

helpforce

Volunteering Passporting (Portability)

How To Guide

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Introduction

Over the course of 2020, in response to the COVID-19 pandemic, we have seen many examples of where volunteers in one setting were needed to support other services at short notice. For example volunteers that had previously supported people within NHS Hospitals were called on to deliver support to people who were shielding within the community. This demonstrated a real value in the ability of volunteers to move from one organisation to another with as little friction as possible.

From our work with different volunteer projects we have seen that delays in getting volunteers in place are one of the biggest reasons that volunteers withdraw their support. By reducing the levels of volunteer attrition we can maintain overall volunteer numbers as well as retaining the skills and experience of individual volunteers.

In many cases the friction that individuals experience in volunteering in different settings is caused by different processes of host organisations. Harmonising those processes means that a volunteer response can be much more agile and volunteers themselves will have a better experience when volunteering.

As Integrated Care Systems take a more joined up approach to supporting volunteering, one of the main focuses of attention is how shared processes can be developed that allow volunteers to move between organisations. This is called a 'portability process', i.e. a mechanism that facilitates volunteers moving from the organisation which initially hosted them on to another in the same system.

The most common portability tool is the development of a volunteer passport, i.e. a record of competencies, skills, training and achievement completed by a volunteer, which are recognised not just by the organisation which awarded them / signed them off, but others too. This means organisations agree to trust each other when it comes to recognising volunteering standards in an area.

This document tells you more about portability, the most common challenges and its benefits (for systems, volunteers and people). It also gives you examples and practical suggestions for what you can do to implement portability in your area.

Who is this guide for?

This guide is aimed at people who work within Integrated Care Systems (ICS) and are interested in how the system can come together to support the portability of volunteers. You might be trying to bring your system together to see what potential there is for portability or you might be at an even earlier stage trying to understand the benefits of putting in place portability.

Integrated Care Systems are complex and the range of people that are likely to have an interest in portability is likely to reflect that complexity. We believe that this guide will be of interest to:

- Integrated Care System workforce Leads
- Integrated Care System volunteering leads
- Leaders and managers within key statutory bodies (both providers and commissioners) that are exploring volunteering programmes across systems. This could cover
 - Local Authorities
 - Community Nursing providers
 - Mental Health Trusts
- Staff working for local third sector organisations and that are keen to better integrate their volunteers with systems
- Local Infrastructure organisations such as Voluntary and Community Sector support organisations (VCS) that want to support greater collaboration between the voluntary sector and health systems

As you begin to look at options around portability it is important that you gather a range of people that might have an interest in how the process will work. Portability cannot be achieved through the actions of a single organisation or sector.

What is portability?

Portability is about how organisations that host volunteers can reduce the friction volunteers feel when they move into different roles. For example the need to complete the same or similar training with different organisations because those organisations do not recognise previously carried out training.

As areas come together to explore opportunities to increase volunteer portability they need to consider what the current barriers are to prevent volunteers moving from one organisation to another. Some examples of barriers are :

- A common approach to validating identity.
- A common recognition of training.
- A common approach to Disclosure and Barring Service checks (DBS).
- A shared approach to risk management.

By agreeing to adopt common approaches organisations create portability. We have found that the process of creating portability is much more focussed on reaching agreements between organisations rather than making a “thing”.

In order to reach agreement on those processes that can be shared, or mutually recognised, it is also important to have a shared understanding of the benefits of portability. Some benefits we have seen delivered are:

- Reducing the time taken for volunteers to take up new roles.
- Improving volunteer experience and reducing attrition.
- Reducing costs to hosting organisations in bringing in new volunteers.
- Supporting better integrated working as volunteers cross silos.

What is the problem for systems?

