Investing in Volunteers

- an organisation's how to guide

Contents

Introduction 4
History of IiV 4
Benefits to achieving IiV 4
The Investing in Volunteers timeline 5
The Investing in Volunteers standard 6
Investing in Volunteers steps 7
Tips for organisations working with IiV 11
Terminology 12
Resources to help you 12
1. Step one: getting started 13
1.1 Introductory workshop 13
1.2 Setting up a working group 13
2. Step two: self-assessment 15
2.1 Completing self-assessment 15
2.2 Submitting the self-assessment and evidence 18
2.3 Assessor review of your self-assessment 18
3. Step three: improving practice 20
3.1 Completing your improving practice plan 19
3.2 Submitting the improving practice plan 20
3.3 Assessor review of your improving practice plan 20
4. Step four: assessment 22
4.1 Assessment days 21
4.2 Stakeholder sampling for interviews 22
4.3 Scheduling assessment days 24
4.4 Written evidence 25
4.5 Outcome of the assessment 25
4.6 Feedback 26
4.7 Quality assurance process 27
4.8 Complaints and appeals procedure 27
5. Step five: celebrating and achieving the award 27

5.1 Congratulations on achieving the IiV Award! 27
5.2 Celebration of the IiV Award! 27
5.3 The impact of IiV and feedback to us 27
5.4 How to use the report 27
6. Step six: continual improvement and renewing your award 29
6.1 Continual improvement 29
6.2 Keeping connected 29
6.3 Annual check-ins 29
6.4 Benefits of renewing your award 30
6.5 Process for renewing your award 30
Contact 30

Introduction

Welcome and congratulations on registering to achieve the Investing in Volunteers (IiV) quality standard. The IiV journey will support you to examine how you recruit, support and manage volunteers to improve volunteers' experiences and help your organisation achieve its goals.

You will soon be contacted by your appointed assessor who will take you through the six steps of the IiV process that are outlined in this manual. You'll probably dip in and out of the manual as you progress through these different steps of the journey.

History of IiV

Investing in Volunteers began in 1995 with a group of volunteer centres who wanted to have a way to know the volunteers they referred to other organisations received a good standard of management and care.

The standard has been through several reviews to ensure the standard is inclusive to a wide range of different organisations and types of volunteering, to be more explicit about how volunteering is linked with organisational strategy and impact, and to have a greater focus on volunteers' experiences. It was developed based on consultation with a wide range of people and organisations. It incorporated NCVO's Time Well Spent research that surveyed over 10,000 volunteers about what a quality volunteer experience looks like, concluding that it should be: inclusive, flexible, impactful, connected, balanced, enjoyable, voluntary and meaningful.

Benefits to achieving IiV

Each organisation will have their own reasons for going through the IiV journey. Benefits that achievers have identified include:

For **new, developing volunteer programmes**, IiV can:

- Create a more structured environment for volunteers and volunteer managers, enhancing volunteers' experience.
- Develop clear boundaries and expectations of volunteering.
- Increase the variety and flexibility of your volunteer roles, which can increase diversity and bring a wider range of perspectives to your organisation.
- Ensure correct documentation is in place for safe and legal volunteer management, creating a safeguarding culture throughout your service.

For **established volunteer programmes**, IiV can:

- Review and strengthen processes and procedures that help to find the balance of formal and informal that suits your organisation, volunteers and the roles.
- Identify areas for development and innovation with assessor support.

- Develop a greater understanding of the importance of volunteers in your organisation, the impact that they have and how they help the organisation to achieve its goals.
- Identify areas for development in your volunteer programme, building confidence and ensuring safe, effective practice in line with the UK standard.

IiV achievers tell us that this can:

- Increase volunteers' motivation and enhance their experience
- Raise the profile of volunteering within the organisation, boosting people's morale
- Encourage more people to volunteer
- Reassure funders that their money will be well-spent through having a well-managed volunteering programme that links into organisational strategy and impact.

"The IiV accreditation process has had a notably positive impact across our stakeholder groups. For staff, it provided a structured opportunity to reflect on and enhance our support systems for volunteers, leading to increased confidence and clarity in our volunteer management practices. Volunteers felt genuinely valued through their involvement in the process and appreciated our commitment to continual improvement. Trustees gain reassurance that our volunteer programme aligns with best practice and contributes strategically to our mission. For external partners, IiV will reaffirm our credibility and professionalism, reinforcing trust and encouraging further collaboration. (Midlands Air Ambulance Charity 2nd renewal)

The IiV website

As you have now registered to complete the award, you will have a unique website link that will give you access to all the resources and enable you to download documents you will need. Contact your **country manager** if you have any problems accessing the website.

The Investing in Volunteers timeline

The diagram below sets out the approximate timeline from the contracting stage to achieve, celebrate, and renew IiV, although this will vary by organisation.

