

Volunteering Action Plan

PARTICIPANT HANDBOOK

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230621	Update references in reflective learning, explore section Creation of Enquire section Process evaluation (creation of poll) Group questions added in Appendix 2 related to Enquire	AS AS / DM AS AS
010721	Add detail on Volunteering for All: national framework p.6	AM
060721	Added link to a workstream log (note its references to risks, mitigations and equalities).	AS
190821	Added link to Scope and Mapping input slides p.8 Added link to Evidence materials for each outcome area	AS
030921	Removed systems mapping material from explore and moved to understand. Remove group task in explore around system mapping and added group task around Outputs A and B	AS

	Add Lunch and Learn session references to learning generally, EXPLORE and ENQUIRE Updated the UNDERSTAND section	
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Introduction

Welcome to a potential new way of working and **thank you for helping to create the Volunteering Action Plan**. While you may be reading this document because you're a member of either the Governance Group, one of the Outcome Working Groups or the Management Team, we'd encourage this document to be shared and used more widely.

By agreeing to create a Volunteering Action Plan (see [ambition for the plan](#) below) you've also agreed to apply a "process of co-production, learning and a spirit of reciprocity". This process has been developed to bring us together, to give us space to learn (reflect, question, listen) and a chance to build valuable, new working relationships. We want you to chat, get to know each other, share your views and learn. But most of all we want you to **enjoy the experience**.

There is simply no doubt that you will add enormous value to this process. However, this will be less about the experience and knowledge that you bring to the 'room' and more about **your passion for volunteering**, your desire to change it for the better and your commitment to this process and to learn. Through an open, transparent and respectful approach we ask that you listen to other's views and perspectives and play your part to support a positive learning culture. In so doing, we hope that everyone feels comfortable to discuss topics and issues that will very likely span organisations, sectors and policy domains.

Through staying true to this process and the principles that it's built on, you're best placed to fully understand the complexity of the subject matter, to decide the nature of the challenges we face and to propose the most appropriate actions we should take. We believe that this process and your commitment to it, provides our very best chance of changing volunteering for the better.

How to use this handbook

This handbook is intended to support a more collaborative approach to learning, applying knowledge and producing outputs; this is your handbook and your Volunteering Action Plan. While it's for everyone, some parts will be more relevant depending on your role, the stage of your learning journey and your appetite to learn. The handbook is deliberately 'light touch'; just enough information to get started. We anticipate some groups and group members will look to deepen their knowledge and/or find other useful tools or frameworks to apply at each stage of the [learning journey](#). Not only is that ok but we'd actively encourage you to share what you've found (i.e. what works and what doesn't) with others in this process.

- We've indicated the [ambition for the plan](#) - it's why we're all here. Although we agreed this statement in previous meetings it doesn't mean you can't [comment on it](#) or that it doesn't change in future, with some consensus agreement.
- Emerging from this ambition are some key [outputs and activities](#). This is in essence what each working group will focus upon and produce and what the governance group (and other influencers) will help steer, review and comment upon.

- We've proposed an approach to [group development](#) that's based on Tuckman's model, whereby groups: **form, storm, norm and perform**. This section provides some definitions for each stage and some principles and practical advice to help groups progress between stages. This is another area where groups and chairs can provide feedback and advice for others.
- The handbook outlines a [learning journey](#) for each individual and group, which is a combination of self-directed learning (including notes and reflections) and group-based activities. The learning journey is based on four areas, namely: **explore, enquire, understand and change**. These areas reflect the key principles of the Human Learning Systems approach.
- Finally, we've outlined an approach to [process evaluation](#), with responsibilities across all participants, in order to capture the key learnings from this work as we progress.

How we'll work together

How we'll work together is critical to the success of this process. While we expect that groups will each find their best way of working, there is a level of commitment that we require from each other to ensure the integrity of the wider process, to meet learning and group development aims and to allow us to learn as we go and evaluate the process effectively.

- **Commit time to the process:** we expect that group members will commit to the process through their attendance at meetings, their input to agreed channels of feedback or communication, and via the support and attention they provide to others in this process. If the level of commitment asked for becomes unmanageable we expect group members to raise those issues early with the chair or management team, in order that a solution can be found.
- **Engage with the learning journey.** Group members should engage with each of the four areas of the learning journey: explore, enquire, understand and change. While there is scope for groups to introduce other related methodologies, these should be rationalised (shown to fit) within the broad principles of HLS. The management team can help advise.
- **Advocate for important views and perspectives.** A key principle of the HLS approach is to listen and value those who are closest to the issues and especially those who will be most affected by any changes; the human element of HLS. It's also important to actively seek out and present important 'voices' that are absent within your group. There are a number of ways to advocate for important views and perspectives; these are described further within [learning journey: enquire](#).
- **Support the prescribed communication channels.** We expect that group members will support the use of [#Slack](#) and the [Toolkit on google drive](#). See 'how we'll support you' below.
- **Keep good records:** we expect that group members will ensure that appropriate records are kept of meetings. Wherever possible [meeting agendas](#) should be provided in advance of each meeting to allow members to prepare. A [meeting note](#)

of any key meetings should be shared with the management team within a few days of the meeting taking place.

