

**Institute for
Volunteering
Research**

Monitoring volunteers: a guide to collecting and using data

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Introduction

Key aims for both government and the voluntary and community sector are to ensure that volunteering is accessible to everyone and to increase the diversity of volunteer involvement. In order to be effective in achieving these aims, organisations need systems that will help understand what they are doing well and where they could improve. This organisational learning cannot take place without having in place some kind of monitoring of volunteers.

Among the wide range of organisations which involve volunteers or which support and place volunteers, there are varying methods of volunteer monitoring - and little consistency. Both volunteer-involving organisations (VIOs) and volunteer development agencies (VDAs) have expressed confusion and concern about what kinds of information should be collected about volunteers, what information is needed, and what information volunteers are willing to give. They are anxious too about what forms and methods of asking for information are most successful in eliciting accurate and useful responses. It is clear there is a gap in information and standards in relation to monitoring volunteers.

The purpose of this publication is to provide guidance to VIOs and VDAs across England on how to collect information from volunteers. It is based on findings from a four-month research project (see methodology). It addresses the following areas related to monitoring volunteers:

- > why VDAs and VIOs should collect data on volunteers
- > what types of data to collect and when
- > how data should be collected and stored
- > how to use monitoring data as an organisational tool.

In particular, the main focus is on how to collect equalities data about volunteers. Equalities data includes the identified government equality strands as well as other information about socially excluded or minority communities. In addition, this publication offers brief suggestions on good practice for monitoring elements through the entire volunteering life-cycle. Volunteering England's good practice bank contains more detailed advice and information on other aspects of volunteer monitoring (www.volunteering.org.uk/resource/goodpracticebank).

Monitoring in this case simply refers to collecting information (or data) about and from volunteers such as demographic information, time spent volunteering, particular support needs and suggestions for improvement. Both VDAs and VIOs can benefit from this information in a number of ways. As Hann (2003, p.44) notes:

'Monitoring is about more than just being law abiding. It gives you the opportunity to explore who your people are and what their backgrounds are. You may uncover existing talent or find new skills through identifying groups of people previously under-represented in your organisation'.

Why collect data on volunteers?

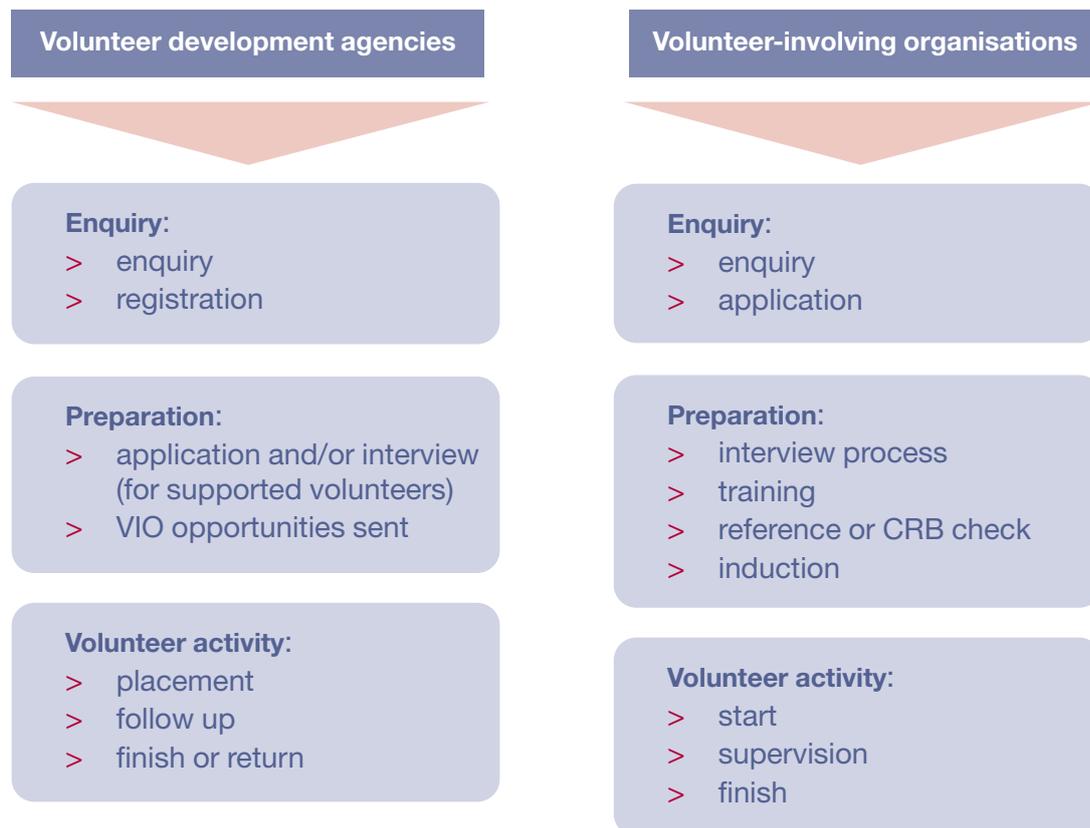
Organisations collect data and monitor volunteers for a number of reasons. The use of monitoring data for VDAs and VIOs of varying sizes and types across England is explained as:

