Volunteer Management Activity Review Summary of feedback – Public workshops, February – May 2018

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Context and purpose

The Volunteer Management Activity

mpconsulting has been engaged by the Department of Social Services (the Department) to review the appropriateness, effectiveness and efficiency of the Volunteer Management Activity (VMA) and formulate options for its future improvement (the Review).

The VMA aims to increase opportunities for people experiencing disadvantage and/or social exclusion to participate in the social and economic life of their broader community through volunteering, by:

• maximising and promoting volunteer participation
• increasing the diversity of volunteers and the ways in which people volunteer
• maximising opportunities for volunteering to provide a pathway to other forms of social and economic participation
• matching potential volunteers with a volunteering opportunity, especially humanitarian entrants or people experiencing disadvantage
• improving access to information on volunteering
• promoting innovation in volunteering
• providing access to the training, resources and support volunteers and volunteer involving organisations (VIOs) need, and
• building effective volunteering practices and opportunities within organisations and communities.

Through the VMA, the Department funds 52 organisations to deliver volunteer support across Australia. These Volunteer Support Services (VSS) recruit, encourage, support and train volunteers and work with VIOs (organisations that engage with volunteers to deliver services), and increase participation in volunteering.

The Review

Purpose

The focus of the Review is to examine the appropriateness, effectiveness and efficiency of the VMA. To this end, we are exploring:

• the value of the VMA, including the activities currently undertaken by VSS funded through the VMA, and the way outcomes and successes are being measured
• the relevance of the VMA to the wider volunteering community and more broadly, including the strengths and limitations of the VMA
• the way the Department interacts with VSS and administers the VMA, and
• whether the current funding model and approach represents the best way for the Australian Government to make a contribution to volunteering in Australia.

Approach

The Review of the VMA will be informed by.

- Consultations with stakeholders, such as:
    - public workshops undertaken across Australia
    - feedback submitted via email
    - meetings and teleconferences including with Departmental staff, funding arrangement managers, VSS, VIOs, peak bodies and volunteers
    - an online survey available publicly through Survey Monkey from 31 January to 31 March 2018, and
    - site visits to VSS, including a range of small and large, metropolitan and regional organisations, with differing foci and service models.

- Review of relevant documents, such as:
    - research, reports, data and peer reviewed articles providing context on volunteering and volunteer management within Australia and internationally, and
    - grant agreements, data, reports and other documents regarding the VMA and broader Departmental and Government strategic direction.

This report

This report provides an overview of stakeholder views by summarising the key themes and outcomes from the public workshops held throughout Australia from February to May 2018. This report does not capture the complete range of views and information received through the workshops but provides a high level summary of the key themes.

Across all workshops a total of approximately 200 people attended, comprising a mix of volunteers, VIOs, VSS, (those funded by the Department through the VMA and those not) and peak bodies.

Workshops were held in the following locations:

- Melbourne – 13 February 2018
- Brisbane – 1 and 2 March 2018
- Adelaide – 13 March 2018
- Sydney – 15 March 2018
- Perth – 21 March 2018
- Canberra – 10 April 2018
- Darwin – 2 May 2018

The workshops were open to all interested stakeholders and broadly included:

- background on the objectives and focus of the Review
- an overview of our process and approach to the Review
- an overview of the VMA and our early observations in relation to the VMA
- discussion of:
    - the strengths and weaknesses of the VMA
    - the broader challenges and opportunities for volunteer management, and
    - how funding might best be targeted in the future.

Summary of key themes

Discussion at the workshops was robust and reflected the passion of the sector and the degree to which many organisations value VMA funding. Participants were in strong agreement regarding some topics, while other areas were contested.

There was consensus regarding the value of volunteering and the key role it plays in supporting individual wellbeing, the economy, community cohesiveness and the broader functioning of Australian society. Participants discussed the impact of effective volunteer management on improving the volunteer experience and also on increasing volunteer participation and contribution. The pivotal role VSS play in facilitating volunteering and supporting effective volunteer management was also highlighted.

Participants discussed a range of challenges faced by the volunteering sector, including the evolving priorities and expectations of Government and the limited, uncertain and variable funding for volunteer management.

Participants highlighted a lack of clarity regarding the objectives sought through the VMA, given the breadth of services provided and narrow scope of the client target group. Participants also noted the challenges in determining and measuring outcomes and the need for more meaningful reporting to capture the value of the VMA.

In relation to the Department's management of the VMA, participants noted the importance of effective grant management and acknowledged the challenges associated with recent changes, suggesting ways in which the management of grants could be improved and the relationship with the Department strengthened.