Example IiV timeline

Month 1 *introductory workshop*	**Months 2 - 3** *self-assessment completed*	**Month 4** *improving practice plan signed off*
Months 5 - 11 *improving practice & development*	**Month 9** *begin planning assessment*	**Month 12** *assessment*
Month 13 achieving and celebrating	**Years 1 - 3** *continual improvement*	**Half way through Year 3** *apply for renewal*

Note this is for illustration only, you may move through the steps much faster, communicating with your assessor throughout.

The Investing in Volunteers standard

The six quality areas

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.

Quality area 2. Planning for volunteers

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

Quality area 3. Volunteer inclusion

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

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.

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.

Quality area 6: Valuing and developing volunteers

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

You can view the standard with all the practices at **The Investing in Volunteers standard**.

Investing in Volunteers steps

There are six steps to the IiV process, five to achieving the award, and then continual improvement and renewal as the sixth once you have achieved the award.

These are described in more detail below with links to the relevant sections:

Step one: getting started

An introductory workshop will start you on your IiV journey and help you to think about what you want to achieve. It aims to bring a range of stakeholders together, including volunteers, to think about how the standard applies to your organisation, what you want to achieve and how you will organise the process.

It will take place at your organisation or online and generally takes around two hours. Your assessor can also signpost you to sources of information and support.

This workshop generally happens within a month of confirming the IiV contract.

Step two: self-assessment

You will complete a self-assessment checklist to identify where your organisation is currently in relation to the standard. Your assessor will review it with you so you are clear about where you are. The assessor will also review three pieces of written evidence at this stage, one of these should be your volunteer policy or handbook, if you have one.

The self-assessment generally happens within three months of confirming the IiV contract.

Step three: improving practice

Once you have agreed with your assessor what activities you need to take to meet the standard or where you want to use the opportunity to improve practice over and above

the standard you need to devise and undertake an improving practice plan to complete them, considering how you will involve others in your organisation.

Plan - the improving practice plan is usually produced within four months of confirming the IiV contract.

Improve – it usually takes six to eight months to complete activities within your improving practice plan from your plan sign off.

Step four: assessment

The assessor(s) will meet with your organisation, in person or online and by telephone and speak to volunteers, staff and board members as well as review written documentation to assess whether you meet the standard. They can make one of the following three judgements:

- You have MET the standard
- You have MET THE STANDARD WITH CONDITIONS.
- You have NOT MET the standard

They will provide verbal feedback and a full written report outlining their findings.

The assessment generally happens within twelve months of confirming the IiV contract.

Step five: achieving and celebrating the award

Your report will have passed through a quality assurance process before awarded to you, to maintain the quality and consistency of the standard.

Congratulations, you are now an Investing in Volunteers achiever! You will be contacted with information about the certificate, plaque and logo. You should now think about how you can celebrate and publicise your award.

Step six: continual improvement and renewing your award

Now you have achieved the award, this is your opportunity to continue to maintain the good practice you have achieved and to continue to improve, including any development points identified in your report.

You will be contacted annually by your assessor or a member of your **country manager** team to see how you are getting on, to talk through any issues or questions, and to signpost you to information or support.

Your organisation is awarded the Investing in Volunteers award for three years. It is hoped that you will renew this award to maintain the standard and be eligible to publicly demonstrate your commitment to best practice and meaningful, effective volunteering.

Your **country manager** will be in touch to talk through the renewal process and the benefits to you and your volunteers and answer any questions you have during the third year.

IiV country manager

You will have had contact with your **country manager**. The country teams deal with marketing, registrations, access to the website, contracts, renewals, operational delivery and central development. They also provide support and development for assessors.

Assessor roles

You will be allocated an assessor. IiV assessors are based across the UK. They are chosen for their experience of assessment and knowledge of volunteer management and have all undertaken training in IiV assessment.

Your assessor will guide you through the process, working with you in a supportive and collaborative way. Their activities include:

- Delivering an **introductory workshop** to lead you through the process
- Reviewing your **self-assessment** and giving feedback on where you have and haven't met the standard to help to identify the steps you need to take in **your improving practice plan**.
- Advising you if they feel that there is a need for additional advice and support.
- Reviewing **your improving practice plan** to ensure that the activities you have identified are likely to lead to you meeting the standard and are realistic given the people, time and resources available.
- Undertake **an assessment** including reviewing written information and carrying out interviews with volunteers, staff and board members as appropriate and making a judgement about whether you meet the IiV standard. If you are a very large and / or national organisation, you may have more than one assessor undertaking assessments, but you will always have one person responsible for coordinating the process and liaising with you.
- Providing verbal feedback after assessment.
- Writing an assessment report and submitting it to the IiV quality assurance process.

Your assessor needs to retain objectivity so cannot help you to implement systems but can point you to **sources of help**.