- > **Planning** - monitoring can help target new communities for volunteer involvement or to plan strategies for future projects or outreach needs. Planning is most successful when an organisation has monitoring data or feedback that details where gaps in service provision or needs might be and how the organisation has achieved previous targets or goals.
- > **Reporting** - every organisation is accountable to someone, and most are required to report to others about the activities of the group. Reporting to stakeholders might include governing body documents, notes for staff meetings, briefings for volunteers, newsletters to members, reports to funders, announcements on websites or press releases for local newspapers.
- > **Income generation** - funders normally want evidence from organisations to show both their track record of past achievement and the need for the proposed activities. Summaries of monitoring data can provide potential funders with hard evidence to support the proposal and be an outstanding fundraising tool for writing tenders and applying for grants.
- > **Equality and diversity** - collecting information about the diversity of the volunteer base will help to clarify who the organisation serves, where gaps exist and which communities are engaging in the programmes and services offered by the organisation. It serves as a statistical map and evidence base rather than someone's impression or best guess about who volunteers within the organisation. This is particularly important for minority groups that are less visible such as people with learning disabilities or mental health issues, religious minorities or lesbian, gay and bisexual people.
- > **Volunteer management** - volunteer coordinators and managers need information about and from their volunteers in order to understand recruitment and retention rates and to create a high quality volunteer programme. Without some of this basic information, volunteer coordinators will have difficulty in managing the quality of their programmes and in providing volunteers with the support and guidance that they need. When recruiting volunteers, positive action is acceptable. For example, if an organisation wanted to recruit more young people they could create positive wording such as '16- to 24-year-olds are particularly encouraged to apply'.
- > **Meeting standards** - the Voluntary Sector National Training Organisation (VSNTO) has developed national occupational standards (NOS) for those people who manage volunteers. Current NOS standards for working with volunteers include the need to get feedback from volunteers, to communicate the volunteers' contribution to stakeholders and to record personal information about volunteers. The NOS were accredited by the Education Act Regulatory Bodies in November 2003.

What types of data to collect and when?

The type of information collected from volunteers will vary depending upon the structure of each organisation and on what it would like to do with the information. Figure 1 illustrates the typical stages for monitoring volunteers in VDAs and VIOs and elements that might be included in those stages.

Figure 1: Stages for monitoring volunteers



The specific kinds of information and data organisations collect about volunteers are outlined in table 1. This also shows the practical purpose of the information and at what point it should be collected.

