy, and values	Yes
1.2	Volunteering is valued as part of the culture of the organisation and the benefits of volunteering are understood and communicated	Yes
1.3	The impact of volunteering in contributing to organisation aims is understood and communicated	Yes
1.4	Volunteer involvement is reflected in management, financial and resource planning	Choose

Example Advocacy's strategic plan describes how volunteers support the delivery of each of the 10 core strategic objectives. The plan also notes how being supported by an advocate from the local community is central to the overall ethos of the organisation. The CEO said, 'It is central to the society we want to create, one where neighbours speak out for those less able to speak for themselves'. The organisation collects and analyses data around the impact volunteers have and presents statistics and case studies which illustrate this. 'We are proud of what we do' said a volunteer, 'It is lovely to read about the amazing things that we as a team have helped service users to accomplish, the difference we've made to their lives'. Volunteers spoke about how they felt valued and one said 'They are always very prompt with our expenses as they tell us that they do not want us to be out of pocket.'

At the previous assessment it was suggested that Example Advocacy would benefit from more dedicated resourcing for the volunteering function. A successful funding application allowed for the recruitment of the VDM. Volunteers commented on how things had improved in terms of having a specific person to contact, and the introduction of regular peer groups support meetings - 'It's great that [VDM] is here, we know she works Mondays, Wednesdays and Fridays and that we can get hold of her then.' Another said 'It is lovely to have someone that is dedicated to ensuring that volunteers are ok, they are always thinking about how they can make my volunteering experience as enjoyable and rewarding as possible, and are constantly looking at ways to develop volunteering across the organisation.'

Quality area 2. Planning for volunteers

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

Practice		Met
2.1	There are specific and proportionate systems and processes for volunteer involvement that are regularly reviewed	Conditionally

2.2	Relevant people in the organisation are aware of systems and processes relating to volunteering and why they are important	Conditionally
2.3	There are designated people responsible for volunteers and volunteering that have experiences, competencies and attributes for the role	Yes
2.4	Systems are in place to ensure the management of risk, safeguarding, health and wellbeing and protection of volunteers, the organisation, and others	Conditionally
2.5	There are problem solving procedures to deal with issues raised by or about volunteers	Yes
2.6	Records of volunteer involvement are maintained in line with data protection	Yes

Staff and volunteers commented that the introduction of the VDM position had allowed for a review of systems and procedures (which were last updated in 20XX), and how they were impressed with what they had seen so far - 'She [VDM] has circulated redrafts of the main policies for us to comment on…do they cover what they need to, are they clearly written?' said a volunteer. The postholder described how this work was ongoing and that the ultimate goal was to have an online volunteer handbook, 'Getting things online will make everything so much more accessible!' Volunteers spoke of knowing what to do if there was a problem, 'There are very clear procedures for how I should deal with any problems I face and I know that they will always be dealt with in a swift and professional manner.' A volunteer confirmed 'I have had everything about GDPR explained to me so I know they are careful and thoughtful about how they store information, especially my personal details.'

Some conditions are highlighted; your organisation will need to implement actions to meet this quality area – details of requirements are specified in the ***Areas not meeting the standard at assessment*** *section of this report.* ***(Include when sharing report stating conditions set before meeting standard)***

Conditions highlighted in this quality area were met at post conditions re-assessment. Details of how the conditions were satisfied are reported in the ***Post conditions re-assessment*** *section.* **(Delete above paragraph and update final report with this sentence if conditions have been satisfied)**

Conditions were not met in this quality area and therefore the outcome of the assessment is Not Met. Details of the approach and findings of the post conditions re-assessment are recorded in the ***Post conditions re-assessment*** *section.* ***(Update in final report if organisation opts not to complete post conditions assessments/or if gaps still exist and therefore they do not meet the standard and it is a Not Met outcome.***

Quality area 3. Volunteer inclusion

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

Practice		**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	Yes

3.2	There is a proactive approach to increasing volunteer diversity, addressing under-representation, and including targeted groups as part of the organisation's inclusion, equity and diversity aims	Yes
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	Yes
3.4	Where possible there is a wide range of accessible opportunities that can be adapted throughout the volunteer's journey	Yes

