

**advocard**  
**INVESTING IN VOLUNTEERS**  
**FINAL REPORT**



<b>ORGANISATION</b>	<b>AdvoCard</b>
<b>IIV HOST ORGANISATION</b>	<b>VOLUNTEER DEVELOPMENT SCOTLAND</b>
<b>ASSESSOR</b>	<b>Florence Cruickshanks</b>
<b>NAME OF LEAD ASSESSOR</b>	<b>Anne Hislop</b>
<b>ASSESSMENT DATE(S)</b>	<b>17, 20 March 2009</b>
<b>1<sup>ST</sup> ASSESSMENT/RE-NEWAL</b>	<b>1<sup>ST</sup> Assessment</b>
<b>ASSESSMENT OUTCOME</b>	<b>Standard met</b>
<b>CONDITIONS IF ANY</b>	<b>None</b>
<b>DATE CONDITIONS MET</b>	<b>—</b>

<b>ORGANISATION SUMMARY</b>
<p>AdvoCard is an advocacy service for users of mental health services in Edinburgh, providing support to service users either for particular issues or for the longer term. The organisation operates under a service level agreement with the City of Edinburgh Council. Initially the service was provided entirely by volunteers, but as a result of the 2005 Mental Health Act, and the consequent additional demands for support by service users, a small number of paid advocacy workers have been recruited to augment the work of the volunteers.</p> <p>Volunteering is regarded as a positive experience. Some volunteers, who are ex-service users, are encouraged to develop skills to enable them to take up paid work: students and young people wishing to enter careers in related fields are given the opportunity to acquire relevant experience: and those interested in re-entering the workforce, or in changing their careers, learn new transferable skills. Most volunteers are involved in advocacy work, but other opportunities are available, including training, committee work, and, in the future, event organisation.</p>

<b>SAMPLING RATIONALE</b>	
<p>A total of 12 individuals were interviewed. These comprised seven volunteers, four paid staff, and the Convenor of the Management Committee. The volunteers who were interviewed included recent recruits, the Training Programme Facilitator, and one who acted as adviser to the Committee. The paid staff were the Acting Project Manager, the Training Manager, and the two Advocacy Workers responsible for the co-ordination of volunteer activities. Interviews were carried out individually and in small groups, on Tuesday 17 and Friday 20 March 2009.</p>	
<b>NUMBER OF SITES, BRANCHES, LOCATIONS:</b>	One location
<b>NUMBER INCLUDED IN INTERVIEW SAMPLE:</b>	One
<b>NUMBER OF VOLUNTEERS:</b>	25
<b>NUMBER INTERVIEWED:</b>	7

## **WRITTEN EVIDENCE**

A comprehensive portfolio of evidence was provided, including the following documents

- AdvoCard's constitution and mission statement
- policies on anti-harassment, confidentiality, data protection, equal opportunities, expenses, fair treatment, freedom of information, disclosure information, protection of vulnerable adults and young people, recruitment of offenders, smoking, stress management, and whistle blowing
- procedures for complaints, incidents, and personal safety and lone working
- outline job description for volunteer advocacy worker
- volunteer policy and contract
- volunteer advocacy worker pathways (chart)
- agreement between AdvoCard service user and volunteer advocacy worker
- Volunteering for AdvoCard – What's involved? (leaflet)
- Annual Report 2007
- volunteer training schedule.

## **INDICATOR 1**

**There is an expressed commitment to the involvement of volunteers, and recognition throughout the organisation that volunteering is a two-way process which benefits volunteers and the organisation.**

### **SUMMARY OF PRACTICE**

AdvoCard has a volunteer policy and a comprehensive range of policies and operating procedures covering human relations issues, some of which apply to both volunteers and paid staff, others having been developed specifically for volunteers. Copies of the policy documents, which are covered during initial training, are included in the material given to all new volunteers: the procedures are available in the office. A recent innovation has been the introduction of the 'policy of the month', which highlights different areas of practice and encourages comment and suggestions. There is a process for reviewing all policies at regular intervals or when necessary because of external developments.

Volunteers are essential to the successful operation of AdvoCard, and until 2005 the service was delivered entirely by volunteers. Typical comments from paid staff were -

“We couldn't function without our volunteers.”

“They're absolutely vital and everybody knows that.”

“We can help them get proper jobs. It they haven't worked before, they don't have any references, but if they come here for a few months we give them a reference.”

Volunteers knew they were appreciated. As one of them put it, “Everybody here really appreciates us. We're very well treated and they've always got plenty of time for us.” Another added, “I got my day job through volunteering here”.