Table 1: Types of data and their collection

Stage	Types of information to be collected	Specific data items to be collected and recorded	Data collection method	Purpose
Enquiry	Name and identification number	Name and unique identifying code	Application form	Monitor number of enquiries received, with a unique identifying code assigned alongside the person's name to create a confidential record of each applicant
	Contact information and personal details	Contact details, emergency contact, date of birth, adjustments or support needed, references	Application form	Contacting the volunteer, identification and understanding their needs
Preparation	Motivations and expectations	Motivation, how they heard about the opportunity, areas of interest, skills, experience or knowledge, availability	Application form or interview process	Improve recruitment, matching and placing volunteers effectively
	Equalities and diversity monitoring	Age, ethnicity, disability, gender, religion sexual orientation	Diversity and monitoring form	Understanding which communities are being reached and engaged, identifying gaps
Volunteer activity	Equalities and diversity – optional monitoring	Refugee status, employment status, qualifications, ex-offender status, caring responsibilities, nationality	Optional monitoring form	Understanding in greater detail which communities are being reached and engaged, identifying gaps
	Time-based	Hours spent volunteering and activities undertaken	Timesheet	To quantify the amount of hours volunteers help out within an organisation and to understand the cost-benefit ratio of volunteering
Expenses		Amount and type of expense incurred	Expenses claims form	To reimburse volunteers for out-of-pocket expenses and to understand the cost-benefit ratio of volunteering
Feedback		Suggestions for improving activities, complaints, feedback or evaluation of volunteering placement	Suggestions, complaints and feedback forms and evaluation questionnaires	To improve volunteer management, understand the impact and outcomes of volunteering and to create a high quality volunteer experience which helps the organisation meet its goals and deliver its mission

How to collect and store equalities monitoring data

Once an organisation is ready to collect information from volunteers, careful thought should go into the systems and methods of collecting and storing this very valuable data. The following points have been developed as a guide for VIOs and VDAs when collecting and storing volunteer equalities data. Many points also apply when collecting other types of monitoring data. While every organisation is unique and should develop systems and processes that are adapted to their needs, these guidelines serve as general good practice advice on volunteer monitoring.

- 1 Keep individual information about volunteers stored safely and securely and abide by the Data Protection Act 1998. Organisations should have a data protection policy in place that specifically includes volunteer data. Staff and volunteers should receive training on the Data Protection Act guidelines. Data protection includes:
 - > explaining to volunteers why you are collecting information about them and what you will do with that information
 - > getting consent from volunteers to hold their personal details
 - > storing personal data securely and sharing information with others only as needed or appropriate
 - > storing data only as long as necessary.
- 2 Separate equalities and diversity information from general volunteer data, and store this information in separate files, databases or spreadsheets. Equalities information should be stored centrally and should never identify the volunteer. Equalities information should be kept by one person who has responsibility for aggregating the data and reporting it. Equalities forms can be pre-coded by project, location, programme or a unique identity code for each volunteer if necessary. Most volunteer application forms (or the equivalent) will include a start date and an end date so as to be able to track the start and end of the volunteer placement. Equalities monitoring data will normally show only the data on enquiries or volunteer starters for a particular time period such as a year. In order to track equalities information for all volunteers in an organisation over time, data on volunteers who stop volunteering will need to be pulled from the data set. This can only be accomplished by assigning a unique identity code to volunteers. This type of system will result in a more comprehensive data set but also involves greater levels of expertise, staff time and resources.
- 3 Ensure that staff and volunteers are fully informed and at ease with collecting data. People who directly collect information from volunteers must be told how the data will be used and why it is important to the organisation in order to successfully collect the data. If staff and volunteers are not comfortable asking for this information, they should receive coaching or support until they feel fully competent and capable of collecting the required data.
- 4 Minimise the number of forms and paperwork for volunteers. Organisations should create a simple and streamlined process for volunteers. This should include monitoring forms that are clear and jargon-free. Monitoring forms should also include:
 - > definitions of key terms, concepts and examples where appropriate
 - > an offer of help to complete any forms
 - > an offer of multiple communication methods (i.e. paper, electronic, web-based, phone)

- > an offer of alternative formats (i.e. larger fonts, audio)
- > an introductory explanation of how the data will be used and stored
- > an option of 'rather not say' for all questions
- > an option for 'other' or 'don't know' as appropriate.

