Learning from using the Volunteer Impact Assessment Toolkit in NHS Scotland

Guidance and Tips for new users March 2009

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Introduction

The Volunteer Impact Assessment Toolkit (Institute of Volunteering Research, 2004) was developed in response to growing demand from organisations for support to identify the impacts of volunteering within their programmes.

The toolkit helps programmes assess the impact of volunteering on four stakeholder groups: volunteers, staff, users and the wider community.

The toolkit helps assess the impact of volunteering in relation to:
- Economic Capital (e.g. enhancing ability to increase income)
- Human Capital (e.g. increased self-esteem)
- Social Capital (e.g. increased access to social networks)
- Physical Capital (e.g. increased numbers of tangible resources)
- Cultural Capital (e.g. increased awareness and understanding of experiences of others)

The toolkit contains research tools such as questionnaires, focus group topic guides and a traffic light scoring system to help make sense of results.

If you are considering carrying out an impact assessment, or have started to plan one, this guidance is designed for you. The guidance refers to volunteering within programmes, but is equally relevant to volunteering at the organisational level, within specific projects, groups or networks.

Volunteer Scotland supported three health boards in NHS Scotland to conduct their own Volunteer Impact Assessments. Each of these pilot projects differed by size, remit, and numbers of volunteers.

This guidance is based on what we learnt from these pilot projects and contains key questions you should ask and tips to consider as you plan your assessment.

TIP: Don't be daunted by conducting an impact assessment! Using these tips to think things through carefully at the beginning to help ensure you get the information you need.

Volunteer Scotland is the sole deliverer of the Volunteer Impact Assessment Toolkit and training in Scotland. If you have any questions about this guidance or the Volunteer Impact Assessment Toolkit, get in touch with us by e-mail: hello@volunteerscotland.org.uk or call 01786 479593.

Why should we assess the impact of volunteering?

Understanding the impacts of volunteering within your programme allows you to go further than "simply to assert that volunteering is 'a good thing'" (Institute for Volunteering Research, 2004, '*Volunteering Impact Assessment Toolkit*').

By carrying out a volunteering impact assessment you will be able to identify, understand and demonstrate specific impacts experienced by different stakeholder groups.

"The Volunteer impact assessment Toolkit can help you:

- Assess the impact of volunteering on:
    - o Volunteers
    - o Your organisation
    - o Your service users or beneficiaries
    - o The wider community

- Assess a wide range of impacts – from skills development and well-being of your volunteers to the economic contribution of volunteering to your organisation

- Compare results over time

- Explore positive and negative, intended and unintended impacts"

(Institute for Volunteering Research, 2004, '*Volunteering Impact Assessment Toolkit*')

Other benefits we've spotted are:

- Getting information which can inform how you can improve volunteer management practice

- Helping to explore how making changes in your programme can help increase the impact of volunteering

- Generating information that may help with funding applications, or to attract new volunteers

- Getting clarification across the programme on what everyone thinks about volunteering, how it contributes to what they're trying to achieve, and how they can support it better.

Will it be easy to use the toolkit in our programme?

From the pilot projects run within NHS setting we learned that when planning the impact assessment you should consider:

- variety in volunteer roles, stakeholder groups and contexts
- who is conducting the impact assessment
- levels of support for conducting the impact assessment

Pilot projects which had less variety within their stakeholder groups and volunteer management, found it easier to design an impact assessment.

For example, some programmes have a large number of volunteers in a variety of different roles. This might mean that only some volunteers are able to undertake training for their role, or access different types of training, it is difficult to design one question about training which will be relevant to all volunteers.

Pilot projects with less variety were able to ask questions about specific aspects of volunteering which were relevant to everyone who responded. Specific information about what is going well or not so well is useful, as it makes it easier to see what changes might ensure the impacts of volunteering can be maximised.

> *TIP: Think about whether those within stakeholder groups experience volunteering in similar ways. For example, do staff all have similar working relationships with volunteers, do volunteers carry out similar types of roles, and so on.*
>
> *If you're worried that there is a lot of variety, you might want to consider conducting a number of smaller impact assessments, for example, you could focus on impacts of volunteering in relation to a specific volunteer role.*

For larger programmes and organisations there might be more than one person involved in implementing the impact assessment, this requires communication and co-ordination.

> *TIP: Allow extra time for planning and communication if there is more than one person designing and conducting the impact assessment.*

It may be more difficult to carry out the impact assessment if you don't have support from senior management, as they can help ensure appropriate resources are allocated for the assessment.

It is also important to have the support of colleagues and those participating in the assessment, particularly if your questions or findings relate to topics people find sensitive or difficult to talk about.