The focus of future Departmental funding for volunteer management was of interest to all stakeholders and a wide range of priorities and models for future funding were proposed.

Value of volunteering and volunteer management

Across all workshops, participants highlighted the fundamental value of volunteering, volunteer management, and the contribution made by VSS.

Comments regarding the value of volunteering included that volunteering:

- contributes to the economy and community sustainability by providing significant return on investment for Government and the community, enabling delivery of core services and programs
- is a fundamental contributor across a broad range of sectors including aged care, disability services, family and community services, emergency relief, sports, events, arts and culture
- allows individuals to expand their skills and build capacity, improve confidence, expand their networks, engage socially, and feel valued
- provides a pathway to employment, and
- is core to a cohesive and socially responsible community.

Stakeholders also highlighted some of the emerging trends in volunteering, some of the challenges recruiting volunteers, and some of the innovative activity occurring to promote volunteering and improve the volunteer experience.

Participants discussed volunteer management within the context of volunteering and how effective volunteer management can improve the volunteering experience for volunteers and VIOs, including by:

- supporting VIOs to:
  - utilise strategies to recruit and retain volunteers who are appropriately skilled to match the volunteer opportunity
  - implement effective systems, clear policies and processes to support volunteer involvement (for example with regards to regulation and risk management, feedback and complaints mechanisms, professional development pathways, etc.)
  - reduce administrative burden and increase flexibility for volunteers
  - provide training that enables volunteers to effectively perform their role, and
  - comply with the National Standards for Volunteer Involvement
- enabling clarity of roles and responsibilities for both volunteers and VIOs
- promoting a positive culture towards volunteering, and
- providing recognition for volunteer contribution.

Participants noted the significant effort and resources required to recruit and manage volunteers and many noted that volunteering cannot effectively occur without investment in volunteer management (be it via VSS or directly through the VIO).

Service models and value of VSS

The role VSS play in facilitating volunteering was also discussed. Participants outlined the ways in which VSS contribute to volunteering and supporting effective volunteer management, including through:

- supporting VIOs to create suitable volunteer positions within their organisation
- introducing potential volunteers to volunteering, for example by providing information regarding volunteer rights and responsibilities
- assisting VIOs to draft volunteering advertisements and placing these online (for example through the VIKTOR volunteer database)
- matching and referring volunteers to volunteer opportunities within VIOs
- providing VIOs with resources regarding best practice volunteer management (for example information on their legal obligations, and tools, templates and checklists regarding recruiting and retaining volunteers)
- providing advice and troubleshooting issues for volunteer managers
- coordinating networking and professional development opportunities for volunteer managers
- providing a physical centre for volunteers, VIOs and communities to connect and seek support
- attending events to promote volunteering within the community, and
- facilitating recognition of volunteers within the community.

The discussion highlighted that service models differ considerably among VSS – partly driven by the Department's funding but also driven by the history of each VSS, its role in the community, other funding sources and the particular interests of the Board/staff of the VSS.

For example, some VSS:

- concentrate on face-to-face interviews with volunteers, including screening and checking in with volunteers following their referral to a VIO. Others may refer volunteers to a suitable VIO without interviewing, and without maintaining contact afterwards
- focus on socially or economically disadvantaged communities and encouraging volunteering within these groups, others do not have such a focus
- provide training for VIOs (for example on implementing the National Standards for Volunteer Involvement, how to recruit volunteers through social media, how to work with culturally and linguistically diverse volunteers). Others focus less on training for VIOs and more on facilitating networking and information exchange between VIOs
- utilise a membership or fee-for-service model, such that the services they offer are influenced by their members needs or preferences
- combine their volunteer management role with other roles including as community advice centres, peak bodies, community development bodies, or services providers (delivering services such as community transport, aged care services or community visitors services), and
- play a much stronger role than others in promoting volunteering more broadly within the community.

While VSS participants highlighted the value of the services they provide, there were some differing views regarding the usefulness of VSS among VIO participants. Some VIO participants had experienced frustrations working with VSS, (for example, citing unresponsiveness in referring volunteers and/or providing resources and support). Some VIOs and volunteers were unaware that VSS existed and therefore did not know if there was a VSS in their region.

A number of non-VMA funded VSS provided examples of alternative methods for providing support to volunteers and volunteer managers including, for example, through comprehensive online volunteer recruitment and management platforms or the provision of reliable legal resources and advice.

Challenges

Participants generally noted that the changing landscape of volunteering and shifting environmental context presents challenges for the sector and for volunteer management.