One of Example Advocacy's strategic objectives is to ensure that volunteer advocates are representative of local communities and of the service users. 'It's all part of service users feeling comfortable with their advocate, feeling their advocate really understands where they are coming from,' said a staff member. 'It's about offering people opportunities to get involved [as volunteers], people who might not have thought about it before,' said another. The organisation has undertaken targeted marketing and in particular made presentations to a significant number of local networks and umbrella groups. Volunteers also appreciated that 'Interviews and induction training have been offered at differing times including evenings and weekends, and at a range of venues across the catchment area – that has made it so much easier for me to get involved!' Detailed analysis has taken place to review the success of recruitment drives and a staff member commented 'We are really pleased that a good match to the demographic of the populations of the three counties has been achieved. '

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

Practice		Met
4.1	People are clear about the opportunities available and the process to become involved	Yes
4.2	Recruitment processes and checks are timely, fair, consistent, straightforward and appropriate	Yes
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	Yes
4.4	Volunteers are provided with any necessary information, introductions and training for their role	Yes

The work of Example Advocacy is widely publicised and a staff member noted that they 'have a lot of success attracting volunteers through contact made with relevant organisations supporting people with learning disabilities or difficulties, dementia or long-term health conditions, older people, and their carers, and the health sector generally.' One volunteer commented 'I found it really easy to find out about the volunteer opportunities' and another volunteer noted how they received clear information about how volunteers can support the organisation. She said 'There is a clear recruitment and induction process which appears to be consistently applied. I felt it gave me ample opportunity to consider if the opportunities on offer are right for

me'. One volunteer said 'I wasn't sure if I would have the confidence to be an advocate, but [VDM] suggested I do the training and then see how I felt. She even said I could maybe do an admin role for a bit if I still wanted to think about it some more'. A young volunteer said "The training was brilliant! I thought it might be boring but they made it so much fun and gave us lots of scenarios to think about and discuss. I leaned loads!'

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

Practice		Met
5.1	Volunteers feel appropriately supported in their role and able to discuss all aspects of their volunteering	Yes
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	Yes
5.3	Volunteers have the opportunity to discuss how they are doing	Yes
5.4	Volunteers have opportunities to express their views and ideas and to be involved in relevant decision making	Yes
5.5	Volunteers feel there is good communication between themselves and the organisation	Yes
5.6	There are systems for volunteers to have a positive and managed exit	Yes

Volunteers commented that they feel a part of the organisation, 'I'd go so far as to say we are the organisation,' said one; 'We outnumber the staff and support the majority of the service users' and another said 'We are just one big family.' It was clear that volunteers felt very supported in their roles, with one saying 'I just love that no matter what I do there is someone that I can talk it through with and get lots of ideas for doing things better.' Another said 'I am very clear about where my role starts and ends, the staff make it very clear that there are some things that I need to hand over to them and that I should never worry about doing that.' Volunteers appreciate being consulted about the development of practice in relation to volunteering, '[VDM] has been consulting us as she works through reviewing all of the documents about volunteering. It is good that they ask us what we think'. Volunteers also appreciated how their work is portrayed in the organisation's publications, 'The stories are so moving, and they really showcase what volunteers can do for service users, the difference we make'.

Quality area 6: Valuing and developing volunteers

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

Practice		Met
6.1	Volunteers feel their contribution is meaningful and rewarding	Yes
6.2	Volunteers feel valued by and a part of the organisation	No

6.3	The experiences, attributes and competencies that volunteers bring are recognised and they have opportunities to develop them	Yes
6.4	Volunteers have the opportunity for connecting with and learning from other volunteers where appropriate	Yes
6.5	Volunteers' future aspirations are supported where appropriate	Yes

Volunteers commented that they felt that their contribution was meaningful, and that they enjoyed their roles, 'I know that I am making a difference to someone and I enjoy that.' They commented on the feedback they received from service users, either directly or passed on by staff, about how much their input had helped and how grateful they were. 'To have this opportunity to support someone through the bureaucracy, to know that without you they would probably have given up… it is such a wonderful feeling. Gives my life purpose,' said one.

The new VDM introduced group meetings, one for each county and volunteers also commented on how much they enjoyed these peer support groups - 'A great opportunity to share experiences and learn together.' 'We're encouraged to form our own support networks with other advocates local to us, exchange telephone numbers, email addresses,' said a volunteer.

Future plans

Example Advocacy's current plans include growing the overall number of volunteer advocates to keep up with demand for services; and developing a specialist service for young people - initially this will be staffed by paid advocates, but the organisation feels that roles for volunteers will be developed as well.

