WEST GLAMORGAN REGIONAL PARTNERSHIP

R E G I O N A L

VOLUNTEERING

S T R A T E G Y

INTRODUCTION

In January 2021, thanks to investment from Welsh Government, West Glamorgan Regional Partnership Board led a partnership to explore regional approaches to volunteering. The partnership brought together:

- Neath Port Talbot Council
- Neath Port Talbot CVS (NPTCVS)
- Swansea Bay University Health Board
- Swansea Council
- Swansea CVS (SCVS)
- West Glamorgan Regional Partnership

All partners are different in the way they work with and involve volunteers. Some partners have a well-established approach to working with volunteers but this varies considerably across the region. However, all partners are keen to continue working together around volunteering.

This document reflects both the background work that took place to develop the strategy alongside the strategy and action plan itself. The information shared in this document reflects the volunteering assessment and discussion workshops that took place with all partners, including volunteers, and extensive meetings throughout the West Glamorgan Volunteering Project one year secondment.

The principles are built on best practice such as Investing in Volunteers Quality Standard, the Code of Practice for organisations involving volunteers, and the Charter for Volunteering and Workplace Relationships. The workshops that underpin all elements of the work were developed from the Helpforce et al [Framework for Volunteering in Health and Social Care](#) with additional research based on best practice and led to partner action plans and exploration of common themes. You can read how we 'Operationalised the Helpforce et al Framework for Involving Volunteers in Health and Social Care' in **Appendix 1**.

STRATEGIC CONTEXT

A Healthier Wales
A Healthier Wales (AHW) is Welsh Government's long-term plan for Health and Social Care. It sets out a future vision of a whole system approach to health and social care, which is focused on health and well-being and on preventing illness, with access to a wide range of seamless community-based services. It recognises RPBs as key drivers of integration, able to pool resources and expertise to deliver seamless, preventive models of care at a local, regional and national level.

West Glamorgan Partnership
One of the key strategic programmes within the West Glamorgan Partnership is the Prevention and Community Coordination programme, which sits under the stabilisation and reconstruction priority.

Regional Integration Fund
The Prevention and Community Coordination programme aligns with the Regional Integration Fund Model of Care: Community based care – prevention and community coordination. This model of care should enable people to remain independent for as long as possible by maintaining and growing people's social networks and through growing the sometimes-untapped sources of support in the community around them.

Prevention and Community Coordination Programme
Our ambition is to shift services out of hospital to communities, and we want more services which stop people getting ill by detecting things earlier or preventing them altogether. This will include helping people manage their own health and manage long term illnesses. We also want to make it easier for people to remain active and independent in their homes and communities. Our Vision is to:

- Enable individuals to live longer, happier lives and take more control of their own health and wellbeing, including supporting others in their local areas by developing partnerships with a wide range of organisations and people from the public, private, third sector and communities to deliver support to people in local areas.
- Provide health and care for people that need it from people that act as one team and work for organisations that behave as one system.

Wellbeing of Future Generations Act
The Wellbeing of Future Generations Act 2015 provides public bodies in Wales with the ambition, permission and legal obligation to improve the well-being of our population as well as prevent persistent problems such as poverty, health inequalities and climate change. It is built around seven well-being goals and five principles that that are championed by the Future Generations Commissioner for Wales. The focus on long-lasting, positive change for our future generations makes it a key driver for a preventative and community co-ordination, given the preventative element is a crucial element to the changes and decisions we make today that will impact upon us in the future.

Development of Volunteering Strategy:
A key component of delivering our ambition and vision for the programme is to develop our volunteering strategy in order that we can:

- ensure the building blocks are in place that allow for improvements to be made regionally, enabling more people to access quality volunteering opportunities
- allow volunteers to have the best support possible which will enable them to make a greater impact on regional services
- move toward consistent data collection which could lead to volunteers being able to move between organisations

BACKGROUND TO THE STRATEGY

Covid-19 created an unprecedented understanding of the role and value of volunteers. When the first national lockdown happened in March 2020 they played a hugely valuable role ensuring local people had access to food and medicines. As the pandemic progressed volunteers played an important role in supporting the testing and vaccinations centres that were established.

This increase in volunteering led to a wide range of people volunteering for the first time and an increased recognition from organisations about the value of working with volunteers.

Throughout 2021 and into 2022, volunteering practices across the region have continued to develop. In the winter of 2021/22, volunteers were shared between organisations in the partnership for the first time, with lessons being learned including about the importance of consistent data collection and appropriate training being delivered to volunteers. The partnership has also looked at ways they can utilise volunteers to enhance their user experience, for example in care home settings. All partners in the partnership are also increasingly recognising and valuing what co-production brings to their service delivery.

However, all partners in the partnership have different requirements for volunteers, different ways of working with volunteers and different ways they see volunteering developing in their organisation. All partners are at different stages with their volunteering processes and strategic approaches.

As such, the aim of this strategy is to move towards a consistent approach to volunteering across the region and create a set of shared principles.

For the partners involved in this strategy the agreed definition of volunteering is that developed by the Welsh Government:

"Volunteering is activity which: is undertaken freely, by choice; is undertaken to be of public/ community benefit; is not undertaken for financial gain"

The work underpinning the strategy identified a need for a joint understanding about what volunteering is and the different types of support volunteers may need.

Involving volunteers is not free, time and resources need to be committed in order for roles to remain safe, well managed and appropriate. Investing in training for your

volunteers and paying out of pocket expenses are a few of things you should budget for when involving volunteers.

Different types of volunteering come with different levels of risk and involving volunteers will require safeguarding, risk assessments, insurance and the development of appropriate roles.

Understanding the support needs of different types of volunteering is a key principle that runs through the strategy. A diagram illustrating how different types of volunteering require different levels of support can be found in Appendix 2.

