



Involving People with Lived Experience as Volunteers

Good Practice Guide

For organisations considering
taking on service users/people
with lived experience of your
area of work as volunteers





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1. Introduction

1.1 About this guide

Fife Voluntary Action (FVA) has produced this guide to assist organisations in the recruitment of individuals who have personal experience of the focus for your organisation (herein referred to as lived experience volunteers or LEVs). For many years, organisations offering support to people (e.g. addiction support, rehabilitation of offenders/ex-offenders, domestic abuse, counselling etc.) have enlisted the help of people who have lived experience in the delivery of their services. This document, although focussing specifically on people with lived experience, can be used as a framework for any organisation recruiting volunteers to roles where they're likely to be supporting vulnerable people.

1.2 Who is this guide for?

This guide is aimed at trustees/committee members, managers and staff of any organisation that want to involve people with lived experience beyond the role of service user/member/client. This guide is predominantly designed for volunteer roles (including trustee/committee member). Your organisation should have its own staff recruitment policies and procedures.

1.3 Value of volunteering

Charities, social enterprises and community groups are often the beating heart of communities; involving local people both as beneficiaries and in the planning and delivery of services. Occasionally, service users/members/clients make the transition to volunteer or staff/committee member. Possibly the purest example of asset-based community development, this process can provide the perfect vehicle to bring about positive social change. By engaging and nurturing the people who have been in receipt of a service and have the capacity and interest to offer more, your organisation can benefit from invaluable 'frontline' experience, which will allow you to shape future provision accordingly.

Volunteer involving organisations (VIOs) are faced with various challenges when it comes to recruiting and managing volunteers. Careful consideration must be given to the needs of clients/service users as organisations ultimately have a duty of care to them. These organisations often support disadvantaged and vulnerable people in their work so it's imperative that volunteers are suitably skilled and trained to deal with any potential circumstances which may arise.

1.4 Types of experience

This document will focus on three main types of lived experience volunteering:

1. Directly supported lived experience

This is the 'service user' group. The individuals in this category have at one time or another been in receipt of a service from the organisation they're looking to volunteer with.

2. Indirectly supported lived experience

This is where an individual has been in receipt of a service for a particular issue and wishes to give their time to a different organisation e.g. a person attended a mental health support group for a few years and now wants to volunteer with a separate mental health organisation.

3. No known support

This is where an individual has lived experience of an issue, but has not accessed support for themselves.

Please note that for 2 and 3 above, the person may not have disclosed their experience.

1.5 Benefits of lived experience

Lived experience volunteering can have positive benefits for the individuals: raising self-esteem, and confidence, providing new skills and training opportunities and potentially opening the doors to paid employment. In many cases it allows them to repay an organisation and or/fulfil their desire to help others in circumstances in which they have found themselves.

There are also benefits to the service users of the organisation - it helps to show that time as a service user can come to an end, which provides hope for people that they won't always be reliant on the support of that organisation. Being supported by a volunteer who has experienced the same or similar issues can provide comfort to a service user, and can create a bond they might not otherwise have built.

There are benefits for the organisation too of course, including, a readily available 'pool'

of potential volunteers, all of whom have valuable insight into your work and may well know better than anyone what works and what does not. This level of knowledge about the organisation often makes for a 'win-win' situation and usually this process is managed without incident; but there are some good practice measures you can put in place and this guide provides a framework for some of that work to be carried out.

1.6 Managing risk

It's also important to understand the risks involved in recruiting service users as volunteers. This document will explore these potentially challenging situations and give guidance on how best to mitigate against such risks.

This guide provides a simple but effective introduction to involving people with lived experience in your volunteering activities, including examples of good practice, checklists and signposting to further information and support. This is a generic guide, produced as a good practice framework. Your organisation should consider its needs, values, ethos and risk appetite for making lived experience volunteering happen. Consider also taking advice from organisations like FVA about the specifics of implementing LEVs in your organisation. For more detail about managing risk, see section 3.5.



2. Planning and Policy

2.1 Developing a structured approach

A documented structural approach will underpin your organisation's commitment to involving people with lived experience and demonstrate to everyone that you value the role people with direct experience of a particular issue can play in supporting your service design and delivery. It also acts as a planning document which can be used to evidence to your trustees, stakeholders and funders that you value the benefits of involving lived experience volunteers.