- **Adhere to agreed terms and charter principles.** We've provided a set of [Terms of Reference](#) which are applicable to all participants in this process. Although we've agreed these in principle, this document is live and subject to **comment and change**. We've introduced a Charter which provides operational level principles to help groups meet effectively, see below:

The Charter

1. Assume good intent (all contributions are equal and welcomed)
2. Listen to understand, not to respond (we'll listen honestly, openly and without prejudice)
3. Respond to what's in front of you, not to what you imagine
4. No interruptions
5. Share the air – take responsibility for helping everyone have time in the conversation, including by taking less time that you might usually to make your points
6. No 'chat' in Zoom or WhatsApp during the session

How we'll support you

The Management Team will help support you in this process. There are two main channels for support:

[#Slack channels](#)

The following [#Slack](#) channels have been created in order to operationalise and discuss issues pertinent to your work; you should find 'your group' here. The general channel is for communications with the Management Team (who'll monitor and respond as appropriate) or for wider consumption. Slack channels comprise:

1. Governance group
2. Working Groups (5 off)
3. General interest (learning, process, support, announcements).

[Toolkit on google drive](#)

This is where key documentation will be stored, namely: agreements, guides and templates; learning and research materials; meeting notes and agendas; and shared working group outputs e.g. mapping templates. This area will be updated throughout the process. **The participant handbook (this document)** is your guide to this process. It will be added to (especially based upon group contributions); related resources will largely be found on Google Drive. The latest published version of this document will also [live on Google Drive](#).

Ambition for the plan

see [live version on Google Drive](#)

AMBITION	To transform the aspirations of the Volunteering for All: national framework into practical 'action on the ground' for the benefit of volunteering and its contribution to society. And that this is achieved through a process of co-production, learning and a spirit of reciprocity.
OBJECTIVE	To deliver the Volunteering Action Plan ('The Plan') within the timeframe of one year which translates the five VFA volunteering outcomes into specific actions. The Plan should encompass responsibilities, timelines and, where appropriate, any funding implications for actions. The Plan will be a 'living document' which will continue to be reviewed, updated and enhanced over the next decade.
PROCESS	The Plan process will be modelled on the Human Learning Systems (HLS) approach: Explore, Enquire, Understand and Change.
OUTCOMES	<ol style="list-style-type: none">1. Action Plan for 2022 – 2032 (TBC)2. Learning <u>Personal learning</u> – a rewarding experience which benefits participants (engaging, relevant, fun) <u>Collective learning</u> – within and between the Groups and other organisations3. Collaboration Improved understanding of, and engagement with, individuals and organisations supporting volunteering.4. Monitoring & Evaluation

The [Volunteering for All: national framework](#) was developed by the Scottish Government jointly with partners from the volunteer and community sector, local government and NHS, with academics and social researchers, and with volunteers.

The objective of the Framework is to:

- Set out clearly and in one place a coherent and compelling narrative for volunteering;
- Define the key outcomes desired for volunteering in Scotland over the next 10 years;
- Identify the key data and evidence that will inform, indicate and drive performance at a national and local level;
- Enable informed debate and decision about the optimal combination of programmes, investments and interventions.

See this [powerpoint extract](#) covering 'volunteering benefits', 'what is volunteering?' and the 'our national framework' diagram.

Key activities and outputs

We've tasked Outcome Working Groups with undertaking activities and outputs (A-E) in year 1 (April 2021 – March 2022); timely provision of these will allow the Governance Group to steer, review and comment.

- Activities A and B can commence without any prior knowledge of HLS however, we anticipate that these 'drafts' will be refined as group knowledge of Human Learning Systems increases.
- Activities and outputs C and D are based upon the group's work around HLS and supported by their learning journey.
- Activity E additionally incorporates work more traditionally associated with action planning and project appraisal.

Activity A - scope the parameters of Outcome area; setting boundaries and agreeing what's in and out.

Activity B – mapping of in-play initiatives and quick wins (projects, programmes, events) relevant to Outcome area.

Activity C – learn HLS, analyse the current “state” of the system and agree future “state”; identify issues and change areas.

Activity D – draw up a long list of possible options and a business case for priorities in Year 2.

Activity E – project appraisal to review feasibility in terms impact, leadership, funding etc.

Output A - a draft and final **definition of scope** for your Outcome Working Group

Output B - **mappings** of 'potential' quick wins and existing funded initiatives

Output C – a group **system diagram**, areas of change and **mapping** (add 'System changes').

HLS: learn and apply

Output D – **priority initiatives** (Yr 2).

Output E - draft and final **action plan** (Yr 2).

Please make use of the following shared area

Output A and B: add your group's response via [VFA – Output A and B](#)

Please review the following [scope and mapping inputs](#) for working groups (a brief set of slides) to aid this task.

Other ideas for sharing our outputs with others?

List the here and let the management team know and we'll include in this document for others.

