Understanding Volunteering Impact Measurement Practices across Scotland

A report commissioned by the Scottish Volunteering Forum, prepared by

CHAS
Children's Hospices Across Scotland

&

Volunteer Scotland

Final Report – 3 May 2018

Contents

Executive Summary

This report contains the results of the volunteering impact measurement survey that was undertaken by 68 Volunteer-Involving Organisations (VIOs) in February 2018.

The results show us that only 51% of VIOs currently measure the impact of volunteering, which declines to only 9% for smaller organisations. Clearly, there are significant barriers affecting VIOs' engagement with impact measurement.

Organisations currently measuring impact do so primarily to celebrate success, and to improve performance with marketing and securing funding being secondary reasons.

Of those organisations that measure impact, 97% measure impact on volunteers. However, only 59% measure impact on beneficiaries and even fewer (just 56%) undertake impact measurement in order to improve organisational performance.

Of the organisations that measure impact, only 59% share the evidence of impact with volunteers. We were surprised to see that the number of organisations sharing the information externally was so low, with very few sharing evidence through marketing and social media channels. Furthermore, only 71% of organisations measuring impact share the evidence with senior leadership teams. This seems like a missed opportunity, particularly as the Scottish Volunteering Forum (SVF) and Scottish Government are committed to driving volunteering participation rates in Scotland.

The organisations that measure volunteering impact rate the performance of their monitoring, evaluation and impact measurement highly. Interestingly, smaller organisations rate the performance of their impact measurement higher than larger organisations.

91% of respondents who measure impact assess it as having either a 'major', 'significant' or 'some' positive impact on their organisational performance, with smaller organisations rating this impact higher than larger organisations.

Lack of time and resources are cited as the principal constraints to measuring volunteering impact. It is clear that VIOs require more guidance and support to enable them to measure impact more effectively and toolkits, guidance notes, online resources and training are cited to be of most value.

The evidence gathered from the survey has shaped the recommendations and next steps suggested in this report. It is clear that there is a strong rationale to support organisations to improve their volunteering impact measurement practices. Doing so will enable Scotland's volunteering sector to influence the Scottish Government and funders, help increase volunteering participation rates, ensure a more inclusive outcome and further increase the profile of volunteering in Scotland.

1. Introduction

The Scottish Volunteering Forum is a collective of national volunteering organisations and intermediaries across Scotland which aims to raise the profile of volunteering, break down barriers, increase understanding and encourage more people to volunteer.

One of our aims is to better understand volunteering impact measurement across Scotland. In order to achieve that aim we conducted a survey in February 2018 to explore current impact measurement practices. The survey was completed by 68 volunteer-involving organisations from a wide geographical area and including urban, rural, local and national organisations. In the survey we invited organisations to share their impact measurement practices in relation to volunteering.

The results of the survey are summarised in this report. It is hoped that the results will be of value to VIOs, enabling them to benchmark with other organisations and develop their practice. We also hope that the results will inform the development of the National Volunteering Framework and serve as a platform for improvement.

A number of short, medium and long-term recommendations have been developed in response to the evidence of the survey. We are looking forward to leading the implementation of these recommendations in order to improve the impact measurement of volunteering in Scotland.
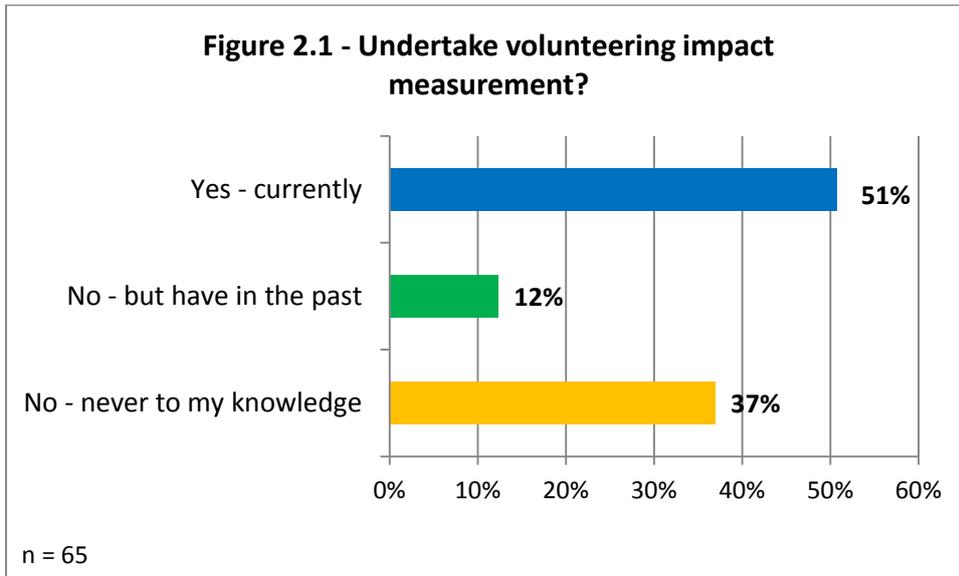
Acknowledgement

The SVF impact sub-group would like to thank the 68 organisations which took the time to participate in the survey and share their information on, and experience of, impact measurement. A full list is presented in the Appendix.