**INDICATOR 2**

**The organisation commits appropriate resources to working with volunteers, such as money, management, staff time and materials.**

**SUMMARY OF PRACTICE**

Responsibility for the selection and training of volunteers rests with the paid training staff, assisted by designated volunteers, who facilitate the training programme. Following training, volunteers are co-ordinated and supported by two advocacy support workers. These responsibilities are reflected in job descriptions, and regularly reviewed, in the light of funding and staffing changes.

Volunteers are invited to monthly communications meetings, and are given the opportunity to contribute to a range of committee activities, such as working groups. Volunteer issues are raised when appropriate at monthly multi-function meetings and quarterly project meetings.

Objectives for the volunteer programme are incorporated in the service level agreement, and also appear in the three year rolling strategic plan. Despite some financial constraints such as the current budget freeze, management ensures that the volunteer programme is adequately funded. The payment of expenses and training costs, internal and external, are seen as crucial to the success of the project, although, as the Manager admitted, "We have had to cut back a bit on the funding of social events for volunteers, but they will still go ahead. They're important to us. They're our way of saying 'thank you'."

**INDICATOR 3**

**The organisation is open to involving volunteers who reflect the diversity of the local community, in accordance with the organisation's stated aims, and operates procedures to facilitate this.**

**SUMMARY OF PRACTICE**

Publicity materials about volunteering with AdvoCard are widely distributed through hospitals, day centres, libraries, and at events such as conferences, with relevant information also available on the web site and window displays at the AdvoCard premises. The information provided is appropriate to the objectives of the organisation, and no visual images are involved.

There is a general openness to involving volunteers from a range of backgrounds and abilities, many volunteers being ex-service users. The publicity leaflet 'Volunteering with AdvoCard – What's Involved?' states "You are welcome at AdvoCard regardless of race, gender, religious belief or sexual orientation. We positively encourage mental health service users to contact us." Training arrangements are adjusted to accommodate volunteer recruits with different types of impairment, and special support mechanisms ensure that volunteer needs are met, through, for instance, the creation of new volunteer jobs, or encouragement to take time out. Openness to diversity among all personnel is important to the organisation, and relevant attitudes are assessed during initial training, with further training being given on diversity and equal opportunities.

Work on the analysis of the diversity of the volunteer team against that of the local community has been carried out informally to date, and recently a more formal system has been introduced. (One of the difficulties is the varying profile of volunteers due to constant changes.) Positive attempts are made, through advertising, to attract

volunteers of specific gender or ethnic group, since it is acknowledged that such factors are important in user/volunteer matching.

**INDICATOR 4**

**The organisation develops appropriate roles for volunteers in line with its aims and objectives, and which are of value to the volunteers and create an environment where they can develop.**

**SUMMARY OF PRACTICE**

Outline job descriptions for volunteer roles, along with person specifications, are provided to potential volunteers, with the required skills and attitudes being addressed through the training programme. While most volunteers are involved in advocacy work, there are other opportunities, such as the facilitation of training, working as an adviser to the Committee, and participating in working parties. There is a flexible attitude to trainee volunteers – a new job, of organising a forthcoming event, has recently been created to meet the needs of a volunteer who decided, during training, that advocacy work was not for him. During initial training, some ‘talent spotting’ takes place. As one volunteer put it, “I wanted to do advocacy work, and I do, but while I was training, they spotted my aptitude for training work, and asked me to help with it, and so I got involved in the running of courses.” Once trainees have completed their training, their external commitments are always respected in the allocation of work. “We make sure they know that they can walk away at any time if they want to.”

**INDICATOR 5**

**The organisation is committed to ensuring that, as far as possible, volunteers are protected from physical, financial and emotional harm arising from volunteering.**

**SUMMARY OF PRACTICE**

Management is aware of potential risks to volunteer advocacy workers, and has responded by preparing risk assessment check lists and a number of policies (personal safety and lone working, incident, stress management) and by including safety measures in the initial training programme. Volunteers are covered by the organisation’s personal indemnity insurance cover.

AdvoCard has a clear policy on volunteer expenses, and volunteers confirmed its effectiveness. “It’s quite simple. I just fill in a form, produce my bus ticket, and I get the money right away.”

Three further policies, on confidentiality, data protection, and the secure handling, use, storage, retention, and disposal of disclosure information, ensure that the personal details of volunteers, along with those of users, are made available only to those needing to have them, except with the permission of the individual concerned, and that similar consideration is given to their ultimate disposal.