REGIONAL VOLUNTEERING STRATEGY

The purpose of the regional volunteering strategy is to:

- ensure the building blocks are in place that allow for improvements to be made regionally, enabling more people to access quality volunteering opportunities

- allow volunteers to have the best support possible which will enable them to make a greater impact on regional services

- move toward consistent data collection which could lead to volunteers being able to move between organisations

- This will be achieved through implementing the principles that have been developed for this strategy.

PRINCIPLES

Based on the workshops all partners have a commitment to:

1. adopt the Welsh Government Volunteering Policy (2015 – under current review) definition of volunteering

2. provide support to volunteers and recognise the contribution volunteers make to their service delivery. This includes proactively promoting volunteering

3. provide clarity on the types of volunteering and the levels of support different volunteer roles require

4. be clear on the different assessment for suitability, recruitment and safeguarding practices of different roles and the support the volunteer will receive. This includes appropriate induction and supervision arrangements. Develop best practice policies and procedures to ensure volunteers are kept safe and supported in their roles

5. have a clear understanding of the difference between volunteers and staff and there are processes in place to manage these boundaries as outlined in the Wales TUC and WCVA Charter for Strengthening Relations Between Paid Staff and Volunteers

6. actively seek feedback from volunteers and respond to the feedback they receive

7. understand the value of informal and formal volunteering roles and how they can be used to attract different types of volunteers and increase the diversity of those volunteering

8. seek to understand the motivations from a volunteer and help them achieve their goals in relation to volunteering

9. proactively promote diversity in their volunteer base and publicise their volunteering opportunities widely using different methods of communication including the Volunteering Wales website

10. stay up to date with best practice in volunteering and take guidance from local County Voluntary Councils (CVCs)

11. understand the importance of collecting quality data about who is volunteering and the difference volunteering makes to them and service delivery

12. provide opportunities for volunteer voices to be heard

13. ensure those who directly support volunteers undertake volunteer management training and understand volunteering good practice

14. hold strategic discussions about the different ways to involve volunteers that will help deliver and achieve their vision

To further enhance volunteering across the region partners will continue to work together to:

- Find ways to jointly demonstrate the impact of volunteers across the region on both volunteers themselves and the organisations they volunteer in. This includes beginning to collect similar or comparable data on who the volunteers are, what roles they undertake and how long they have been involved in the organisation. Good data collection enables partners to accurately provide references for their volunteers which can assist future workforce development

- Identify mechanisms for sharing best practice around safeguarding and managing risk

- Diversify their volunteer base and address barriers people face around volunteering

ACTION PLAN

The aim of the Regional Volunteering Strategy is to move towards a consistent approach to improve the quality of volunteering recognising that each partner is different, has different demands and is working in a different local context. This strategy will create a mechanism for showcasing and keeping volunteering visible at the regional level.

This strategy recommends that partners:

- Continue to work across the region to ensure a good understanding of different volunteer roles and the support they need. This will be particularly important as more partners embed co-production into their ways of working.

- Showcase the different roles volunteers are undertaking with the partners and how they enhance service delivery, particularly within health and social care.

- Create three regional spaces where conversations about volunteering can take place:

  1. **Volunteer voices -** Creating regular opportunities for volunteers within the partner organisations to come together regionally. This will help to showcase what best practice looks like for volunteers and help volunteers understand what a good volunteering experience should be like. It will also help create an informal network of volunteers across the region. The design and content of these sessions would be co-produced with volunteers

  2. **Volunteer managers** - Creating a network of volunteer managers within partner organisations to share best practice around volunteering. This group would have a particular focus on developing ways to move toward consistent data, promoting diversity among the volunteer base, managing risk in volunteering, sharing best practice for developing ad hoc opportunities for people to volunteer and amplifying examples of where volunteers have been shared between organisations

  3. **The West Glamorgan Regional Volunteering Strategy Group -** Bringing together key partners to keep a strategic focus on volunteering

- Establish a Regional Volunteering Strategy Officer post to continue the momentum of the work already started and to ensure this strategy is implemented. **See Appendix 3**.

Appendix 1 – Operationalising the Helpforce et al Framework for Involving Volunteers in Health and Social Care

Operationalising the Framework for Health and Social Care - a workshop-based approach

2022

Context

In early 2021 the Welsh Government released the Coronavirus Recovery Grant for Volunteering. This fund aimed to capitalise on the swell of volunteering that had taken place across Wales during the Covid-19 pandemic. The West Glamorgan Regional Partnership Board (RPB) hosted a partnership between:

- Swansea CVS
- Neath Port Talbot CVS
- Swansea Council
- Neath Port Talbot Council
- Swansea Bay University Health Board
- West Glamorgan Regional Partnership Board

Phase 1 of the work took place between January 2021 and March 2021. This work developed a wide range of information sheets and toolkits. It also undertook some foundational work around more collaborative, cross organisational approaches to utilising volunteers.

This phase of work also identified a strong desire for more collaboration to take place and an aspiration for a regional strategy to support volunteering was developed.

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To support this,

two part time posts were created and hosted by the RPB between September 2021 and September 2022. These posts were seconded into with experts in volunteering from Neath Port Talbot CVS and Swansea CVS. Alongside this, Urban Foundry provided some resource to support the implementation of a work plan.

The work plan included developing a regional strategy for volunteering. However, Covid-19 was continuing to place a heavy burden on health and social care. The focus of the strategic partners that needed to be involved in the strategy development were responding to the immediate operational pressures that the system was facing.

The constraints presented by Covid-19, alongside the time pressures facing partners, drove us to develop a more innovative approach to developing a regional strategy.

We further developed the Framework for Volunteering in Health and Social Care, a resource created by Helpforce et al and also funded by the Coronavirus Recovery Grant for Volunteering and used it as a basis to start the development of our regional volunteering strategy.