In particular, the quality and depth of the open questions has been invaluable. We appreciate the time which organisations have taken in providing this data. It has given us a high quality evidence base upon which to base our recommendations and 'next steps' for the development of impact measurement for Volunteer Involving Organisations.
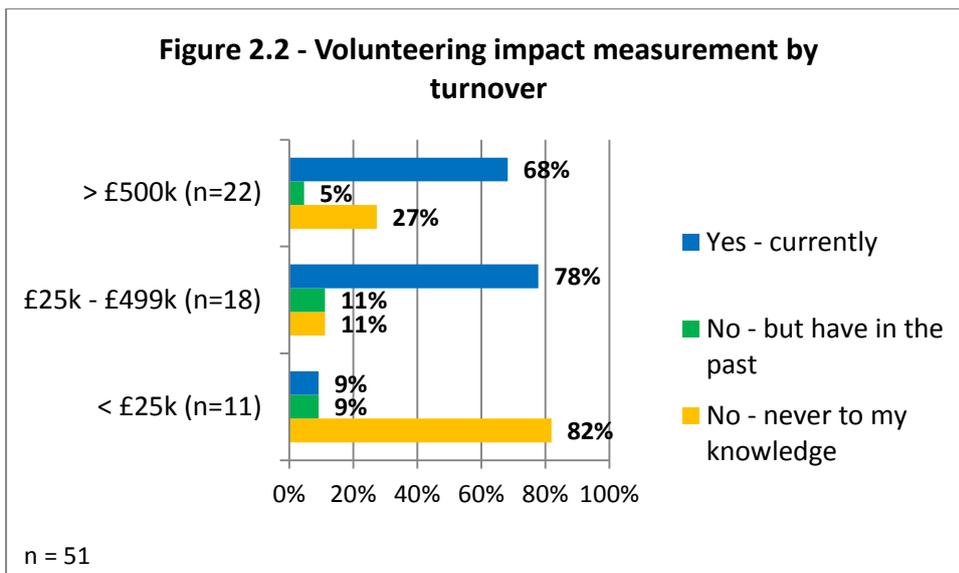
2. Characteristics of VIOs undertaking impact measurement

Involvement in impact measurement

51% of survey respondents are currently involved in impact measurement: see Figure 2.1. The fact that nearly half are not engaged is quite worrying; with 37% stating that they had never undertaken any impact measurement.

Figure 2.1 - Undertake volunteering impact measurement?

Category	Percentage
Yes - currently	51%
No - but have in the past	12%
No - never to my knowledge	37%

n = 65

As one would expect the challenges in engaging with impact measurement are significantly greater for smaller organisations. For example, for those with a turnover of < £25,000 only 9% of organisations are currently involved in undertaking impact measurement work[1]: see Figure 2.2. This compares to 68% for those with a turnover in excess of £500k.

Figure 2.2 - Volunteering impact measurement by turnover

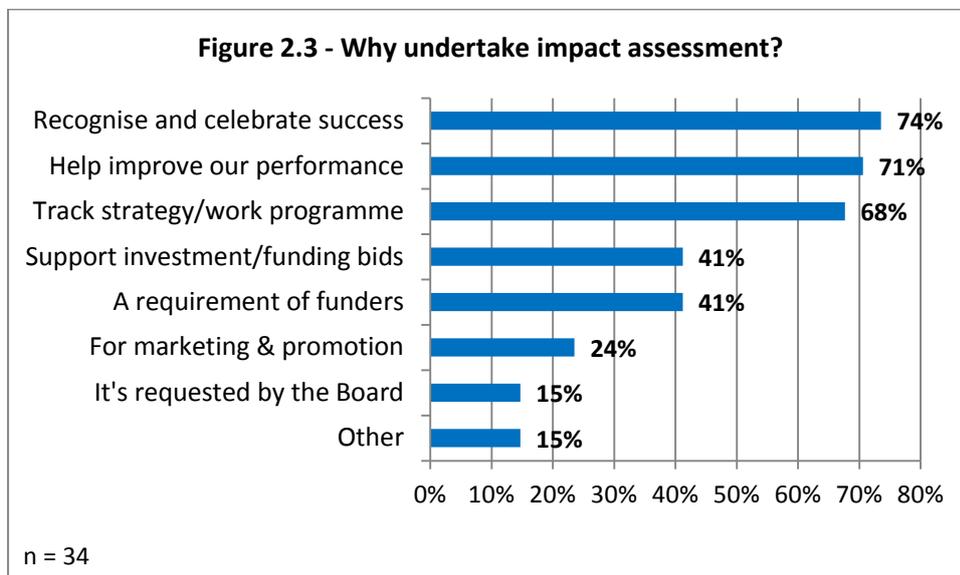| Turnover	Yes - currently	No - but have in the past	No - never to my knowledge
> £500k (n=22)	68%	5%	27%
£25k - £499k (n=18)	78%	11%	11%
< £25k (n=11)	9%	9%	82%

n = 51

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[1] Note: the cell sizes are small for the cross-tabulated results, so one has to be careful in their interpretation.

