Using Data to Enhance Volunteer Management and the Volunteer Experience

Chest Heart and Stroke Scotland

A. Introduction

Chest Heart and Stroke Scotland (CHSS) is an exemplar in the capture and embedding of volunteering data within its strategic decision-making, and is leading the way in developing an approach to data capture which reflects the needs and expectations of 21st century volunteers.

B. Discussion questions

1. How can data support volunteer recruitment, management, and retention?
2. How can data enhance the volunteer experience?
3. How do you get people 'on board' with data?
4. How important is digital capability in the capture and use of data?

C. Organisational profile

CHSS has an annual income in the region of £7.8 million. It provides a range of frontline services to people with relevant conditions and their carers (eg., information, advice line, one-to-one support, public policy advocacy) and has a network of charity shops throughout Scotland. It has 260 employees (FTE I96), and more than 2000 volunteers are involved in almost 70 different roles within the charity. The digital team comprises a Digital Communications Manager, a Database Developer, and Database Communications Officer. The team is supported by a Volunteering Department Assistant. CHSS has Investors in

Volunteering Accreditation and has also been awarded the Queen's Jubilee Award for Volunteering.

D. What is driving the charity's engagement with data?

Data is regarded as an asset within the organisation, with the Volunteer Development Manager widely perceived to be driving the charity's investment in volunteering data. He both understands and has the vision to see how data can both enhance the volunteering experience and the charity's performance. More widely, he is aware, too, of the opportunities that both data and digital technologies afford in positioning volunteering and volunteer management for the 21st century, at sectoral and public policy levels.

E. How important is digital technology for the charity's data utilisation?

Digital technology is of crucial importance in capturing, processing, analysing, and reporting volunteering data. Data is captured using online forms which have been developed in-house. The data is then stored, queried and analysed, and delivered in the form of reports and graphs using Microsoft Access. Staff in headquarters are able to access the data in real-time using the cloud-based Google Drive, with uploads for other staff available at midnight. Online technology also affords staff the opportunity to run their own data queries. Prior to the investment in digital, data was captured and managed using a mixture of manual documents and spreadsheets. It was extremely difficult to analyse data held in these formats.

More recently, CHSS has invested significantly in the development of an online Volunteer Portal. This will enable volunteers to create their own 'digital profile' detailing their experiences and development as volunteers with CHSS. It will also enable the charity to capture more data about its volunteers.

The charity also employs a salaried professional to manage the development of the volunteering database and Portal. A trained volunteer is responsible for entering updates to the database on a weekly basis. While routine information is captured and processed online, non-routine information such as an unexpected change to a volunteer's hours has to be updated manually.

F. What types of data is the charity capturing and using?

CHSS has been capturing data about each stage in the volunteer pathway, from recruitment; to placement, training, and progression; to exit; and return (where volunteers who have left start volunteering again). It holds data on why people decide to volunteer with the charity or why they decide not to, on how long they plan to stay with CHSS, as well as why they leave, and volunteers are invited to respond to a bi-annual survey (online and paper-based) and an annual review with their staff manager, both of which capture data about their perceptions and experiences of CHSS during their time as volunteers and the social, economic, and cultural impact which volunteering has had on them. The charity is also able to see the age, ethnicity, and gender, and location of its volunteers, as well as which volunteering roles they hold or have held with it. Data is affording the charity an overview of volunteering at the macro-organisational level, at the meso-level of individual services, shops, and units, and at the micro-level of the individual volunteer.

The data enables patterns and trends to be identified. CHSS is also looking at volunteers over 5 year, 10 year, and 15 year periods with it, and it is about to look at volunteers who have been with it for 20 years, thereby enabling it to keep up-to-date with new patterns of volunteering evolving in the 21st century with a view to actively and responsively positioning its volunteering strategy, policies, and management to meet future challenges.