We identified the Framework as a resource to draw upon as it is the result of an iterative process involving focus groups with 169 people from 89 organisations, survey responses from 107 individuals and one-to-one conversations with key influencers, all of which have shaped the content and the format of the resource.

This Framework offers a series of common questions that should be considered by all organisations involved in volunteering. Using this Framework as a basis, the matrix was further developed against best practice such as the Investing in Volunteers quality standard, the Code of practice for organisations involving volunteers and the Charter for volunteering and workplace relationships.

Through our work we operationalised the framework, using it to design a workshop that could then provide the building blocks for a regional strategy.

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Regional approach to volunteering

The approach we have developed would work equally well in any large organisation, strategic or public sector body where volunteering would take place.

At its heart, strategies contain three key components:

- **Now** - where are you as an organisation now, what are your strengths and weaknesses
- **Where** - where do you want to get to as an organisation
- **How** - how are you going to get to where you want to go

We found a workshop approach that explores these three elements is a hugely time effective way of helping to develop a strategy. We used the Framework for Volunteering in Health and Social Care as our starting point and combined it with the expertise we had at our disposal to objectively identify what 'good' looks like when it comes to volunteering in larger organisations including public sector bodies.

This was then built on with reference to a wide range of other good practice guides including: The Investing in Volunteers quality standard, the Code of practice for organisations involving volunteers and the Charter for volunteering and workplace relationships.

We held a workshop with each of the local partners (West Glamorgan Regional Partnership Board, Swansea Bay University Health Board, Swansea CVS, Neath Port Talbot CVS, Swansea Council and Neath Port Talbot Council). These workshops allowed these organisations to consider where they were now, where they wanted to get to and how they were going to do it.

Following these local workshops, the insight was used to draft a set of regional principles and how these could be used to form the building blocks for joint working.

Each individual workshop also resulted in a mini-strategy and action plan for how they could develop volunteering further in their organisation.

A detailed guide on the workshop is provided, describing our methodology and the final framework.

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Detailed workshop plan
Background considerations

We ran the workshops online so it was not necessary for people to travel or be face-to-face during Covid-19 pandemic times. We recognise that for some participants this is not an easy environment to engage with. However, the on-line environment made organising the workshops easier, kept costs low and allowed more people to engage as it was not necessary for people to travel.

To ensure people felt as able as possible to participate in the process we set the following key ground rules for the sessions:

- All voices are equal and all experiences are equally valued

- All people in the workshop are asked to contribute and to have their voices heard

We also ensured there were two facilitators in each session. This meant one person (a skilled workshop facilitator) could lead the delivery, ensuring everyone was invited to add their thoughts, whilst the other could deal with any technical issues or anything practical, who was skilled in best practice volunteer management and could answer any queries raised in the session.

Where there were volunteers in the session, we ensured they felt comfortable to contribute and often asked them to share their views first before opening it up to the wider group.

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Practical delivery

We also undertook a pilot session with the West Glamorgan Regional Partnership Boards' Coproduction Group volunteers. This was a hugely useful process as it led us to change and simplify the whole workshop. This ensured it was more accessible and led to a product people could engage with, including volunteers.

This led us to applying the following principles to deliver:

- Slowing down - making the delivery accessible to all

- Shorten and make the introduction more concise

- Making sure all feedback is captured during the note taking

- Hard copies of information in advance with a few days to process

- Providing an opportunity to feed into the thinking after the workshop

- Working at a steady pace and offering people the opportunity for breaks

- Providing a reminder the day before.

How much time and where

We allowed 3 hours for each workshop. In most cases we were finished in about 2.5 hours but the extra half an hour ensured people did not feel rushed.

We ran all our workshops on Zoom but the workshop would work equally well face-to-face.

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Background and preparation

In advance of the workshop we developed an overview of the purpose and objective of the workshop and agreed who to invite. This is shown in the table below.

Overall Purpose	To support organisations to reflect on their current approach to volunteering, to identify the position they want to get to and to identify the key actions for how they are going to get there.
Objectives	Through a workshop format we will: • Understand the current position of volunteering in an organisation using the Framework for Volunteering in Health and Social Care as the basis • Understand what 'good' in volunteering looks like • Identify key tangible actions that will allow volunteering to develop in an organisation
Constraints	We recognise the workshops will combine individuals with a strategic overview of volunteering and individuals with a more detailed operational knowledge. The workshop does not require all participants to be able to answer every question. The discussion may identify areas where there are knowledge gaps. Although the session uses scoring, this is simply a tool to aid the action planning. There is no benchmarking and gaps in knowledge will make no difference to our ability to think and reflect on volunteering. In other words, as long as you have an interest in volunteering you are welcome to attend.
Suggested Invites	We recommended the following people attend the workshop: • Individuals with responsibility for managing volunteers • Individuals interested in utilising volunteers in service delivery • Individuals with responsibility for commissioning activities that involve volunteers • Individuals with an interest in developing strategic approaches to volunteering

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We also sent out an email prior to the session so people understood what they were attending. This is shown below. The email was hugely helpful for reminding people about the workshop and helping to set the scene and provided links to development resources to aid ongoing improvement.

✉ Template Email: To send to participants prior to workshop

New message   ● ● ●

To:

Subject:

Many thanks for agreeing to attend the West Glamorgan Regional Volunteer Strategy workshop on **[date]** You should have received a meeting request with information to join the Zoom session. You are welcome to join via the link for a video call or dial in by telephone.

What are these workshops about?

The West Glamorgan Regional Partnership Board are hoping to develop a volunteer strategy for the West Glamorgan region. The partnership consists of six different organisations: Neath Port Talbot CVS, Swansea CVS, Neath Port Talbot Council, Swansea Council, Swansea Bay University Health Board and the West Glamorgan Regional Partnership Board.