A sample equalities monitoring form (see figure 3) is available to download in word format at www.volunteering.org.uk/monitoringform

- 5 Collect information that you can compare to local and national data sets. Use categories on monitoring forms that match questions from data sets such as the national census or the Citizenship Survey (Department for Communities and Local Government) or the Helping Out survey (Low et al 2007).
- 6 Organisations have expressed concerns regarding monitoring the age of volunteers, particularly with regard to current legislation. Currently, age regulations do not apply to volunteers and much of the equalities legislation that has been passed over the last few years is aimed at employers and paid workers or service users (see www.agepositive.gov.uk/news/key_facts.asp for further information). When monitoring age, do not use age bands as they are difficult to compare with other data sets. Use either date of birth or age as an open field.
- 7 Create an operational question related to disabilities which is separate from the equalities monitoring form. This should happen during the application or interview process and will capture any adjustments that the organisation might need to make for people who want to volunteer.
- 8 If using V-Base, a national database for volunteer management, grey out the equalities information and use the 'specials' function to add missing equality strand categories.

How to develop information storage systems

Any information about volunteers that is collected by organisations should have a clear purpose which should be of benefit to the VDA or the VIO. If an organisation has no intention of using monitoring data, then there is no point collecting it. Volunteer monitoring can be a valuable organisational tool but this must be fully communicated and debated at all levels of the organisation and understood and agreed by everyone expected to carry out monitoring if it is to succeed.

All VDAs and VIOs who are developing or improving their monitoring systems should consider a range of issues, including:

- 1 Discuss, debate and decide how the organisation will use volunteer data and what type of data it will collect. This dialogue should take place at all levels of the organisation and include the governing body, staff and volunteers.
- 2 Communicate to all levels of the organisation, including staff, volunteers and the governing body any decisions regarding the use of monitoring and data collection.
- 3 Put in place policies to complement the monitoring process. For example, an equal opportunities policy, an equalities action plan and a child protection policy should include volunteers specifically.

Many organisations have multiple forms and information storage systems that have developed over time to track volunteers. This can create confusion. Monitoring volunteer data requires one system in place to properly store the information. Before

choosing a system, organisations should first ask themselves the following questions:

- > how many volunteers do we work with on average each year?
- > how many separate projects or sites do volunteers work at?
- > do we have paid staff responsible for volunteer management?
- > does the organisation offer ICT training and support to staff or volunteers related to spreadsheets or databases?

This guidance provides an overview of the major benefits and disadvantages of the three types of storage systems for volunteer information:

- > paper-based
- > spreadsheets (such as Excel)
- > databases (such as Access or a bespoke system).

Paper-based systems

- > are recommended for small organisations who work with less than 50 volunteers in total or those with very few IT skills or resources
- > offer benefits including lower costs, lower skill level needed to maintain and less intimidating to users
- > have disadvantages including no 'back up' data and risk of loss, not manageable for high volume and difficulty in summarising and totalling data for reporting.

Spreadsheets

- > are recommended for medium-sized organisations working with less than 500 volunteers
- > offer benefits including ease of calculating and aggregating data, ability to track separate projects and the need for only basic IT skills
- > have disadvantages including no automatic reporting mechanism and less manageable with high volumes.