Over the course of 2020, the response to the pandemic has demonstrated the value of volunteering and what can be achieved when organisations stop working in silos and are truly collaborative. Finding sustainable ways to reduce the bureaucracy involved in registering as a volunteer is a critical part of ensuring that volunteering initiatives are effective and that they lead to good outcomes, both for beneficiaries and volunteers. Additional considerations show why it is important to enable volunteers to easily move across organisations:

- The majority of volunteers, in systems, operate outside of the NHS, in local Voluntary and Community Sector organisations, the local authority or less formal settings, such as mutual aid groups. This means that there is a pool of active and experienced individuals who deliver tangible benefits to systems, but might encounter significant barriers to take their passion to an NHS setting, due to bureaucratic barriers.
- Volunteering for most is not a job, but rather a journey, focused on helping others and doing something rewarding. Volunteers focus on supporting their beneficiaries, regardless of the statutory services that are involved throughout that person's care journey.
- The progress of integration between health and care means that the lines between organisations, particularly in Primary Care, are increasingly blurring.

A key challenge to systems, highlighted by the pandemic, is how volunteers can be mobilised at scale in response to civil emergencies. In times of crisis we need to access a pool of trusted, and trained volunteers, that can respond quickly to a range of tasks. We have seen that the range of volunteers exists within many systems but they have relationships with, and are hosted by, a wide variety of organisations.

Having shared processes in place means that large numbers of volunteers can be mobilised at short notice and the new organisations they are supporting can get a quick understanding of their skills, experience and knowledge.

There are two main issues systems currently experience, which have repercussions on several aspects of volunteering:

Bureaucracy

- *Recruitment*: in some cases volunteers can wait between three and six months after expressing interest in a volunteer vacancy within a health and care organisation. This can lead to volunteers losing interest or not being available anymore.
- *Development*: volunteers find moving between organisations difficult and slow, which limits their ability to take their skills to different organisations and different roles.
- *Onboarding*: the length of time taken to bring volunteers into roles reduces an organisations ability to carry out adequate service planning.
- *Volunteer experience*: time lag and complexity mean volunteers can fall out of the process, they move on, feel it's not worth it, or their opportunity to volunteer has passed. This in turn creates high rates of attrition.