A workshop will be held for each partner organisation where they will be undertaking a self-assessment on how they involve volunteers currently (you will be attending as **[org name]**. Using the six questions outlined in the **Helpforce's Framework for Involving Volunteers in Health and Social Care**, there will be a set of statements to reflect on which are based on national volunteering good practice. At the end of the workshop each partner should have an action plan stating the areas in which they could improve their volunteering good practice. These action plans will feed into the development of the regional volunteer strategy.

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New message   • • •

What is volunteering good practice?

Third Sector Support Wales has developed a set of resources to help volunteer-involving organisations to provide a good experience for volunteers. This includes ensuring volunteering is properly resourced, that they have appropriate policies and procedures in place, that they create an inclusive environment for individuals wanting to get involved, including developing appropriate roles and training. The resources we have used to develop these workshops include the **Volunteering code of practice**, **Investing in Volunteers** and the **Charter for volunteering and workplace relationships**.

Your role in the workshop?

We want you to tell us how you feel we are doing as an organisation in terms of involving volunteers. Do we involve volunteers in our planning/processes, what support do we have in place, are our roles flexible etc. Then we want you to tell us if there are areas where we need to improve. There is no right or wrong answer, all your comments will be welcomed. Whether you are a volunteer, trustee, staff member, your views are important to us.

Who will be in the workshop?

We are expecting:

[names of attendees/roles]

If you would like more information **[facilitator's name]** will be facilitating the workshop on the day and I will be on hand for support. If you have any problems joining the session then please let me know. My contact number is **[number]**.

Send

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The workshop content

We developed a PowerPoint presentation to support the delivery but we found this was not needed as the session ran as a conversation. We followed the following format.

Welcome and Introductions

We found it was valuable to set the scene and reiterate the purpose and focus of the workshop. We highlighted the following points:

- The workshop is supporting the development of a regional volunteer strategy

- 6 local partners are involved and all are at different points for how they use volunteers

- It is based on the Framework for Volunteering in Health and Social Care but through the expertise of Swansea CVS and Neath Port Talbot CVS and their links to best practice volunteer management including the Code of practice for organisations involving volunteers, Investing in Volunteers and the Charter for volunteering and workplace relationships.

- The aim is to highlight what 'good' looks like in volunteering

- The tool is not about benchmarking – it is simply a tool to promote discussion

- It follows the principles of strategy development – where are you now, where do you want to get to, how are you going to do it

- It doesn't matter if people don't know the answer – the value is in asking the question

- All voices are equal in this environment

- The end point is some regional principles.

We also shared the overall approach to the workshop:

- Task 1 - Self assessing where you are with volunteering

- Task 2 - Putting an objective lens on it

- Task 3 - Action planning.

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Task 1 - Self assessing

We asked people to individually give their organisation a score out of 5 for how much they agreed with a series of statements based on the framework. We used the following scale:

- We are excellent at this

- We are good at this

- We are okay at this

- We could definitely improve this

- We haven't considered this / we don't know

We found it important at this part of the session to emphasise the scoring is not about judgement. We found it important to emphasise that it doesn't really matter if you select 0 or 5, it is just a process for helping you think about the role of volunteers in your organisation.

- Our organisation has a good understanding of the varied ways we currently/could involve volunteers in service delivery

- Our organisation has a good process in place for planning how we involve volunteers and ensuring we have the resources in place to support them

- Our organisation understands the partners and connections that help support the volunteers involved in service delivery

- Our organisation has good systems in place that allow us to manage and develop our volunteers

- Our organisation has good systems in place for tracking the volunteers we have, the difference they make to our organisation and we share that widely with people.

As we were using Zoom we used a Zoom poll to help us do this. A short discussion took place on what people think are the strengths and weaknesses.

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Task 2 - Putting an objective lens on it

The majority of the session was then working our way through the framework. The initial intention had been to go through each statement and get people to give themselves a score. Our early piloting showed this approach would not work. Instead we came up with a list of questions that opened up a discussion about the different framework areas.

The facilitator could then use the framework to ask any follow up questions or probe and explore. It was clear in our workshops there were some areas of the framework where no activity was taking place. The approach of using open questions allowed us to move quickly through some areas and to spend longer on those areas where development work was happening.

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Questions Used In Workshop

	Sub-theme	Facilitator questions	What is good?
Involving Volunteers	**Clarity and Vision**	How do you plan for involving volunteers?	We know why we involve volunteers. This includes a clear understanding of where it is appropriate for volunteers to be part of service delivery. This includes elements that are ringfenced for volunteers and elements that are ringfenced for employees
			We have a mechanism for ensuring staff and volunteers are meaningfully engaged in the planning cycle
		Do you ever have discussions about how volunteers can help you achieve your vision?	We have considered how volunteering roles help us achieve our vision
		Are there opportunities to discuss why you involve volunteers?	We have identified positive reasons for using volunteers, it is not about reducing costs
	Volunteer Roles	How do you decide on volunteer roles?	We involve volunteers in different roles and different tasks. Volunteers are involved in different ways across the organisation

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Questions Used In Workshop

	Sub-theme	Facilitator questions	What is good?
Involving Volunteers	**Volunteer Roles**	What would you say are the key differences between volunteers and staff?	We are clear of the difference between work experience, educational placements, internship, user engagement and volunteering – and between worker and volunteer Volunteer roles are flexible Volunteering is strategically planned and there is a mechanism for mobilising volunteers in response to a crisis
		Do you have a process for distinguishing volunteers and staff? What happens in an emergency?	Volunteers and employees are easily identifiable and have distinct and complementary roles, even in times of emergency or disputes
	Equality and Diversity	What do you have in place to promote diversity among volunteers? What do you think are your strengths and weaknesses around this?	We design roles to attract diversity and cater for a diversity of volunteers in order to facilitate wide community engagement We promote opportunities for volunteers to use Welsh We consider how to involve volunteers from different backgrounds We make efforts to attract a diverse range of volunteers