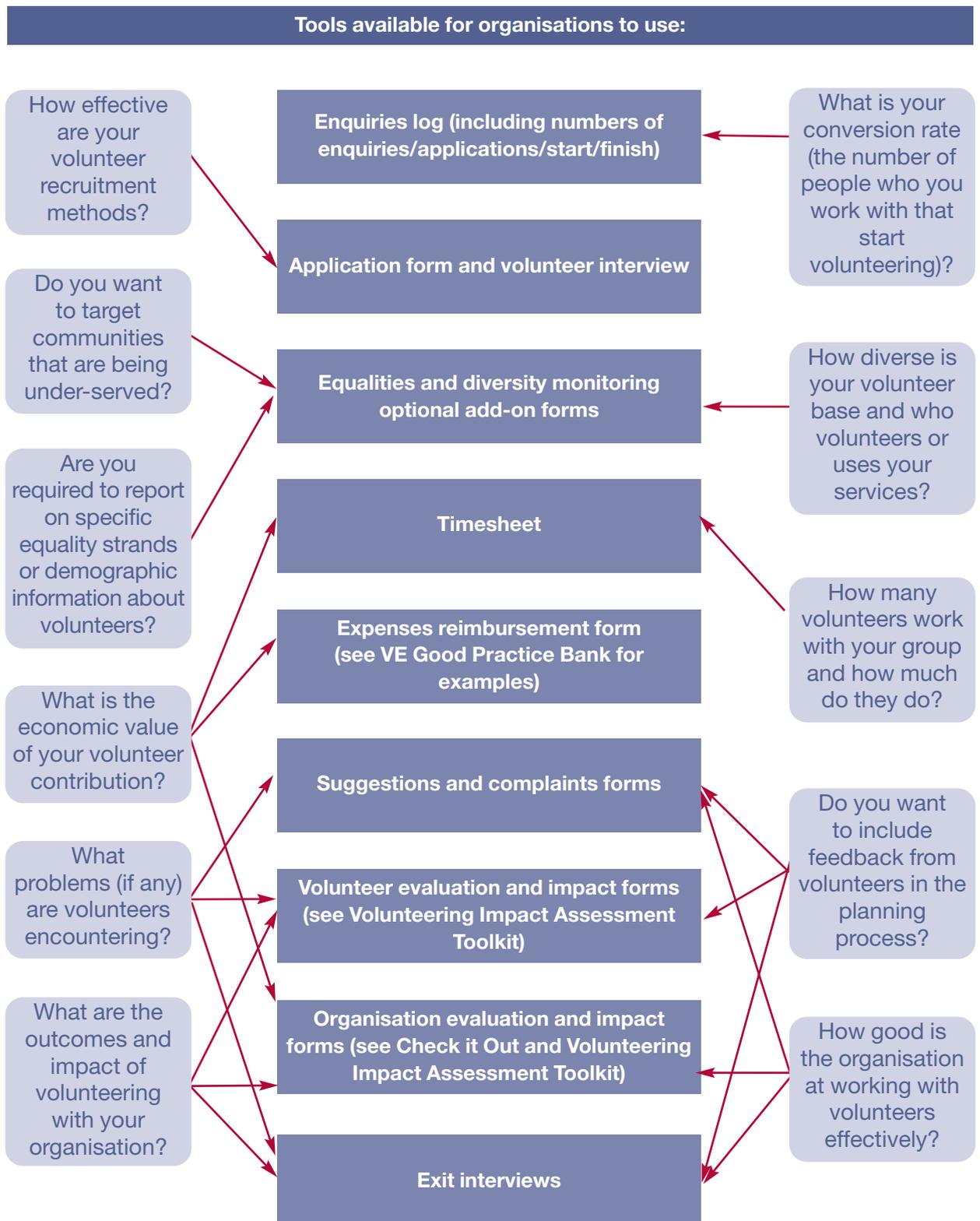
Databases

- > are recommended for larger organisations working with more than 250 volunteers
- > offer benefits including reporting functions, ability to store high volumes of data, ability to easily cross-tabulate information and the ability to customise fields
- > have disadvantages including higher IT skill levels required, training and support needed.

How to use monitoring data

Monitoring information should be used as a tool for organisational development and sustainability. The following illustration (figure 2) can help organisations choose the right tools to help answer the questions and challenges they face.

Figure 2: Making use of monitoring data



Methodology

This guidance is based on qualitative research conducted between November 2007 and March 2008. This included background research on the current best practice regarding monitoring and volunteers; a telephone survey of 27 VIOs and VDAs; in-depth semi-structured interviews with nine organisations across the country; and a group consultation with 15 members of Greater London Volunteering (an umbrella group representing London's Volunteer Centres) on the recommendations. In total, 51 organisations were involved in developing the guidance with additional input from Volunteering England staff. The organisations who participated in the research and consultation represented both urban and rural communities and included a range of types and sizes of organisations.

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This research bulletin was written by Kim Donahue, independent researcher and research associate, IVR.