Group development

The group development approach we're advocating is based on Tuckman's model. To learn more view [this video](#) from Bellview University. The concept is also outlined below courtesy of [MindTools.com](#):

1. **Form** 'In the beginning, when a new team forms, individuals will be unsure of the team's purpose, how they fit in, and whether they'll work well with one another. They may be anxious, curious, or excited to get going. However they feel, they'll be looking to the team leader for direction. This may take some time, as people get to know their new colleagues and one another's ways of working'.
2. **Storm** 'In the storming stage, people start to push against the established boundaries. Conflict or friction can also arise between group members as their true characters – and their preferred ways of working – surface and clash with other people's. At this stage group members may challenge chair / leader authority or management style, or even the team's mission. Left unchecked, this can lead to face-to-face confrontations or simmering online tensions. If roles and responsibilities aren't yet clear, individuals might begin to feel overwhelmed by their workload or frustrated at a lack of progress'.
3. **Norm** 'Gradually, the team moves into the norming stage. People start to resolve their differences, appreciate one another's strengths, and respect chair / leader authority. Now that they know one another better, group members will feel more comfortable asking for help and offering constructive feedback. They'll share a stronger commitment to the team's goals, and they should make good progress toward it'.
4. **Perform** 'Now each team is in flow and performing to its full potential. With hard work and structured processes, the team is likely to achieve its goals efficiently'.

There are some key considerations for our groups at each stage of development. It is important that groups adopt best practice (where possible) but also that groups monitor what stage they're at, seek support and where necessary take appropriate action in order to continue their development. **Review each stage and principles, discuss these within your group.**

Putting group development ideals into practice

Stage	Principle	Comments
Form	Agree a Team Charter	These are a set of principles that define desired behaviours (to a degree), guided by the Terms of Reference document. At the first Outcome Working Group meeting (26 th May, 2021) we discussed and agreed a Team Charter. Feel free to add to or amend these principles within your groups. More detail is provided in the How we'll work together section.

Form	Agree the outputs and activities of this group	Check in often, be clear on activities, goals and mission. Draw group members' attention to the Volunteering For All framework . The source material for the Volunteering Action Plan. Refer to the Key Outputs and Activities (in the previous section). Don't assume group members are on the same page.
Form	Set personal goals	It's important to make space in this process for group members to set goals and also reflect on their learning as they progress. See learning journey for more details.
Form	Keep the conversation going	As groups form and members get to know each other, it can be difficult to keep the conversation going or to avoid the conversation being dominated by a few members. This can be frustrating for group members. There are a few tried and tested tips for keeping the conversation going .
Storm	Feel safe putting forward ideas	See also Team Charter above. More important, however is that these principles are being adhered to when the groups convene and through any other communications (e.g. #Slack channels). This is an issue for each Chair to be mindful of.
Storm	Don't leave conflict unchecked	Managing conflict supports a positive co-existence between group members. Passion can run high during the change process and this can lead to disagreements. Differences in opinions, approaches, interests and behaviour can all create conflict. Remember to accept that conflict is normal. Don't react to the conflict, be aware of and try to manage your feelings. Deal with the issue, don't attack the person. See this useful slide on receiving feedback .
Storm	Encourage some types of conflict	Conflict is often seen as negative and something to avoid but sometimes conflict can be good. Conflict if managed can often be beneficial; create ideas and creativity, solve problems, provide alternatives, share other beliefs and improve skills. Without conflict we can have 'groupthink' which can be limited the effectiveness of the group. See these useful tips for managing conflict .
Norm	Bond through face-to-face or virtual meetings	While more formal group meetings will help members to share learning and get through the work of the day, impromptu meetings, online 'coffee breaks' or 'watercooler chats' can all help groups to bond. One size does not fit all.

		We encourage you to share your bonding lessons for others.
Norm	Work on tasks together	The Plan process requires that groups meet regularly but also work between meetings. This brings its own challenges but it also helps groups to find their rhythm. Try to support each other and be mindful (if you are doing joint work) that you may have more or less capacity at that point in time. Good communication can help alleviate any growing frustration between group members.
Performing	Delegate tasks and projects	One sign that groups are in the 'perform' stage is where members take on more complex tasks and projects. Remember, most people like to be asked and want to contribute; you may need to set tasks for some. We expect that activities and outputs D and E will be best expedited by groups in the perform stage.
Performing	Discuss with the group opportunities and resources available to them	Another sign that groups are in the 'perform' stage is when members can speak freely around the resources and opportunities available to them. A keenness to have this type of exchange reflects a healthy level of trust within the group. Try to ensure that this is an exchange by understanding what other members need as well as what they bring.
Performing	Celebrate team achievements!	The Plan process should be enjoyable and even fun! One way to ensure that group members find this an enjoyable experience is to remind each other - this is enjoyable. There are many ways to make any shared experience more enjoyable e.g. find time to build relationships, put enough focus into new learning and embrace this as a group. Also, importantly find ways to mark how far you've come and what you've achieved; individually and as a group.
Performing	Ask for 360-degree feedback	Groups at the perform stage can ask for 360-degree feedback. To reflect, learn and better manage future teams

Other ideas for group development?

List the here and let the management team know and we'll include in this document for others.