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Questions Used In Workshop

	Sub-theme	Facilitator questions	What is good?
Planning for Volunteers	**Managing Risk**	How do you approach managing risk when using volunteers? What do you do around screening, recruitment and safeguarding?	We risk assess tasks undertaken by volunteers, this includes a specific consideration of safeguarding We arrange appropriate insurance cover We ensure our recruitment and screening processes are proportionate
	Considered	What definition of volunteering do you use?	We use a clear definition of volunteering
		Do you use both informal and formal volunteers?	We understand the difference between formal or informal volunteering which leads us to recruit and support proportionately
		Do you have a specific approach to volunteer management? Do they feed into strategic planning?	We have dedicated staff for volunteer management

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Questions Used In Workshop

	Sub-theme	Facilitator questions	What is good?
Planning for Volunteers	**Considered**	Do you have a budget for volunteering?	We have a budget for volunteering that includes training, development and reimbursement of expenses
		Do you think about the language you use around volunteering?	We are mindful of our language around volunteering as to not suggest contractual relationships with our volunteers. For example: Role description never job description
Who we work with	**Deliverers**	What support is available for staff managing volunteers?	We ensure our staff receive training in managing and supporting volunteers We ensure our staff understand our volunteer policy and procedures Our staff understand how volunteering helps us deliver services
		How do you make sure volunteers know where they fit in?	Our volunteers understand the part they play in helping deliver the service
	Stakeholders	Who do you involve in discussions about what volunteering should take place?	Volunteers, participants, staff/ trade unions have a regular opportunity to discuss volunteering including the opportunity to review policies, procedures, roles and feedback received

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Questions Used In Workshop

	Sub-theme	Facilitator questions	What is good?
Who we work with	**The Experts**	How do you stay up to date with best practice in volunteering?	Volunteer managers and planners meet regularly with local County Voluntary Councils (CVCs) / volunteering infrastructure organisations to ensure we are up to date with volunteering best practice
			We keep up to date about innovation happening in the health and social care service around volunteering
			We are part of a local volunteer forum and network with other volunteer involving organisations
			We have considered working towards Investing in Volunteers or other benchmarks and understand the key principles of the Code of practice for organisations involving volunteers
Managing and Developing	**Preparation**	What happens when a volunteer joins?	We prepare volunteers properly for their volunteering, with an induction and training to carry out their volunteering activities
			We provide volunteers with access to information including a written description of their role, organisational policies, procedures and standards
			We ensure volunteers are clear of their responsibilities in relation to Safeguarding and that they understand our 'problem solving' procedures or 'what to do if things go wrong'

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Questions Used In Workshop

	Sub-theme	Facilitator questions	What is good?
Managing and Developing	**Preparation**	What are the supervision arrangements?	We deliver appropriate training, support and supervision for volunteers and paid workers, to ensure that the scope, boundaries and expectations of roles are clear, and access to appropriate learning and development opportunities is available
	Support	How do you support and reward volunteers? What happens around expenses?	We offer full reimbursement for out of pocket expenses We have health and wellbeing support for volunteers We reward and recognise our volunteers appropriately in a way that does not lead to any financial consequence to our volunteers We collect data, recording the commitment and achievements of our volunteers such as recognising the number of volunteer hours
	Development	How do you support the development of volunteers? How do you know what they want from the opportunity and how do you support them to achieve that?	We support volunteers' development by offering references We make information about internal jobs available to them We provide training & development opportunities available to support movement to other volunteering roles We provide a range of learning options to volunteers

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Questions Used In Workshop

	Sub-theme	Facilitator questions	What is good?
Managing and Developing	**Development**		We develop volunteers' skills and confidence
			We discuss volunteers' future aspirations and where possible help them develop in that direction
	Transparency	Are there some policies that apply to staff and some to volunteers? How do you manage that?	We make it clear what policies apply to both staff and volunteers or to volunteers or to staff only
		What is the complaints procedure when working with volunteers?	Processes for handling complaints and difficulties are made clear and there is a distinct process for handling difficulties involving volunteers
Impact	**Data Collection**	What is your approach to data collection?	We capture data during recruitment, so that we can check the profile of volunteers reflects that of the local community served by the organisation.

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Questions Used In Workshop

	Sub-theme	Facilitator questions	What is good?
Impact	**Data Collection**		We plan the impact we hope to achieve by volunteering, we measure the performance against this goal, we analyse the data to understand the impact, we review & communicate the impact made by volunteering and review toward the next plan
	Feedback from Volunteers	What is your approach to data collection?	We create opportunities for volunteers to give feedback and to contribute to decision making processes within the wider organisation
			Volunteers have input into reports/publications
			We actively encourage volunteers' input / feedback e.g. surveys, representatives at meetings or decision making
	Case Studies	What is your approach to data collection?	We gather stories and information to demonstrate the impact of volunteering
			We recognise, celebrate and publicise the contribution of volunteers, both internally and externally
			We are aware of the impact of our volunteers, and of the difference they make

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Questions Used In Workshop

	Sub-theme	Facilitator questions	What is good?
Impact	**Distance Travelled**	What is your approach to data collection?	We have mechanisms in place to understand the impact of volunteering on volunteers
	Value	What is your approach to data collection?	We have mechanisms in place for demonstrating the value volunteering brings to our organisation
	Publicity	How do you publicise your work around volunteering?	We recognise, celebrate and publicise the contribution of volunteers, both internally and externally
			Our external information about volunteering, and information about how to get involved is easy to find & understand
			We publicly celebrate Volunteers' Week. We share impact of volunteering stories on social media
			We thank volunteers e.g. cards, in reports, at events, each session they attend
Communication	**Promotion**	How do you promote opportunities to volunteer?	We advertise on the volunteering opportunities on the National Volunteering Wales platform www.volunteering-wales.net.
			We ask our local volunteer centre to help us promote our volunteering opportunities