G. What is data enabling the charity to do differently or better?

Informing volunteering strategy and policies

Until as recently as four or five year ago CHSS held very limited data about its volunteers. Now, the Volunteer Development Manager, managers who rely on volunteers for the delivery of services, and the Trustees and senior management team have data which enables them to make informed decisions in the interests of the volunteers, the beneficiaries of their volunteering, and CHSS as a whole. Data is captured on an on-going cycle which feeds into strategies and policies about recruitment, selection for particular volunteering roles, support, and volunteer development. It also feeds into training, to volunteer motivation, and to

assessments of the value of volunteers to CHSS. The data also enable CHSS to assess how volunteering impacts on the volunteers.

Enhancing the volunteer experience

The insights generated from the volunteering data are perceived to have been an important contributory factor in achieving the Innovation in Volunteering (Re) Accreditation and the Queen's Jubilee Award for Volunteering. As well as providing hard evidence in support of the charity's application, data has also enabled enhancements to the volunteer experience to be delivered. The most notable enhancement, perhaps, has been enabling volunteers to 'be heard' and to be part of influencing change within CHSS whether that involves the development of frontline services or suggestions about the database and how data should be classified within it.

CHSS is also using data to evaluate the impact that volunteering has had for the volunteer socially, economically, and culturally. Thus, volunteers are asked about whether they have formed new friendships as a result of volunteering, whether it has assisted a move into employment, or whether it has led to an attitudinal change, for example.

Informing local volunteer management strategies

The availability of online data means that staff at local level are better informed about their volunteers. They are also able to develop their own volunteer recruitment plans for presentation to the Volunteer Development Manager, as opposed to the Volunteer Development Manager taking a strategy to them. This can enable qualitative improvements in frontline services. Thus, for example, if a local service has a number of service users whose preference is for volunteers of a particular ethnicity or sex, the manager of that service is able to examine the relevant data and to present a case for recruiting a different volunteer demographic based on the evidence. The data can also identify how changes in volunteering strategies are impacting on service users who are supported by volunteers. Thus, it can demonstrate the impact that a shift to recruiting more volunteers from a particular ethnicity has on service users, for example.

Managing volunteers cost-effectively

The Volunteer Steering Group is also able to monitor volunteering expenses on a regular basis, and to feedback recommendations to volunteer managers where appropriate. So, for example, if the data identify an imbalance in the costs incurred in providing volunteer support to one group of service users as compared to others, they can look at why this is happening. It may be that the service users in question require volunteers trained to work with people suffering from strokes, but that there are no volunteers in the local area with this specialism and the manager is, therefore, having to bring in volunteers from some distance away. The other group, with lower volunteering costs, may be providing support to people with heart conditions and may also have to hand locally sufficient volunteers with this specialism, resulting in lower travel reimbursements to volunteers. The Volunteer Steering Group can draw the manager's attention to the data and the manager may seek to recruit volunteers with stroke specialisms closer to the locality. By using data in this way appropriate volunteering expertise can be made available to the service user, more cost-effectively to CHSS.

Data also enables CHSS to calculate the 'return period' on its volunteer investment. Thus, it costs more to train a volunteer for a role as a one-to-one volunteer providing support to service users than it does to train a volunteer for a role in one of its charity shops. The Volunteer Development Manager can look at data about the potential volunteer's motivations for volunteering and at the length of time the volunteer plans to stay with the charity. He can then look at the costs of training the volunteer for different roles which the volunteer have indicated an interest in performing, and based on this data the volunteer may be invited to consider one role rather than another. Data also enables the charity to assess the overall value of its volunteers, estimating their net worth as £1.5 million annually.

Monitoring and planning volunteer training

Data enables CHSS to identify gaps in volunteers training histories and the reasons for this. This assists in planning the delivery of training and in ensuring that it is well targeted. Thus, the data may indicate that training needs to be available from a location closer to the volunteers who are not meeting the training requirements, or at a more convenient time, for example.

The data also allow CHSS to monitor where there is a gap between new learning about the best way to support people with stroke conditions and the openness of a volunteer to adopting new practices. The service manager is then in an informed position from which to engage in discussion with the relevant volunteer about the best way forward and whether training has a role to play or whether the volunteer might wish to move into a different volunteering role. Data is central to the ability to have these types of conversations.

