Routemap to improvement

Executive Summary

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Routemap to Improvement

The 'Road to Recovery' report explores the actual and projected impact of COVID-19 on volunteering in Scotland during the pandemic and over the longer term. Research evidence was drawn from the period March 2020 – August 2021. It 'forms part of a UK-wide research study involving a wide range of academic and practitioner partners: Mobilising Voluntary Action Across the UK.[1]

The report highlights how remarkable the community and volunteering response in Scotland has been. Organisations and individuals came together at pace to develop solutions and support those most in need. A new 'can do' attitude brushed aside a lot of the bureaucracy and other barriers to 'make change happen'.

Although inevitably some mistakes were made along the way, the far greater impact was the introduction of new structures, new models of working, new and stronger relationships, new ways of supporting volunteering, and new volunteer roles. This learning represents a golden opportunity for a strong volunteering legacy from COVID-19.

The key goal of this 'Routemap to Improvement' is to ensure that this new way of working is recognised, supported and developed – not just for the ongoing COVID-19 response, but to foster and support volunteering in the long-term, post-pandemic. The 'Routemap' identifies how we can improve through learning which will help us to maximise the contribution of volunteering to society. The danger is that if we don't act now a lot of this good practice and lessons learned may be lost as we revert to the old 'business as usual' model.
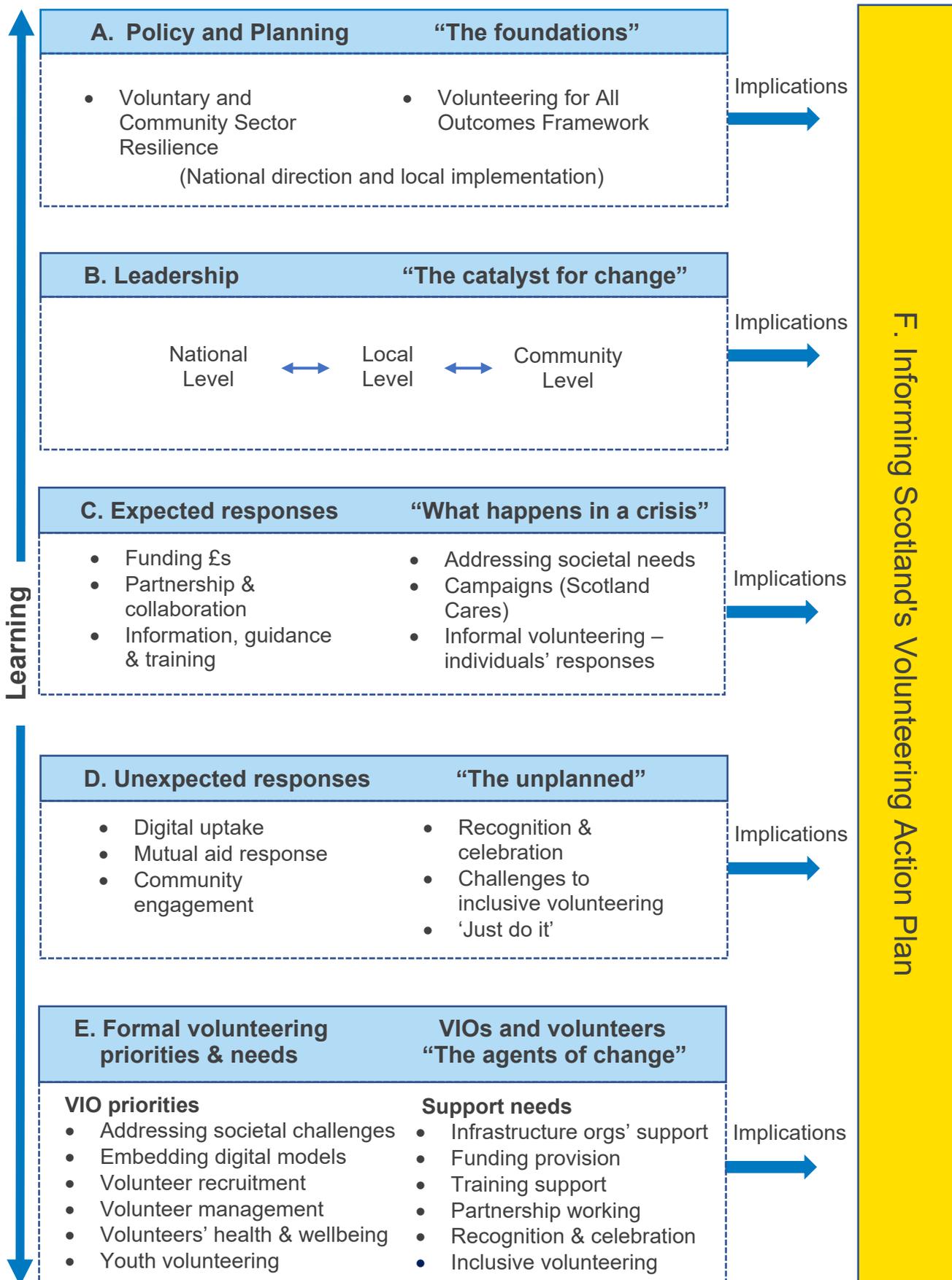
Scope and structure of the Routemap

The objective of the 'Routemap' is to summarise the key lessons learned from the 'Road to Recovery' report and to identify how we can improve the support for volunteering during the recovery period and beyond. Its focus is primarily on 'where we need to get to' rather than 'where we have been'. An overarching structure for assessing the evidence is presented in Figure 1. Its goal is to inform the development and implementation of the 'Volunteering Action Plan' for Scotland and help facilitate 'evidence into action'.[2]

There are five overarching elements underpinning Scotland's response to COVID-19 which we need to learn from:

- **Policy and planning** – understanding the contribution of the relevant policies and planning relating to resilience and volunteering that were in place at the outbreak of COVID-19, and how they have evolved since then.

- **Leadership** – an assessment of the effectiveness of Scotland's leadership in supporting the volunteering response at the national level, in the 32 local authority areas, and at the community level.