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A shared resource for developing knowledge

Questions Used In Workshop

	Sub-theme	Facilitator questions	What is good?
Communication	**Promotion**		We think about how and where we advertise opportunities to make sure we reach a diverse range of potential volunteers. We share info about how to volunteer, widely
			We talk about a variety of roles and ways to volunteer & make visible a diversity of volunteers to make efforts to attract the widest potential of volunteers

Tips: Steering the Discussion

We paced the session carefully. We ensured we had a break every 30 to 45 minutes. We also made sure everyone had the opportunity to contribute to each discussion. Where conversations were about supervision or management of volunteers, we would open the discussion by asking the volunteers to share their experiences, before moving onto what the policy is. This worked well and ensured volunteers felt able to contribute to all elements of the discussion.

Action planning

At the end of the discussion, it was often clear what 5 or 6 areas were priorities for the partner involved in the workshop. We used the remaining time in the session to consider how these actions could be practically implemented in their organisation. In most of the sessions we used break out rooms to support this. This allowed us to break off into small groups and think about how the action could be practically implemented.

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Regional priorities

We then finished the session with a final Zoom poll where we asked people to consider what they felt should be regional priorities and those they felt should not. We had a list of common discussion areas that had emerged from meetings with partners in the Regional Volunteer Project Manager secondment and asked them to consider the following areas:

- A common approach to managing risk, recruitment and safeguarding

- A common approach to promoting diversity among volunteers

- A common approach to recognising volunteers and supporting their development

- A common approach to using volunteers in emergencies

- A common approach to volunteer management (including volunteer expenses)

- A common definition of volunteering

- A consensus of why to involve volunteers

- A consistent approach to measuring the impact of volunteers and publicising the role of volunteers

- A mechanism for sharing best practice in volunteering

- A set of common volunteer roles

Wrap up

We then finished the session by providing an overview of what was discussed.

The session was then written up and provided to each of the partners. The template we used is provided in the Appendix. This can, of course, be amended in any way.

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Appendix 1 -
Write up suggested structure Developing a Regional Approach to Volunteering Introduction

On **[date]** we held a session with key staff at **[Insert name of org].** This workshop was part of a wider piece of work led by the West Glamorgan Regional Partnership to develop a volunteer strategy for the West Glamorgan Region.

In January 2021 six partners came together to deliver a project under the Coronavirus Recovery Grant for Volunteering. The project had several strands and included producing toolkits and information sheets alongside researching strategic approaches to volunteers including the use of volunteers in an emergency and a volunteer passport.

The six partners involved are: Neath Port Talbot CVS, Swansea CVS, Neath Port Talbot Council, Swansea Council, Swansea Bay University Health Board and the West Glamorgan Regional Partnership Board.

Following the first phase of work all partners identified a desire to continue working closely together around the subject of volunteering. This was further facilitated by underspend from the first phase of work allowing the RPB to host a post that would specifically look at developing a regional approach to volunteering.

Developing a regional approach to volunteering means asking three core questions:

- **Now** - where are the different partners now around their approach to using supporting volunteers, what are the similarities and differences in their current position

- **Where** – what are the different partners vision for volunteering in their organisation and what are the similarities and differences between the partners for this vision

- **How** – what are the current plans in place to developing volunteering in the organisation, what is the same or different across the region

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To support us in asking these questions we developed a workshop that supported each of the partners to undertake a self-assessment exercise. The workshop was based on the Helpforce's Framework for Involving Volunteers in Health and Social Care. We developed a set of statements based on the framework and national volunteering good practice. Through the workshop we asked a series of reflective questions that allowed us to understand the current position of each organisation and where there may be areas for development. As part of the discussion, we also identified key areas for action and considered what the organisation felt should be priorities in any regional approach to volunteering.

Using this document

This document provides a write up of the workshop session that took place in **[date]**. However, we would encourage each organisation to:

- Share the document with those that attended the workshop (and more widely where this is appropriate) and encourage people to make further comment or add to the action list

- Review the good practice that has been developed to guide the workshop conversation. Identify any areas where you can take positive action to improve and develop (this can be done with support from CVCs[1])

- Create a short implementation plan for the actions and other areas of the Framework that may be particularly relevant (this can also be done with support from CVCs)

- Review progress on volunteering annually and use the Framework to support this review

- Consider any additional considerations for a regional approach to volunteering and share these with the representatives supporting volunteering at the RPB

Both Neath Port Talbot CVS and Swansea CVS hold a huge amount of knowledge around volunteering and can support the implementation of the actions identified in the workshop and other actions associated with the Framework.

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[1] Gemma Richards and Julia Manser are available on **GemmaR@nptcvs.org.uk** or **julia_manser@scvs.org.uk**

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Task 1 - Self assessing

We undertook an initial assessment based on the questions asked in the Framework for Involving Volunteers in Health and Social Care. This was used to simply get people thinking about their organisation and volunteering. The table below shows the results from those involved in this initial discussion.

It helps illustrate the strengths of **[org name]** across key areas reflecting their position as leaders of good practice around volunteering.

	We are excellent at this	We are good at this	We are okay at this	We could definitely improve this	We haven't considered this / I don't know
Our organisation has a good understanding of the varied ways we currently/could involve volunteers in service delivery					
Our organisation has a good process in place for planning how we use volunteers and ensuring we have the resources in place to support them					
Our organisation understand the partners and connections that help support the volunteers involved in service delivery					

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	We are excellent at this	We are good at this	We are okay at this	We could definitely improve this	We haven't considered this / I don't know
Our organisation has good systems in place that allow us to manage and develop our volunteers					
Our organisation has good systems in place for tracking the volunteers we have, the difference they make to our organisation and we share that widely with people					

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We then went on to consider the Framework in more detail and some of the objective elements that reflect good practice in volunteering.

