



**NORTH WEST NETWORK**

**SAM Project  
Progress Report**

**31<sup>st</sup> July 2004**

Voluntary and Community Sector Infrastructure – Development & Exemplar Projects, Local, Regional & Sub-Regional Early Spend Fund

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## **Aim of the Report**

The aim of this report is show progress of SAM Project towards outcomes and achievements to date as stated in the original application for the Voluntary and Community Sector Infrastructure – Development & Exemplar Projects at Local, Regional & Sub-Regional Early Spend Fund.

## **Introduction**

As part of NWN's Capacity Building Project, SAM Volunteer Management will be used as a development aid for volunteer involving organisations to increase the effectiveness of their volunteer programme and services. This will enable and empower volunteer involving organisations to:

- Improve their ability to recruit, manage and retain volunteers
- Comply with current legislation
- Improve their management of funding contracts and ability to obtain future funding
- Attain a greater level of sustainability by replacing cultures of 'fire fighting' with a culture of future planning

This will result in an improvement in the quality of service volunteer involving organisations offer to the community in which they work; this includes volunteers, service users and networks.

Using SAM Volunteer Management, organisations will begin to (if do not know already) understand the Compact – Volunteering Code of Good Practice and be able to work towards meeting and implementing the suggested standards for volunteer involving organisations.

SAM Volunteer Management was produced by achieving the following outcomes:

- Production of Self Assessment Manual (SAM)
- Recruitment of Consultation Group
- Develop an Implementation Strategy
- Develop Existing Funding Strategy
- Further Develop Skill Base of Project Staff

The work plan shows progress towards these outcomes.

NWN has developed a volunteer management self assessment manual (SAM) that when combined with practical support from NWN will enable and empower volunteer involving organisations to:

- Improve their ability to recruit, manage and retain volunteers
- Comply with current legislation
- Improve their management of funding contracts and ability to obtain future funding
- Attain a greater level of sustainability by replacing cultures of 'fire fighting' with a culture of future planning

Thus resulting in an improvement in the quality of service volunteer involving organisations offer to the community in which they work; this includes volunteers, service users and networks.

In addition, SAM Volunteer Management will give organisations assistance to understand the Compact – Volunteering Code of Good Practice and work towards meeting and implementing the suggested standards for volunteer involving organisations.

The completion of NWN SAM Project was obtained by achieving the following outcomes:

- Production of Self Assessment Manual (SAM)
- Recruitment of Consultation Group
- Develop an Implementation Strategy
- Develop Existing Funding Strategy
- Further Develop Skill Base of Project Staff

# NWN SAM Project Work Plan

	May				June				July					August			
Activities by weeks	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
<b>Self Assessment Manual/Consultation Group</b>																	
(#) Recruit consultation group + organise schedule	█	█															
1st consultation meeting		█	█														
Review existing Self Assessments and the compact	█	█	█	█	█	█	█										
Design section layout and format of new manual	█	█	█	█	█	█	█										
Ongoing feedback from consultation group via email				█	█	█	█		█	█	█	█		█	█	█	
2nd consultation meeting							█										
Add content to SAM								█	█	█	█	█	█				
Proof readings												█					█
3rd consultation meeting (review draft)													█				
Implement changes identified by consultation group													█	█	█	█	
4th Consultation group meeting (agree final draft)																	█
Send to Printers																	█
<b>Implementation strategy</b>																	
Identify organisations for consultation					█												
Design questionnaire						█	█										
Distribute questionnaire								█	█	█	█	█	█				
Analyse questionnaire results														█	█		
Contact organisations to discuss implementation																█	█
<b>Funding strategy</b>																	
Update Funding strategy					█				█					█			█
Link implementation consultation to funding strategy																	
<b>Further develop of skill base of staff</b>																	
Identify training and book training course	█				█												

█	Outcome 1: Production of Self Assessment Manual SAM	█	Outcome 2: Consultation Group	█	Outcome 3: Implementation Strategy
█	Outcome 4: Funding Strategy	█	Outcome 5: Further develop skill base of staff	█	Progress made on outcome

## **Project Outcomes**

The outcomes and progress towards the five outcomes of SAM project are listed below:

### **1. Self Assessment Manual (SAM)**

Production of a Self Assessment Manual for generic application to VCS organisations that will assist NWN in the development of VCS organisations.