Figure 1 - Routemap to Improvement – a Learning Journey

Learning ↑↓

A. Policy and Planning — **"The foundations"**

- Voluntary and Community Sector Resilience
- Volunteering for All Outcomes Framework

(National direction and local implementation)

→ Implications

B. Leadership — **"The catalyst for change"**

National Level ↔ Local Level ↔ Community Level

→ Implications

C. Expected responses — **"What happens in a crisis"**

- Funding £s
- Partnership & collaboration
- Information, guidance & training
- Addressing societal needs
- Campaigns (Scotland Cares)
- Informal volunteering – individuals' responses

→ Implications

D. Unexpected responses — **"The unplanned"**

- Digital uptake
- Mutual aid response
- Community engagement
- Recognition & celebration
- Challenges to inclusive volunteering
- 'Just do it'

→ Implications

E. Formal volunteering priorities & needs — **VIOs and volunteers "The agents of change"**

VIO priorities
- Addressing societal challenges
- Embedding digital models
- Volunteer recruitment
- Volunteer management
- Volunteers' health & wellbeing
- Youth volunteering

Support needs
- Infrastructure orgs' support
- Funding provision
- Training support
- Partnership working
- Recognition & celebration
- Inclusive volunteering

→ Implications

F. Informing Scotland's Volunteering Action Plan

- **'Expected responses'** – this is defined as the main categories of response that one can depend on during a major crisis: funding, information, guidance, working together, addressing major needs, etc. These all came to the fore during COVID-19 and if there was another crisis tomorrow, we would have confidence that similar categories of response would occur. However, there have been important lessons learned during COVID-19 which need to be captured to help inform our response to future crises.

- **'Unexpected responses'** – these are defined as the responses to COVID-19 that people did not see coming and could not realistically have been predicted in advance. They have introduced innovative ways of collaborating, working together and delivering services with the potential for long-term legacy impacts. However, some unexpected responses have also presented challenges which need to be addressed.

- **Formal volunteering priorities and needs** – the evidence has identified specific volunteering priorities for VIOs and their support needs to help them deliver these priorities. Importantly, these priorities and needs are as important for 'steady state' beyond COVID-19 as they are in helping to support the ongoing recovery and addressing future crises.

For each topic in Figure 1 there is a brief overview of key lessons learned to identify 'what's worked'. This is followed by 'Implications' of the evidence (see the shaded text), which discusses possible options to improve performance. The 'Implications' are purposely not as prescriptive as 'recommendations', because Volunteer Scotland recognises that there are gaps in the evidence collected. The scope of the 'Mobilising Voluntary Action' research study under-represented important stakeholder voices such as funders, umbrella organisations and national bodies with expertise relevant to key themes such as community engagement and inclusion.[1]

Therefore, our objective, in partnership with the Scottish Government and the wider sector, is to invite further critical review of the research evidence presented in this report. The 'volunteering action planning' process that Scotland is currently engaged in provides an excellent opportunity for a wide range of stakeholders to review the relevance and applicability of the Routemap's 'Implications', which will help inform the specific actions being considered.

For each of the topics discussed there are hyperlinks to the relevant supporting evidence drawn from Sections 2 – 7 of the 'Road to Recovery' report.

Definitions: to assist the reader in the terminology used such as 'mutual aid', 'informal volunteering', 'infrastructure organisations' and 'Third Sector Interfaces' (TSIs), this link provides a full list of definitions.

A. Policy and planning

A.1 Volunteering policy ([See section 2.2](#))

Before the outbreak of COVID-19 there was a strong policy direction in Scotland related to volunteering, with a particular focus on its contribution towards the Scottish Government's Performance Framework and specific National Outcomes. This is articulated in 'Volunteering for All: Our National Framework'.[2]

The outcomes and principles embedded in the Framework provided high level guidance on priorities relevant to Scotland's volunteering response to COVID-19, particularly for the role of formal volunteering:

- Tackling poverty and disadvantage
- Achieving a more inclusive society
- Enabling people to contribute to society
- The contribution of volunteering is recognised and appreciated
- Supporting a healthy and active society
- The 'places and spaces' where we volunteer are supported and sustained.

However, no evidence was identified by this study on how useful the framework was in relation to informing the volunteering response and there was no national Volunteering Action Plan in place.

> **Implications – volunteering action planning**
>
> - The current development of a 'Volunteering Action Plan' for Scotland will assist in addressing the requirement for more detailed volunteering priorities for Scotland relevant to the recovery from COVID-19, addressing future crises and volunteering in the longer term.
>
> - 'The Road to Recovery' report provides supporting evidence relating to each of the five Volunteering Outcomes which will help to inform the Management Team, Working Groups and Governance Group responsible for the development of the Volunteering Action Plan. This includes implications for policy, practice and learning.
>
> - The report also provides clear guidance on how volunteering can enhance its resilience response to future crises, which is relevant to the action planning process.

A.2 Resilience policy, planning and implementation
(See sections [2.2-2.4](#), [5.1-5.2](#) and [6.4](#))

Before the outbreak of COVID-19 the Scottish Government had a national, regional and local resilience infrastructure in place, including the Voluntary Sector Resilience Partnership and Voluntary Sector Resilience Groups. It also had a major policy and operational focus to build Scotland's resilience at the community level with guidance in place for responders – 'Building Resilient Communities' – and the Ready Scotland website.[3, 4] During the pandemic the resilience infrastructure was further developed through:

- The formation of the Voluntary and Community Sector (VCS) Advisory Group
- The ongoing development of the Ready Scotland website
- The creation of the National Voluntary Sector Coordination (NVC) Hub

Good communication, coordination of partners, effective partnership working and shared learning were key to the effective resilience response in Scotland's local authority areas. Although the Scottish Government survey evidence showed that the awareness of, and involvement in, resilience planning pre-pandemic by infrastructure organisations varied significantly across the 32 local authority areas, in general, their level of resilience engagement during the pandemic was very positive except in a small minority of areas.[5]

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Implications – resilience planning and implementation

There is a strong platform to **build on the positive progress in resilience planning and operation** during COVID-19:
- Continuing the integration of the voluntary and community sector alongside Category 1 and 2 responders
- Embedding the voluntary and community sector more effectively and consistently in Local Resilience Partnerships (LRPs) and Groups – particularly the TSIs.
- Reviewing the need for resilience planning as an integral element of Scottish Government's funding agreements with TSIs – see the TSI Outcome Framework.[17]
- Providing bespoke support to the small number of local authority areas where resilience planning needs to be significantly strengthened.
- Promoting the sharing of learning between Local Resilience Partnerships and Groups, including innovative ideas and ways of working.
- Being clear that partners' involvement in crisis planning brings with it an obligation to help lead and coordinate the voluntary sector's response for future crises.
- Reviewing the balance between Scotland's emergency crisis response and the need to address longer term societal needs. See C.5
- Learning from the work of the Social Renewal Advisory Board's Communities and Volunteering Circle recommendations.[8]

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B. Leadership
(See section sections 5.3, 5.4 and 7.1)

A crisis of the scale and complexity of COVID-19 required decisive and prompt action across areas such as information, guidance, support, services, innovation and funding to facilitate the response by the third sector and volunteering. Effective leadership was critical in helping to make this happen, and the evidence from Scotland demonstrates how much is owed to those who fulfilled this leadership function: nationally, locally and at the community level. This was a combination of those in leadership roles pre-pandemic, embracing and responding to the COVID-19 challenges, whilst for others it was a case of 'stepping up to the plate' and taking on new leadership roles to fill gaps in Scotland's response, especially at the local level.