Strengths

A number of strengths were identified during the assessment, these are detailed below. The numbers in brackets refer to the quality area and specific practice of the Investing in Volunteers standard.

- Example Advocacy produces attractive and engaging information that illustrates the involvement of, and contribution made by volunteers. This includes the annual review report as well as promotional material, newsletter features and general media coverage. Staff speaking at events similarly extol the contribution volunteers make. This contributes to volunteers feeling a valued part of the organisation, and that their involvement makes a difference. Comments from volunteers included, 'The feel good factor is very high here,' 'Everyone, the staff, the service users, they all go out of their way to thank you, to show you your work is appreciated,' and 'Sometimes I think you could be forgiven for not realising there are paid advocates too, really, all of their stuff just talks about what volunteers have done!' (**Vision for Volunteering** 1.2, 1.3; **Valuing and Developing Volunteers** 6.1, 6.2)
- A significant amount of work has been undertaken to ensure that volunteers are representative of both the local community and the service user group. Example Advocacy set themselves ambitious targets around achieving a demographic match and in the four years since the last assessment they have accomplished this. This work has included very targeted recruitment activities with careful consideration of where information about opportunities has been placed and with a proactive approach adopted to reaching under-represented groups such as men of all ages, young women, lone parents, people from Black, Asian, minority ethnic and refugee communities. The whole staff team has been involved in promoting opportunities through outreach. This means that the organisation is able to offer service users considerable choice in terms of who they are matched with. 'I am really proud of what we have achieved and the fact that we can now offer service users an advocate who maybe shares the same first language, or who has had a similar life experience. I want to keep working on this so that we can offer even more choice,' said a staff member. (**Volunteer Inclusion** 3.2, 3.4)

Areas not meeting the standard at assessment

During the assessment a number of areas were identified where further work is needed in order to demonstrate that the organisation meets all the criteria of the Investing in Volunteers standard. Addressing these areas within the next three months will be a condition of achieving the award.

The numbers in brackets refer to the quality area and specific practice of the Investing in Volunteers standard.

- The VDM is in the process of reviewing and updating all policies and procedures that pertain to volunteer involvement. These were last reviewed in 2016 in preparation for the previous assessment against the Investing in Volunteers standard. A number are now significantly out of date, for example there is no reference to GDPR (General Data Protection Regulation). Volunteers who have been recruited over the last four years said that they had not been provided with copies of policies as part of their induction or didn't know how to access them (although they did recall them being mentioned during induction and had recently begun to see some of these as they have been going out for consultation).

  Action: In order to meet the standard, Example Advocacy needs to complete the review of all policies and procedures that pertain to volunteers; establish a clear review cycle and review approach; and ensure that volunteers know how to access the documents. Updated documents will need to be provided which clearly show review due dates; how future reviews will be undertaken will need to be explained and volunteers will need to confirm that they know how to access policies and procedures. (**Planning for Volunteering** 2.1, 2.2)

- Further to the above, the volunteer role risk assessments need to be updated. Volunteers are now working with more complex cases in a wider variety of situations including visiting service users at home and lone working. The current risk assessments were developed over four years ago when volunteers were meeting service users in referring organisation's premises or at Example Advocacy's offices. Volunteers said that they were given advice about how to keep themselves safe, but to ensure that this is comprehensively and systematically covered with volunteers, a re-evaluation of risk and identification of what measures need to be taken to prevent or manage risk needs to take place.

  Action: In order to meet the standard a risk assessment for each volunteer role will need to be provided that shows steps that will be taken to reduce risk and how situations will be managed if they do occur (**Planning for Volunteering** 2.4)

Continuous development and improvement

Suggestions for continuous development and improvement are offered to help the organisation be even better than it already is in relation to involving volunteers. The adoption of these suggestions and progress against them will be followed up on during the annual telephone check ins and more fully explored during the renewal assessment in three years' time. The numbers in brackets refer to the quality area and specific practice of the Investing in Volunteers standard.

- The number of volunteers has grown significantly since the last assessment and there are plans to further increase the size of the team. The VDM is part time and there are no immediate plans to increase resourcing in relation to volunteer involvement. Volunteers commented that they already felt '[VDM]'s time was spread a little thin' and that this would be increasingly the case as the number of volunteers grew. They commented 'I try not to bother her if I can help it, I know how much she has to do,' 'I volunteer on a Thursday, the Manager doesn't work on a Thursday, so I do kind of feel out on my own. It would be great to have someone around five days a week,' 'There is so much we would like, so many things that would help us be more effective, but she [VDM] just doesn't have the time to put them in place,' 'Things do tend to take a very long time to get done, there just aren't enough staff really,' and 'It's just about okay at the moment, but with more volunteers, well….'

