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Learning from the standards self-assessment pilot – report summary

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Introduction

The Global Standard for Volunteering for Development was developed in 2018–19, through a global consultation process across the Volunteering for Development sector. As part of the validation of the standard a self-assessment tool and learning action planning framework have been piloted amongst 30 organisations representing a diverse range of volunteer involving organisations. The pilot took place during 2020 and this report presents a summary of the findings from a learning exercise commissioned by Forum and conducted with the pilot organisations from Sept 2020 to January 2021.

A survey was developed and used to gain feedback on the content of the standard, experiences of using the self-assessment and learning action tools, support needs for organisations using the tools and organisational learning emerging from the process. The survey was supplemented with four case studies which highlight the experiences and learning of organisations taking part in the pilot.

Summary of findings

Content of the standard

Many organisations felt that the standard is a useful, flexible and comprehensive tool for strengthening operational delivery. There was however strength of feeling that the standard appears to be most relevant for international organisations and relevance and alignment is much weaker for national and local organisations. These organisations reported not being able to fully implement the standard and considered some of the indicators as being too onerous for resource strapped organisations working with limited resources, infrastructure and without specialist staff. A similar disconnect was reported by organisations working with informal volunteers. They felt that components of the standard do not align with programmes which place a greater emphasis on informal volunteering but have a stronger fit for international organisations working with international volunteers.

Whilst some organisations reported finding the standard clear others felt that some of the language used in the standard is complicated and the actions and indicators vague, making it difficult for organisations to use. This may reflect levels of previous exposure to similar tools using this structure and format which are relatively familiar in some countries and cultures and more likely to be new and alien to others. There were also many comments about the need for materials to be translated in to French and also local languages.

Some organisations identified perceived gaps in the content of the standard. Areas identified included a section to evaluate the quality of relationships with organisations and partners supporting volunteer activities, a section on the efficiency of the use of available resources and something to support evaluation of what volunteers bring. Some wanted more on working with local volunteers and some identified a need for indicators on climate change, inclusion and social and environmental innovation. Whilst the standard was developed before the COVID-19 pandemic this has highlighted how the operating context for organisations can change over time which in turn highlights the need for a mechanism to ensure review of the standard over time.

Recommendations

- Set up a task focused working group with a small number of national and local organisations and those who work with informal volunteers to review the content and identify possible adaptations.
- Simplify the language used in the standard which would increase clarity and make it easier for organisations to engage confidently.
- Translate the standard and supporting documentation into French and other local languages to enhance accessibility.
- Consider the inclusion of areas identified as gaps in the standard. Whilst it may not be possible to include all the identified gaps it will be helpful to provide a rationale for including or not including identified areas.
- It is important to ensure that a mechanism is in place for reviewing the standard over time to ensure that it retains operational relevance.

The self-assessment process

The self-assessment process had helped organisations to understand the strengths and weaknesses of their work, helped with the implementation and management of their volunteering programme, identification of improvements, reflective practice and evaluation of work.

Organisations identified drivers which had helped them to make progress with the self-assessment process and these include motivation to improve, support from organisational leadership, support from colleagues, effective team work and planning and the timing of the exercise fitting well from an operational perspective. The guidance and support from Forum and other members of the working group were also reported as valuable. Barriers to progress with the self-assessment process included the language used in the standard, time pressures, resource limitations, challenges engaging with partner organisations or country offices and competing priorities especially pressures arising from the COVID-19 pandemic.

Some organisations had benefited from focusing their self-assessment process on certain aspects of the standard where they identified a need for improvement. This approach has made the self-assessment processes more targeted and realistic.

Most participating organisations said the self-assessment process had brought about some change ranging from improved vision, strategic direction and prioritisation and increased awareness of strengths and weaknesses. For some organisations the changes reported were about an approach to their work and they reported greater involvement of different stakeholders, introduction of a human rights-based approach and increased professionalism. Some said that the process had increased their awareness of the value of indicators and for others it had informed the questions that they ask of partners and volunteers. Some said that the changes were linked to specific areas such as an increased focus on mental health or tightened safeguarding and security practices.

Recommendations

- When marketing the standard emphasise the drivers that have supported the progress of organisations taking part in the pilot. This will help organisations to prepare and position themselves to gain maximum benefit from going through the process.
- Ensure that the self-assessment tool and guidance are made available in French and other local languages to enhance accessibility.
- Consider introducing a “not applicable” option within the tool to help organisations focus on the relevant areas as they progress through the tool in acknowledgement that not all indicators will apply to all organisations.

Organisational learning

All organisations said that they had experienced organisational learning as a result of going through the self-assessment process and some highlighted how they had benefited from the process of self-reflection. They valued the fact that the process helped them to see what they were doing well and at the same time identify areas for improvement. Areas for improvement identified included improved practices and operating procedures, volunteer management, safety and safeguarding, data management, measuring impact, training, inclusion of volunteers and mental health.

Most organisations said that they had made changes as a result of going through the self-assessment process and these changes included organisational strategies, processes and documentation, formalisation of informal volunteering, prioritisation of mental health, approaches to inclusivity and in one case setting up a committee to assess the impact of actions.

Recommendations

- Emphasise to organisations that their own needs must be at the heart of the self-assessment process and they can adapt use accordingly by focusing on the core areas of certain domains.
- Promote the value self-reflection and assessment as a mechanism to support continuous improvement.
- Emphasise accountability for delivering change can be generated as a culture from within the organisation rather than relying on external accountability mechanisms.

Support

Organisations valued the support that they had received as they undertook the self-assessment process. They valued the guidance notes and access to supporting documents and also the opportunity to have personal support and guidance from Forum. The opportunity to share ideas, challenges and progress with other organisations also going through the self-assessment process was very valuable. They felt that mentoring, case studies and a mock exercise would also be very useful for organisations going through the self-assessment process in the future.

In many respects the support needs of organisations going through the self-assessment process is the most complex consideration for the wider roll out of the standard as consideration needs to be given as to how these needs can be met. Support needs varied considerably across organisations with some finding the process clear and the structure of the standard familiar and straightforward whilst others struggled with both the content and elements of the structure. Supplying mentoring support to organisations is time consuming and will potentially have a significant resource implication.

Recommendations

- Assess the scale and profile of organisations that the standard is marketed towards in order to estimate the level of support that could be needed for organisations going through the self-assessment process.
- Consider developing a series of short YouTube videos to offer support for organisations in key areas.
- Consider the use of a buddying or peer support system where organisations identifying support needs as they go through the self-assessment process can access this support from an organisation that has already been through the process.