Organisation lead

A volunteer manager or coordinator is often the lead within the organisation for IiV, but it can be anyone, including board members or a volunteer in a smaller volunteer-led organisation. The role of the organisation lead includes:

- Overseeing and leading the process
- Maintaining communication within the organisation, with the IiV assessor and with the IiV country manager

- Setting deadlines and ensuring they are met
- Coordinating evidence for the self-assessment
- Overseeing and delivering the improving practice plan
- Coordinating the assessment day.

Tips for organisations working with IiV

Organisations that have achieved the standard have provided some advice to others:

"Get staff and volunteers involved in the process in the early stages"

"Invest staff time into the process - this isn't something that can be done overnight"

"Ensure the whole organisation is included"

"Make use of any help that is offered and develop strong links with organisations that can give advice"

"See how other organisations work to help make your own improvements"

"Work through methodically and start early"

"Be patient when making changes to allow those affected to respond"

"Share existing policies with those who they affect and ask for feedback"

"Don't make it arduous by creating too many forms to fill in"

"Ask for help from the IiV team"

"Use the IiV – an organisation's how to guide, it tells you how to do each step and provides links to lots of templates"

"Use the process as an opportunity to learn and grow as well as to demonstrate your strengths"

"Give yourself plenty of time to book in the assessment interviews and ensure your interviewees have confirmed that they will be attending"

"Be prepared and make sure you have thoroughly read the criteria and compiled your evidence against each in good time before the assessments start"

"Ensure that the person who is leading on the accreditation has enough capacity to manage it on top of the work they are doing as it does take a lot of planning and co-ordination"

"Enjoy the process! It will show you a lot about yourselves as an organisation and your internal support systems and processes as well as just focusing down on the volunteering elements"

Terminology

- **Organisation** applies to any grouping of people, including community groups and membership organisations whether or not they are formally constituted
- **Board member** has been used to refer to anyone in a governance role, for example board or management committee member, trustee, director, school governor, councillor and so on. Although most board members are in unpaid roles, the term "volunteer" here applies to people who are carrying out day-to-day rather than governing activities, although someone may be a volunteer and a board member. For the purposes of IiV assessment they provide a different stakeholder perspective at assessment.

Resources to help you

Each of the country leads has resources to help you, links below:

England	**NCVO Know How**
Northern Ireland	**https://www.volunteernow.co.uk/publications/**
Scotland	**Volunteer Scotland Investing in Volunteers**
Wales	**Third Sector Support Wales**

You may also be able to get help from a local infrastructure organisation (Voluntary Action, Council for Voluntary Service, or Volunteer Centre) or national infrastructure or umbrella organisation for your area of work.

1. Step one: getting started

1.1 Introductory workshop

Your assessor will contact you to organise an introductory workshop at your organisation or online, this should include key members of staff, volunteers and trustees, board or committee members. See 1.2 for setting up a working group to manage the process.

Purpose of the workshop

The outcome objectives of the workshop are:

1. Participants will be more familiar with the content of the IiV Standard than they were before attending the workshop
2. Participants will understand the six steps to achieving the award
3. Participants will feel confident in their ability to undertake step two – the self-assessment
4. Participants will be aware of the role of the assessor, of their responsibilities, and of the availability of support through local and national infrastructure organisations
5. Participants will have considered how they will manage the process and the timeline for working through the steps

Attendees should download **The Investing in Volunteers standard** before the workshop to familiarise themselves with the six quality areas and 29 practices, although these will be covered fully during the workshop. Your assessor may ask you to prepare some handouts or have information available electronically to participants. This may include the **IiV standard and guidance** and/or **IiV self-assessment TEMPLATE**

1.2 Setting up a working group

Many successful organisations involve a working group to guide the process of achieving IiV that can:

- Support and encourage the process.
- Bring different perspectives.
- Comment on the work as it progresses.
- Lead on areas of activity.
- Contribute helpful ideas.
- Help increase knowledge and buy in across the organisation.

Depending on the size and structure of your organisation, members can include volunteer managers, chief executive and other managers, people working alongside volunteers, and trustees, board or management committee members. Involving volunteers in this working group is a great way to ensure that their voice and experience is heard, that they are involved in

developing systems that apply to them, and that the processes that are developed are going to be relevant, useful and accessible to volunteers.

Organisations may involve members of an existing volunteer advisory or steering group where this exists; others set up a working group for Investing in Volunteers and then continue it once the quality mark has been achieved to work on volunteering aims and issues beyond this.

Organisations should consider:

- Who are the right people to be involved to provide a range of experiences from across different roles and sections of the organisation to bring different ideas and perspectives.
- Ensuring clarity about the role of working group members so everyone is able to contribute to the best of their ability, for example is it just to attend meetings or will there be work in between; if volunteers are involved do they have a role in seeking the views of other volunteers or are they there as experts in their own right?
- Providing members, particularly volunteers, with the information and support they need, for example making sure that any necessary jargon is explained and that they are aware of relevant systems within organisations.