With regards to the **priorities and expectations of Government**, participants highlighted:

- the changing priorities of Government and management of the VMA moving between departments and program areas, has resulted in the VSS adjusting their services to suit their context (or the particular objectives of a Government agency) rather than focusing primarily on best practice or regional community needs
- the different foci of various funding bodies, organisations, and communities can be a challenge for VSS to manage. For organisations receiving funding from multiple sources, each funder has separate reporting requirements, deliverables, and expectations. In addition, the organisation

must work towards its own vision and attempt to meet community expectations. These factors do not necessarily align

- increasing reliance on volunteering to deliver government services, for example in aged care, disability services, and where jobseekers or older Australians use volunteering to fulfil their Centrelink mutual obligation requirements. It was suggested that these intersections between the VMA and other government programs are often unclear and unrecognised, and
- the specific challenges faced in regional and remote areas of Australia.

Across all workshops, participants consistently and strongly stated the need for more funding for volunteering and volunteer management. Issues cited by participants relating to the **limited, uncertain, and variable funding** for volunteer management included:

- not all VSS are funded under the VMA and some state peaks are also funded as VSS, which is seen by some as a conflict
- the organisations funded through the VMA and the geographical distribution of funding is largely historical and does not necessarily target the areas of greatest need
- limited and uncertain funding poses challenges for VSS in forward planning, staff recruitment, and making long-term service commitments to their clients. This can also create organisational stagnation, with little funding available for VSS to invest in updating systems and professional development, and
- the competitive funding environment has, in some areas, diminished the innovation and collaborative working relationships of the sector. Stakeholders suggested that the funding environment can lead to duplication, overlap, and inefficiencies.

VSS funding sources vary significantly. Some organisations rely largely on VMA funding, while for others, the VMA is a relatively small component of total funding/resources. Participants variably noted the sources of funding including:

- Local Councils: some Councils share resources and collaborate with VSS and VIOs and some also operate as VSS themselves.
- State Government: State Government involvement in volunteer management varies significantly across the country. States may fund specific projects or focus on specific sectors in which volunteering supports service delivery.
- Federal Government: some VSS are funded to deliver other community services such as aged care or community transport.
- Corporate sector: some VSS charge corporations to place their staff in suitable volunteering opportunities (that align with their brand) and some receive sponsorships for events or other in-kind donations from the corporate sector.
- Membership fees: some VSS charge a membership fee to VIOs, and others do not. This may provide members with volunteer referrals, networking events, access to training, advice resources, etc.
- Fee for service: some VSS offer training or other consultancy services to VIOs for a fee.
- In-kind contributions: many VSS receive in-kind contributions including, for example, shared accommodation, discounted rent, free advertising, and free or subsidised venues for training or events.
- Fundraising: some VSS receive donations but many participants noted that it is difficult to raise funds specific to volunteer management, i.e. if not tied to a particular cause/project. Stakeholders noted that fundraising itself requires innovation, utilises volunteers, and can be resource-intensive.

Appropriateness, effectiveness and efficiency

In relation to the **objectives and scope of the VMA** participants variously suggested that:

- the VMA target groups (which focus on disadvantaged communities) are too narrow and inappropriate in the context of volunteering. Some participants proposed that the focus on target groups fundamentally contradicts the constitution of their VSS, because they are expected to support all volunteers
- the stated sub-objectives of the VMA are broad. Some supported this, while others highlighted the challenges in ensuring a consistent service offering and in reporting achievements or impact across such a wide range of objectives, and
- the services provided differ across each VSS, based on their approach and model, situation, local community needs and other services they provide and hence they will naturally differ in focus and work toward different objectives.

Participants highlighted the **difficulty measuring outcomes for the VMA** and the lack of visibility regarding VSS 'success'. Issues raised by participants in relation to this included:

- the broad program objectives and absence of an outcomes framework make it difficult to report and measure VMA outcomes. Stakeholders suggested that there is an unclear relationship between outcomes, outputs, and inputs, resulting in performance indicators that are not necessarily reflective of the services or value of the VMA
- VMA performance data is not consistent or comparable, making it difficult to accurately assess performance across VSS
- VMA performance indicators are output focused (for example measuring the number of individuals that were supported to find a volunteering opportunity). This does not accurately represent the value of a VSS that might provide a more intensive service to fewer individuals, and
- conversely, outcomes focused performance indicators are not practical for some VSS that may provide a one-off service (e.g. refer a volunteer or train a volunteer manager) but not maintain an ongoing relationship with the person. This makes reporting through the Department's Data Exchange (DEX) particularly challenging.