Learning journey

The Learning Journey is outlined below. We expect each team to 'cycle' through these steps in order to achieve required aims and also stay true to the Human Learning Systems (HLS) approach:

1. **EXPLORE** the topic area, through a set of recommended materials participants can contribute to the group from an informed position. There's scope to explore further.
2. **ENQUIRE** around the topic; around evidence building and introducing / representing voice. This work will help 'articulate' the domain and begin to capture complexity.
3. **UNDERSTAND** the system, this is the basis for action and change. It involves making the system visible, learning together and agreeing a shared purpose.
4. **CHANGE** the system. This is about defining change, prioritising, building the case but also in some cases, starting work. There is also a personal dimension to 'change'.

The instruction and materials we provide across all four areas should be considered a foundation (a minimum requirement). Each group has the opportunity (and is in fact encouraged) to deepen their combined knowledge, introduce and share new and complementary learning sources, all within the spirit of the Human Learning Systems approach.

Throughout the Learning Journey, members are also encouraged to set learning objectives and to reflect regularly on what they've learned and now feel able to apply. There is an important linkage between this 'individual' reflection and the development of each group.

Your learning and development

Your learning and development is a crucial part of this process. We want to help you to develop your knowledge, understanding and skills in Human Learning Systems; you'll contribute more to this process and you'll also have a better experience.

We recommend that you take time to stop, pause and reflect on your learning (see this excellent [guidance on reflective practice from Evaluation Support Scotland](#) (opens as a .pdf). To help you learn, we've created a [Learning Journal \(see Appendix 1\)](#). Use this to capture your thoughts, questions and some key points of learning e.g. you may wish to note three actions or take-aways from a particular topic.

We've also run a series of Lunch and Learn sessions, covering the main topics of this participant handbook. We've referenced these at appropriate points within the next section. The first Lunch and Learn session focuses on learning itself, entitled '[Let's talk about Learning](#)'.

As Human Learning Systems are new to most of us, we'd recommend that you now engage with the recommended learning materials in the first section of your learning journey; Explore.


EXPLORE

EXPLORE relates to the Human Learning Systems methodology and the mindset shift it demands. It involves reading, discussing and reflecting on the key aspects of this methodology before applying it to group work.

Objectives


1. Understand Human Learning
2. Understand Systems Thinking
3. Discuss aspects of this methodology with peers and share highlights
4. Critically reflect on aspects of the method and this approach
5. Suggest complementary knowledge sources to explore

Self-Learning


 <p>INDIVIDUAL</p>	<p>We've identified 2 related topics below. On your own reflect on what you've taken from each learning source, think about the wider application of this learning; in the Plan process and within your own work environment. Use your learning journal. Each topic should be discussed separately within working groups.</p> <p>TOPIC 1: INTRODUCTION TO HLS (# 30 MINS – 1.5HRS)</p> <ol style="list-style-type: none"> 1. View this introductory video (2-3 mins) from Human Learning Systems 2. Review the slides 'Intro: Human Learning Systems' but also check out the Human Learning Systems website 3. View the slides and watch the video from this 1 hr Lunch and Learn session entitled 'Unpacking human learning systems' 4. Review 2 or 3 questions from EXPLORE Appendix 2 <p>TOPIC 2: HUMAN LEARNING SYSTEMS (# 1.25 HOURS)</p> <ol style="list-style-type: none"> 5. Read ch.1 and 2 of this publication Human Learning Systems: Public Service for the Real World. (pp.27–47; 54-75) 6. Read this publication Exploring the new world: practical insights for funding, commissioning and managing in complexity – focus on human and learning aspects of this method (pp: 11-21) 7. Review the slides (.pdf) 'The Role of Learning & Emotions in Systems and Systems Change' 8. View systems thinking! (5 mins) and systems thinking: a cautionary tale (cats in borneo) (3 mins, thanks Mick Doyle!) 9. Review 2 or 3 questions from EXPLORE Appendix 2 <p>FURTHER READING</p> <ol style="list-style-type: none"> 10. Video (8-9 mins): Learn about the Cynefin framework from CognitiveEdge.
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	<p>11. Publication Managing complexity and chaos in times of crisis which helps to navigate a crisis (relevant to COVID-19) through applying the Cynefin framework.</p> <p>12. Publication A Whole new world: funding commissioning in complexity - “In response to the call for a new paradigm, we spoke with funders and commissioners who were trying new collaborative, relational ways of working”</p>
<p>Other useful (re)sources</p>	<p>What other useful sources have you found? Send these to the management team on #Slack for inclusion in future revisions of this document.</p> <p>List here.</p>

Group Work

 <p>GROUP</p>	<ol style="list-style-type: none"> 1. Learning discussion. We suggest that groupwork should include some wider discussion of the Self Learning ‘topics’. To support this activity, we’ve provided a list of questions against each of the topic areas within EXPLORE, see Appendix 2. Decide which topic areas and questions to cover during and perhaps include within your meeting agenda. 2. Discuss and agree Outputs A and B (page 8). Scope the parameters of your Outcome area, setting boundaries and agreeing what’s in and out. View ‘Scope and Mapping inputs for Working groups’ to help inform this area.
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Impact