There is an **IiV invitation to workshop letter** that organisations can send to stakeholders which will help explain the purpose of the workshop.

2. Step two: self-assessment

2.1 Completing self-assessment

Your organisation is now ready to start assessing which of the six quality areas from **The Investing in Volunteers standard** they meet, and where work is needed. You will need to complete the **IiV self-assessment TEMPLATE** - the **IiV standard and guidance** is a great tool to keep you right. The self-assessment is part of the development process, not part of the final assessment, so it is important to be honest about where you are against the standard. Organisations should generally complete this within three months of signing up.

A note on terminology: quality areas and practices

There are six quality areas in the standard:

1. ***Vision for volunteering***
2. ***Planning for volunteers***
3. ***Volunteer inclusion***
4. ***Recruiting and welcoming volunteers***
5. ***Supporting volunteers***
6. ***Valuing and developing volunteers***

Within each of the quality areas are between four and six practices, these are what organisations have to demonstrate they meet to achieve the standard, for example,

1.1 Volunteering is planned and reviewed in line with the organisation's vision, strategy, and values

2.3 There are designated people responsible for volunteers and volunteering that have experiences, competencies and attributes for the role

6.1 Volunteers feel their contribution is meaningful and rewarding

Tips for completing the self-assessment

Organisations take different approaches to the self-assessment, suggestions are below:

1. Decide who will be involved in the self-assessment process; it is good to get input from a range of people to cover different perspectives, particularly if volunteers are involved across a range of roles, sites, regions with different managers.

2. Provide people with the relevant documents:
   - The **IiV standard and guidance**
   - The **IiV self-assessment TEMPLATE** or in the case of renewing organisations the **IiV self-assessment renewal TEMPLATE**; a section of the table that you need to complete is below:

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			

3. Organisations approach the process in different ways, for example:
   - A small group of people coming together in a meeting and filling in the checklist collaboratively.
   - One person initially completing a first draft of the template and then submitting it electronically or in a meeting for consideration by others.
   - Different people taking away different sections to complete and them coming back together again to discuss.

4. The quality areas can be addressed in any order, for example you may decide to work through them in sequence, or you may decide to start with the one that you think you will most easily meet.

5. For each practice:
   - Read through the IiV standard and guidance.
   - Identify what evidence you currently have and how it meets the practice and write this in the *Evidence of what you already have* column. Evidence should be current e.g. policies reviewed within the last two to three years. You are aiming for one or two pieces of evidence per practice, although you may not yet have any evidence, this is fine at this stage.
   - It can include anecdotal evidence where there is no documentary evidence available, for example where you are confident that staff and volunteers would be able to give an accurate and comprehensive account of practice at interview. One piece of evidence, e.g. a volunteer policy or handbook, may be evidence for more than one practice.
   - Based on this, identify what further developments are required in the *Still to do column*. These may be actions that you need to take to meet the standard, or you may consider that you do already meet the standard but there are further things that you would like to develop that are over and above the standard. This can be discussed with your assessor and will form the basis of your **improving practice plan** in the next stage. In

this column there may be policies and procedures that you need to revise, new systems introduced, or you may need to consider ways of evidencing processes that are in place.

What level of evidence is appropriate?

IiV is not designed to be a bureaucratic, paper-based standard but encourages organisations to develop processes and systems that suit their volunteers and themselves. The "example documents" in **IiV standard and guidance** is intended to provide some suggestions but organisations do not need to have all of them, consider whether they will be of practical benefit to you. For example, larger organisations or those operating across more than one site are likely to need more things written down than smaller organisations where there is a lot of contact between volunteers and others.

Assessors have experience working with different types of organisations and volunteer roles and are used to adapting the assessment to the organisation. If you are not sure whether something is working or not, ask volunteers, if they are clear about systems and processes. You can also discuss this with your assessor when they feed back on your self-assessment.

6. Finally, identify whether you think your organisation has met, partly met, or not met the standard:
   - **Met** indicates that:
     - You carry out the practice; and,
     - You have identified evidence to demonstrate the practice; and,
     - You are confident that it is being implemented, and when the external assessor interviews a sample of volunteers and other key stakeholders, the practice will be confirmed.
   - **Partly met** indicates one or more of the following:
     - You partly carry out the practice, but it needs adapting or improving; and/or,
     - You have identified evidence for part of the practice only; and/or,
     - The practice is not implemented consistently e.g. across all roles or sites.
   - **Not Met** indicates that:
     - You do not carry out the practice; and/or
     - You have little or no evidence.
     - It is fine to be at this stage for some practices at self-assessment.