#### **Progress towards this outcome**

- The consultation group has agreed the definition of SAM. It will be a development tool in form of a self assessment manual for volunteer management – SAM Volunteer Management.
- SAM Volunteer Management will be divided into four smaller manuals called sections - Planning, Recruitment and Selection, Support and Monitoring and Evaluation.
- Statements of good practice from consultation group and the Compact code for volunteering have been listed under the sections: planning, recruitment and selection, support, monitoring and evaluation as guidelines to content.
- The consultation group has agreed the format, content, sections and design of SAM Volunteer Management.
- NWN has designed evaluation sheets (to be completed for each sections) around the barriers to self assessment manuals as identified by the consultation group.
- All draft sections of SAM Volunteer Management are complete. NWN are now working towards drafting the introduction and templates for each section.
- The consultation group agreed that SAM Volunteer Management will be for generic application and will assist in the development of VCS organisations as shown in the progress evaluation sheets in appendix 2.

### **2. Consultation Group**

The project will establish a Consultation Group – broadly representative of delivery and infrastructure VCS organisations in the North West - to review and evaluate the Self Assessment Manual.

#### **Progress towards this outcome**

- NWN has established a Consultation Group which comprises of regional and local infrastructure organisations and local support delivery organisations as listed in appendix 1.

- The consultation group completed IT audit to ensure the methods used for feedback was compatible with the IT systems the consultation group are familiar with.
- Three consultation group meetings have been held and the contribution to the development of SAM Volunteer management has been excellent.
- NWN has received excellent feedback on the consultation process used in the development of SAM Volunteer Management, as shown in appendix 2.
- The consultation group will meet five times instead of four times as shown in the work plan, as NWN feels it is important that the group have an exit meeting to the project during September, to give further feedback on their contribution and the consultation process. The group will also have access to the final version of SAM Volunteer Management.

### **3. Develop an Implementation Strategy**

The project will develop an Implementation Strategy after consulting with VCS infrastructure organisations within the North West to identify areas of highest need (geographic and thematic) and ways in which the project can collaborate with existing infrastructure organisations to avoid duplication in areas with strong infrastructure, plugging gaps in weaker areas. Consultation will take place in the form of a questionnaire.

#### **Progress towards this outcome**

- NWN was informed at the beginning of the project that NWVF, a member of the consultation group, are carrying out a mapping project that will identify infrastructure organisations in the North West. It was agreed the information gathered from the mapping project will be used to inform implementation strategy of this project.
- Feedback questionnaire designed and distributed to consultation group. The consultation group have expressed an interest in working with NWN on the implementation of SAM Volunteer Management as shown in appendix 2.
- The consultation group will be assisting in the design of the questionnaire for infrastructure organisations in the North West to ensure the correct approach to these organisations when NWN are ready to deliver their capacity building project.

#### **4. Develop Existing Funding Strategy**

The project will develop its existing funding strategy, investigating possible funding sources to implement the Self Assessment Manual reflecting the areas of need identified during the development of the Implementation Strategy. The Funding Strategy will be reviewed through monthly management meetings.

##### **Progress towards this outcome**

- Funding strategy has been reviewed within four management meetings.
- NWN has identified the Big Lottery Fund as a means to implement SAM Volunteer management and are currently working towards submitting an application in September.

#### **5. Further Develop Skill Base of Project Staff**

Project staff will undergo coaching training to further develop the skills needed to facilitate organisations through the development process. It is envisaged that 3 days of training will be carried out between week 11 and 13 of the project.

##### **Progress towards this outcome**

- Project staff attended training in high scoring applications for the Community Fund to assist with developing the funding and implementation strategies.
- The team are continually investigating other sources of funding and awaiting announcement of known future funding streams such as ACD main infrastructure programme which could support the implementation of SAM Volunteer Management.
- The team are currently investigating training courses with coaching accreditation to enhance staff skills and to give organisations the confidence that NWN staff can facilitate them through the development process.

## **Equal opportunities and meeting the need of BME communities**

North West Network is committed to developing and maintaining best practice in equal opportunities for all and has in place a comprehensive Equal Opportunities Policy.