Examples of leadership include:

- Scottish Government's role in the resilience response, Scotland Cares and funding
- National bodies such as SCVO and Volunteer Scotland in information, research, and engagement with Scotland Cares sign-ups such as through RadioV.[16]
- TSIs, local authorities and partners working together to support the third sector and volunteering locally. The recognition of TSIs' leadership relating to volunteering expertise was critical in this regard.
- Communities and neighbourhoods taking the initiative to develop services and support functions to help people locally; for example, food preparation and delivery.

It is important to embed the good practice underpinning Scotland's leadership response and to learn lessons and to improve leadership for future crises and for the long-term support of volunteering in Scotland.

Implications – leadership

National leadership – there is an opportunity for Scottish Government and national partners to review how to further improve national level leadership of volunteering in Scotland. The following issues should be considered:
- The structure and modus operandi of a national volunteering leadership group for volunteering during a crisis. This includes a review of the organisations that should be represented, chairing responsibility and the consensual decision-making model. Specific factors to consider include:
  - The engagement of the TSI Scotland Network representing 32 local authority areas
  - The engagement of representative national organisations such as the Scottish Volunteering Forum
  - The relationship with the Voluntary and Community Sector Advisory Group.
- What functions should a national group be responsible for? In particular, it will be important to differentiate between national responsibilities and those that should be devolved to TSIs and partners at the local and community levels.

Local leadership – TSIs' leadership role for volunteering is now much more widely recognised at the local authority level and this needs to be embedded across all areas. Suggestions to further enhance their leadership role includes:
- Developing Scottish Government and national partners' understanding of the services, skills and expertise of TSIs and partners locally – what they can do, how they can help in a crisis and how they can work together more effectively and optimise their contribution in 'steady state'.
- Scottish Government and national partners' role in facilitating greater autonomy and flexibility at a local level – devolving decision-making and support to TSIs and local partners to utilise their local knowledge to best effect.
- Local authorities, TSIs and partners facilitating community planning and action at the sub-local authority level, giving a more localised approach.

Community leadership – TSIs, local authorities and local partners have the opportunity to review their experience from the pandemic in facilitating community-led action, to identify and share good practice. Suggestions included:

- Recognising that communities are best placed to support themselves – they know where the needs lie and where the gaps in provision exist.
- Additional support for smaller, local, community groups and for these groups to be included in local area decision making.
- Ensuring that policies and campaigns are adapted to the needs of local areas.
- TSIs and partners improving their communication and engagement with community leaders and community organisations.

Clarity in leadership and support roles:

- Improved clarity in responsibilities between national, local and community organisations – especially leadership roles versus support and facilitation roles.
- Enhanced cascade of responsibilities from national, to local, to community. Understanding needs and priorities for action locally, and the support required by local/community groups and local partners to help deliver this.

C. Expected responses

C.1 Funding
(See sections 5.6 and 6.3-6.6)

There was a strong funding response during COVID-19 by Scottish Government and funding partners:

- Scottish Government committed £350 million to support communities throughout the pandemic.[6]
- The 'Response, Recovery and Resilience Fund' was launched to manage donated funding, which distributed £7 million to 1,400 charities by February 2021.[7]
- In 2020-21 Scottish Government allocated an additional £2 million to the TSI Scotland Network to help support TSIs' response to the pandemic.

The attributes of funding support provided to the third sector in Scotland included:

- Scottish Government working with funding partners with the expertise, networks and resource to support the development and operation of the funds.
- Early provision of funding – the speed of fund development and the issue of funds was a key strength at the height of the crisis.
- Importance of real-time learning – the Scottish Government stressed the importance of learning as funds were developed and rolled out.
- Flexibility and risk taking – the need for funds to have sufficient flexibility and to accept a reasonable level of risk were important
- Centralised funding information – SCVO set up a Funding Hub to coordinate the funding offer to the third sector.

The Scottish Government survey also identified the need to transfer this learning to funding during 'steady state' conditions beyond the pandemic.[5]

Implications - funding

Influencing funders & listening to funders – there would be merit in bringing together a representative group of funders to discuss how to improve the awareness and understanding of volunteering by funders; and for the partners in the development of Scotland's Volunteering Action Plan to better understand the constraints and issues facing funders. From the volunteering perspective the evidence indicates that the following should be considered:

- Funding applicants having to 'test' the relevance of volunteering to their project/programme, and the proportion of funds allocated to support volunteering where relevant.
- The funding donor taking into consideration 'investment' factors such as volunteer management and practice – either as a requirement of funding or as an outcome of funding. Linkage to national standards such as Investing in Volunteers and Volunteer Friendly where appropriate.[19, 20]
- As part of the evaluation of funds there should be an assessment of the impact on volunteering. This would help to enhance understanding not only of fund performance but also importantly the fund's contribution to volunteering in Scotland.

The way in which funding is allocated and distributed also needs to be reviewed. Specific issues for consideration include:

- Security in funding with longer-term, multi-year commitments, building on the Scottish Government's commitment to multi-year funding [21]
- Simplifying application and grant-making processes with reduced bureaucracy
- Speed of funding distribution. COVID-19 has demonstrated what can be achieved during a crisis period versus 'steady state'.
- Flexibility, innovation and creativity in funding for the sector.

Funding support – consideration needs to be given to the funding needs not just of VIOs, but also of infrastructure organisations. There has been an increased recognition of the vital role played by infrastructure organisations during the pandemic, and it is appropriate to review their ongoing funding needs to enable them to support VIOs and volunteers; not just for the recovery but also over the long term (e.g. TSIs and national umbrella bodies).