7. If you are an organisation that is renewing your IiV award there is a question at the end that helps you to reflect on what has changed and inform your ongoing development.

8. Make sure you have completed the information on the front cover of the self-assessment: organisation name; name of the person who led on completing 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.

2.2 Submitting the self-assessment and evidence

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. Email the completed self-assessment and three pieces of evidence to your assessor.

2.3 Assessor review of your self-assessment

The assessor will review your self-assessment checklist and evidence and provide feedback by telephone or online. You will also have the opportunity to discuss anything that you are not sure about. You will receive written feedback after the call.

This feedback will form the basis of step three where you finalise your **improving practice plan** to fill any gaps in practice. Your assessor will agree with you when the completed improving practice plan will be submitted.

You may find **IiV self-assessment EXAMPLE for organisations** gives you an idea of the level of detail required.

3. Step three: improving practice

3.1 Completing your improving practice plan

Your improving practice plan will set out the activities that you need to undertake to meet the standard as agreed with your assessor during the self-assessment feedback. You should refer to the written feedback provided to you.

Involving a range of people in the improving practice plan, for example those you involved in the self-assessment, as before may help to make it more relevant and increase whole organisation motivation and buy in.

There is a pro forma for an improving practice plan that you can use **IiV improving practice plan TEMPLATE**, but you may agree with your assessor to use your own template if this is more convenient for you. The following are the sorts of things to consider.

Practice number	Actions	Who?	By when?	Resources required

The type of actions identified may include:

- Writing new policies and procedures
- Reviewing policies and procedures
- Implementing new systems
- Bringing together processes to create consistency across the organisation
- Working with volunteers to ensure systems and processes meet their needs
- Working with the people you serve to ensure volunteer roles meet their needs
- Working with board members or staff to ensure that they are implementing volunteering processes
- Consulting and informing people within the organisation.

For each action identified, consider who will be responsible for leading on that action, by when they will have completed the action, and whether there are any specific resources needed (for example additional staff time, access to colleagues, or equipment).

Record the actions in the improving practice plan template referenced by quality area and practice number.

When you are setting target dates, bear in mind the date of your **assessment visit**, the assessor will want to see that you have made significant progress toward establishing a new or improved practice although you may not have completed it, for example you may have started targeted

recruitment of volunteers to increase inclusivity, equity and diversity, but not yet have volunteers in place. Your assessor will be able to discuss with you what is expected.

If you require additional support, information and training, this is available via the relevant **country manager**.

3.2 Submitting the improving practice plan

Email the completed improving practice plan to your assessor who will check to ensure that you have addressed all of the areas for development identified in your self-assessment.

3.3 Assessor review of your improving practice plan

The assessor will review your improving practice plan and provide feedback by telephone or online. They will confirm that they are happy with the identified activities to address the gaps and/or discuss where activities may need to be added or changed.

With clarity about what time is required for development, your assessor will also talk to you about setting a date(s) for the **assessment**.

4. Step four: assessment

Once you have completed the activities identified in your improving practice plan you are ready to be assessed. You may already have a date agreed with your assessor, otherwise get in touch and let them know that you are ready.

4.1 Assessment days

The number of days for assessment will have been agreed at registration, based on the number of volunteers, roles and sites in your organisation. Your assessor will check with you that you still have a similar number of volunteers and roles and talk to you about other stakeholders in your organisation. This will determine how many people they need to talk to in order to meet nationally agreed sampling guidelines when interviewing. The day or days may consist of:

- Face-to-face interviews at one or more of your sites
- Telephone or online interviews
- An online survey for organisations with large numbers of volunteers.

Large organisations and assessment teams

Most organisations will have one assessor undertaking visits, but if you are a large and geographically dispersed organisation there may be various assessors involved at different locations. You will always have one key assessor to liaise with who will be responsible for organising the other assessors.

Large organisations and questionnaires

In some instances where there are large numbers of volunteers who are geographically dispersed, the assessor may consider using a questionnaire. The questionnaire will only be used to supplement face to face and telephone interviews with volunteers in organisations, a 'double check' that practice is consistent either across sites that the assessor is unable to sample or when volunteer numbers are so large that the assessor is only able to interview a small number. It is the organisation's responsibility to circulate questionnaires, though the assessor will provide a letter with the link.

Many organisations routinely undertake surveys of their volunteers, perhaps annually or every other year. You may therefore be reluctant to 'over burden' your volunteers with the IiV assessment questionnaire. In this case talk to your assessor as they may be able to provide questions to be embedded in your own survey. The assessment would need to be timed to correspond with the organisation's survey schedule. It is suggested that this is just prior to the assessment window so that results are available to the assessor at the time of the assessment to inform interviews.

4.2 Stakeholder sampling for interviews

The evidence provided through interviews is a central part of the assessment process, so it is important that all key stakeholder groups are represented in the interview sample. The majority of the interviews are usually with volunteers, but we also interview board members, and staff (if any) in different roles.