**INDICATOR 6**

**The organisation is committed to using fair, efficient and consistent recruitment procedures for all potential volunteers.**

**SUMMARY OF PRACTICE**

Advocard has clear selection criteria for volunteers, which are set out in the outline job description. There is a standardised, documented, volunteer selection procedure. Potential volunteers are sent information packs, and invited to information evenings where they are given the opportunity to find out more about the advocacy work before committing themselves. In the course of the evening, they have an initial one to one interview, during which their expectations, and those of Advocard, are explored. The ten week initial training programme is part of the selection process, with any potential problems being explored and addressed. If a trainee feels that advocacy work is not for him or her, other opportunities are explored. Applicants are rarely turned down at the start, but in such cases alternative volunteering work with other organisations is discussed.

**INDICATOR 7**

**The organisation takes a considered approach to taking up references and official checks which is consistent and equitable for all volunteers, bearing in mind the nature of the work.**

**SUMMARY OF PRACTICE**

Advocard's procedures for taking up references reflect the nature of the volunteers' roles, and are clearly set out in its volunteer recruitment policy. Guidelines on disclosure, taking into account Government policy, are in place, and the organisation has a clear policy on the recruitment of ex-offenders. Applications from potential volunteers with criminal records are considered on an individual basis.

**INDICATOR 8**

**Clear procedures are put into action for introducing new volunteers to the organisation, its work, policies, practices and relevant personnel.**

**SUMMARY OF PRACTICE**

New volunteers are introduced to other volunteers and staff during the initial training course, and at volunteer support meetings and social events. At the end of the training programme, they are formally handed over to the volunteer co-ordinator staff, who are thereafter responsible for their volunteering activities.

The training programme is very comprehensive and includes issues such as risk assessment, health and safety and emergency procedures, insurance cover, the need to contact Benefits Offices where appropriate, and expenses. Particular attention is paid to the clarification of boundaries of volunteer advocacy work. "It's very important," one of the volunteers reported, "that we are aware of our roles as advocacy workers. We're not befrienders and we're not support workers. We have to watch out for signs of dependency on the part of users. For instance, all contact has to be made through the

office. We never give users our home telephone numbers.”

Initial training also covers the complaints procedure, and actions to be taken in the light of discrimination. All volunteers were clear about the need to involve staff, either the Acting Manager or one of the co-ordinators, in such situations.

#### **INDICATOR 9**

**Everybody in the organisation is aware of the need to give volunteers recognition.**

##### **SUMMARY OF PRACTICE**

All concerned clearly recognised the contribution made to Advocard’s work by its volunteers. This is reflected in the annual report and the programme of social events organised for volunteers. In addition, volunteers reported that they are regularly thanked for their work, that certificates are presented to them following successful completion of the initial training programme, and that they are offered additional volunteer opportunities and further training courses, some of them external. Staff comments included, “I always pass on feedback from users. It’s important that our volunteers know what a good job they’re doing.” One of the volunteers said, “There’s a really nice atmosphere here. They make sure you’re supported at all times, and that you feel part of the team. That’s what keeps us here.”

Volunteers are encouraged to express their views on Advocard’s work and policies through monthly support meetings, one to one reviews, the suggestion box, and informal contact with the manager and staff. In addition, they are involved in the consultation on the strategic plan, and when, arising from this exercise, a number of working parties were recently set up, volunteers were invited to join them.

Volunteers leaving Advocard are asked to complete exit questionnaires, and references are provided on request. All volunteers maintain a portfolio, recording their training and work with the organisation, and this can also be shown to prospective employers.

#### **INDICATOR 10**

**The organisation takes account of the varying support needs of volunteers.**

##### **SUMMARY OF PRACTICE**

Volunteers with Advocard are very well supported. For six months following each training programme, training groups meet at regular intervals: subsequently they can attend monthly support meetings for all volunteers. Detailed briefings are held before a volunteer meets a user for the first time, volunteers are encouraged to consult staff during interviews, and debriefings are held afterwards. All volunteers are offered regular one to one sessions with co-ordinators. Staff are aware of the emotional demands made on volunteers by some users, and try to ensure that volunteers are given appropriate support. At present, fundraising options, aimed at providing a counselling service for volunteers, are being explored.

Further protection is provided through training in recognising and refusing inappropriate demands made on volunteers. One volunteer commented, “It’s important for us to remain independent advocates. We mustn’t get too close. But the training course helps with this, because we learn about other agencies which can provide the services, such as befriending, that we can’t.”

All staff involved in the supervision of volunteers have been formally trained in volunteer management, and there are plans to extend this training when further funding becomes available.

Volunteers reported that they were kept very well informed about all relevant developments, through letters, phone calls, e-mails, support meetings, the AGM, and newsletters.

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