C.2 Partnership and collaboration
(See Sections 5.4 and 6.3-6.5)

The feedback from infrastructure organisations was extremely positive regarding the effectiveness of the coordination of the volunteering response, especially in local authority areas.[5] The key strengths were:

- TSIs being recognised as the centre of knowledge and expertise on volunteering locally, resulting in many TSIs becoming more effectively involved with their local authority and local partners in the management of the crisis.

- Improved communication and problem solving between TSIs. The TSIs acknowledged that the TSI Scotland Network was 'now actually working' as a 'network'.
- National support and collaboration from organisations such as SCVO, Volunteer Scotland and the British Red Cross was also acknowledged, although, in general, national to local collaboration was seen as weaker than local collaboration.

At the local level the Scottish Government survey also highlighted that the strength of local partnership working was not universal, with a minority of local authority areas having problems with communication and partner engagement. [5]

> **Implications – partnership and collaboration**
>
> There is an excellent opportunity to further strengthen partnership working and collaboration that progressed positively during COVID-19. Areas which have been highlighted by the research include:
> - **Local partnership working** - strengthening specific local authority areas where progress during COVID-19 has been weaker.
> - **TSI and local authority engagement** – building upon the improved collaboration and joint working in relation to volunteering – in structures such as Community Planning Partnerships and Local Resilience Partnerships and Groups.
> - **TSI Scotland Network** – building upon the gains made in the effective operation of the Network during COVID-19.
> - **National and local collaboration** – reviewing ways to improve the collaboration and communication between Scottish Government, national bodies and the TSIs and local partners. Specific issues identified by the evidence include:
>   - Providing increased clarity on the responsibilities of national bodies such as Volunteer Scotland and SCVO, and the TSI Scotland Network. In particular, the importance of identifying mutual responsibilities where close collaboration is essential.
>   - How to improve the 'voice' of local partners in national planning relating to the third sector and volunteering? For example, local authorities and TSIs.
>   - How to share data, expertise and resources more effectively from local to national and vice-versa.
>
> These findings are directly relevant to the work of the 'Volunteer Action Planning Process'.

C.3 Information and guidance
(See sections 4.3, 5.3 and 6.3)

As expected in a national crisis the scale and complexity of COVID-19 the role of information and guidance was critical. There was widespread evidence of good practice, both nationally and locally:

- **National level** – in addition to the Scottish Government's role in areas such as information on COVID-19 restrictions, funding programmes and the Ready Scotland website, other examples included SCVO's centralised funding information; and interpretation of COVID-19 restrictions for VIOs and the public, information which

was shared by national organisations such as Scottish Community Development Centre (SCDC), Volunteer Scotland and SCVO.

- **Local level** – TSIs and local partners delivered a suite of information to support VIOs and the wider public on safe volunteering including videos, branded campaigns such as 'Think Local, Act Local', and 'being a good neighbour' guide. Types of support provided for mutual aid groups included guidance on formalisation of their organisation; governance and legal compliance; volunteer management; COVID-safe delivery of services; lists of formal organisations they can signpost to; and coordination of support geographically.

Implications – information and guidance

Notwithstanding the strong focus on information and guidance during COVID-19, there was feedback from infrastructure organisations and VIOs that Scotland's information and guidance response could be improved, both nationally and locally:[5]

- **Guidance for involvement of volunteers** – one important area was the demand by VIOs for national and local government to provide clearer guidelines on the involvement of volunteers throughout the whole COVID-19 recovery phase, and that these guidelines should be kept up-to-date and shared in a timely and accessible manner.
- **Recognition and support for informal volunteering** – ensuring that the newfound recognition of informal volunteering in a crisis is retained and that appropriate support is provided. This includes guidance to support individuals in helping their neighbours, friends and colleagues safely – especially local community support focused on crisis needs, and mitigation of social isolation and loneliness.
- **Information and data sharing** – more effective information sharing at all levels: within local authority areas; sharing good practice, lessons learned, etc. between areas; and between national and local levels. The scope to widen access to quality assured information centrally, to minimise duplication locally, should also be considered – not just for crises but also in 'steady state'. Examples of relevant platforms include Ready Scotland website, Volunteer Scotland's website and [VolunteerWiki](#) which was initiated locally by Volunteer Edinburgh, but has national relevance and reach.

C.4 Training provision
(See sections 4.4, 6.3, 6.4 and 6.6)

The development of new volunteer roles, the introduction of new systems to support volunteers (especially on digital platforms), the onboarding of new volunteers and re-engagement of existing volunteers, and ensuring the health and wellbeing of volunteers during COVID-19, all required significant training support from VIOs. OSCR's survey of Scottish charities and the Scottish Government survey highlighted the need for this training support and how important it was, not just for frontline volunteers but also trustees.[5, 9]

Implications – training provision

Training support for VIOs was identified in the following areas, which has relevance for VIOs beyond COVID-19: [5]

- Funding support to help cover the costs of training by VIOs. This could be delivered via a variety of routes, such as:
    - Funders to make an allowance in their application process for volunteer training expenses when funding volunteer-involving activities.
    - The design of future volunteering funds by Scottish Government and other funders to include a specific focus on training and standards supporting good volunteering practice.
    - The provision of free or subsidised training for smaller VIOs, but chargeable for larger VIOs, as per Volunteer Scotland's pricing model.
- Training support in embedding different models of engaging and supporting volunteers: for example, online/ remote volunteering.
- Creation of online training products to support VIOs in delivery of training.
- Training provision to be complementary to and supportive of the needs of those VIOs pursuing Investing in Volunteers and Volunteer Friendly.[19, 20]

Infrastructure organisations' role in the provision of training support locally is critical; combined with learning across geographies. Infrastructure organisations also have a key role in supporting the development and rollout of a national 'quality pipeline' based on quality assured training and national standards of good practice currently being led by Volunteer Scotland, the TSI Scotland Network and other partners.

C.5 Addressing societal needs
(See sections [4.5](#) and [4.6](#))

A key focus during the first lockdown (March – June 2020) was addressing the crisis needs of PPE production, food shopping, collecting and delivering prescriptions, other food support, and keeping in touch, particularly for those most isolated and at risk. Through a combination of formal volunteering, mutual aid and informal volunteering these needs were addressed very effectively and relatively quickly. In contrast, societal needs relating to mental health, social isolation and loneliness, and poverty (among a long list of needs), were significantly exacerbated by COVID-19. These long-term systemic challenges proved to be an ongoing resilience challenge throughout the pandemic.[5]

What stands out from the evidence is the widespread engagement of Scotland's VIOs in helping to address these long-term societal needs, not just in the first lockdown but throughout the pandemic.