Reasons for undertaking impact measurement

For the 51% of organisations that confirmed they were currently undertaking impact measurement, their reasons for doing so were varied: see Figure 2.3. The responses can be classified into four categories as follows:
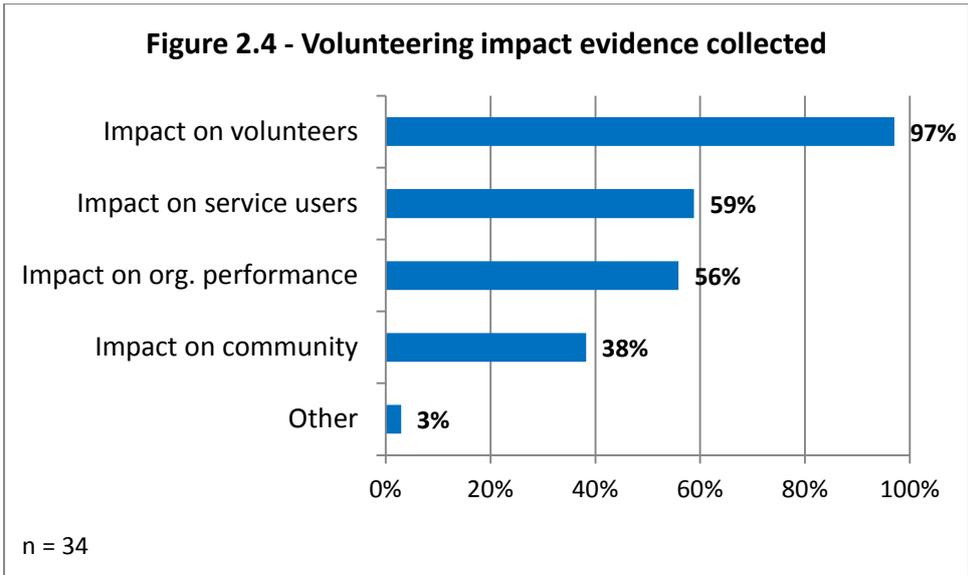
- **Recognition** – the most popular reason is recognising and celebrating success – 74%;
- **Performance** – using the impact evidence to help improve performance is the next most frequently cited reason – 71%; followed by evidencing performance against strategy and/or work programme – 68%;
- **Funding** – to support investment decisions /funding bids – 41%; and the stipulation of funders – 41%;
- **Marketing** – the last category relates to the use of impact evidence for marketing and promotional reasons – 24%.

Figure 2.3 - Why undertake impact assessment?

Reason	Percentage
Recognise and celebrate success	74%
Help improve our performance	71%
Track strategy/work programme	68%
Support investment/funding bids	41%
A requirement of funders	41%
For marketing & promotion	24%
It's requested by the Board	15%
Other	15%

n = 34

Focus of volunteering impact measurement

Of the 34 responding organisations which have experience of impact measurement, all but one collect evidence relating to their **impact on volunteers** (97%) – see Figure 2.4. Based on anecdotal feedback from VIOs attending Volunteer Scotland's 'Measuring the impact of Volunteering' course, this is a much higher figure than we expected. This is great news as it shows organisations are focused on their volunteers and how volunteering affects their performance, wellbeing, etc.
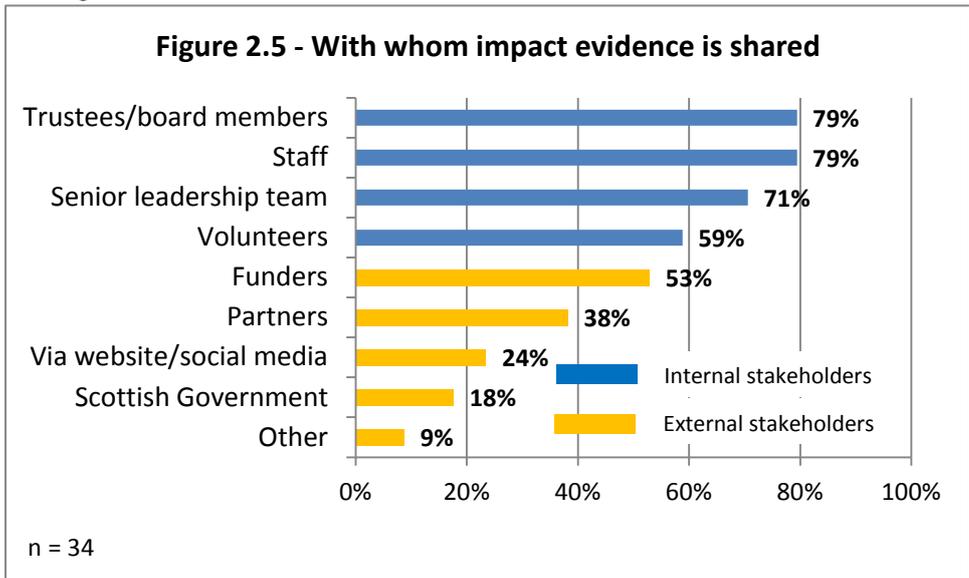
However, what is somewhat worrying is the fact that only 59% of respondents focus their impact measurement on **service users/beneficiaries**; and only 56% on understanding their **organisational performance**. Given that impact measurement can be used to provide invaluable evaluation evidence to improve organisational performance, we believe this is a major missed opportunity for the 44% of respondents not evaluating their performance.