You will be asked to submit lists of people to be interviewed in the different stakeholder groups you have identified. You can use **IiV assessment sampling stakeholder TEMPLATE** or you can provide these in your own format if this is easier. For example downloading from your database, ensuring that they contain the information requested on the templates: volunteer ID number (instead of names for GDPR purposes), role, length of time in the organisation and role (if different), and site or location where the person is based.

Identifying stakeholder groups

The table below contains some examples of the different stakeholder groups that you might identify and the information that is needed. Discuss with your assessor how you might structure your stakeholder groups, you may not have people in all of the categories.

These lists should generally be provided at least 20 working days before the assessment visit.

Stakeholder group	Information required
Volunteers from all roles	▪ Role(s) – you may decide to group volunteers with similar roles into one category, e.g. different types of admin volunteers, befrienders, drivers, advice volunteers etc. ▪ Site or project (if relevant, discuss with your assessor) ▪ Length of time in the organisation
Board members	▪ Role on board if relevant (e.g. chair, treasurer) ▪ Length of time on board
Chief executive or most senior manager	▪ Length of time in the organisation ▪ Length of time in the role
Volunteer co-ordinators (and their managers)	▪ Length of time in the organisation ▪ Length of time in the role ▪ The site or project they work in
Paid staff managing volunteers	
Paid staff working alongside volunteers	

Paid staff not working directly with volunteers	

Larger organisations

For larger organisations where full lists will be time consuming to produce, speak to your assessor for alternative methods of undertaking sampling, for example the assessor might identify sites for assessment first before sampling volunteers and staff.

Data protection and GDPR

You may assign numbers, codes, or just identify role titles to preserve anonymity at the stage of identifying stakeholders before the sampling process. Once interviewees have been selected, receiving the names of interviewees is an integral part of delivering the contract with those organisations" so there is a "lawful basis" for assessors to receive this information. All lists are destroyed once the assessment process is complete.

Identifying a sample

Once you have provided the full lists, the assessor will select people that they would like to interview. To recognise the need for flexibility, where possible the assessor will provide a choice of interviewees in different categories, e.g. one of three identified people.

The assessor will provide you with a list of the people they want to speak to at assessment at least ten days before the visit.

Inclusion, equity and diversity

To ensure that the sample is representative of your organisation and community, your assessor will ask you to check that there is a diverse range of people selected from the sample. This may include the protected characteristics in equality legislation, for example in England, Scotland and Wales the Equality Act 2010, identifies as age, disability, gender reassignment, race, religion or belief, sex, and sexual orientation[1] as well as factors appropriate to the organisation and roles, for example geographical, volunteers who have been service users, education or professional background etc.

You should also check that the sample is representative of volunteers by length of service and who they are managed by; if several people are responsible for supporting the volunteers in the organisation, you need to ensure that you sample from across their teams.

The organisation can make suggestions to the assessor to change interviewees to improve the diversity of the sample.

[1] Although the Equality Act does not apply to Northern Ireland, the list can be used to check inclusion.

4.3 Scheduling assessment days

Assessments will usually be undertaken remotely via videoconferencing and telephone unless an onsite visit is required or preferred. Once the list of people for interviews has been provided by the assessor, the organisation is responsible for scheduling the interviews to fit in with the timetable provided by the assessor. The format will be negotiated with your assessor, and may include:

- Individual interviews
- Pairs or small groups of volunteers or other stakeholders.
- Telephone or online interviews.

The integrity of the assessment is dependent on a sufficient number of volunteers being interviewed so as to have confidence that views expressed are representative. There are set guidelines indicating what percentage of active volunteers need to be interviewed dependant on the overall number of volunteers engaged. **It is the organisation's responsibility to ensure that enough volunteers are available for interviews.** If the requested number do not prove to be available on the day the assessment will be deemed incomplete and additional cost will be incurred in arranging extra assessment time.

There is an **IiV letter to invite interviewees to assessment** to send to stakeholders.

It is strongly recommended that you have back-ups available for interview in case any planned interviewees are not available on the day. Where videoconferencing is being used, ensure that interviewees are confident with the technology, perhaps undertaking a practice where necessary.

Someone in the organisation will need to be available on the day, to physically welcome volunteers, or via telephone in the case of virtual assessments to be able to troubleshoot any problems.

Ensuring stakeholders are available for interview

Organisations tell us that coordinating interviews can be challenging. Particularly for larger organisations with a lot of volunteers and/or those who are geographically dispersed there may be a lot of communication between yourself and your assessor at this stage. Talk to your assessor about giving yourself enough time to go through this process and how to make it easier for you.

If you are having any difficulties in organising the interviews, please speak to your assessor as soon as possible. Always have 'reserve' interviewees who can be called upon should there be unforeseen circumstances on the day, for example they may be available by telephone.