	Sub-theme	What is good?	Current Position
Involving Volunteers	**Clarity and Vision**	We know why we involve volunteers. This includes a clear understanding of where it is appropriate for volunteers to be part of service delivery. This includes elements that are ringfenced for volunteers and elements that are ringfenced for employees	
		We have a mechanism for ensuring staff and volunteers are meaningfully engaged in the planning cycle	
		We have considered how volunteering roles help us achieve our vision	
		We have identified positive reasons for using volunteers, it is not about reducing costs	
	Volunteer Roles	We involve volunteers in different roles and different tasks. Volunteers are involved in different ways across the organisation	
		We are clear of the difference between work experience, educational placements, internship, user engagement and volunteering – and between worker and volunteer	
		Volunteer roles are flexible	
		Volunteering is strategically planned and there is a mechanism for mobilising volunteers in response to a crisis	

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	Sub-theme	What is good?	Current Position
Involving Volunteers	**Volunteer Roles**	Volunteers and employees are easily identifiable and have distinct and complementary roles, even in times of emergency or disputes	
	Equality and Diversity	We design roles to attract diversity and cater for a diversity of volunteers in order to facilitate wide community engagement	
		We promote opportunities for volunteers to use Welsh	
		We consider how to involve volunteers from different backgrounds	
		We make efforts to attract a diverse range of volunteers	
Planning for Volunteers	**Managing Risk**	We risk assess tasks undertaken by volunteers, this includes a specific consideration of safeguarding	
		We arrange appropriate insurance cover	
		We ensure our recruitment and screening processes are proportionate	
	Considered	We use a clear definition of volunteering	
		We understand the difference between formal or informal volunteering which leads us to recruit and support proportionately	

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	Sub-theme	What is good?	Current Position
Planning for Volunteers	**Considered**	We have dedicated staff for volunteer management	
		We have a budget for volunteering that includes training, development and reimbursement of expenses	
		We are mindful of our language around volunteering as to not suggest contractual relationships with our volunteers For example: Role description never job description	
Who we work with	**Deliverers**	We ensure our staff receive training in management and supporting volunteers	
		We ensure our staff understand our volunteer policy and procedures	
		Our staff understand how volunteering helps us deliver services	
		Our volunteers understand the part they play in helping deliver the service	
	Stakeholders	Volunteers, participants, staff/ trade unions have a regular opportunity to discuss volunteering including the opportunity to review policies, procedures, roles and feedback received	

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	Sub-theme	What is good?	Current Position
Who we work with	The Experts	Volunteer managers and planners meet regularly with local CVCs/ volunteering infrastructure organisations to ensure we are up to date with volunteering best practice	
		We keep up to date about innovation happening in the health and social care service around volunteering	
		We are part of a local volunteer forum and network with other volunteer involving organisations	
		We have considered working towards Investing in Volunteers or other benchmarks and understand the key principles of the Code of practice for organisations involving volunteers	
Managing and Developing	Preparation	We prepare volunteers properly for their volunteering, with an induction and training to carry out their volunteering activities	
		We provide volunteers with access to information including a written description of their role, organisational policies, procedures and standards	

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	Sub-theme	What is good?	Current Position
Managing and Developing	**Preparation**	We ensure volunteers are clear of their responsibilities in relation to Safeguarding and that they understand our 'problem solving' procedures or 'what to do if things go wrong' We deliver appropriate training, support and supervision for volunteers and paid workers, to ensure that the scope, boundaries and expectations of roles are clear, and access to appropriate learning and development opportunities is available	
	Support	We support volunteers' development by offering references We make information about internal jobs available to them We provide training & development opportunities available to support movement to other volunteering roles We provide a range of learning options to volunteers We develop volunteers' skills and confidence We discuss volunteers' future aspirations and where possible help them develop in that direction	

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	Sub-theme	What is good?	Current Position
Managing and Developing	**Transparency**	We make it clear what policies apply to both staff and volunteers or to volunteers or to staff only Processes for handling complaints and difficulties are made clear and there is a distinct process for handling difficulties involving volunteers	
Impact	**Data Collection**	We undertake equal opportunities monitoring of recruitment of volunteers, so that we can check the profile of volunteers reflects that of the local community served by the **[organisation name]**. We plan the impact we hope to achieve by volunteering, we measure the performance against this goal, we analyse the data to understand the impact, we review & communicate the impact made by volunteering and review toward the next plan	

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	Sub-theme	What is good?	Current Position
	Feedback from Volunteers	We create opportunities for volunteers to give feedback and to contribute to decision making processes within the wider organisation	
		Volunteers have input into reports / publications	
		We actively encourage volunteers' input / feedback e.g. surveys, reps at meetings or decision making	
	Case Studies	We gather stories and information to demonstrate the impact of volunteering	
		We recognise, celebrate and publicise the contribution of volunteers, both internally and externally	
		We are aware of the impact of our volunteers, and of the difference they make	
	Distance Travelled	We have mechanisms in place to understand the impact of volunteering on volunteers	
Impact	**Value**	We have mechanisms in place for demonstrating the value volunteering brings to our organisation	