H. What are the challenges associated with being a data-informed charity and how are these being managed?

Ensuring that staff understand the value of volunteer data

The first challenge that CHSS has faced has been to ensure that staff who are gathering data about volunteers or who need to encourage volunteers to provide data understand the importance of the data to CHSS, and convey their support for data gathering to volunteers. Without this support data capture will be incomplete and the quality of the data less robust than it could be.

This is being handled in a number of ways going forward. Firstly, staff and volunteers are encouraged to take 'ownership' of their data and to understand its worth for them. Secondly, staff from different departments within CHSS are represented on the sub-groups which oversee data gathering and are actively involved in discussing what CHSS can gain from the data, how it should be used, and how this should be communicated. Thirdly, as new staff are recruited, receptiveness to capturing and working with volunteering data is being embedded into the interview process, so that in the longer-term new appointees will arrive equipped with the relevant mindset and skills and will see data capture and utilisation as a key part of their remit.

Ensuring that staff have the necessary technological skills

A second challenge has been ensuring that staff have the technological skills required to input and work with data. This has been a particular challenge in the case of the volunteer coordinators as they are geographically dispersed throughout Scotland.

The appointment of the Database Development Officer has been invaluable in this respect, enabling training to be delivered at local level, as required. In the longer term, it is anticipated that as digital technologies continue to evolve and become increasingly user-friendly and continue to be embedded throughout everyday life, staff and volunteers will find data capture, processing, and analysis more straightforward.

Ensuring that volunteers provide high quality data

Currently, the majority of the charity's volunteers are providing the requested data. However, with the aim of continuing to improve and ensure the highest quality of data the aim is to grow this number.

This is being approached in two ways. Firstly, CHSS holds workshops and meetings with volunteers so that it can demonstrate why CHSS needs their data, how the data has been used, and how this benefits volunteers. Secondly, whenever volunteers provide data directly to CHSS the charity makes it as easy as possible for volunteers to provide data, including offering the choice of using online or paper-based options.

I. What are the charity's next steps with data?

In the longer term the aim is that volunteers will be able to create and edit their volunteer profiles using mobile technologies such as mobile phones to connect with the Volunteer Portal, thereby permitting them the flexibility to connect at times and from locations which suit them, such as when waiting for a bus for example. Importing online forms into the Portal will further ease the process. Crucially, this will also enable CHSS to gather data from its volunteers on an on-going basis, allowing it to respond more timeously to suggestions and emergent issues.

The ambition is that in the longer-term the Portal will be rolled out nationally, enabling volunteers to 'take their profiles with them if they move to another charity'. Volunteers joining CHSS from other charities would also bring their profiles with them. It is also envisioned that by capturing data in this way it can be used by individual organisations to better manage their volunteering strategies; by the third sector, and the public and private

sectors which are also volunteer-supported, to help them attract and retain volunteers; and to inform volunteer-related public policy development.

More broadly, as the value of the volunteering data has become increasingly clear to CHSS the organisation has begun to consider whether a similar initiative should be taken forward by its HR department in relation to the salaried staff.

J. Insights from the case study

- Data can enrich and support strategic and operational decision-making; generating information which aids volunteer recruitment and selection, the day-to-day management of volunteers, and which sheds light on why volunteers stay or move on.
- Data can tell the organisation what attracted people to volunteer with it and what they enjoy and value as a volunteer with the charity. It can also help the charity to improve their experience.
- Embedding data capture and utilisation throughout the organisation is crucial. Investing time and resources in 'selling' data *internally* helps ensure high standards of data collection and engagement. Being clear about what data is required, why, and how it will be of benefit to staff, volunteers, and service users is a crucial part of this process. Involving key stakeholders in decisions about what data will be captured, and how it will be analysed and used is also crucial. Reporting back to stakeholders on how the data has been used is also extremely important. Making data capture, processing and analysis quick and easy to do is very important.
- Investment in online, digital technologies is vitally important.

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