 <p>ACT</p>	<p>Group actions</p> <ul style="list-style-type: none"> Summarise your discussion, key decisions and actions for other groups through meeting notes. You may also want to consider use of a workstream log (thank you Selena and work group #2 for sharing).
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 <p>REFLECT & EVALUATE</p>	<p>Individual learning</p> <ul style="list-style-type: none"> Reflect on aspects of the method and complete your learning journal. <p>Process evaluation</p> <ul style="list-style-type: none"> Review Process evaluation, specifically group and chair responsibilities
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ENQUIRE

ENQUIRE reflects the ‘curiosity-based mindset’ required to change through applying Human Learning Systems; in an HLS approach “everybody learns, alongside the people being served” (Brogan et al, 2021:p 63). There are two major implications: 1. We need to consider **how we use evidence**; and 2. Your articulation of ‘the system and its boundaries’ determine who is part of the system and who’s **voice you need to hear**.

Objectives


1. Understand the evidence landscape
2. Understand the role of voice and ways to introduce it in the process
3. Discuss relevant evidence and voice with peers and share highlights
4. Critically reflect on aspects of the method and this approach
5. Suggest complementary sources to explore

Self-Learning

 <p>INDIVIDUAL</p>	<p>We’ve identified two related topics below. On your own reflect on what you’ve taken from each topic, think about the wider application of this learning. Use your learning journal. Each topic should be discussed separately within working groups.</p> <p>TOPIC 1: EVIDENCE (# 45 MINS)</p> <p>As a sector, we’ve a wealth of evidence which we should view as a ‘starting-point for learning’ (Brogan et al, 2021:p 64). Drawing on this existing evidence will help us to ‘understand the system’ with the caveat that it could be out of date or incomplete.</p> <ol style="list-style-type: none"> 1. Review the Evidence in the round paper from Volunteer Scotland 2. Review the Evidence Map which provides a useful way to navigate volunteering evidence 3. Review materials, presentations and videos for four outcome areas (WG2 Policy Impact, not included): <ol style="list-style-type: none"> a. WG 1 – Lifelong engagement .doc .ppt .mp4 b. WG 3 – Recognition and Celebration .doc .ppt .mp4 c. WG 4 – Places and Spaces .doc .ppt .mp4 d. WG 5 – Inclusive Volunteering .doc .ppt .mp4 4. View this Tedx video (11m) from David Snowden, entitled Complexity, citizen engagement in a Post-Social Media time 5. Review 2 or 3 questions from ENQUIRE Appendix 2 <p>TOPIC 2: VOICE (#1-2 HRS)</p> <p>A healthy system must hear ‘a diversity of voices, and ask questions about who is included and who is not’ (Brogan et al, 2021:p 102). This involves recognising all of the ‘actors’ relevant to a system outcome and enabling effective collaboration between them.</p>
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	<ol style="list-style-type: none"> 6. View the slides and watch the video from this 1 hr Lunch and Learn session entitled 'Planning and Running a Voice session'. 7. Read ch.7 of this publication Human Learning Systems: Public Service for the Real World. It's useful to represent systems at 4 different scales (Brogan et al, 2021) (p.147–171) 8. Read this publication Exploring new territories for evaluation (p.53-54) 9. View this introduction to Appreciative Inquiry online 10. Review 2 or 3 questions from ENQUIRE Appendix 2 <p>FURTHER READING</p> <ol style="list-style-type: none"> 11. Read the Volunteering national framework: literature review 12. Read this publication from the Department of Education on evidence informed practice 13. View online these Collective Leadership for Scotland Supporting Practices 14. View online these Collective Leadership for Scotland Action Inquiry resources 15. Read this case study from the Finnish Innovation Centre 16. Read this case Study from the Collective Leadership for Scotland
<p>Other useful (re)sources</p>	<p>What other useful sources have you found? Send these to the management team on #Slack for inclusion in future revisions of this document.</p> <p>List here.</p>


Group Work

 <p>GROUP</p>	<ol style="list-style-type: none"> 1. Learning discussion. We suggest that groupwork should include some wider discussion of the Self Learning 'topics'. To support this activity, we've provided a list of questions against each of the topic areas within ENQUIRE, see Appendix 2. Decide which topic areas and questions to cover during the meeting and perhaps include within your meeting agenda. 2. Run an evidence session. Materials have been provided for each outcome area. Discuss these in groups. Consider what do we know? What do we need to know? 3. Plan to input 'voice' into this process. Considerations include: What voices / stakeholders do we need to hear from and where do we find them? In what ways, will we hear these
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	voices? How will we use appreciative inquiry and/or active listening?
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Impact

 ACT	<p>Group actions</p> <ul style="list-style-type: none"> • Agree a set of questions that have arisen and enquiry actions (ensure everyone has an action) • Summarise your discussion, key decisions and actions for other groups through meeting notes. You may also want to consider use of a workstream log (thank you Selena and work group #2 for sharing).
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 REFLECT & EVALUATE	<p>Individual learning</p> <ul style="list-style-type: none"> • Reflect on aspects of the method and complete your learning journal. <p>Process evaluation</p> <ul style="list-style-type: none"> • Review Process evaluation, specifically group and chair responsibilities
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UNDERSTAND

UNDERSTAND relates to the Human Learning Systems methodology and the mindset shift it demands. “It is important to remember that “understanding” is an active process – a process of action inquiry, of building relationships and trust (coming from learning together) and developing shared purpose.” (Brogan et al, 2021:p 110) Working in collaboration, this typically involves making the system visible, learning together: purpose, actors and factors, checking who’s included and not, building relationships and trust and establishing a shared purpose. While we’ve begun this process of Understanding through EXPLORE and ENQUIRE, there is more to Understand before we look at co-design and CHANGE.