4.4 Written evidence

Your assessor will provide a list before the assessment of any written evidence that they would like to see. They may also ask to see other documentary evidence during the assessment, perhaps in response to something they have heard. Note however it is not a paper-based assessment, the most important evidence will come from interviewees, especially the volunteers' voices. If the assessor is visiting, they may look at hard copies, otherwise organisations can email documents or for large documents agree with your assessor the use of technology such as **Google docs**, **Dropbox** or **WeTransfer**.

4.5 Outcome of the assessment

The assessor(s) will meet with your organisation and speak to volunteers, staff and board members as well as review written documentation to assess whether you meet the standard. They can make one of the following three judgements:

- You have **MET** the standard

Your organisation has met the standard if the assessment provides clear evidence that your organisation is meeting all the quality areas and therefore can be awarded IiV.

- You have **MET THE STANDARD WITH CONDITIONS**.

Your organisation has met the standard subject to certain conditions being fulfilled in an agreed timeframe. Conditions are set where the practice is partly carried out, needs adapting or improving, or is not implemented consistently. There should be no more than three conditions, and these must be completed within the timeframe set by the assessor, usually three months.

If further assessment shows that these conditions have been met, your organisation will be awarded Investing in Volunteers, subject to the quality assurance process. If further assessment shows that these conditions have not been met, then the decision will be 'Not Met' (subject to the quality assurance process). See information below on not met.

- You have **NOT MET** the standard

If your organisation has not met one or more of the quality areas, and there are too many gaps to address for conditions to be set, the final decision will be not met.

Following a not met decision, you may decide you still want to pursue the IiV Award building on development to date. You can re-register for the award after discussions with your **country manager**.

4.6 Feedback

The assessor may be able to provide you with verbal feedback at the end of the assessment (the end of the last day for multi-day assessments). This includes whether they are recommending that you have met the standard, met with conditions, or not met the standard as well as a brief summary of findings. However, they may need to further review the evidence, in which case verbal feedback will be given by telephone or online within three days of the visit.

A full written report will be provided against the six quality areas of the standard within 15 days after a **quality assurance process**.

4.7 The quality assurance process

Before the report is sent to you it will be reviewed by a lead assessor to ensure that the report meets IiV requirements and that they agree with the assessor's recommendation.

The report will then be sent to you to check for any factual inaccuracies. You cannot change what people have said in interviews, but you can correct any organisational information, for example incorrect job or role titles, or information about projects.

The lead assessor will then sign off your report and submit this to the Country Manager who will formally inform you of your achievement (usually on first of the subsequent month).

Organisations can only be given confirmation that they have achieved the award and are able to use the logo **after** the quality assurance process. Confirmation will be sent to each organisation electronically.

4.8 Complaints and appeals procedure

Organisations have the right to make a complaint and/or appeal using the **IiV complaints procedure** or **IiV appeals policy**, if they feel that they have received an unfair decision. In the first instance this should be discussed informally with the assessor and then referred on to the lead assessor and country manager. If it is not resolved, then a further action may be made to the UK Quality Assurance Panel.

5. Step five: celebrating and achieving the award

5.1 Congratulations on achieving the IiV Award!

You are now officially an Investing in Volunteers achiever. You will be contacted by your country manager shortly after the quality assurance process is completed with confirmation of the award. Your organisation will be sent the IiV certificate and plaque and you will be able to use the IiV logo. Further information will be provided about how you can use this.

5.2 Celebration of the IiV Award

We encourage you to get as much publicity as possible – let everyone know about your success. Some ways that organisations have done this:

- Celebration event including volunteers, staff, board members, service users and other beneficiaries, partners and so on.
- Individual volunteer awards.
- Media and social media campaigns and publicity
- Creating a video or writing a case study for the IiV website Case Studies - Investing in Volunteers, and our LinkedIn account @investing-in-volunteers-iiv Note we can support you to tell your story
- Thank you event(s) and activities for volunteers: for example, afternoon tea, coffee and cake, meals, parties, and cards.

5.3 The impact of IiV and feedback to us

You will be asked to provide feedback about the process and the impact on your organisation, please take time to do this as it helps us improve our service. If you are willing for a case study to be drawn up based on your experience, please let us know in the evaluation form.

5.4 How to use the report

The report can be used to highlight good practice across your organisation, with the people you serve (if applicable) and show appreciation to particular people where appropriate, and to share with volunteers to thank them for their time. You may want to use parts of it in external promotion or funding applications to highlight good practice, demonstrate what volunteers achieve including their impact in line with your organisations aims and to the people you serve (if applicable), and identify gaps for further development.

If you have been given suggestions for development and continuous improvement, you should consider how you might like to undertake these developments, for example drawing up a plan for what needs to be done in conjunction with volunteers, staff and board members.