Figure 2.4 - Volunteering impact evidence collected

Category	Percentage
Impact on volunteers	97%
Impact on service users	59%
Impact on org. performance	56%
Impact on community	38%
Other	3%

n = 34

Sharing of impact evidence

Figure 2.5 highlights the greater propensity to share impact evidence internally within organisations than externally with funders, partners, etc. Key observations on the results include:

- Why is impact evidence not shared with **staff and management** as a matter of course? It is good practice to share evidence internally. In particular, why do 29% of organisations decide not to share this information with their senior management team? Perhaps the information goes to junior/middle management and no further? Or perhaps the information is not forwarded at all because the evidence highlights problems in performance which managers/evaluators do not wish to share?
- Given that 97% of organisations undertake impact measurement on their **volunteers** (see Figure 2.4), why do only 59% share this information with them? This information can be used to improve volunteer engagement and is good practice in volunteer management.

Figure 2.5 - With whom impact evidence is shared

| Category	Percentage
Trustees/board members	79%
Staff	79%
Senior leadership team	71%
Volunteers	59%
Funders	53%
Partners	38%
Via website/social media	24%
Scottish Government	18%
Other	9%

Internal stakeholders
External stakeholders

n = 34

- Finally, the extent to which impact evidence is shared externally is extremely poor. Only around half of respondents share this information with their funders (53%) and an even lower figure share it with their partners (38%). Again, we believe this is a major missed opportunity as the evidence can be used to deepen relationships with funders/ partners; highlight the impact and contribution of volunteers; and secure feedback on volunteering performance as part of a process of continuous improvement. We believe that all too often organisations undertake excellent impact work but are too busy to engage with key external stakeholders.

3. Effectiveness of VIOs' impact measurement

Effectiveness of impact measurement systems

Those organisations which engage in impact measurement tend to rate the performance of their systems quite highly: see Figure 3.1:

- Monitoring system – 74% believe their system is either 'effective' or 'very effective'
- Evaluation system – 71% believe their evaluation is either 'effective' or 'very effective'
- Impact measurement – 55% believe their impact measurement is either 'effective' or 'very effective'.

Figure 3.1 - How effective are your systems?
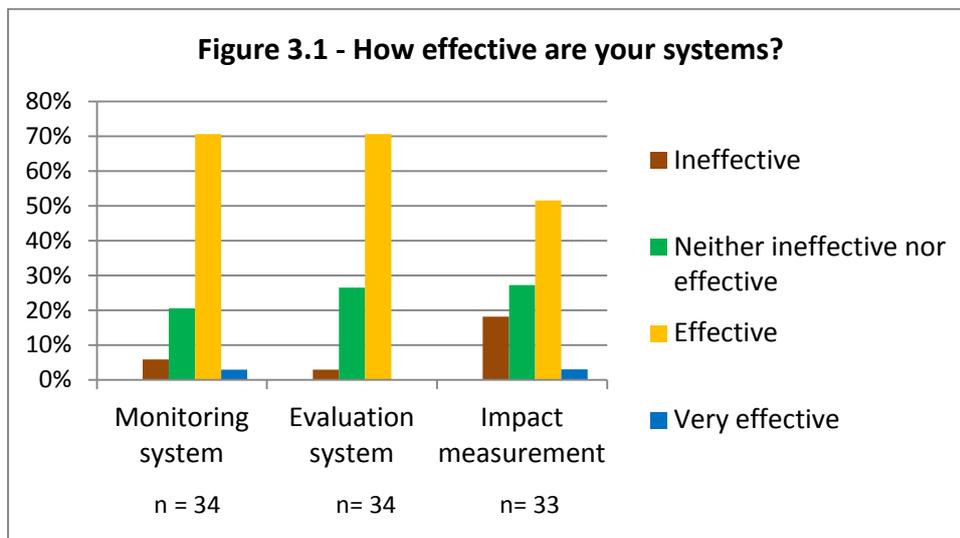
Whether this self-measurement is an accurate reflection of their actual performance is clearly unknown. It is quite possible that they have under-rated or over-rated their performance. For example, given the complexities of undertaking quality evaluation, a 71% figure does seem quite high.