An approach document could include the following:

- Reference to any policy/legislation/ funder requirement for LEVs;
- Review of current LEV involvement;
- A list of planned LEV activities, and how they link to overall aims of organisation;
- A copy of the LEV involvement policy document(s) – see 2.2;
- How you will monitor and evaluate LEV and communicate this;
- How risks will be managed.

2.2 Lived experience policy

It's crucial that the involvement of people with lived experience as volunteers (and possibly staff too) is consistent in its implementation and practice. A policy on LEV is the most effective method of ensuring this happens across your organisation. The policy doesn't need to be complicated or lengthy, but it's important it covers the necessary points around involving service users.

A policy could include:

- A vision and commitment for the organisation around the subject of involving those with lived experience;
- A statement detailing why your organisation thinks the involvement of people with lived experience is important;
- Summary of recruitment, training and induction for LEVs;
- A section on 'clearance gap' – see section 2.3 for more information on this;
- A statement about how LEVs contribute to the monitoring and evaluation of this and other policies;
- Commitment to ongoing review of the policy (every policy document should include this);
- How you will actively support LEVs.

2.3 Clearance gap

Clearance gap is the term we use for the amount of time passed since a person has been a service user/beneficiary of an organisation i.e. the time they've been clear of your service. Below is a summary of the considerations required for both direct and indirect/no known support LEVs.

2.3.1 Directly supported lived experience volunteers

With the direct lived experience (e.g. ex-service users), it's common for organisations to have written into a policy (either the Volunteering Policy or a Lived Experience Policy) that the individual must be 'clear' of using the service for a pre-determined period of time before they can return as a volunteer (or indeed as a member of staff). This is fairly straightforward to manage since your organisation will have information on when each ex-service user stopped engaging with you for support.

The length of the gap will be a decision that's for your board/committee to take, but we would suggest starting discussions at 6 months. Typically the service users will have been vulnerable at the point you were supporting them so you'll want to avoid getting them involved and giving them additional responsibilities whilst still in a vulnerable position.



Your organisation's recruitment and induction procedures for all volunteers should detail the specific challenges related to the area of work e.g. if the role involves supporting victims of abuse, then prospective volunteers should be made aware of the challenges in supporting this client group.

The recruitment/selection stage should emphasise the challenging conversations and potentially delicate situations that may arise, as well as the importance of confidentiality. This will allow those with lived experience (and the organisation themselves) to opt out of progressing their volunteering with your organisation.

This won't prevent people with lived experience from progressing on to volunteer with your organisation, but it emphasises the importance of recruiting people who are ready to deal with the specific challenges faced by the people you serve.

2.3.2 Indirect/no known support lived experience volunteers

For this group, all of the above applies, but with one added complication - self-declaration. This is more challenging to manage, as it relies on the disclosure of any lived experience by the prospective volunteer. Of course, a prospective volunteer has the right to not disclose certain information about their circumstances. You may want to build in questions about past experiences in your application process. This gives your organisation the chance to broach the subject of lived experience as early as possible however, again, a prospective volunteer may not disclose past experiences here.

3. Putting it into practice

3.1 How can you involve lived experience volunteers?

There's potential for your organisation to engage LEVs in any part of the work you do (subject to the usual legal limitations, safeguards and avoiding job substitution of course!). However it's important that regardless of how you go about the process of involving LEVs, your organisation should keep service users safe, while delivering a high-quality service. Planning your organisation's involvement of LEVs is of paramount importance to avoid harming your service, reputation, service users or volunteers.

You may already have a long and robust history of involving LEVs, you may be about to try it for the first time or you may have had negative experiences previously which put you off.

Think about the level of participation that is appropriate for volunteers with lived experience. This allows your organisation to be clear about its vision, and importantly lets potential LEVs know exactly what your expectations are. You might consider inviting LEVs to joining your board (in rare cases this might be a requirement for some organisations – sometimes this is appropriate, but not always). Recruiting LEVs on to your board means they can contribute to the overall strategic direction of your organisation, alternatively you might want to involve them in frontline service delivery.