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- Volunteering England (2008) *Accepting volunteers from overseas*, available at www.volunteering.org.uk/information
- Volunteering England (2008) *An introduction to the Criminal Records Bureau* available at www.volunteering.org.uk/information
- Volunteering England (2008) *Who is allowed to volunteer?* available at www.volunteering.org.uk/information
- Volunteering England (2006) *The Independent Safeguarding Authority: a new scheme for vetting, barring and accessing CRB checks* available at www.volunteering.org.uk/information
- Volunteering England's Good Practice Bank contains lots of advice and guidance on all aspects of volunteer involvement, including monitoring.
- Wilson, R. and Lewis, H. (2006) *A part of society: refugees and asylum seekers volunteering in the UK* Tandem Publications: Leeds

Figure 3: sample form

The following form is a sample equalities monitoring form that may be used by any organisation. It is designed to be one page that is printed on both sides. It includes all the equality strands and also can be adapted to include the optional categories listed in table 2. Users of the form should edit the introduction to reflect their specific circumstances and values and add their contact details at the end.

Equality and Diversity Monitoring - Volunteers

The **[Add organisation name]** aims to provide equal opportunities and fair treatment for all volunteers. Please complete the form and email or post to the address at the end.

The information below is anonymous and will not be stored with any identifying information about you. All details are held in accordance with the Data Protection Act 1998.

We would like you to complete this form in order to help us understand who we are reaching and to better serve everyone in our community. The information will be used to provide an overall profile analysis of our volunteer base.

If you would like the form in an alternative format or would like help in completing the form, please contact a member of staff.

Ethnicity

Please state what you consider your ethnic origin to be. Ethnicity is distinct from nationality and the categories below are based on the 2001 Census in alphabetical order.

Asian

- Indian
- Pakistani
- Bangladeshi
- Any other Asian background (please write in)

Mixed

- White and Black Caribbean
- White and Black African
- White and Asian
- Any other mixed background (please write in)

Black

- Caribbean
- African
- Any other Black background (please write in)

White

- English
- Irish
- Scottish
- Welsh
- Any other white background (please write in)

Chinese or other ethnic group

- Chinese
- Any other ethnic group (please write in)

- Rather not say

Age

Date of Birth: _____ Rather not say

Disability

The Disability Discrimination Act 1995 (DDA) defines a person as disabled if they have a physical or mental impairment which has a substantial and long term (i.e. has lasted or is expected to last at least 12 months) adverse effect on one's ability to carry out normal day-to-day activities. This definition includes conditions such as cancer, HIV, mental illness and learning disabilities. Do you consider yourself to have a disability according to the above definition?

Yes No Rather not say

Gender

Male Female Transgender F to M M to F
 Rather not say

Faith

Which group below do you most identify with?

No religion Baha'i Buddhist
 Christian Hindu Jain
 Jewish Muslim Sikh
 Other (please write in) Rather not say

Sexual orientation

How would you describe your sexual orientation?

Bisexual Gay man Heterosexual or 'straight'
 Lesbian Other Rather not say

Today's date: _____

Thank you for completing this form.

Please send the completed form:

by email: **[Add contact details]**

by post: **[Add contact details]**

The Institute for Volunteering Research

The Institute for Volunteering Research (IVR) is a specialist research and consultancy agency focusing on volunteering. IVR is an initiative of Volunteering England and the University of East London. It was set up in 1997 in response to the increased demand for research on volunteering. Over the past ten years IVR has carried out a wide variety of research, consultancy and evaluation projects on many different aspects of volunteering. It has completed four national surveys of volunteering.

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Volunteering England

Volunteering England supports volunteering and everyone who works with volunteers by:

- > providing information and advice on volunteering through its information team, its website and its publications;
- > giving local support to volunteers and volunteer organisations through its network of Volunteer Centres;
- > developing and supporting a strong and effective nationwide volunteering infrastructure;
- > working at local, regional and national levels;
- > making sure that everyone knows how valuable volunteering is to society by its powerful lobbying and campaigning;
- > ensuring that volunteering is understood at the heart of government, and in the public, private and third sectors.

www.volunteering.org.uk



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