National Group for Volunteering in NHSScotland
Volunteer retention

1. Introduction

This paper provides the National Group with an update on a thematic discussion topic that had emerged as a priority based on engagement and feedback from volunteer managers in NHSScotland.

The Volunteering in NHSScotland Programme seeks to ensure it retains flexibility to respond and adapt to needs that emerge from within the primary stakeholders of the programme, NHS Boards.

In this instance a lack of consistency or coherency in reporting on volunteer engagement across NHS Boards prompted questions on levels of comprehension of volunteer engagement in management and leadership positions – particularly where a preoccupation on volunteer numbers was being perceived to be at the expense of quality of experience for volunteers and end beneficiaries.

Further engagement with volunteer managers in NHSScotland led to a more expansive question of how to report on volunteer retention, if at all, and what, if any, measurement could or should be used as an indicator of quality.

A small scale study was undertaken and reported to the Scottish Volunteering Forum in April 2019. This led to the establishment of a thematic discussion group for which two meetings were held in April.

2. Small scale study

In early 2019 the Programme Manager conducted a small scale study with third sector organisations from the Scottish Volunteering Forum in order to establish if similar issues existed in a different sector.

The engagement identified a number of key considerations and recommendations for further studies. The paper produced at the end of the study is included in Appendix A.

Submissions were received from Aberlour, CHAS, Chest Heart and Stroke Scotland, Macmillan, Quarriers, Shelter and Volunteer Edinburgh.

3. Thematic discussion groups

Two thematic discussion groups were hosted by the Programme Team who facilitated discussion on the topic on 5 and 26 April.

Representatives from Beatson Cancer Charity, Edinburgh Volunteer Centre, Glasgow Life, Homestart UK, NHS Fife, NHS Fife, NHS Greater Glasgow & Clyde, NHS Lanarkshire, NHS Tayside and Quarriers shared their own experience of reporting and consideration of the topic.

Representatives from NHS Boards reported that they were likely to expect between 3 and 12 months commitment from prospective volunteers and that this would be stated in the role descriptions. Other organisations had a mix of approaches, some stating an expected length of commitment, others reporting a reticence in doing so for fear of the prospective volunteer disengaging.

Participants discussed the use of the term 'volunteer retention' and concluded that this was not a suitable measure of success or quality given the person-centred nature of volunteering.

Organisations with an employability remit were noted to be more likely to recognise volunteer exit to other destinations as a positive outcome for the volunteer and organisation.

Participants were asked to consider what successful and sustainable volunteer programmes would look like:

Successful	Sustainable
Volunteers are motivated and return	Managing expectations
Volunteers enjoy their experience	Happy and trained volunteers
The roles and experiences meet the needs of the volunteers and the organisation	Supported staff
There are meaningful roles that add value	Volunteers are retained
The programme meets key performance indicators/targets	Volunteering is an integral part of organisational strategy
Volunteering is inclusive	Recognition that volunteering needs to be and is adequately resourced
The organisation is able to demonstrate wider value	There is adequate management time and capacity to engage and support volunteers
There is adequate management in place for the volume of volunteers	Volunteers are valued
There is sufficient communication in place	The right person is in the right role

The meetings led to the identification of key messages that volunteer-engagers would benefit from considering, regardless of the sector they are based in.

4. Key messages

The meetings identified a number of key messages:

‣ **Do not assume people in senior positions in your organisation understand volunteering or volunteer engagement**. Even for third sector organisations of for NHS Boards (where volunteering has been established for almost 50 years), it should not be assumed that people understand that volunteers are individuals with needs and commitments that can change.
‣ **The ratio of volunteer manager to volunteer is often not considered or understood, nor are the risks involved in excessive ratios.** This is of particular importance in emotionally demanding roles and where volunteers engage in isolation.
‣ **Organisations should recognise positive destinations for volunteers when they leave an organisation or programme** – these are a measure of success for the volunteer and wider society.
‣ **The concept of episodic volunteering does not fit well with patient-facing roles in the NHS**. Roles that require longer-term engagement do not need to be amended but there may be scope for the creation of shorter-term roles which would engage the demographic of the episodic volunteer.
‣ **Volunteer managers should honest in designing volunteer roles and in engaging volunteers**. Both the volunteer engager and volunteer should have an opportunity to share their expectations of the role and of the expected term of commitment.

▸ **Offer alternatives to disengagement**. Volunteer managers have an opportunity to consider progression and pathways for volunteers. Retaining good volunteers may be more effective if people are provided with opportunities to progress and develop.

5. Actions for National Group

The National Group for Volunteering in NHSScotland is asked to consider the key messages identified from the engagement activity undertaken on the topic.

Members are encouraged to help to spread awareness of these key points amongst circles they engage with and to actively challenge statements that appear in contrast to what is known and understood in volunteer engagement in NHSScotland and volunteering in Scotland.

Appendix A: Volunteer retention – what does it mean and why measure it?

Introduction

This paper sets out the findings from a small-scale study of approaches to measuring volunteer retention amongst Scottish Volunteering Forum members.

The impetus for the study stemmed from challenges conveyed by volunteer managers in NHSScotland where the imposition (or inference) of numerical targets on volunteer recruitment introduced a challenging dynamic into volunteer management. Engagement with NHS Boards on this topic highlighted some instances of underlying misconceptions and assumptions about the nature of volunteering and the practices of volunteer engagement amongst senior management.