As always with volunteering, you don't want to put potential volunteers off with the training/induction requirements or timescales, and it's no different with LEVs. It's worthwhile also considering the informal roles LEVs can take up while they're waiting on training e.g. shadowing other volunteers, meeting with staff to discuss details of service and any other training that's available before their formal role begins.



3.2 Careful recruitment

Like all volunteer recruitment, it's important that you recruit the right people for the right roles. There are extra considerations when looking to recruiting someone with lived experience in your area of work e.g. risk assessment and management, suitability of the role to a prospective LEV. You don't want to be prohibitive in your recruitment, but you also must put the needs of the organisation first. If a person with lived experience isn't right for the role, then it's your organisation's right to decline someone for that position.

Are you specifically recruiting people with lived experience for certain roles? If so, consider how you'll communicate this message to maximise your chances of recruiting those that will have the biggest impact on your organisation, while ensuring that you're not setting them up to fail by placing them in volatile or risky situations. The action plan template (Appendix A) will help to forward plan and assess for this.



3.3 Ideas for involvement

There are many ways to involve LEVs in the work that you do. Some people may enjoy 'frontline' opportunities e.g. public speaking and sharing their experiences, others may prefer a more 'behind the scenes' approach. As with all other volunteer recruitment, always aim to match skills and strengths with appropriate volunteering tasks.

Think about your budget, your organisation's capabilities and resources, staff skills and workload before choosing the most effective way to involve lived experience volunteers. You also need to consider whether certain roles are suitable for certain kinds of lived experience (i.e. the three types defined in section 1.4).



Some examples of involvement are listed below:

- **Peer review and monitoring**
to help the organisation improve services through research, evaluation, surveys etc.;
- **Peer support**
mentoring and support schemes which allow volunteers to learn from each other;
- **Attending meetings or events**
as a speaker or to help in general;
- **Training and support**
delivering training to staff or service users;
- **Recruitment**
involved in selection of staff and board members;
- **Governance**
can sit on board or management committee. This can be particularly stressful at times of difficult decisions, discussing confidential information and so forth.

3.4 Action planning

It's important to be honest with yourself about what your organisation wants to achieve and set realistic goals.

Ask yourself these questions:

WHAT

are you trying to achieve?

Do you want to improve or change your service?

Do you want to show how much you value your volunteers?

Do you need to show funders that your practices are inclusive?

Are you looking to help the volunteer to develop employability skills?

WHO

are you trying to involve?

Is it a select group?

Is it all who use your service?

Can it include family and/or care givers?

HOW

are you going to involve them?

What methods will you use?

How will you support them?

What training (if any) will they require?

Will they need more support/different support?

WHERE

in the organisation will they be involved?

Are there restrictions on the roles they can

WHEN

will you involve them?

Are you involving current service users or ex-service users only?

How long is appropriate between leaving the service and becoming a volunteer?

See Appendix A for an action plan template.

Answering these questions will help you to plan how your organisation sets about the process of lived experience volunteering. Further considerations in the planning and designing of lived experience volunteering:

- What specific roles are you offering to LEVs?
- What resource do you have to make this happen e.g. staff time, finances etc.?
- What are the risks to your organisation in implementing LEV?
- To what extent are 'external' volunteers made aware of LEVs background?
- What if someone doesn't have lived experience of your organisation, but of another one offering similar support? What level of disclosure do you require about this?
- Do you risk setting precedents? E.g. letting one ex-service user volunteer, but saying no to another.

3.5 Risk management

The involvement of people with lived experience (either direct or indirect) can be inspiring and transformative as well as safe, meaningful and productive with the correct protective measures in place. It is good practice to risk assess and plan ahead for any potential areas of risk, just as you would within any other area of your organisation.

A risk assessment is a tool for measuring the likelihood of something going wrong against the level of harm that might cause and mitigating actions, along with a timescale for reviewing any identified risks.

All volunteer involving organisations (VIOs) have a duty of care to both their clients and their staff/volunteers. As with all volunteering in an organisation, activities should be risk assessed. The process of risk assessment

is one which allows the organisation to minimise the chances of something going wrong and any potential impact on your clients/members/staff/volunteers. No activity is risk-free, but by implementing some basic good practice measures, you can reassure funders, stakeholders and clients while fulfilling your health and safety and insurance/other regulatory requirements. See Appendix B for a template risk assessment document.