Promotion of equality of opportunity has been integral at all stages of the project as shown below:

- Recruitment for the consultation group was advertised within NWN newsletter that has a readership in excess of 1200 voluntary and community organisations from different thematic and specialist backgrounds.
- The consultation group consists of regional and local infrastructure organisations and local support delivery organisations representing or working with marginalized communities (VBx, CVS's, BME regional network, regional volunteering forum, a housing network, an unemployed project, and an adult education project). This has ensured the manual is comprehensive, up to date and relevant to the needs of a wide range of VCS organisations.
- The consultation group completed an IT audit to ensure the methods used for feedback were compatible with the IT systems the consultation group are familiar with. The content of each section of SAM was evaluated using a criteria set by the consultation group to ensure the manual uses clear language in a non-threatening manner.
- Equal opportunities is included within each section of SAM Volunteer Management. Organisations can use this to identify areas of development and receive assistance to develop and improve their implementation of Equal Opportunities, if needed.

## **Monitoring and Evaluation**

NWN has monitored and evaluated the SAM Project in the following ways:

- Project staff hold weekly team meetings to monitor the projects progress against the schedule of the work plan and the feedback from the consultation group.
- Project and Directorate staff hold monthly management meeting to monitor the projects overall progress against the projects outcomes and the projects profiled spend.
- The Consultation Group have monitored and evaluated the work undertaken by project staff , through contributing at meetings, completing evaluation sheets and completing the project progress questionnaires.
- Minutes of consultation meetings and individual suggestions on how the SAM Volunteer Management can be improved have been recorded and acted on by project staff. Latest minutes are shown in appendix 3.

## **Finances**

NWN has committed £27126 as at 30<sup>th</sup> June 2004 of grant allocated.

NWN are on target to achieve spending profile by project completion.

## **Summary**

NWN SAM Project is progressing according to the work plan and spend towards financial profile.

The consultation group has exceeded the expectations NWN had of its role. NWN would like to acknowledge the guidance and contribution the group have made to the development of SAM Volunteer Management. They are truly equal partners within the SAM Project.

NWN carried out a progress evaluation through the distribution of questionnaires to the consultation group to evaluate the consultation methods used and areas in which NWN could improve.

NWN had excellent feedback on the methods used to develop SAM Volunteer Management from the consultation group.

The statements given by consultation group members are shown in appendix 2.

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## Appendix 1: List of Consultation Group Members

First name	Surname	Position	Organisation
Karen	Ashley	Volunteer Coordinator	Routes to Employment
Elaine	Wood	Regeneration Worker	Calico Housing
Shona	Murphy	Project Director	Chorlton Workshop
Sue	Vickers	Manager	Volunteer Centre Tameside
Barbara	Bleeker	Chief Officer	Trafford CVS
Siddika	Ahmed	Development Officer	1NW
Cathy	Jackson	Project Manager	NWVF
Steve	Egan	Regional Manager	CSV Media North
Dorothy	Shears	VB Manager	Hyndburn & Ribble Valley CVS

## **Appendix 2: Feedback from Consultation Group**

### **What do you think of the SAM consultation process so far?**

Comments:

- Discussions have been thought provoking
- I found it useful, interesting and a pleasure to be involved in
- Very Productive
- Excellent
- The process has been first class. We get info prior to meetings, tasks to be achieved in between meetings with deadlines, reminders of the meetings. At meetings themselves we are truly treated well, our opinions/views respected and taken on board
- Didn't expect to be consulted so thoroughly
- Really good

### **Are there any differences to how you have been consulted in the past?**

Comments:

- Yes – opportunities for open and honest debate, yet positive comments made
- Better and fully engaged
- Just better all round
- More in depth than before

### **How could the consultation process be improved?**

Comments:

- No, good time has been allowed for feedback on separate sections. Group has had plenty of debate regarding issues. Group has consisted of members from different geographic areas and specialities of work
- I think the group has been well received and accommodated in all areas
- No perfect
- I can't think of anything that hasn't been acted on

### **Is NWN SAM Volunteer Management living up to your expectations?**

Comments:

- It will be a useful tool for organisations
- Well organised and should be easy to follow
- I thought this was a much needed and helpful resource, to be presented in a thoughtful, meaningful way – not just recycling past ideas. It has exceeded my expectations, mainly by how it has not lost its way or gone off on a tangent
- Better than expected – more involved and covering more areas

## **Appendix 2: Feedback from Consultation Group**

### **Will SAM meet the needs of volunteer involving organisations?**

Comments:

- I think it will meet the needs of all organisations – good at prompting thought and allows for good development of plans
- It will help them (volunteer involving organisations) develop and grow into responsible organisations
- Yes, because many organisations (not all) need something which challenges their thought processes, but not in a threatening or confrontational way. The idea to improve must come from themselves
- Yes covers all the relevant areas

### **How is SAM different to other Self Assessment Manuals?**

Comments:

- Open questioning style allows people to explore thoughts
- More than just another manual
- No pressure
- More accessible and easy to read
- It does not just pick bits and pieces from what already exists it is truly new
- Designed by the people who would use it

### **Would your organisation benefit from using SAM**

Comments:

- Yes be good for my organisation to start thinking and planning for volunteer activities and not pass the buck
- Yes it will be useful to many organisations I know
- Yes It starts off thought processes which have either never been done or not reviewed for some time
- Yes it would make my job a lot easier to have everything in one place

**Would you like to work with North West Network's capacity building project in the future?** All the consultation group members said yes other comments are shown below

Comments:

- Provisionally yes – would depend on priorities for my organisation
- Yes a good team
- Yes very professionally organised

### **Has this experience been good for your own personal development?**

Comments:

- Yes – has provoked me to think about how I plan and develop work for volunteers
- Yes will adapt volunteering aspects of planning to loads of other areas

## Appendix 3: Latest Minutes of Consultation Group

### Minutes of Meeting

<b>Minutes by:</b> Jane Stanistreet	<b>Date:</b> 21 July 2004	<b>Start:</b> 13.20	<b>Finish:</b> 15.50
<b>Attended:</b>	Cathy Jackson Karen Ashley Elaine Wood Siddika Ahmed Sue Vickers Shona Murphy Carol Savage Dan Farley Jane Stanistreet (minutes)	North West Volunteering Forum Routes to Employment Calico 1 North West Volunteer Centre Tameside Chorlton Workshop North West Network North West Network North West Network	
<b>Apologies:</b>	Steve Egan Dorothy Shears	CSV Media North Hyndburn & Ribble Valley CVS	

Item	Details of Points Raised	Action
1.	<b>Apologises</b>  Apologies were recorded	
2.	<b>Introductions</b>  All were welcomed to the Consultation Group Meeting and thanked for their attendance. Introductions took place.	
3.	<b>Minutes of last meeting</b>  The minutes from the previous meeting were reviewed.  Amendments to the minutes – Siddika's first name spelt incorrectly. Tameside Volunteer Centre should have been Volunteer CentreTameside.  The minutes were agreed as a true and accurate record of the meeting.	
4.	<b>Section 3: Volunteer Support</b>  The feedback from the evaluation of Volunteer Support was given and a discussion was held around the accessibility of SAM.  It was agreed that it would be impractical to print SAM in different formats at this stage but will be printed as and when this is required.  A suggestion that this should be clearly stated on each of the sections will be acted upon.  The group was asked to check that NWN had amended the suggestions gathered from the evaluation sheets.	<b>NWN</b>  <b>All</b>
5.	<b>Section 2: Volunteer Recruitment</b>  NWN produced a draft of the recruitment section; Part A – organisation details	

### Appendix 3: Latest Minutes of Consultation Group

	<p>(Background), Part B - individual feelings and Part C – the process (scenarios).</p> <p>Part A was discussed and the following points were raised:</p> <ul style="list-style-type: none"> <li>▪ The question ‘Do volunteers work with children or vulnerable people?’ started a discussion around Disclosure. The group agreed an additional question on screening needs to be inserted. NWN will devise and add a question on screening</li> <li>▪ The group acknowledged the question ‘How many hours do volunteers complete in a week?’ was important to ask however, felt many organisations may find this hard to answer. It was suggested to change the question to ‘What is the minimum number of hours volunteers complete in a week?’ This was agreed</li> <li>▪ The group suggested and agreed the question ‘Do I involve volunteers in recruiting more volunteers?’ should read ‘Do I involve volunteers in recruiting new volunteers?’</li> <li>▪ The group suggested and agreed the question ‘What are my major sources of recruiting volunteers?’ should read ‘Where do I recruit the majority of my volunteers?’</li> <li>▪ The group felt the question ‘Is the number of volunteers I have to recruit effected by this funding?’ has a double meaning and should be split into two. NWN agreed to devise and insert two questions to allow for both meanings.</li> </ul> <p>Part B was discussed and agreed</p> <p>Part C was discussed and the following point was raised with regards to scenario 3:</p> <ul style="list-style-type: none"> <li>▪ The group suggested and agreed the question ‘Is there anything that would stop me finding another opportunity within my organisation?’ should read ‘Is there anything that would stop me finding the volunteer another opportunity within my organisation?’</li> </ul> <p>A suggestion was made that the Recruitment Section should be called Recruitment and Selection due to the contents referring to the selection process. This was agreed.</p> <p>It was agreed that NWN will amend the recruitment and selection draft section to include the above points before distributing it to the group.</p> <p>The group agreed to attempt the questionnaire either on themselves, their colleagues or an organisation they support and complete the evaluation sheets. The group agreed to feedback their comments to NWN as soon as they can.</p>	<p><b>NWN</b></p> <p><b>NWN</b></p> <p><b>NWN</b></p> <p><b>All</b></p>
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## Appendix 3: Minutes of Last Meeting