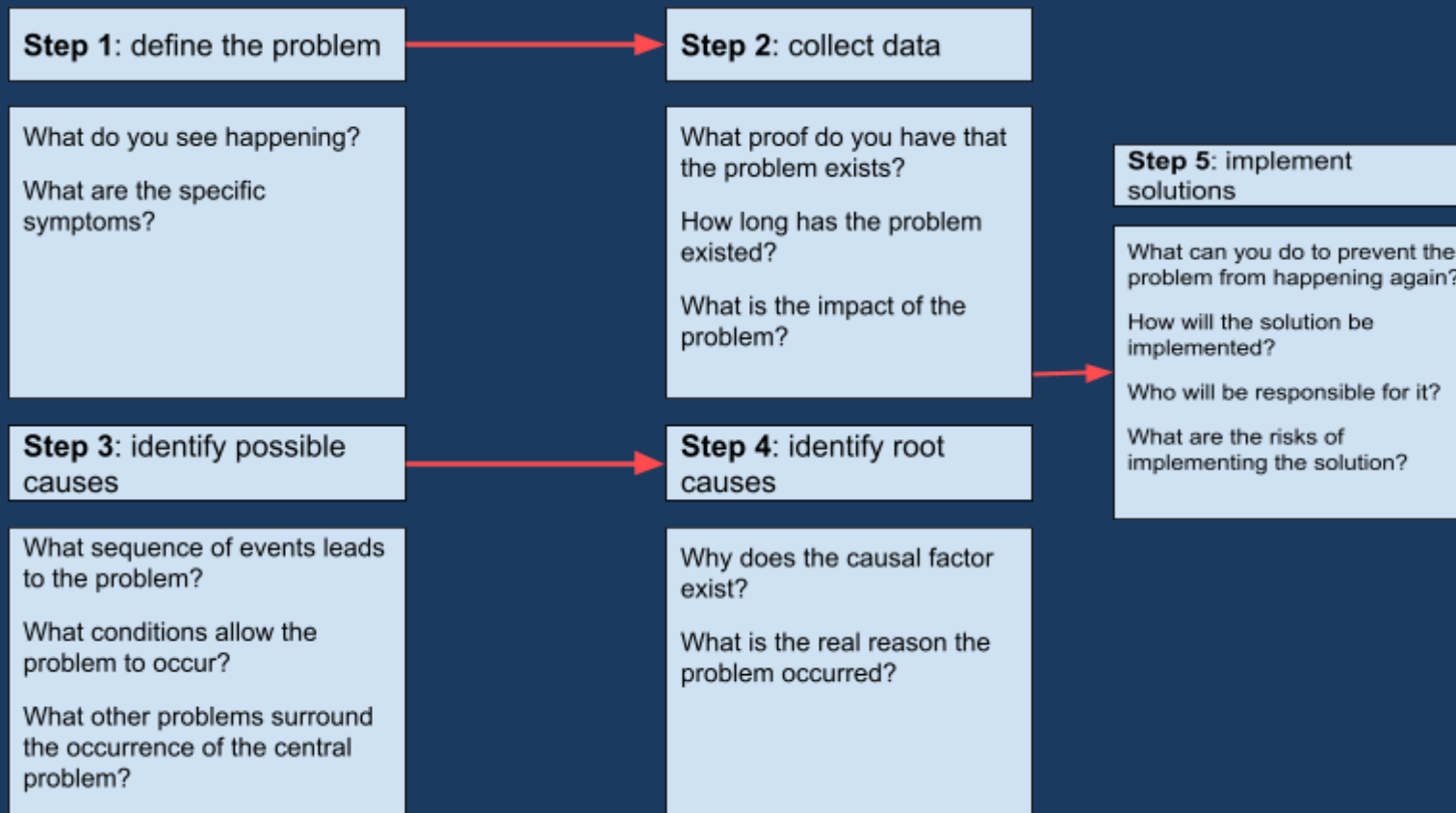
Culture, trust and relationships

- Ownership and building consensus across multiple organisations and bodies to find a system-wide solution.
- Previous attempts that have been unsuccessful.
- Desire for organisations or services to own their volunteers.
- Reconciling geographic boundary issues when organisations involved span a wide area. For instance, when an organisation operates across multiple local authorities or Integrated Care Systems, this can lead to having to deal with different processes and procedures for each.

As you can see most of the problems that systems need to resolve are around organisational processes rather than technical challenges. In talking to different organisations across the country it has been constantly repeated to us that real progress has only been achieved, in portability, once all partners agree that the benefits outweigh the cost and effort to change processes.

What is the root cause of the issue in your system?

There is a simple yet effective tool which will help you identify why your system is having an issue with enabling volunteers to work across organisational boundaries.



What will be better if this is solved?

To address the issues discussed above, organisations within a system can agree to a set of standardised checks, requirements and training. Once these are completed and approved by any of the participating organisations, they enable volunteers to operate in any setting across that system. This information is then captured in a passport, which evidences a volunteer's skills, capability, training and checks and thus demonstrates how they can fulfil volunteering roles.

The main benefits of volunteers' passports are:

- They make it **easier for volunteers to move** between different volunteer roles, reducing the likelihood of losing volunteers through time consuming and repetitive processes, and allowing them to support people and services across organisational boundaries.
- They make **volunteering more flexible and accessible** to a wider cohort of potential volunteers.
- They could **open opportunities for volunteers** who are building up a portfolio of experience to evidence their skills in future job applications and identify development areas.
- The **economies of scale** achieved through removing the bureaucracy costs from individual organisations to the system could free resources to be further invested in volunteering.
- The ability to **better utilise volunteers** means that systems will be able to better respond to civil emergencies. This system wide flexibility will create a level of resilience to protect core services' provision.