Where extra protective measures are put in place (e.g. risk assessment and risk matrix), then people with lived experience volunteering with your organisation are likely to be more closely supervised than other volunteers, meaning that they're actually less likely to pose risk to clients/members/service users.

For certain volunteering roles (where the role qualifies as regulated work), the VIO will be required to carry out a PVG check on the prospective volunteer. Background checking is one method of risk assessing a person's suitability for a role, but shouldn't be used exclusively. Gathering references, conducting face-to-face interviews, prior knowledge of a person and indeed formal risk assessments should be considered when recruiting someone with lived experience (or indeed anyone) as a volunteer.

As always, in the event of something serious happening, all staff/volunteers/clients should be made aware of reporting arrangements for child/adult protection.

3.6 Supervision and wellbeing of LEVs

Again, LEVs are no different to any other volunteers, they require support and assistance to carry out their role. It's important that you equip them with the right tools to be effective in their role e.g. training, ongoing support, access to development opportunities (if appropriate), a good induction and anything else specific to the role.

Be mindful of the impact volunteering might have for someone with lived experience. It may be that they require some more time with a member of staff to discuss their experiences as a volunteer. The role itself might remind them of a difficult time in their life and it's important that you as an organisation recognise and accommodate this.

Appendix A

Action plan template

This is a generic action plan template. Your organisation will need to tailor it to your own requirements.

Action plan template

What are you looking to achieve? What change are you looking to bring about?

Who are you trying to involve? Are there any restrictions? Is it a select group e.g. service users only?

How are going to involve them? What training will be offered?

Where in the organisation will you be involving people with lived experience?

When are you able to involve them? Is there a clearance policy? What's the timescale for making it happen?

Appendix B

Risk assessment template

This is a template risk assessment only and should be tailored to your organisation’s requirements.

Risk assessment <<Insert overall activity here>>

ACTIVITY	PERSON AT RISK	SIGNIFICANT HAZARDS	RISK			RISK CONTROL MEASURES	RESIDUAL RISK*		
			L	S	DR		L	S	DR

LIKELIHOOD

(L) = Frequent (5) Probable (4) Occasional (3) Improbable (2) Remote (1)

SEVERITY

(S) = Catastrophic (5) Major (4) Reportable (3) Serious (2) Minor (1)

Degree of Risk (DR) = LIKELIHOOD x SEVERITY

*Residual risk is the level of risk that remains after suitable and sufficient control measures are introduced.

Signed originator

Job title

Date completed

Date for revision

Appendix C

Risk matrix template

This is a template risk matrix, with some example content. Your organisation should tailor it to suit your own requirements.

Risk matrix			
MAIN ACTIVITY	POTENTIAL RISK AREA(S)	MITIGATING ACTION	REPORTING ARRANGEMENTS
<i>e.g. A volunteer with lived experience supporting an individual recovering from mental ill-health on a one-to-one basis</i>	The client becomes too emotionally dependent on the volunteer, leading to a decline in the volunteer's mental health	Risk assessment of volunteer prior to recruitment and induction Regular support and supervision with the volunteer Clear defined boundaries of volunteer's role	Volunteer Co-ordinator/ Service Manager
<i>e.g. A volunteer with lived experience befriending someone actively using drugs</i>	Regular contact with an individual with access to drugs provides temptation for the volunteer to relapse	Risk assessment of volunteer prior to recruitment and induction All contact to take place in a community setting Confidential support made available for all volunteers	Volunteer Co-ordinator/ Service Manager
<i>e.g. A woman with direct experience of domestic abuse advocating for someone living with an abusive partner</i>	The process of supporting this woman leads to the volunteer recalling her own experiences and feeling anxious The volunteer gives potentially harmful advice based on her own experiences	Regular 'debrief' sessions and informal communication with the volunteer's named contact Mandatory training programme in relation to roles, responsibilities and boundaries	Volunteer Co-ordinator/ Service Manager



tel: 0800 389 6046

www.fva.org