> *TIP: Ensure you have the support of colleagues and senior managers to carry out the assessment. If you think they could be more supportive, it might help to think about why they would be interested in the benefits of carrying out the assessment. For example, in a health context, the potential impacts you have identified might relate directly to priorities for your programme or department, in relation to health outcomes or ways of working with the community.*

Are we ready to find out what requires development, so we can improve?

> The toolkit is a really good way to explore how you could increase the positive impacts of volunteering in your programme.
>
> In other words, challenging results are useful results! These are the results that help you spot areas for improvement.
>
> Some results can be difficult to talk about; imagine findings suggest a specific aspect of volunteer management might need to be improved, how might the person responsible for that aspect of volunteer management react?

> *TIP: For each question, imagine that you are applying the traffic light system to the responses you receive. Think about how others might react to red traffic lights.*
>
> *If you think a particular 'red' result is likely, and might prove challenging to talk about, ensure everyone who will need to talk about it is involved in developing the questions and supports the assessment taking place.*

How much time do you need to plan and conduct the impact assessment?

Based on the experience of our pilots and similar pilots carried out by NHS health trusts in England and Wales, you should probably allow a minimum of 14 days to plan and conduct the assessment[1]. You may also want to consider using volunteers to help conduct your evaluation. The amount of time it takes will be dependent on a range of factors: the size of the project and stakeholder groups, the number of people planning the assessment, and so on.

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[1] Teasdale, S., (2008) *Health Check A practical guide to assessing the impact of volunteering in the NHS* Institute for Volunteering Research

If you feel it is necessary and you have the resources required, you may be able request external support to analyse your data. However, where possible we would encourage you to analyse your own data, as this can help you gain a better understanding of what your results were, how you might improve how you got the information and ideas or interesting findings you want to explore further. There may be other individuals or departments within your organisation that can help you.

TIP: Don't underestimate the planning time, but remember, the time spent on the initial impact assessment is really worthwhile. Not only are you far more likely to get useful information, but you will be able to use your questionnaires over and over again, helping you continually develop volunteering and monitor the impact of volunteering over time.

TIP: Don't underestimate how long it might take to analyse the data. The length of time will depend on how much data you collect, what type of data (e.g. lots of qualitative data can take longer to analyse) and how familiar you are with tools, such as Microsoft Excel.

Do we need permission to carry out an impact assessment?

Check whether you need approval (e.g. from your organisation or programme manager) to carry out the impact assessment before you start. If you do need approval, make sure you know what the process involves and how much time it is likely to take, and alter your timeline accordingly.

TIP: Check whether you need approval to conduct the impact assessment, what type of approval is required and who can grant approval.

Will our questions work ok?

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The questions in the toolkit questionnaires are tried and tested, but they are designed so you can easily adapt them to make them relevant to volunteering in your programme. If you are adapting or adding your own questions, you might not realise that the question doesn't work until you get the responses back and discover that you can't use the information.

No questionnaire is ever perfect, but the more you try out the questions in advance, the more likely it is that you will discover problems before, not after you've completed the impact assessment.

It can be helpful to pilot your questions with people who know about your programme and how it involves volunteers, but make sure you don't include people who you want to participate in the actual assessment.

Before you start to use, adapt or write your own questions, take note of the following tips.

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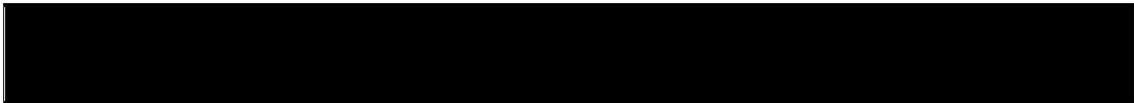
For example, you might want to use the following question from the "Volunteer Supplementary Questionnaire":

'To what extent are you satisfied with 'Awards and certificates'?

One of our pilot projects used this question, and found that 63% of volunteers who responded were 'satisfied' with awards and certificates.

Some programmes have a number of different awards and certificates for volunteers. To help them see where they can increase satisfaction, they might need information about which specific awards and certificates receive lower satisfaction ratings. They might adapt the question to ask about a specific award or certificate which they are concerned about, and/or are able to make improvements to.

> *TIP: Look at each question, imagine what the result will be – now ask yourself: How would I use that information? Adapt the questions if they aren't going to get specific enough information for your context.*
>
> *TIP: Make sure what you're asking about isn't too broad. Check you're only asking about ONE thing, not two…or three…!*

This example highlights why it is important to think carefully about the response categories you are asking people to choose from.

One pilot project asked the following question:

How many years have you volunteered in your current role? (tick the appropriate box)

1yr   1-4 yrs   4-6   over 6yrs

Look at the options carefully, if you had volunteered for 1 yr, or 4yrs, you would be able to tick more than one option. These options overlapped, so the results were invalid: they didn't get a clear understanding of how many people had volunteered for each period.