Objectives

1. Discuss approaches to systems mapping with peers and make recommendations
2. Make the system visible through Systems Mapping
3. Critically reflect and discuss key factors within the system
4. Understand the Learning Cycle
5. Suggest gaps and identify areas to explore further

Self-Learning



INDIVIDUAL

We’ve identified 2 related topics below. On your own reflect on what you’ve taken from each learning source, think about the wider application of this learning; in the Plan process and within your own work environment. Use your [learning journal](#). Each topic should be discussed separately within working groups.

TOPIC 1: THE LEARNING CYCLE (# 30 MINS)


8. Read ch.5 of this publication [Human Learning Systems: Public Service for the Real World](#). (pp.106–128)

TOPIC 2: SYSTEMS MAPPING (# 1.25 HOURS)


9. View this video [In a world of systems](#)
10. View the slides and watch the video from this 1 hr Lunch and Learn session entitled ‘[Getting: Started System Mapping](#)’
11. Read ch.3 of this publication [Human Learning Systems: Public Service for the Real World](#). (pp.76–97; pp.32 ‘actors and factors’)
12. Read this publication [Exploring the new world: practical insights for funding, commissioning and managing in complexity](#) – practice, how change happens, examples, tools and case studies (pp: 22-26; 35-40; 50-59)
13. Read this publication [The 5Rs framework in the program cycle](#) from USAID. A useful framework for mapping a system.
14. Review 2 or 3 questions from UNDERSTAND [Appendix 2](#)

	<p>FURTHER READING</p> <ol style="list-style-type: none"> 15. Article from Nesta Measurement for Learning Part 1 discusses with practical examples a key principle of Human Learning Systems – it requires a paradigm shift from the traditional model (New Public Management) 16. Publication Are we rallying together: collaboration and public sector reform “looks at a set of projects across the UK in 2018/19 which identify as collaborations to understand what is happening on the ground, what does this collaboration look like and how does it function?” 17. Publication Systems Grantmaking: Resource Guide – proof if it were needed that there are very many ways to map a system (useful summary table on p.19).
<p>Other useful (re)sources</p>	<p>What other useful sources have you found? Send these to the management team on #Slack for inclusion in future revisions of this document.</p> <p>List here.</p>

Group Work

 <p>GROUP</p>	<ol style="list-style-type: none"> 1. Learning discussion. We suggest that groupwork should include some wider discussion of the Self Learning ‘topics’. To support this activity, we’ve provided a list of questions against each of the topic areas within UNDERSTAND, see Appendix 2. Decide which topic areas and questions to cover during and perhaps include within your meeting agenda. 2. Output C. Create, discuss and refine a system map. Starting with the high-level system (within your working groups or split into 2 groups). Make the system visible. See Appendix 3 for guidance and an example. Identify broad principles; values and behaviours that may need to change.
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Impact

 <p>ACT</p>	<p>Group actions</p> <ul style="list-style-type: none"> ● Summarise your discussion, key decisions and actions for other groups through meeting notes. ● Share your system ‘map’ Output C for other groups
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REFLECT &
EVALUATE

Individual learning

- Reflect on aspects of the method and complete your [learning journal](#).

Process evaluation

- Review [Process evaluation](#), specifically group and chair responsibilities


CHANGE

CHANGE relates to the Human Learning Systems methodology and the mindset shift it demands. We expect that you've already provided your shared understanding of the system through a system map. CHANGE involves identifying key leverage points across the system (points of potential action). In this section, you'll learn about generating and prioritising ideas as well as making ideas 'concrete' through scoped 'experiments'. Experiments allow us to learn and even 'fail' early. Perhaps the most profound area of CHANGE we anticipate is around establishing those system principles or values that guide the behaviours of actors across the system – enabling us to hold each other to account for how we behave. Consideration should also be given to the need for wider systems thinking training, roles (and power within the system); giving people space to explore (often with peers) and permission to work differently.