When asked how VSS performance and outcomes might be more effectively measured, participants overwhelmingly noted the challenges in doing this, but also made a wide variety of suggestions including measuring:

- feedback from those receiving their services (i.e. volunteers and VIOs)
- the social impact of VSS (for example, the social capital built, reduction in isolation and exclusion, and savings in welfare payments and mental health care)
- the extent to which services are delivered by small and medium not for profit organisations within communities and across sectors, or
- outcomes measures chosen by each VSS from a suite of performance indicators provided by the Department. This would allow for comparable measurement of outcomes without diminishing the flexibility amongst the various VSS models.

In terms of the **efficiency** with which services are delivered, participants acknowledged the duplication of resources produced by various VSS (including for example training materials for volunteers and VIOs and checklists for volunteer induction and support), but also noted the desirability of resources that are adapted to the local community. Participants also noted the inefficiency generated by the differing administrative arrangements and reporting requirements of funders.

The Department's management of the VMA

In relation to the Department's management of the VMA, participants noted the importance of effective grant management and their appreciation of the support provided by some grant managers. Participants acknowledged the challenges associated with recent changes within the Department's service delivery structure and a move towards more streamlined grant agreements and standardised reporting. It was suggested that the shift to localised grant managers may enable more effective engagement and improve the Department's understanding of each VSS.

A number of participants were critical of the Department's limited consultation on some significant changes (including new funding agreements which took effect from 1 January 2018), limited communication and support regarding changes, and approach to reporting.

In particular, the DEX reporting system was not deemed suitable to capturing outcomes related to the VMA. DEX is a case management based system, which participants advised is inappropriate and/or impractical in the context of the VMA, noting that most VSS do not have an ongoing relationship with volunteers (such that they can follow up on individual outcomes).

Participants proposed various ways in which the relationship with the Department could be further strengthened including:

• stronger engagement between the Department and funded organisations during times of significant change. This could include assistance in building their organisational capacity to manage changes to funding agreements and reporting
• the timeframes allowed for organisations to apply for grants and review funding offers can be difficult for organisations to meet. Participants proposed longer timeframes and increased consultation and support around changes to funding agreements to assist with this, and
• the administrative burden can be difficult for small organisations to manage. Participants suggested clearer guidance and feedback regarding expectations of organisations and examples of good performance would also be appreciated.

Future options and priorities

Participants discussed a range of ideas as to where the focus and priorities for the VMA and funding of volunteer management more generally could lie. Some suggestions included the following.

• Development of national resources:
  – A national **volunteer management strategy** jointly developed by the volunteering sector (VSS, peak bodies and VIOs), government (including cross-sectoral Commonwealth, State and Local representation), and businesses. The strategy might assist in clarifying

accountabilities and expectations of stakeholders (including outcomes and performance measures) and inform broader policy development.

- An **accreditation program** where VIOs are assessed against the National Standards for Volunteer Involvement. This could encourage best practice within the sector and assist volunteers and corporates to select high performing VIOs.
- **Resources for volunteer managers**, including best practice tools and checklists to support volunteer managers (within VIOs) to recruit, train, support and retain volunteers.
- **Conferences or workshops** where VIOs and VSS can collaborate and share best practice, effective models and lessons learned.
- **A volunteer passport**, that could be used nationally and contain a central record of the volunteer's police check and other information such as working with vulnerable people checks or working with children checks, along with relevant training, skills and experience.
- **Improvements to online platforms for volunteer management**, including to improve the capacity of VIKTOR/VERA and also to enable the sharing of best practice resources, etc.
- **For advocacy and promotion** including to promote volunteering, volunteer management and its wider community impacts and also to recognise volunteers.

- Expansion of local placed based services and infrastructure:
    - **Local community coordination** and **capacity building**, including face-to-face engagement with volunteers and VIOs, building networks within the local community and providing advice and support in the regional context.
    - Development of **social innovation opportunities and projects** based on the local community needs, aimed at achieving specific aims for that region or target group.
    - **Support disadvantaged individuals** to build connections, capacity and self-confidence and provide pathways to employment.

- Direct funding of VIOs to employ a volunteer manager or to develop and improve their internal volunteer management programs (reducing the need for intermediaries such as VSS).

- Funding for peak bodies nationally and in each State/Territory (with various suggestions made regarding the appropriate functions and role of peak bodies).

Next steps

Further consultation, site visits and research will be undertaken throughout May and June 2018.

The Final Review Report will be provided to the Department in June 2018 and will present a range of possible options for the future. Subject to Government's consideration of the Review Report, the Review Report will be made publicly available.

Thank you

Thank you to all those who participated in the VMA workshops, assisted us to conduct site visits, provided feedback via email or through the survey, or met with us to inform the Review. Your time, candour and invaluable contributions to this Review are much appreciated.