However, based on the self-assessment results, what does this data tell us?

- The results for monitoring and evaluation are good – but we must remember that all of these results relate to the 63% of organisations which have experience of impact measurement either currently or in the past. It tells us nothing about the 37% which have never engaged in impact measurement – see Figure 2.1. For example, although they claim not to undertake impact measurement, they are quite likely to have some form of monitoring and possibly a basis approach to evaluation.
- From Figure 3.1 we can deduce that 45% of respondents believe that there are some problems in the effectiveness of their impact measurement. Clearly, there is scope to improve performance in this area.
- Our analysis of their systems' performance by organisational turnover produces a counter-intuitive outcome. One would have expected that the larger organisations with turnovers in excess of £500k would assess their performance to be higher that the smaller organisations. However, it is exactly the opposite – see Table 3.1.
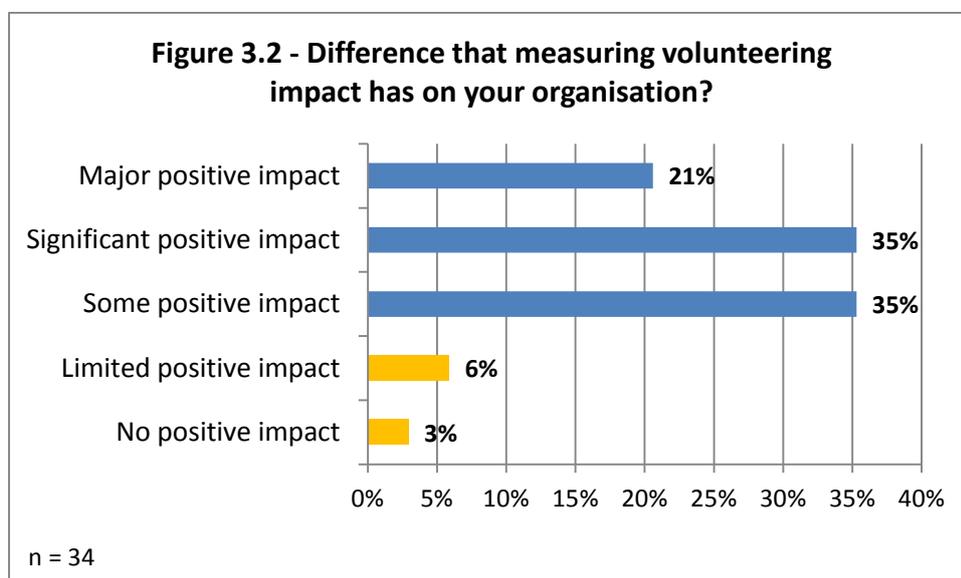
Table 3.1 - Self-assessment of VIOs' systems		
Percentage 'effective' or 'very effective'	**£0 - £499k**	**£500k +**
Monitoring system	78%	69%
Evaluation system	83%	56%
Impact measurement	65%	44%
Number of respondents	18*	16
Note: * No. of respondents = 17 for impact measurement		

These research findings do challenge the robustness of the self-assessment process. Is it really the case that the smaller VIOs with turnovers less than £500k consider their evaluation systems to be 83% 'effective' or 'very effective' – some 27 percentage points higher than for larger organisations with turnovers in excess of £500k?

One could argue that the smaller organisations suffer from 'information failure' and may not have enough knowledge, skills and experience to assess their performance accurately. Using the Donald Rumsfeld quotation they may be suffering from '*The unknown unknowns'*. If this is the case then the figures in Figure 3.1 and Table 3.1 are overstating the effectiveness of VIOs' impact measurement systems.

## The difference which impact measurement has on organisational performance

A really encouraging finding is that impact measurement has at least some positive impact on 91% of respondents, ranging from 'major' to 'significant' to 'some' – see Figure 3.2.

Figure 3.2 - Difference that measuring volunteering impact has on your organisation?

- Major positive impact: 21%
- Significant positive impact: 35%
- Some positive impact: 35%
- Limited positive impact: 6%
- No positive impact: 3%

n = 34

Again, the smaller organisations rate this impact higher than the larger organisations. When the results are cross-tabulated by turnover 61% of those with a turnover less than £499k assess their impact to be either 'major' or 'significant'; compared to 50% for those with a turnover in excess of £500k.

Constraints affecting impact measurement work

The question on 'constraints' was asked of all respondents, whether they had undertaken any impact measurement work or not. By far the most important constraint is **lack of time** which 72% of respondents cited as a key issue – see Figure 3.3. The next most important is **lack of resource** at 42%, followed by **lack of skills** at 22%.