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	Sub-theme	What is good?	Current Position
Communication	**Publicity**	We recognise, celebrate and publicise the contribution of volunteers, both internally and externally	
		Our external information about volunteering, and information about how to get involved is easy to find & understand	
		We publicly celebrate Volunteers' Week. We share impact of volunteering stories on social media	
		We thank volunteers e.g. cards, in reports, at events, each session they attend	
	Promotion	We advertise on the volunteering opportunities on the National Volunteering Wales platform www.volunteering-wales.net.	
		We ask our local volunteer centre to help us promote our volunteering opportunities	
		We think about how and where we advertise opportunities to make sure we reach a diverse range of potential volunteers. We share info about how to volunteer, widely	
		We talk about a variety of roles and ways to volunteer & make visible a diversity of volunteers to make efforts to attract the widest potential of volunteers	
		We engage with volunteering campaigns	

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Identifying Actions

The discussion around the Framework allowed us to identify the following actions that could be implemented by the organisation:

- **[name of org]**

Regional Priorities

We also sought feedback on the elements that **[name of org]** felt were important for a regional approach to volunteering or were important to exclude from regional work. This identified the following areas:

Area	Number agreeing it is a priority	Number feeling it should not be a priority
A common approach to managing risk, recruitment and safeguarding		
A common approach to promoting diversity among volunteers		
A common approach to recognising volunteers and supporting their development		
A common approach to using volunteers in emergencies		
A common approach to volunteer management (including volunteer expenses)		
A common definition of volunteering		
A consensus of why to involve volunteers		
A consistent approach to measuring the impact of volunteers and publicising the role of volunteers		
A mechanism for sharing best practice in volunteering		
A set of common volunteer roles		

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West Glamorgan Volunteering Support is a multi-agency project creating shared resources to develop the knowledge, management and coordination of volunteers and volunteer involving organisations across the Swansea and Neath Port Talbot areas. It has been funded through the Welsh Government Volunteering Recovery Fund.

The project partners are:
Neath Port Talbot Council, Neath Port Talbot Council for Voluntary Service, Swansea Bay University Health Board, Swansea Council, Swansea Council for Voluntary Service and West Glamorgan Regional Partnership.

For more information visit:
www.westglamorgan.org.uk/wgvs

Appendix 2 – Examples of types of volunteering and level of support required

Examples of types of volunteering and level of support required

TYPES OF VOLUNTEERING	DESCRIPTION	LEVEL OF SUPPORT REQUIRED
INFORMAL	Helping neighbours or being involved in a local community groups where there is no formal structures in place.	Lower levels of volunteer support; possibly provided on the day and requiring minimal data collection.
MICRO-VOLUNTEERING	Bite-size volunteering with no commitment to repeat and with minimum formality, involving short and specific actions that are quick to start and complete.	Lower levels of volunteer support; possibly provided on the day and requiring minimal data collection.
AD HOCK OR ONE-OFF VOLUNTEERING	Ad hock or one-off volunteering opportunities where little or no contact is made with others.	Lower levels of volunteer support; some training possibly provided on the day/ at the event potentially requiring minimal data collection.
EVENT VOLUNTEERING	One off events or festival volunteering where contact is made with others.	Medium levels of volunteer support; some vetting checks, more structured recruitment with data collection, training and briefing beforehand and support on the day.
FORMAL (WHERE ROLES DO NOT SUPPORT PEOPLE)	What most people understand by 'volunteering'; making a regular commitment of time to an organisation. This includes those who share lived experience to inform service developments / change	Medium-high levels of volunteer support; vetting checks will depend on the role, more structured recruitment with data collection, training and ongoing support provided. Emotional support for those sharing lived experiences.
FORMAL (WHERE ROLES SUPPORT PEOPLE AND SERVICE DELIVERY)	Where volunteers provide regular commitment of time to an organisation. They may volunteer directly with individuals who need support and service delivery.	Higher levels of volunteer support; vetting checks, structured recruitment with data collection, training and ongoing support provided including regular supervision sessions.
GOVERNANCE/ TRUSTEE	Trustees have independent control over, and legal responsibility for, a charity's management and administration.	Higher levels of volunteer support; vetting checks will depend on the role, more structured recruitment with data collection, training and ongoing support provided. Regular communication, board meetings and reports to be provided.

Lower levels of support

Higher levels of support

Appendix 3 – Regional Volunteering Strategy Officer

To continue with the momentum of developing a regional approach to volunteering, it is recommended that a full-time Regional Volunteering Strategy Officer is recruited within the Partnership to:

➢ Work with all partners to continue to understand their individual position related to volunteering and to liaise with them regarding their volunteering action plan from workshops delivered within phase two (May/June 2022)

➢ Work with the Regional Volunteering Strategy Group to develop a timetable for reviewing the Regional Volunteering Strategy, recommended for adoption within the secondment and its implementation, continuing an ambitious approach to developing volunteering excellence.

➢ Develop a shared understanding of the value of volunteering and provide a focus to ensure the region strives for best practice volunteer recruitment and management.

➢ Develop an agreement for consistent data collection and monitoring around volunteering across the partners and improve regional understanding of volunteering trends to support future regional volunteering vision.

➢ Establish two additional forums alongside the Regional Volunteering Strategy Group: (1) Volunteer voices forum, made up of a range of volunteers from within the Partnership; (2) A regional partnership volunteer managers forum made up of staff who have day to day responsibility for recruiting and managing volunteers across the partners.

➢ Build a focus on best practice volunteering in health and social care settings within a regional context, with emphasis on innovative community-based support and prevention.

➢ Link future workforce need with volunteering opportunity development and regional volunteering campaigns to raise the profile of opportunities.

➢ Work with the Regional Volunteering Strategy Group and local CVCs to regularly review all volunteering best practice resources stored on the West Glamorgan Volunteering Support webpages

➢ Make a plan for the next incarnation to be a fully co-produced strategy, involving all stakeholders, which may or may not continue to be aligned with the matrix and workshop structure developed in phase two linked to the Helpforce Cymru's Framework for Volunteering in Health and Social Care.

➢ Continue discussions around emergency volunteering and sharing volunteers in a crisis within the Partnership.