This ultimately leads to benefits for the people who use the services where volunteers are involved. Some examples we have seen of the positive impact of portability on health and system outcomes include:

- **Making communities more resilient** to civil emergencies by providing more capacity to services enabling a joined up response.
- **Preventing ill health** - keeping people healthy in communities and out of NHS services where possible.
- **Reducing health inequalities** - volunteers are a source of intelligence that can be utilised to reduce health inequalities. When volunteers have experience of a greater range of service environments they can bring a deeper insight to health systems.
- **Integrated care** - integrated services provide better care for patients and investing in flexible volunteering is an easy way to support this.

There are examples where portability has been implemented successfully. For instance Blackburn with Darwen Borough Council, the local Job Centre Plus, Blackburn College, Blackburn with Darwen Clinical Commissioning Group, and local Bootstrap Enterprises have agreed to 8 half-day training sessions (including topics such as equality and diversity, and communication skills) which they all recognise and makes participants eligible to volunteer in their organisations.¹

The NHS is currently implementing the use of passports for staff in areas other than volunteering, including:²

- COVID-19 Digital Staff Passport.
- Workforce Sharing Agreements (aka Memorandums of Understanding or MOUs).
- Electronic Staff Record (ESR).
- NHS Smartcards.

These are trailblazing the use of passports and can potentially pave the way for passports to be used in the context of volunteering as well.

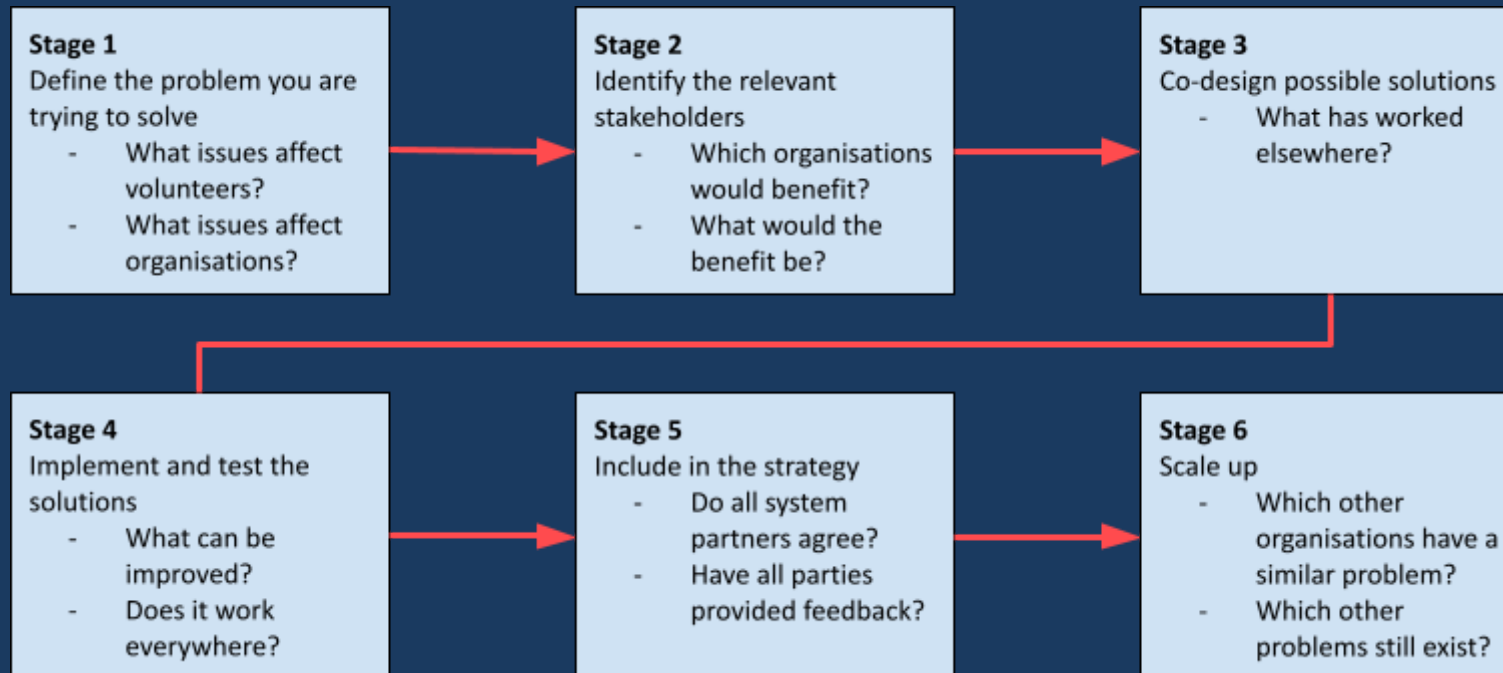
¹ [Volunteer Passport – Community CVS](#)