Figure 3.3 - Constraints affecting impact measurement work

n = 50
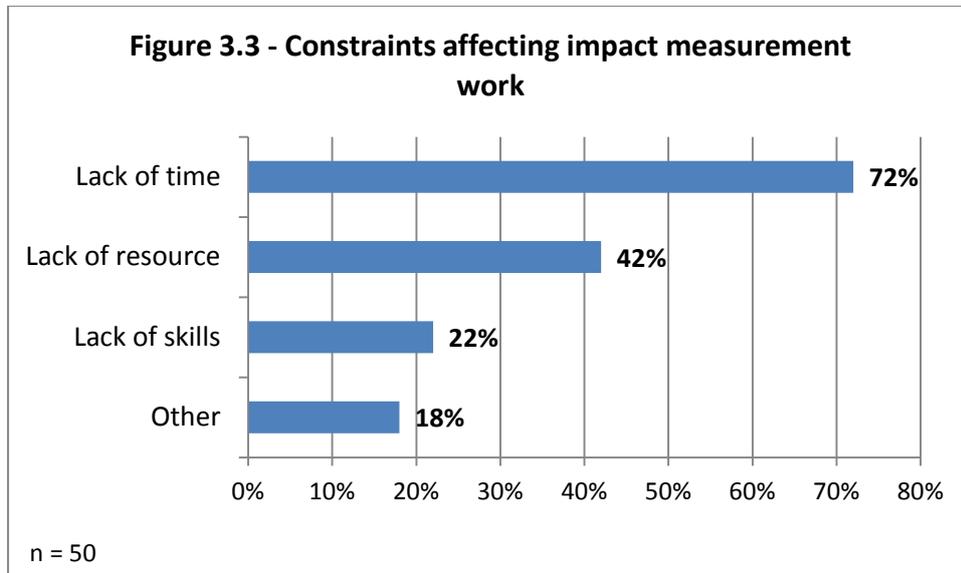
When the results are cross-tabulated with turnover the findings don't highlight the variations one might have expected between the smaller and larger VIOs – see Figure 3.4. For 'lack of time' and 'lack of skills' the variations are marginally higher for smaller VIOs. However, for 'lack of resource' those organisations with turnovers in excess of £500k the issue affects 47% compared to only 35% for those with turnovers < £500k.

Figure 3.4 - Constraints by turnover category

n = 50
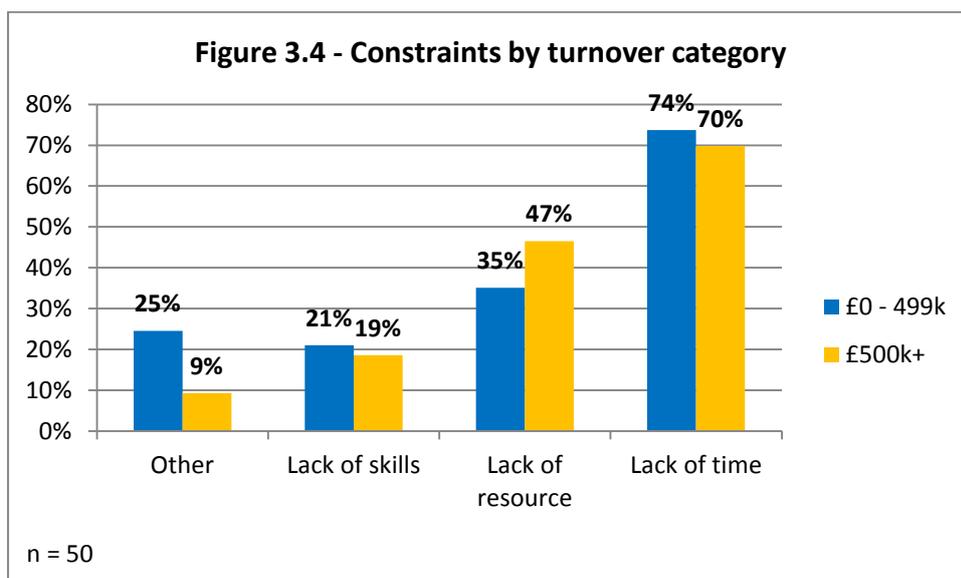
4. Support measures to improve VIOs' impact measurement