Implications – addressing societal needs

- The importance of formal volunteering in addressing these more complex long-term societal challenges should be recognised, compared to the limitations of mutual aid and informal volunteering (with the exception of 'keeping in touch' to combat social isolation and loneliness, which mutual aid and informal volunteering are very good at).
- The contribution of VIOs in addressing these challenges needs to be recognised and supported by Government Departments, agencies, and funders in 'steady state' – not just in response to the pandemic.
- The scope of resilience planning should be reviewed to consider the appropriate balance between addressing short-term crisis needs and the longer-term resilience of society.
- How to ensure volunteering remains as inclusive as possible during a crisis should be reviewed. Those who derive the greatest health and wellbeing benefits from volunteering are often those most excluded in society. Unfortunately, it was these groups who were often least able to volunteer during the pandemic.

C.6 Scotland Cares
(See section 5.5)

The Scotland Cares campaign was set up in direct response to COVID-19 and invited people to register their interest to volunteer via the Ready Scotland website. The objective was to provide one place for potential volunteers to sign up, and for this pool of volunteers to be redirected to local organisations, so, if and when they were needed, that need could be expressed and met locally. It was recognised that the demand for volunteers would most likely be variable and spread over time. It should also be recognised that Scottish Government and partners were acting at pace and in conditions of considerable uncertainty in the design and mobilisation of the campaign.

Scotland Cares achieved over 60,000 sign-ups within a month, and this demonstrated the willingness of Scotland's people to help in tackling the national crisis. It also helped to raise the profile of volunteering. However, evidence from the analysis of the c.35,000 sign-ups via the Volunteer Scotland portal, identified three key problems:

- The demand-supply imbalance due to the relatively small number of formal volunteering opportunities compared to the large number of sign-ups, which meant that most applicants did not get the chance to volunteer. This may also have had negative impacts on applicants' perceptions of volunteering and the organisations associated with the delivery of the Scotland Cares campaign.
- The heavy workload involved in the administration of the Scotland Cares sign-up and registration process administered by Volunteer Scotland nationally, and the 32 TSIs locally across Scotland, often with the support of their local authority. This workload also hit the TSIs in May-June 2020, when they were already very busy.
- The 'window of interest' from volunteer sign-ups was limited, especially after the first lockdown when people came off furlough and started to return to work. Volunteer Scotland's engagement with the sign-ups identified a significant waning of interest.

Implications – from 'Scotland Cares'

There are important lessons to be learned from Scotland Cares which can help to inform future initiatives of this nature.[5] There would be merit in Scottish Government and key partners coming together to review the following factors:

- **Consultation pre-launch** – could communication with, and inputs from, the key volunteering organisations in Scotland be improved? This includes Volunteer Scotland, the TSI Scotland Network and other key partners such as SCVO.
- **Appraisal process** – to review how the campaign was appraised by Scottish Government and what changes, if any, could be made to improve the process.
- **Getting the timing right** – balancing the need to act quickly and decisively versus giving sufficient time for planning the details of such a campaign, giving advance notice to the TSIs, etc.
- **Collaboration post-launch** – the way Scottish Government and third sector partners came together to help develop and deliver the Scotland Cares campaign was seen as a real strength. There may be lessons that could be capitalised on for future campaigns, events and relationships more generally.
- **Managing volunteers' expectations**: how best to manage volunteers' expectations when there are significant variables in a campaign of this nature.
- **Don't forget your existing volunteers** – alongside the management and onboarding of new volunteers from Scotland Cares it was very important to acknowledge the contribution of the ongoing volunteering effort across Scotland.

C.7 Informal volunteering – Individuals' responses
(See sections 3.2, 3.4, 5.3 and 6.4)

When a 'crisis' affects communities at the local neighbourhood level people 'step up to the plate' and support each other. Acting as an individual to check on your neighbour, help them with their shopping, or provide transport is what we might expect. This is most frequently evidenced in people's response to adverse weather events, the impact of a terrorist attack or a local disaster. The unique feature of COVID-19 was its severity and that it impacted every single neighbourhood in Scotland; so, it was the scale and duration of the informal volunteering response that was so notable.

The recently published Scottish Household Survey 2020 results highlight how significant this response was.[10] Informal volunteering participation increased from 36% in 2018 to 56% in 2020. Also, informal volunteers focused their efforts supporting the crisis needs which were particularly acute during the first lockdown:

- Keeping in touch with someone who is at risk of being lonely: up from 18% in 2018 to 69% in 2020
- Doing shopping, collection pension, collecting benefits or paying bills: up from 12% to 51%
- Providing transport or accompanying someone away from home: up from 9% to 20%
- Routine household chores: up from 11% to 19%
- Providing advice or support with letters of forms or speaking with others on someone else's behalf: up from 6% to 16%.

'Acknowledging and supporting informal volunteering' was the third most frequently cited priority by infrastructure organisations to support Scotland's recovery from COVID-19.[5] However, there is less evidence on how informal volunteering should be supported.

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Implications – Informal volunteering

Care needs to be taken not to try and 'formalise the informal', and so lose the inherent strength of informal volunteering – its informality. Notwithstanding the difficulty in supporting individuals rather than organisations, there are at least three implications from COVID-19 which need to be considered:

- **Recognition of informal volunteering** – there has been a complete sea-change in the recognition of how individuals acting on their own volition can provide an indispensable contribution during a crisis. There is the opportunity to build on this recognition beyond COVID-19 into steady state.
- **Support for informal volunteers during a crisis** – the needs of volunteers are likely to vary from one crisis to another. For informal volunteering during COVID-19 the priority was to inform the public about the risks and how to volunteer safely. The scope to build on the excellent guidance provided by TSIs and partners locally post-pandemic should be reviewed, with the possibility for extending the range of guidance topics relevant to other crises.
- **Stimulating informal volunteering during steady state** – engaged communities where people feel part of their community, where they know their neighbours, and are involved in supporting their community, may result in higher levels of informal volunteering engagement than would be the case in less engaged communities. There is therefore an opportunity to engage with organisations specialising in community engagement to learn from their knowledge and skills, complemented by wider research evidence, to determine whether this could be an indirect route in fostering people's engagement in informal volunteering.