<p>6.</p>	<p><b>Section 1: Planning for Volunteers</b></p> <p>NWN produced a draft of the planning section. NWN stated that although this section is divided into Part A, Part B, and Part C, as with the other sections the approach in this section is slightly different.</p> <p>NWN explained that taking an organisation through the self assessment process would be difficult to achieve if the person completing this section is not familiar with planning.</p> <p>NWN went on to explain, in basic terms, that the planning process is a 3 stage cycle aim/need, activity/actions and evaluation</p> <p>NWN explained this using a holiday scenario: A person wants a holiday (activity/action) as they are tired (need) through their heavy workload. The holiday will result in the person feeling less tired (aim).</p> <p>However the holiday (activity/action) is not the best way to meet the needs of this person as when they get back to work they will still have a heavy workload and become tired (need)</p> <p>By exploring other options, the better solution (activity/action) would be for the person to have work taken from them or other staff to help them, easing the workload resulting in the person being less tired (aim). Therefore, the activity would be a better way of meeting the need.</p> <p>Briefly, NWN explained, in order to for an organisation to understand it's aim(s) they must have identified the need and explored different ways (activity) to meet the need. It is important that an organisation knows if, how and why the activity/actions met the need originally identified in order to reproduce or improve (evaluation).</p> <p>Using the above principles, the planning section draft was designed in following way:</p> <p>Part A – Background The questions are designed to help the organisation to:</p> <ul style="list-style-type: none"><li>▪ Identify and understand the needs of volunteers</li><li>▪ Identify and understand their own aim(s) and activities and the needs they endeavour to meet</li></ul> <p>Part B – Individual Feeling's To capture the individual feelings around planning</p> <p>Part C – Scenario This is to assist the organisation to explore their planning experience by reflecting on a past event.</p>	
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### Appendix 3: Minutes of Last Meeting

<b>7..</b>	<p><b>Next Steps</b></p> <p>A summary of actions to be completed by the consultation group and NWN was given.</p> <p>NWN will amend and distribute each draft section to the group.</p> <p>The group agreed to review each section using the evaluation sheet to feedback to NWN, as soon as they can, due to the short time scale of the project.</p> <p>NWN will produce the Monitoring and Evaluation draft section and distribute to the group for comments.</p> <p>NWN will produce SAM introduction in order to have the completed draft SAM Volunteer Management at the next meeting.</p> <p>NWN agreed to update and distribute the contact list.</p>	<p><b>NWN</b></p> <p><b>All</b></p> <p><b>NWN</b></p> <p><b>NWN</b></p> <p><b>NWN</b></p>
<b>8.</b>	<p><b>Consultation Group feedback</b></p> <p>NWN distributed a feedback questionnaire to gather the thoughts the consultation group had on SAM Volunteer Management and the process in which NWN had consulted with the group.</p> <p>It was explained that this information would contribute to the NWN progress report to GONW for the VCS infrastructure exemplar and development early spend fund.</p> <p>The group completed and returned the questionnaires.</p>	
<b>9.</b>	<p><b>AOB</b></p> <p>None were recorded</p>	
<b>10.</b>	<p><b>Date of Next Meeting</b></p> <p>Thursday 9<sup>th</sup> September 2004 - Lunch at 12.30pm with the meeting to start at 1.00pm.</p>	