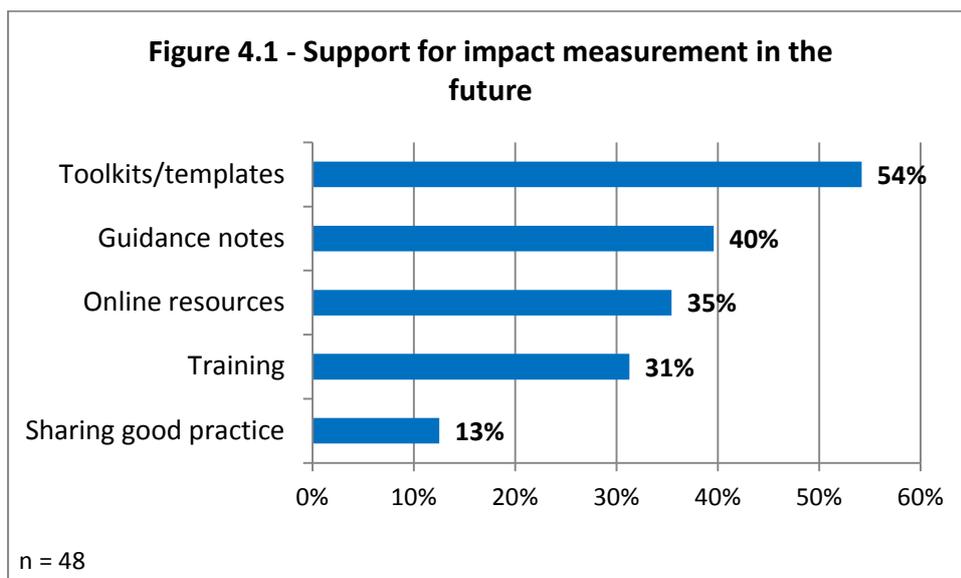**Support received for impact measurement in the past**

This open question elicited a wide-ranging response from the 29 VIOs completing the question. The main themes can be summarised as follows:

- **A 'must-have'** – Impact measurement was viewed as a 'must-have' by 5 VIOs – volunteering is central to the success of their organisations and so impact measurement is not open to debate – it has to happen!

- **External partners**– a range of partners were cited as being important drivers of impact measurement work:
  - *Funders* – 5 VIOs cited meeting funders' requirements. "*The pressure from Scottish Government and other funders.*"
  - *Clients* – 6 VIOs were driven by evidencing their impact on clients and how they could improve. "*As we are an organisation that helps people with learning disabilities we are able to show what benefits our volunteering has on their lives. This is what drives us – social inclusion in day-to-day living.*"
  - *Volunteers* – 5 VIOs used impact measurement to understand and recognise contribution of their volunteers; and also how they could improve the volunteering function. "*Recognition of the importance of volunteering and great appreciation of the contribution volunteers make.*"
  - *Partners* – 4 VIOs cited different project partners as important influences in their impact measurement work. "*Support from project partners.*"

- **Internal drivers** – the importance of the organisation itself being the driver of impact measurement work was cited much less frequently:
  - *Leadership* – one VIO referenced the importance of having a sponsor on the Executive Board; and one cited the importance of nominating a Senior Management Team lead to develop impact measurement processes
  - *Management* – one VIO acknowledged the importance of 'investment' (presumably of their time) of volunteer managers; and another used a dedicated member of staff responsible for all areas of volunteer development

- **Performance assessment** – 6 VIOs stated that they had to understand the impact of their organisation if they were to improve performance:
  "*To give both clients and volunteers the opportunity to consider how we could improve our service. To gain feedback from clients on whether they felt they received a friendly, non-judgemental service from volunteers.*"

- **Processes /systems** – 7 VIOs cited the importance of systems supporting/driving their impact measurement work. This included:
  - Having monitoring and evaluation systems in place "*Our new measures are reliant upon our new Volunteer Management System which facilitates data recording and reporting.*"

- o Embedding impact measurement into Board reports
- o Improving statistical analysis through the use of the SG statistical employee support scheme

- **Other factors** which were cited by only one or two VIOs include:
  - o Recognising the importance of funding impact measurement work. There is a cost involved and this has to be budgeted for
  - o Training – to ensure staff/volunteers have the required skills – see further evidence below under the sub-section "Support requested for impact measurement in the future"
  - o Understanding how the wider community benefits

Support requested for impact measurement in the future

The high response rate and the level of detail provided by respondents to this question tells us that VIOs are in need of support for impact measurement and that they have clear ideas on what this should entail. For an open question to be completed by 48 organisations out of a possible 65 towards the end of a survey is significant. The key categories of support are detailed in Figure 4.1.