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D. Unexpected responses

D.1 Digital uptake
(See sections 4.3, 4.4. 6.3, 6.4. 6.6 and 7.2)

COVID-19 has required very significant adaptation of service delivery models by VIOs to try and maintain business continuity and, in many cases, the very survival of their organisation. Top of these adaptations has been the use of phone/digital platforms, with the majority of VIOs surveyed moving some or all of their activities online in Scotland.[5] OSCR's survey of 2,500 charities stated: "*The single greatest impact of the pandemic and restrictions on almost all charities was going online.*" [9]

The benefits include:
- Improved reach with volunteers and service users:
  - Additional beneficiaries being reached – especially in remote locations
  - Attracting a wider geographical pool of volunteers

- Improved communication and team working with volunteers and staff (especially when working over a large geography)
- The delivery of benefits for both rural and urban areas
- The ability of digital technology to support new and enhanced services
- The cost savings and reduced carbon footprint from digital technology.

However, there is also a need to recognise the limitations of digital technology. The switch to digital was no universal panacea and there were significant challenges for many VIOs, especially for smaller organisations with few or no paid staff:

- Lack of digital skills amongst some volunteers
- The challenges in supporting volunteers digitally
- The exclusion of beneficiary groups such as older adults, disabled people and those excluded due to the cost/lack of equipment
- The basic fact that many services are not suited to online delivery. Face-to-face engagement remains critical for many services.

Implications – digital uptake

Optimising current digital technology – the uptake of digital technology and its application in innovative ways through video platforms such as Zoom and Teams, to social media platforms and the 'good old phone' have been transformational in the support of volunteers and the delivery of their services.

However, support is required to help embed current digital good practice, whilst mitigating its limitations. Consideration should be given to:

- Identification and sharing of good practice in the use of digital technology, including blended models of volunteer support and service delivery. Accessing existing support from organisations such as SCVO will be important, so as not to 'reinvent the wheel'.
- Improving VIOs' digital infrastructure, and provision of IT equipment for staff and volunteers.
- The provision of accessible digital training, particularly for those experiencing digital exclusion such as older age groups and those living in rural areas.

These areas of possible support relate primarily to formal volunteering, but there may also be opportunities relating to the sharing of good practice in the use of social media platforms by mutual aid groups. See further discussion in D.2 below.

Preparing for future digital applications – what COVID-19 demonstrated was the need for organisations to be prepared for digital change and having the ability to respond quickly to the application of communication platforms in new settings. This can be existing digital technologies that were 'discovered' (e.g. Microsoft Teams) as much as completely new technologies. Crises are excellent drivers of rapid update of existing technologies but for new purposes. Hence, a key challenge for the third sector is its ability to be able to address inequalities in digital access when there is fast-paced change in the technologies being used. Interestingly, there appeared to be fewer barriers in the uptake and the application of Facebook and WhatsApp by mutual aid groups, reflecting the widespread skills-set across society on social media platforms. See D.2

D.2 Mutual aid response
(See sections 3.2, 3.3, 5.3, 6.4 and 7.1)

Alongside digital uptake, the mutual aid response ranks as one of the most unexpected, unplanned and transformational aspects of Scotland's resilience response. Exploiting social media platforms such as Facebook and WhatsApp, communities came together spontaneously to provide assistance, which was ideally suited to meeting the initial crisis needs during the first lockdown. Key attributes included: [5] [11]

- Speed of response for crisis needs of food, transport, shopping and shelter
- Services were easy to access in an informal way
- Community connectivity, accessibility and hyper-local knowledge
- Ability to support both those shielding, and those vulnerable but not shielding
- Reaching those in need in areas of deprivation
- Large group membership providing ready access to volunteers

TSIs, local authorities and other infrastructure partners thought that mutual aid was a key component of the COVID-19 response, which complemented formal volunteering activities. They also supported mutual aid groups in some of the challenges they faced such as volunteer safety, risk management relating to vulnerable groups and GDPR, and their long-term sustainability.

> ### Implications – mutual aid response
>
> Mutual aid groups are ideally suited to supporting a crisis resilience response, but for many groups their longer-term role in 'steady state' is more uncertain. There is evidence of many groups moving to community support pages on Facebook, becoming dormant or ceasing to operate altogether. However, this should not be viewed as a negative development. Their very strength is their ability to come together and to act quickly in supporting a crisis response.
>
> We need to be careful not to try and formalise what is a very effective informal resilience response. However, there is an opportunity to review how best to support the contribution of mutual aid groups in future crises and, in particular, the merits of becoming an unincorporated association, versus incorporation with legal status.
>
> **Supporting mutual aid** – suggestions include:
> - Reviewing the role of mutual aid groups in Scotland's resilience planning and the resilience response infrastructure, protocols and guidance. Mutual aid to be seen as an integral part of the local resilience response.
> - TSIs and partners supporting those mutual aid groups which have the interest and potential to become constituted, through becoming an unincorporated association. There may also be a small number that should become incorporated, especially those interested in expanding their operations and recruiting staff or taking on a premise. The Volunteer Friendly national standard has been offered as a support tool for those that transition to constituted status and wish to take proactive action to improve the volunteer experience. [20]

- Supporting constituted mutual aid groups in aspects such as safeguarding, confidentiality, and volunteer safety, drawing upon good practice in relevant national standards.

There is also an opportunity to reflect on the wider contribution of mutual aid groups in improving community engagement and cohesiveness. COVID-19 has resulted in communities coming together, where people forge new relationships and support each other: see D.3 below. Mutual aid has played an important role in this enhanced community engagement. This includes the contribution from hundreds of very small street level self-help WhatsApp groups focused on helping each other with a mainly social support focus; as opposed to mutual aid groups offering services to help others outside their immediate neighbourhood: see those listed on Mutual Aid UK.[12]

D.3 Community engagement
(See sections 6.4 and 7.2)

The TSI Scotland Network study highlighted COVID-19's positive community level impacts with 'people looking out for each other' and 'people developing new connections and better relationships'.[13] The mutual aid and informal volunteering response was critical in achieving this 'strengthened community spirit and identity'.[5] It bought people together to create stronger and more resilient communities; where people help each other and provide invaluable support and kindness.