² [Staff Passporting within the NHS](#)

How do you implement portability?

To build an effective model of portability we propose a six stage process:

- 1) Problem Definition
- 2) Problem Scoping
- 3) Solution Modelling
- 4) Implementation Road Map
- 5) Strategic Incorporation
- 6) Scale



Examples of Portability

Healthier Lancashire & South Cumbria

The Healthier Lancashire & South Cumbria have done extensive work to create a proof of concept around how a system wide passport would work in practice. They have taken an approach that looks at developing a federation of trust between member organisations that would allow volunteers to be able to enter the volunteer eco-system through a variety of different organisations.

They have identified that challenges exist around:

- Trusted process for identification checks.
- A central repository for volunteer information.
- Access to a variety of organisation data systems.

Through detailed work on mapping the volunteer journey they were able to see that the priority was to create a system that sat between services that provided identity checks and the systems that different organisations were using to manage volunteers. It was recognised that if a passporting solution was to achieve wide adoption then there shouldn't be a requirement that federation members disinvest from current data systems.

The focus on building a system that sits at the middle of a range of other systems that are already being used, means that investment is being made in something that is likely to be sustainable over time. Through minimising the change in the way that partner organisations run their volunteer services there is belief that adoption of the passport can be considerably increased.

Suffolk and North East Essex

The Suffolk and North East Essex Integrated Care System have put in place a robust, cross sector, group that looks at all issues that relate to volunteering within their footprint. They have representation from NHS provider organisations, Local Authorities and Community & Voluntary Sector organisations. The system wide group identified some potential benefits could be achieved through putting in place a portability process. As a first step the group looked at work that had already been done in their area.

Some early work had been carried out by Community Action Suffolk to create a passport that set out common training for volunteers. Being able to see the practical application of a passport within the local system proved to be a useful way of getting buy-in from partner organisations. Further work was carried out survey organisations across the system to identify common problems that could be addressed through greater volunteer portability.

Results of the surveying demonstrated a consistent appetite for a portability across a range of sectors. The system is now looking at digital partners that could operate across the different organisations to create a seamless experience for volunteers.

Tips to address common pitfalls

- **Ensure you build on lessons learnt elsewhere and use existing resources.**
 - For instance, Health Education England has created the [National Learning Hub for Volunteering](#) with Helpforce. They have developed a comprehensive learning programme and now award the National Volunteer Certificate.
 - Ask for help. Other systems have gone through a similar process and can help you think through what you need to do. Helpforce is also available to help and point you to relevant resources.
- **Take time to build sustainable relationships.**
 - A portability process is an agreement between organisations, built on relationships as well as on formal arrangements. Developing those relationships is likely to be time consuming but is an essential building block for the effectiveness and sustainability of portability.
 - Focus on this from early on in the process, without leaving it at the last minute. Understanding what drives all organisations involved and what they hope to achieve by implementing this is likely to improve the chosen solution.
- **The devil is in the detail.**
 - Being open and transparent from the outset about the level of commitment and resources required is likely to lead to a more positive outcome. Things to consider include: who would bear the cost and responsibility for a secure and reliable solution? How would you gain consensus across multiple regulators to a series of standardised checks? How would a central passporting system differentiate between the screening needs of different role types?