Objectives


1. Discuss and understand **the change process**
2. Identify key levers for change within the system
3. Discuss and prioritise ideas for change / potential initiatives
4. Understand how to specify initiatives (actions) which allow a test and learn approach

Self-Learning



 <p>INDIVIDUAL</p>	<p>We've identified 2 related topics below. On your own reflect on what you've taken from each learning source, think about the wider application of this learning; in the Plan process and within your own work environment. Use your learning journal. Each topic should be discussed separately within working groups.</p> <p>TOPIC 1: HOW CHANGE HAPPENS (# 1 HOUR)</p> <ol style="list-style-type: none"> 5. Read ch.5 and ch.6 of this publication Human Learning Systems: Public Service for the Real World. (pp.106–128; pp.129-146) 6. Read ch.14 and ch.15 of this publication Human Learning Systems: Public Service for the Real World. (pp.289–301; 302-323) 7. Review 2 or 3 questions from CHANGE Appendix 2 <p>TOPIC 2: WHERE TO ACT (# 45 MINS)</p> <p>Leverage points are places to intervene in a system. Before we begin to think about what we will act upon or change we need to consider where in the system we'll act. Leverage points are not always intuitive.</p> <ol style="list-style-type: none"> 8. View the slides and watch the video from this 1 hr Lunch and Learn session entitled 'Building the Case: Action Planning' 9. Read this article Leverage Points: places to intervene in a system
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	<p>10. Read this article Leverage points for sustainability transformation which distils 12 points to just 4, around Parameters, Feedback, Design and Intent.</p> <p>11. Review the questions from CHANGE Appendix 2</p> <p>TOPIC 3: EXPERIMENT AND BUILD THE CASE (# HOURS)</p> <p>“Unless we’re willing to experiment, we can’t expect big breakthroughs. One way to do that—to make risk more approachable—is to run small tests. To build something that isn’t necessarily grand, but rather light, lean, and quick-experiments that we can send off nimbly through the gates and learn from, regardless of what returns. A Trojan Mouse instead of a Trojan Horse.” – Mahendra, J</p> <p>12. View the slides and watch the video from this 1 hr Lunch and Learn session entitled ‘Building the Case: Action Planning’</p> <p>13. Read this article Wheeling in the Trojan mice</p> <p>14. EDUFI provide guidance on what an experiment is and isn’t. Ch.5 of this publication Human Learning Systems: Public Service for the Real World. (pp.136)</p> <p>15. Review ideation tools from the ‘board of innovation’ website</p> <p>16. Review exercises for ‘unleashing local action’ from LiberatingStructures.com</p> <p>17. Read this article on Business Model Canvas with a view to determining which elements apply to volunteering action</p> <p>FURTHER READING</p> <p>18. Read this book ‘Sprint: how to solve big problems and test new ideas in just 5 days’</p> <p>19. Read this article on ‘Mapping our assumptions’</p>
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Group Work

 <p>GROUP</p>	<p>1. Learning discussion. We suggest that groupwork should include some wider discussion of the Self Learning ‘topics’. To support this activity, we’ve provided a list of questions against each of the topic areas within CHANGE, see Appendix 2. Decide which topic areas and questions to cover during and perhaps include within your meeting agenda.</p> <p>2. Output D. Prioritise actions and build the case. Complete Appendices 4 and 5. Appendix 4 provides 5 steps to take a system map to a set of prioritised ideas and experiments. Appendix 5 provides a ‘canvas’ through which to build the case for each action / experiment.</p>
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Impact

 ACT	<p>Group actions</p> <ul style="list-style-type: none">Summarise your discussion, key decisions and actions for other groups through meeting notes.
 REFLECT & EVALUATE	<p>Individual learning</p> <ul style="list-style-type: none">Reflect on aspects of the method and complete your learning journal. <p>Process evaluation</p> <ul style="list-style-type: none">Review Process evaluation, specifically group and chair responsibilities

Process evaluation

Campbell's law: 'the more any quantitative social indicator is used for social decision-making, the more subject it will be to corruption pressures and the more apt it will be to distort and corrupt the social processes it is intended to monitor'

We believe that the Volunteering Action Plan is already breaking new ground in terms of the process and how we interact with each other to best effect. This process evaluation outline is intended to capture key learnings from this process but also to be 'light' touch in nature.

A. Monitoring group outputs and reports

Analysing progress reporting information from 'groups' to assess if the engagement in the process is maintained and effective.

B. Group M&E discussions (quarterly)

The purpose of these is to review and supplement the findings from section A above. Suggested questions are as follows: -

1. What are your top three learnings from working in the group?
2. What is going well? What needs to improve?
3. What is the level of cooperation in the group? What would improve it?
4. How is level of interest and enthusiasm? What would enhance this?

C. Annual Evaluation

Consisting of three sources of data

1. End of process Focus Group discussion, to be held in each of the groups, to capture people view of the process as well as the outputs.
2. Outputs of the Action Plan.
3. Analysis of the process monitoring data over time so a longitudinal dimension can be captured.

Appendix 1: Learning Journal

Your Learning Journal				
What could I do differently following this topic or section?	Who could help me to do this?	What might be the impact of this improvement?	What resource will I need to take this action forward?	Finally, prioritise these from 1 to 3. Put the top one at the end of the journal.
Example: Better understand...	Board, staff, volunteers or ...	Everyone will share a common understanding or...	Time to attend meetings or ...	
Additional thoughts				

Appendix 2: Questions for groups

EXPLORE: TOPIC 1 Qs: INTRODUCTION TO HLS (# 30 MINS)

Questions

- In what ways is volunteering complex?
- What are the implications of being in a complex system?
- What's wrong with our current ways of doing things?
- Which elements of this approach resonate most with you?
- Are there elements that you would wholly disagree with or contest?
- What do we need to do as a sector?
- What are the implications for this process and our work?
- What is relevant to our consideration of Output A - Scope?
- What is relevant to our consideration of Output B - Mapping?