Importantly, this contribution was recognised and valued by Scotland's infrastructure organisations whose focus pre-pandemic was largely formal volunteering. However, the challenge going forward is how best to foster and support this new spirit of community engagement.

Implications – community engagement

Infrastructure organisations put forward specific suggestions to **build stronger and more resilient communities** through volunteering, including: [5]
- Working with communities to continue to see volunteering as an important aspect of community life.
- The provision of community hubs and support staff to ensure that those people who need the assistance get it.
- Continue to build the 'Volunteer Brand' in local communities which provides a volunteer focused/community-based platform for local people to engage with.
- Infrastructure organisations to undertake needs-based assessment of their local communities to determine how best to support groups/ volunteers and develop more resilient communities.
- Provision of additional funding to support community groups in their recovery.

Inclusive communities – there is an opportunity to make communities more inclusive, and to capitalise on the contributions from informal volunteering and mutual aid. A key geographic focus should be the most deprived communities in urban Scotland, where adult formal volunteering participation rates are significantly lower.[18] Specific programmes of support are planned or underway by the TSIs and partners and the learning from these interventions should be shared locally, regionally and nationally as appropriate.[5]
Community leadership – a need expressed by infrastructure organisations was for more effective empowerment of local community groups to foster community-led action (see section B).

Further research required – there is a requirement for further research to understand the contribution of volunteering to community engagement and vice-versa.

D.4 Recognition and celebration
(See sections 6,3, 6,4, 6.6 and 7.2)

COVID-19 has had a significant impact on VIOs' appreciation and recognition of the contribution of their own volunteers.[5] The pandemic reaffirmed the vital importance that volunteers have within VIOs, within their communities, and within Scotland's response to COVID-19. It is therefore important for all VIOs to fully recognize the contribution of their volunteers and to demonstrate this internally (to volunteers, staff and trustees) and externally to their stakeholders – not just during a crisis but on an ongoing basis.

However, probably an even more important theme emerging from the Scottish Government survey is the requirement for increased recognition of volunteering by a much wider range of organisations, the most important being Scottish Government and its agencies, funders, national partners, umbrella organisations, local government, and employers. There needs to be a much better awareness, understanding and recognition of the role and contribution of volunteering amongst such organisations and more widely in society. Only then will volunteering be reflected effectively in policies at the national, local and organisation levels.[5]

Implications – recognition and celebration

Influencing VIOs – there is an opportunity to build on the increased recognition by VIOs of the importance of volunteers and volunteering. Consideration should be given to how this can best be effected, such as through promotion, events, sharing good practice from COVID-19, and increased uptake of national standards of good practice such as Investing in Volunteers and Volunteer Friendly, etc. [19, 20] There is also a need for increased recognition of the national standards themselves.

Influencing the 'influencers' – this includes Scottish Government, national, regional and local organisations, which can influence policy and practice relating to volunteering. This is a complex goal which will require careful consideration as part of Scotland's 'Volunteering Action Planning Process'.

Inclusive volunteering – improved understanding and recognition of volunteering and its contribution to volunteers' health and wellbeing can help to influence more inclusive volunteering policy and practice. Opportunities include:
- VIOs and the 'influencers' recognise the benefits of directing policies and practice to help engage those who have the most to gain from volunteering.
- Those with lived experience of isolation and loneliness, mental ill-health, poverty, addiction, homelessness, etc. can use their 'voice' in volunteering roles to raise awareness of the impact of the positive health and wellbeing impacts from volunteering
- The scope to introduce programmes to raise awareness and provide support to those excluded from volunteering, such as 'Access to Work' for disabled people, which is currently only available for people in employment.

Infrastructure organisations' role – they understand the importance of recognition and celebration and support this locally as a shared responsibility with partners. However, national organisations with a volunteering responsibility, such as Volunteer Scotland and the Scottish Volunteering Forum, also play a key role in supporting volunteering recognition and celebration in partnership with infrastructure organisations.

D.5 Challenge of inclusive volunteering
(See sections 4.3, 4.5, 6.3, 6.4, 6.6 and 7.2)

Ensuring volunteering is inclusive and accessible to all is a major challenge for the large majority of VIOs in 'steady state' let alone in the midst of a major pandemic. Two key factors have exacerbated the lack of inclusion during COVID-19:
- Those groups in society most excluded and disadvantaged, and who can derive the greatest health and wellbeing benefits, are the people most likely to have been adversely affected by COVID-19, which will have compromised their ability to volunteer; and
- VIOs' ability to engage those who are excluded has been seriously compromised by COVID-19. Their focus has been on their crisis response and longer-term survival. A minority of VIOs considered 'Making our volunteering more inclusive' a priority.[5]

In contrast, infrastructure organisations rated a more inclusive volunteering outcome as one of their top priorities to aid the recovery of the third sector in the wake of the pandemic. This supports the attainment of the Volunteering for All Outcome: "There are diverse, quality and inclusive opportunities for everyone to get involved and stay involved".[5, 2]

Implications – inclusive volunteering

Support for inclusive volunteering – infrastructure organisations identified a range of support measures to tackle barriers exacerbated by COVID-19:
- Re-establishment of programmes for people with higher support needs to help them access suitable volunteering.

- Working with minority communities to ensure volunteering is inclusive and that organisations take an active approach to inclusive practices, through training and the development of inclusive policies, etc.
- Making volunteering opportunities more welcoming and inclusive for different people; ensuring that barriers to recruitment are not created inadvertently.
- A more joined up approach with other infrastructure organisations and community groups, to support and develop inclusive volunteering.
- Development of new projects, for example a Community Growing Project to support those with mental ill-health through volunteering.[5]

Digital inclusion – IT equipment and accessible digital training was identified as a priority by VIOs for staff members and volunteers – particularly for those who were experiencing digital exclusion such as older people, those in poverty and those living in rural areas.[5]

Recognition and promotion of volunteering - VIOs highlighted the key role which recognition has in supporting a more inclusive volunteering outcome – see D.4. [5]

Leveraging mutual aid and informal volunteering engagement – at a wider level, infrastructure organisations identified the opportunity to make Scotland's communities more inclusive through more informal volunteering engagement – see D.3. [5]

D.6 'Just do it'

One of the major positive impacts coming out of society's response to COVID-19 was a transformational 'can do' attitude. Innovation, problem solving, less bureaucracy and quick decisions were achieved by organisations and people coming together to deliver funding and practical support 'on the ground' and at pace. Examples include:
- The development and delivery of major national funding programmes
- National coordination between Scottish Government and partners
- Local coordination between TSIs, local authorities and local partners
- Delivery of support to VIOs, mutual aid groups and informal volunteers by infrastructure organisations
- The delivery of crisis support by mutual aid groups
- The response of individuals helping their neighbours and the countless gestures of kindness.