6. Step six: continual improvement and renewing your award

6.1 Continual improvement

As your organisation has invested significant time and resources into achieving the IiV standard, you will want to see the benefits for as long as possible. Your organisation can now review and plan how it is going to maintain the standard achieved. This will make your renewal journey and re-assessment in three years' time much easier.

Your organisation is now an example of confident volunteer management and positive volunteer experiences. The following suggestions will help you maintain good practice.

- Use the **IiV improving practice plan TEMPLATE** or a similar format to identify the developments that you are intending to make over the coming year.
- Fully incorporate procedures and practices, they should become part of the organisation's culture.
- Make sure policies are regular reviewed and are living documents – practically influencing how you interact with volunteers, not pushed to the back of a shelf.
- Regularly communicate best practice throughout your organisation. Effective induction and training with staff, volunteers and board members will ensure that policies and practice are communicated and acted on.
- Make sure volunteering remains on the agenda with your management/board.
- Actively listen to your volunteers through effective supervision, focus groups and representation on relevant committees.
- Promote and acknowledge the contribution, skills and experience given by your volunteers.
- Keep up to date with changes in good practice and legislation by regularly visiting the IiV website or your relevant country agency website.

6.2 Keeping connected

As an achiever try to keep connected with your local infrastructure organisation to receive communication about IiV and volunteering news, keeping you up to date with events, reports and developments that can support best practice and continual development. IiV achievers can also contact **country leads** to find out if other resources are available.

6.3 Annual check-ins

Your assessor will contact you annually to see how you are getting on: any changes that have affected volunteering, what impact IiV has had on your organisation, how you are getting on

with any development points, any new developments, and whether there is anything that we can do to support you.

You are welcome to contact your assessor or the IiV team between these check-ins.

6.4 Benefits of renewing your award

Your organisation was awarded the Investing in Volunteers award for three years. It is hoped that you will renew this award to maintain the standard and be eligible to publicly demonstrate your commitment to best practice in volunteering through displaying the IiV logo. Renewing IiV after three years has various benefits:

- It reaffirms your commitment to volunteering in your organisation.
- It provides a prompt to review policies, practice, experiences, and systems to ensure that they are still fit for purpose.
- It provides an independent check of progress and supports continual development by looking at the changes since your previous assessment.
- It enables you to find out how volunteers feel that things are going and/or have changed.
- It provides you with a strategy for further ideas and developments that you can make over the next three years.

6.5 Process for renewing your award

Renewing the IiV award will involve an assessment process similar to the process your organisation went through when you first registered for IiV. How long it takes will depend on how well you have maintained the practice and whether or not there have been substantial changes in staff, volunteers or management within your organisation over the three years.

Your assessor will discuss renewal with you in your second annual check-in, and you will be reminded by your country manager during the final year of your award about the expiry date of your current award. You will be encouraged to register for a quote so as you can budget for your renewal.

You then start the six-step process with your assessor, recognising the progress you made at your last assessment, reviewing development, and setting new objectives for this award.

Recognising renewals

You are encouraged to use the following wording to recognise the longevity of your award status:

> *"[Organisation name] is proud to be an Investing in Volunteers (IiV) achiever, having achieved the award in [year] for the [nth] time. We value our volunteers and their impact and we remain committed to meaningful, effective volunteering within our organisation"*

Contact

Investing in Volunteers is a UK standard, owned by the four countries' volunteering infrastructure organisations, NCVO, Volunteer Now, Volunteer Scotland and Wales Council for Voluntary Action. IiV is managed as follows:

England Managed by Volunteer Now

Scotland Managed by Volunteer Scotland

Wales Managed by Volunteer Now

Northern Ireland and Republic of Ireland Managed by Volunteer Now

https://investinginvolunteers.co.uk/

Going through the Investing in Volunteers assessment has been a valuable and insightful experience for us. It reinforced the many strengths of our volunteer programme; feedback from colleagues and volunteers highlighted how our training, communication, and structures are working well which was great to hear.

At the same time, the process helped us identify areas for improvement….. in particular communication and more recognition. Having an external assessor's perspective was incredibly helpful in highlighting these areas objectively and providing constructive feedback on how we could improve. Taking this on board, we've developed a communication plan, improved engagement opportunities, and introduced structured recognition activities, including an in-person celebration event for Volunteers' Week. We've also taken steps to strengthen volunteer involvement in decision-making, with initiatives like the Volunteer Panel and improved training and resources.

It's encouraging to see positive feedback from volunteers on these changes—many have told us they now feel more involved and optimistic about the future.
Overall, this has been a great opportunity to reflect, learn, and grow. The external assessment challenged us to look at our programme with fresh eyes, and we're committed to continuously improving our volunteer experience to ensure every volunteer feels valued and supported in their role (Prostate Cancer UK)