Many volunteer programmes in NHSScotland have moved towards a decentralised model of volunteer management. In these programmes, volunteer managers have limited contact with volunteers once they begin their placements. Whilst this model allows greater levels of engagement and has other benefits (e.g. growth, resilience), the reduced level of contact between volunteer and manager can contribute to disengagement of volunteers and difficulties in establishing the reasons for disengagement, which in turn may lead to increased volunteer turnover.

This paper does not set out to draw any definitive conclusions, rather, it summarises the feedback received and highlights a number of points for consideration.

Methodology

Scottish Volunteering Forum members were asked to share methods and experiences of measuring and reporting on volunteer retention in January 2019. Seven responses were received in response to the questions posed:

1. Do you measure and report on volunteer retention?
2. What do you use to measure this? (engagement after 3 months, 6 months, 12 months etc, engagement longer than the volunteer's initial aspirations, something else?)
3. If you do measure it, do you report on currently engaged volunteers separately from those who have disengaged?

In some cases respondents sent a summary answer to all three questions, whilst others answered each individually.

Key findings

All respondents commented that they record or refer to volunteer retention in one way or another. The methods used vary considerably and in the answers there were references made to the underlying motivations behind measurement and reporting.

1. Motivations for recording and reporting volunteer retention

   Although not explicitly asked, some respondents shared some of the motivations behind the methods and purposes of recording and reporting on retention. These included:

   a. Raising awareness amongst senior members of staff/leadership that by the very nature of volunteering, people will come and go.
   b. Where retention is key – e.g. in short-term, time-based roles.
   c. Internal improvement including comparisons across an organisation to identify and address any inconsistencies.
   d. Better outcomes for volunteers.
   e. To assess whether volunteer recruitment is sustainable.

2. Methods used

   Responses varied considerably with reference to charts, formulas and comparing length of volunteer engagement against initial volunteer aspirations.

   a. Reporting on **reasons for leaving/exit routes**, e.g. an employability project which supports people into paid employment and other destinations via volunteering.
   b. Exit questionnaires/interviews and reports which ask volunteer to reflect on their **motivations**, **circumstances**, **expectations** and any **locality issues**. These are summarised into a report where local can be **compared against national** data.
   c. Cross-referencing **length of volunteer engagement against the length of commitment the volunteer had proposed at the recruitment/interview stage**.
   d. Asking volunteers at different stages (e.g. six weeks, then at three months) **whether their initial motivations are being met**.
   e. Periodical reports by department which show volunteer retention and the **reasons why people stay.**
   f. **Periodical regional focus groups** which ask what is working well and what could be improved. These are used to identify trends, commonalities and allow improvements to be made.
   g. Reporting on the **length of engagement after completing training** including the **average length of engagement of currently engaged volunteers** and **that of those who have left**.
   h. A **calculation of the net growth of volunteering** based on volunteer levels at the beginning of the year, end of the year and how many volunteers were recruited in the year.

Considerations and recommendations

Across the responses there were a mix of views about the benefits and use of a measure of volunteer retention.

Where a strong case was put forward for doing so, this related to the need to increase understanding amongst senior management of the realities of volunteering and for use in improving processes and outcomes for volunteers (the latter largely inferred rather than stated explicitly).

Some respondents outlined the ways in which they measure and/or report on retention but noted that this measurement was not itself a measure of success or sustainability due to the variable nature of volunteer engagement.

Some respondents highlighted the use of exit interviews and questionnaires but did not mention whether responses were easy or difficult to obtain. Perhaps the most notable of practices used is the questions put to currently engaged volunteers about why they remain engaged.

Volunteer-engaging organisations may wish to consider the following:

1. What level of understanding there is at a senior level of volunteer retention in their organisation, sector and how this impacts on service planning and provision.
2. Whether reporting on volunteer retention can support a greater awareness of the above.
3. Establishing volunteer motivations, aspirations and expected level of commitment at the outset in order to be able to measure progress periodically.
4. Offering clarity to perspective volunteers from the outset on the expected level of commitment.
5. The implications of collecting information from leavers in comparison to asking those who stay why they have done so, and how both can be used in parallel.
6. Providing a volunteer roles that offer long and short-term levels of engagement without negatively impact on service provision.
7. Monitoring levels of retention in order to inform the planning and sustainability of services.

Recommendations for further studies

The small study highlighted a range of methods and motivations. It also raised questions about the validity of some measures and how care is needed when reporting on the subject so as not to introduce further misconceptions about volunteering.

A more detailed study could benefit from:

1. More information on the types of organisations taking part, including questions on the size of volunteer programmes, the models of volunteer management in place.
2. More detail on the levels of volunteer retention (length of engagement, comparison of engagement against initial aspirations).
3. Examples of the responses from volunteers who reveal what encourages them to continue volunteering.
4. Examples of how the learning attained from reviewing retention can be used to improve processes and the planning and delivery of services.
5. Any other impact that monitoring and reporting on retention has led to.

Acknowledgments

Thank you to colleagues from Aberlour, CHAS, Chest Heart and Stroke Scotland, Macmillan, Quarriers, Shelter and Volunteer Edinburgh for taking part.