So much has been achieved so quickly compared to what typically happens in 'steady state'. This begs the question as to why the attributes of the 'just do it' attitude cannot be retained beyond COVID-19 as a key lasting legacy.

Implications – 'Just do it'

Learning from COVID-19 – there is the opportunity to review and learn from the 'just do it' model. What made organisations work together so much more effectively? How did funding and support get delivered so much more seamlessly and quickly? Can and should these practices be sustained to the 'steady state' beyond COVID-19?

Combatting the return to the status quo – once the pressures of COVID-19 are alleviated, it will be all too easy to revert to the 'old behaviours'. The factors which need careful consideration include:

- Risk averseness – are decision-making processes overly risk averse, with bureaucratic form filling systems resulting in slower decisions, less innovation and possibly poorer decisions overall?
- Cost-effectiveness – did the 'just do it' approach result in value-for-money outcomes? Did the funding and support get to those most in need and was it cost-effective? To what extent was funding and support misdirected due to having to operate at pace? See C.1
- Collaborative working – when the pressures of COVID-19 are removed, will organisations revert to models based more on self-interest rather than wider local or national interest?

These are complex issues and not easy to influence in terms of securing positive legacy impacts. It is quite possible that the risk-averse approach in normal times, and the 'just do it' approach in crisis are both optimal, which reflects shifts in the risk profile and cost-benefit of action during a crisis. However, there would be merit in an open discussion between the key stakeholder groups involved in the development of Scotland's Volunteering Action Plan.

E. Formal volunteering priorities and support needs
(See Sections 4.3, 4.6, 6.3, 6.4, 6.6 and 7.2)

In the Scottish Government survey VIOs identified volunteering priorities and support needs for their long-term recovery.[5] What was striking was how the issues relevant to addressing the crisis were also seen as being pivotally important in supporting their longer-term development beyond the crisis. The other key finding was the symmetry in views expressed between VIOs and infrastructure organisations regarding priorities to support formal volunteering, with the one exception of inclusive volunteering.

Implications – formal volunteering priorities and support needs

VIO priorities
- *Addressing societal challenges* (see C.5) – a high proportion of VIOs have focused on addressing loneliness, mental ill-health, poverty alleviation, homelessness, etc. and these challenges require long-term volunteering support.
- *Embedding digital models* (see D.1)– capturing the best of digital and mitigating its limitations.
- *Volunteer recruitment* – recovering from the major contraction in formal volunteering through re-engagement of former volunteers and attracting new volunteers.
- *Volunteer management* – additional funding to support volunteer management and coordination was VIOs' most frequently cited funding need.

- *Volunteers' health & wellbeing* – COVID-19 led to problems of fatigue and burnout for those who remained as volunteers, and also for the health and wellbeing of volunteers isolated due to shielding or whose roles disappeared due to social distancing.
- *Youth volunteering* – the loss of volunteering opportunities for young people, and the adverse impacts of COVID-19 on their health and wellbeing are key drivers underpinning the need for focused support on young people's volunteering.

VIO Support needs
- *Infrastructure organisations' support* – at the local level TSIs, local authorities and other local partners have a vital role to play in helping VIOs in addressing the priorities listed above. At the national level this responsibility rests with Volunteer Scotland, SCVO and the Scottish Volunteering Forum.
- *Funding provision* (see C.1) – to provide additional staff resource for volunteer management and coordination, and to build and strengthen the capacity of VIOs during the COVID-19 recovery period and beyond.
- *Training support* (see C.4) – digital training, health and safety training, volunteer management training and training to upskill volunteers were all referenced; as was more accessible provision via online platforms.
- *Collaborative working* (see C.2) – the need to improve collaboration and joint-working – locally and nationally – in supporting VIOs.
- *Recognition and celebration* (see D.4) – the role of Scottish Government, partners and infrastructure organisations in helping to recognise and celebrate volunteering and volunteer practice.
- *Inclusive volunteering* (see D.5) – helping to tackle the barriers to access that have been exacerbated by COVID-19 was a priority for infrastructure organisations. Although it was not a current priority for the majority of VIOs, over one-third of those surveyed wanted to make their volunteering opportunities more inclusive.[5]

F. How to turn evidence into action?

Scotland benefits from having the Third Sector Unit in Scottish Government, which has a specific responsibility for volunteering. It was this Unit which led the development of the 'Volunteering for All: Our National Framework' published in April 2019.[2] It provides a broad strategic framework which is currently being developed into a Volunteering Action Plan for Scotland. Therefore, the timing of the 'Road to Recovery' report is fortuitous as its findings can help to inform the development of the new 10-year Volunteering Action Plan.

'Evidence into action'

Critical assessment and stress-testing of priorities for action. The lessons learned and 'Implications' outlined in this 'Route to Improvement' summary need to be reviewed, stress-tested and, where appropriate, developed further. This should include consideration of the recommendations from the Social Renewal Advisory Board, the Communities and Volunteering Circle, and the YouthVIP recommendations.[8, 14]

Knowledge exchange activities. In addition to Scottish Government and national bodies such as Volunteer Scotland and SCVO, it will be essential to engage key stakeholders in the review process. As a minimum this should include representatives of TSI Scotland Network, local authorities, national sectoral bodies and umbrella organisations, funders and VIOs. The focus should be on:

- Reviewing the 'Implications' in the 'Route to Improvement' to develop agreed priorities for action which are embedded in the Volunteering Action Plan.
- Informing the rollout and implementation of the Volunteering Action Plan.

Wider dissemination. It will also be important to share the 'Road to Recovery' findings more widely and Volunteer Scotland will work with the Scottish Government and key partners to support this dissemination process through social media, events and through the engagement of forums such as the Scottish Volunteering Forum and the Cross-Party Group for Volunteering.

New evidence – an ongoing process. Finally, there should be an ongoing review of evidence on volunteering participation and community engagement to inform our understanding and learning about the long-term impact of COVID-19 on Scotland's third sector and volunteering. We also need to review the monitoring and evaluation evidence relating to the actions arising from this 'Route to Improvement' summary.

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