  Development: Developing the investment in the volunteering infrastructure in line with expansion plans will ensure that volunteers continue to be effective and feel adequately supported by the organisation. (**Vision for volunteering** 1.4)

- Volunteers are supported through quarterly peer support groups facilitated by the VDM, one per county. There is also an annual 'all volunteers' meeting. The VDM is also available by telephone on three days a week, and volunteers can also make an appointment to see the VDM face to face on those days. Volunteers have also been encouraged to share contact details so that they can go to each other for support. Volunteers interviewed felt that these arrangements were, 'Just about working okay,' but suggested that they would like more opportunities for support and general reflection on their practice. Comments included, 'It would be nice to have more time to sit down and just talk through how I might have dealt with a case or a particular situation, get some feedback,' and, 'I do feel supported, and I know I can get hold of someone if I need to, but sometimes you just want to offload and say, [expletive], that was a difficult one'.

  Development: Example Advocacy might explore different ways of providing this opportunity for volunteers, for example introducing a 'lead volunteer' role or a more formal buddying arrangement. (**Supporting volunteers** 5.1, 5.3)

- As identified at the last assessment, volunteers are keen to be able to access further training to help them maintain and develop their skills in order to feel more able and confident in relation to increasingly complex

cases. There has been some training input to the routine volunteer support group meetings, but a number of volunteers at this assessment still reported sometimes feeling out of their depth Comments included, ‘I’d love some basic training around different learning disabilities, just so that I would have an awareness of what it is like for the person I am supporting,’ ‘We’ve had some mini inputs on dementia and blindness, but more of these, and more in depth stuff would be great, ‘I feel if I knew more about different conditions I would be better able to advocate’.

Development: Introducing this, or sourcing providers who offer this, would help volunteers to be more effective in their roles and more assured that they were in the words of one volunteer, ‘Doing the right thing’. Further, a number of volunteers are looking to develop their careers in the sector and the provision of ongoing training, and evidencing attendance thereof, would support them in their aspirations. (**Developing and valuing volunteers** 6.3, 6.5)

Post conditions re-assessment

In order to assess progress against the conditions set a review of new documents was undertaken; these were a newly published Volunteer Handbook which contains a suite of policies and practice guidelines pertaining to volunteering at Example Advocacy; and three volunteer role risk assessments.

A small number of interviews were also undertaken by telephone and video conference; these were with the VDM, the CEO and six volunteers, two of whom were part of the main assessment and four had not previously been interviewed.

- In order to meet the standard, Example Advocacy needed to complete the review of all policies and procedures that relate to volunteers; establish a clear review cycle and review approach; and ensure that volunteers know how to access the documents.

  The volunteer handbook clearly states the publication date and has a review date of July 20XX. The introduction explains that the handbook will be updated every two years in consultation with volunteers; addendums will be issued if external changes necessitate an interim update. It also states that it will be emailed to all volunteers during their induction and when updated, but that hard copies can be requested.

  The VDM described how the Handbook had been produced, 'Myself and [CEO] went through all of the policies and procedures and updated them; then we put everything together in a draft version of the handbook which we asked volunteers to comment on before finalising. In the end it wasn't as much work as I thought it would be. I'm glad we had the push really'.

  The volunteers interviewed all commented that they had received an email copy of the handbook; they also noted that they had received an email asking if they would like to comment on a draft of the handbook a few weeks prior to its publication.

  Planning for Volunteering 2.1, 2.2 - This condition is now met.

- In order to meet the standard a risk assessment for each volunteer role needed to be provided that shows steps that will be taken to reduce risk and how situations will be managed if they do occur

  The three risk assessments provided were comprehensive and the VDM and CEO explained how they will be used to inform volunteer induction training. 'It's true they did need looking at, there was nothing in there about lone working for example. We've used the staff lone working policy as a basis for the volunteer one. And I'm pleased to report that we now have a system for volunteers to call in when they arrive and leave someone's house,' and 'There is much more in there now about challenging behaviour, and about working with other people who might be present like carers or family, we hadn't really covered that before'. The risk assessments also have clear review due dates and will be looked at every two years.

  Planning for Volunteering 2.4 This condition is now met.