Figure 4.1 - Support for impact measurement in the future

- Toolkits/templates: 54%
- Guidance notes: 40%
- Online resources: 35%
- Training: 31%
- Sharing good practice: 13%

n = 48

Self-help options are the most popular including toolkits, templates, guidance notes and online resources. However, traditional training options are also in demand with nearly one third of VIOs requesting this type of support. Sharing good practice was not a prompt option in the question, yet it was cited by 13% of respondents. Examples of feedback include:

> "*A simple toolkit or online resource that would help us ensure that the questions directed to clients and volunteers were presented in an appropriate format. To ensure questions were open and would allow clients and volunteers to give honest answers which were easily analysed. The tools offered should be easy to adapt for local use and easy to administer to clients and volunteers.*"

"*Inspiration from other organisations' work – it would be good to see what 'best practice' looks like, or to be inspired by particularly clever/ innovative examples of impact measurement that were working really well.*"

"*Consistency across the sector – a toolkit with suggestions and shared practice that includes multiple stakeholder engagement – a suggestion of the minimum evidence that should be gathered, who to share it with and the benefits of undertaking.*"

"*Advice from other organisations, sharing of good practice would be useful as there are always ways in which we can improve. We are a very small organisation with few staff so support from peers always welcomed!*"

Other 'one-off' suggestions include:

- Peer support – advice from other organisations (linked to sharing good practice above)
- A collaborative workshop
- Directory of external agencies that carry out impact evaluations
- Online forum – linked to online resources above
- Social accounting approach to longitudinal measurement
- Training in lean added-value impact – linked to training above
- Awareness raising of the importance of impact measurement
- Establishing key national impact questions which organisations can consider for their own organisation

5. Recommendations and next steps

This report provides us with a unique insight into the volunteering impact measurement practices of organisations in Scotland. It is clear that there is significant work to be done to both engage organisations not currently involved in impact measurement work, and to improve the practices of those who are. A key overarching goal is to develop improved awareness and understanding as to why impact measurement of volunteering is critically important to volunteer-involving organisations.

Based on the evidence of the report, we have generated a series of short, medium and long-term recommendations to help improve volunteering impact measurement practice in Scotland.

Short-term
- Share report with participating volunteer-involving organisations and invite those who have had success in impact measurement to share their experience.
- Identify existing toolkits, good practice guides and training courses and quality assure them for future use.
- Share report with SVF Funding Sub-Group with a view to developing guidance for funders (organisations receiving funding must evidence impact)
- Share report with Scottish Government National Volunteering Framework team in order to influence this emerging work.
- Speak to Volunteer Scotland/AVM about including volunteering impact measurement at the upcoming conference they are organising in Scotland and/or other suitable events
- Present results of the report to the Cross-Party Group on Volunteering in June 2018.

Medium-term
- **Don't reinvent the wheel** – from the review of existing toolkits, guidance notes, training courses, etc., identify practical actions which can be taken building upon what is already offered.
- **New online resource** – develop an online resource focused on impact measurement of volunteering that collates good practice from volunteer-involving organisations, existing resources, suggestions of information that should be gathered etc.
- **Peer support network** – create a peer support network for volunteer-involving organisations to speak with others about impact measurement, to exchange practice and learn from one another.

Long-term
- Conduct another survey in three years' time to monitor the efficacy of interventions.

To take forward these recommendations it is suggested that the Impact Sub-Group takes responsibility. However, as part of 'next steps' it would be appropriate to consider holding a workshop to validate/fine-tune the recommendations. Consideration should be given to inviting other parties with specialist knowledge and experience to participate in this workshop.

Appendix – List of Responding Organisations

Aberlour
ACVO (third sector interface for Aberdeen)
Adult Literacy and Numeracy, Argyll And Bute Council
Appin Community Trust
Argyll and the Isles Coast and Countryside Trust
Argyll FM
Befrienders SCIO
Bield Housing & Care
Black Isle Cares
Bridgend Community Centre
Bullwood Nature Trail
CHAS
Chest Heart & Stroke Scotland
Children 1st
Citizens Advice Scotland
Clackmannanshire Third Sector Interface
Contact the Elderly
Craignish Community Company
Cruse Bereavement Care Scotland
CVS Falkirk
CVS Inverclyde
Dunoon Link Club
Dyslexia Scotland
ENABLE Ayr & District SCIO
Forestry Commission Scotland
Friends of Oban Community Playpark
Glasgow Life
Guide Dogs
Headline Helensburgh
Healthcare Improvement Scotland
Hebridean Whale and Dolphin Trust
Helensburgh & Lomond Foodbank
Helensburgh Parish Church
Highland Third Sector Interface
HIV-AIDS Carers & Family Service Provider Scotland
Hoe-Start Lorn
International Voluntary Service
James Street Community Garden
Lismore Community Council
Lismore Community Transport
Lismore Community Trust
Lorn and Oban Healthy Options Ltd
Machan Trust
Macmillan Cancer Support
Modo

Moray Foodbank
MS Therapy Centre Lothian
National Trust for Scotland
NHS Tayside
Oban Salvation Army
Oxfam
PAS
Royal Voluntary Service
Scottish Drugs Forum
Scottish Sports Association
Scouts
See Me
Shelter Scotland
Sistema Scotland
St Andrew's First Aid
The Community Bureau
The State Hospital
Voluntary Action Orkney
Voluntary Arts Scotland
Volunteer Centre East Ayrshire
Volunteer Midlothian
Volunteer Scotland
Waverley Care