> *TIP: Check the options you've given people – could two or three of them apply to ONE person? Put yourself in someone else's shoes and imagine answering the questions.*

In this example, a pilot project mistakenly used the same response categories for different questions, which meant the data was void for some of their questions.

The pilot project asked the following question and provided a list of options for respondents to choose from:

Have any of the following increased or decreased for you?

	Very satisfied	Satisfied	Neither satisfied or dissatisfied	Dissatisfied	Very dissatisfied	Not relevant
My personal development (confidence, self esteem, self management)						
My skills base						
My general health and well being						

The question asks respondents about the extent to which something has 'increased' or 'decreased', not whether or not they were 'satisfied'. This meant that all the data for this question was void.

TIP: Check every question, think about what 'scale' you are asking respondents about, and double check the options that you have provide make sense. Don't cut and paste categories into other questions.

What if some of the questions in the toolkit questionnaires aren't relevant to us?

The questionnaires in the toolkit are designed so they can be adapted easily. The pilot projects all adapted or omitted particular questions to make them more relevant to their NHS contexts. For example, patients who participated in one of the pilot project were unlikely to return to work; therefore this pilot project did not include questions about whether volunteering had impacted on their employability.

> *TIP: This is YOUR impact assessment, to help you make decisions and demonstrate impact, make sure the questions in your impact assessment are relevant and appropriate to your organisation/project and your stakeholder groups.*

How can we make sure enough people participate?

Unless your stakeholder groups are small and very enthusiastic, it is likely that you will not have information from every member of your stakeholder group. One pilot project received very few responses from volunteers and stakeholder groups. However, they still found the information useful as it helped them learn how to use the toolkit and gave some indication of areas that may have required development.

However, it would have been difficult to base decisions about improvements on only a few responses; this would run the risk of making improvements without being sure that those responses were representative of the whole group.

In other words, deciding how many people you need to participate depends on how you want to use the information. Even if you get only a few responses, this will still be really useful. They might suggest ideas that you could then explore in a workshop or discuss with others. It will help you improve your methods and questions. If you have responses from a large proportion of your group, then you can feel safer about using the information to make improvements.

> *TIP: You need to decide how you're using the information, and what amount of missing information you can tolerate. You might want to make that decision with other people who will use the information.*
>
> *TIP: Consider personally contacting people or hand-delivering questionnaires to the people you want to participate…but…**watch out!** Remember to think about what affect it might have if you personally hand over the questionnaire or help people to complete them – might that affect how people answer the questions?*
>
> *TIP: Think about how you could tell people about the impact assessment and why you think it would be of interest to them to get involved. Are there existing opportunities that you could communicate this to them such as staff meetings, or tea room discussions?*

How can we be sure the right people participate?

One pilot project got responses from older volunteers, but not from younger volunteers. If they were to use this information to inform how they make changes, they wouldn't know if those changes would also help younger volunteers.

If you have a large stakeholder group, try to make sure you include a range of people, e.g. male and female, young and old, and so on.

Perhaps you have a wide range of volunteers, but for a particular reason you're only interested in the views of, for example, younger volunteers or women volunteers.

TIP: Think carefully about what you want to know from the impact assessment, and this should help you decide who you want to invite to participate.

Will everyone find it easy to complete a questionnaire?

Think carefully about who is completing the questionnaire and whether they will need support to complete it. Patients were an important stakeholder group for the pilot projects. Some had poor literacy, others were not well enough to complete the questionnaires without support.

*TIP: Consider helping people to complete the questionnaire...but… **watch out!** – Helping people complete the questionnaire might affect how they answer the questions.*

TIP: Consider adapting the questionnaire to make the format more accessible, perhaps you could use symbols instead of words.

How will I input data, and what will I use to do it?

There are a range of tools to help you input data, online survey tools are an option, or you can input directly into excel.

One of the pilot projects was conducted at a health board which had its own electronic survey system. However, using this system created some problems, for example, it required a 'not applicable' or 'other' option for each question.

The data was being collected by more than one person, but only one used the electronic survey system to handle the data. They then had to input the data collected by their colleagues.

TIP: Think in advance about how you will handle the data you collect – consider whether it is easy for people to complete the questionnaire online.

TIP: If you are using paper questionnaires, think about who is going to input the data, and what they will use. Are they familiar with the tool, if not, will you need to allow for more time?

TIP: If you are part of a team carrying out the impact assessment, make sure you are all in agreement as to how the data will be handled.

That's an interesting finding……how can I explore it further?

There were lots of interesting findings from the pilot projects, and sometimes you want to explore them further.

TIP: Think about feeding back the findings to those who participated in the impact assessment, maybe they have some thoughts and ideas about why you got particular results.

TIP: It might be appropriate to explore some things further in your next impact assessment, by adding other questions to a questionnaire, or using a different method.

TIP: There might be publications or research from other organisations and libraries that would help you explore a particular topic or idea.