Other useful questions...? **List below and share via [#Slack](#)**

EXPLORE: TOPIC 2 Qs: HUMAN LEARNING (# 30 MINS)

Questions

- What does next practice mean in the context of volunteering?
- Discuss how learning could enable us to adapt and improve?
- Is learning a luxury: discuss?
- How can we reframe our work (the Volunteering Action Plan) in terms of learning (what kinds of inquiry are important?)
- Do we need to remove competition between organisations to enable greater sharing of learning?
- Do we need to be more emotional about the issues we see in volunteering?
- How can we encourage emotion as part of our working lives?
- Is the current system ok? What about the "current system" makes you feel emotional?

Questions (perhaps for VIOs)

- Do your volunteers have the freedom and authority to respond to the particular strengths and needs of each person they work with?
- How would you support people/organisations to find out what they need to measure in order to reflect on their practice?
- How can you help people/organisations in the system use data well to learn?
- How can you create a learning culture across the system?
- How will you create a 'positive error culture'?

Questions (perhaps for Policy-Makers / Funders)

- What would it take for you to fund without seeking control? How would you decide who you could trust?
- How can you commission on-going explorations of how best to serve volunteers, rather than pre-specified services?
- How can you shift from a narrow target-based form of accountability to an approach that brings together multiple perspectives with a focus on improving outcomes?
- How will you change your performance management system to fit with this?

Other useful questions...? **List below and share via [#Slack](#)**

ENQUIRE: TOPIC 1 Qs: EVIDENCE

Questions

- Which statistics are useful for your outcome area and why?
- What are the trends evident in Scotland?
- How can we use evidence in this process?
- Which areas of volunteering research do you need to dig deeper upon?
- What are good sources of evidence or next lines of enquiry?
- In what ways does the Dave Snowden video challenge our views around evidence?

ENQUIRE: TOPIC 2 Qs: VOICE

Questions

- Whose voices do we need to hear from?
- What is most important in how we capture voice? How will you run your 'voice' session (e.g. appreciative inquiry)
- What should we seek to understand?
- Is there a practical and ideal approach to capturing voice: discuss?
- Who in your group has experience, networks or knowledge useful to you? Are there national / local organisations that can help us capture / represent voice?
- What have you learned from this session(s)?

UNDERSTAND: TOPIC 2 Qs: SYSTEMS MAPPING (# 30 MINS)

UNDERSTAND Systems: supplementary questions

General questions reflecting on system

- How does my work fit with the work of others to help the system achieve its overall purpose?
- What would it take for you to share power, but maintain responsibility?
- Do you understand the health of your system?
- Could you use the System Behaviours (or other principles/behaviours) to check the health of your system?
- Who (person or people) is playing the role of System Steward/Steward of Place?
- What support do they need to play this role well?

Why change? Thinking about the system more widely and based on what you've read.

- The moral case: outcomes for people aren't good enough
- Current models are no longer viable, and (given the moral case) we can't do less of the same
- A 'spark' that drives action by making the imperative to act impossible to ignore, and/or creating a sense that meaningful change is possible.
- Deep listening to feedback from people accessing services
- Incentives for collaboration, provision won't be able to continue without joint working
- New leaders and strategies
- Inspiration elsewhere

Other useful questions...? **List below and share via [#Slack](#)**

CHANGE: TOPIC 1 Qs: HOW CHANGE HAPPENS (# 20 MINS)

CHANGE Systems: supplementary questions

General questions reflecting on system levers

- What are some of the conditions in healthy local systems?
- How do we create healthy systems?
 - How can we share purpose and principles?
 - How can we create more trusting relationships?
 - How do we promote / embed collaborative behaviours?
 - Where does power reside? How do we share power more equally?
 - What of funding, governance and data?
 - How do we create enabling leadership?
 - What should a learning culture mean?
 - How do we embed and influence positive practices?
- Where (if at all) is change already happening through the process of HLS?

Other useful questions...? **List below and share via [#Slack](#)**

CHANGE: TOPIC 2 Qs: WHERE TO ACT (# 20 MINS)

CHANGE Systems: supplementary questions

General questions reflecting on system levers

- What is meant by each of the levers around Parameters, Feedback, Design and Intent?
- Any examples of how we might effect change in each of these leverage points?
- Where if at all is change already happening through the process of HLS?

Other useful questions...? **List below and share via [#Slack](#)**

Appendix 3: Sketch a system

Starting with the high-level system (within your working groups or split into 2 groups). Make the system visible. Refer also to Explore: topic 3 on systems thinking and the Enquire section.

- It's important to start with a clear articulation of what the system is for, and where the boundaries are
- Start with purpose - a system is identified and bounded by its purpose—the change it seeks to achieve.
- Actors in the system, know who else is in the system. Who is part of it, what are the relationships between the different elements of it, how they work?
- Perspectives of those the system aims to serve. Appreciative enquiry or other approach
- Actors from across the system (beyond traditional silos)
- Important to recognise people's different perspectives on the purpose of the system, and the values that they bring.

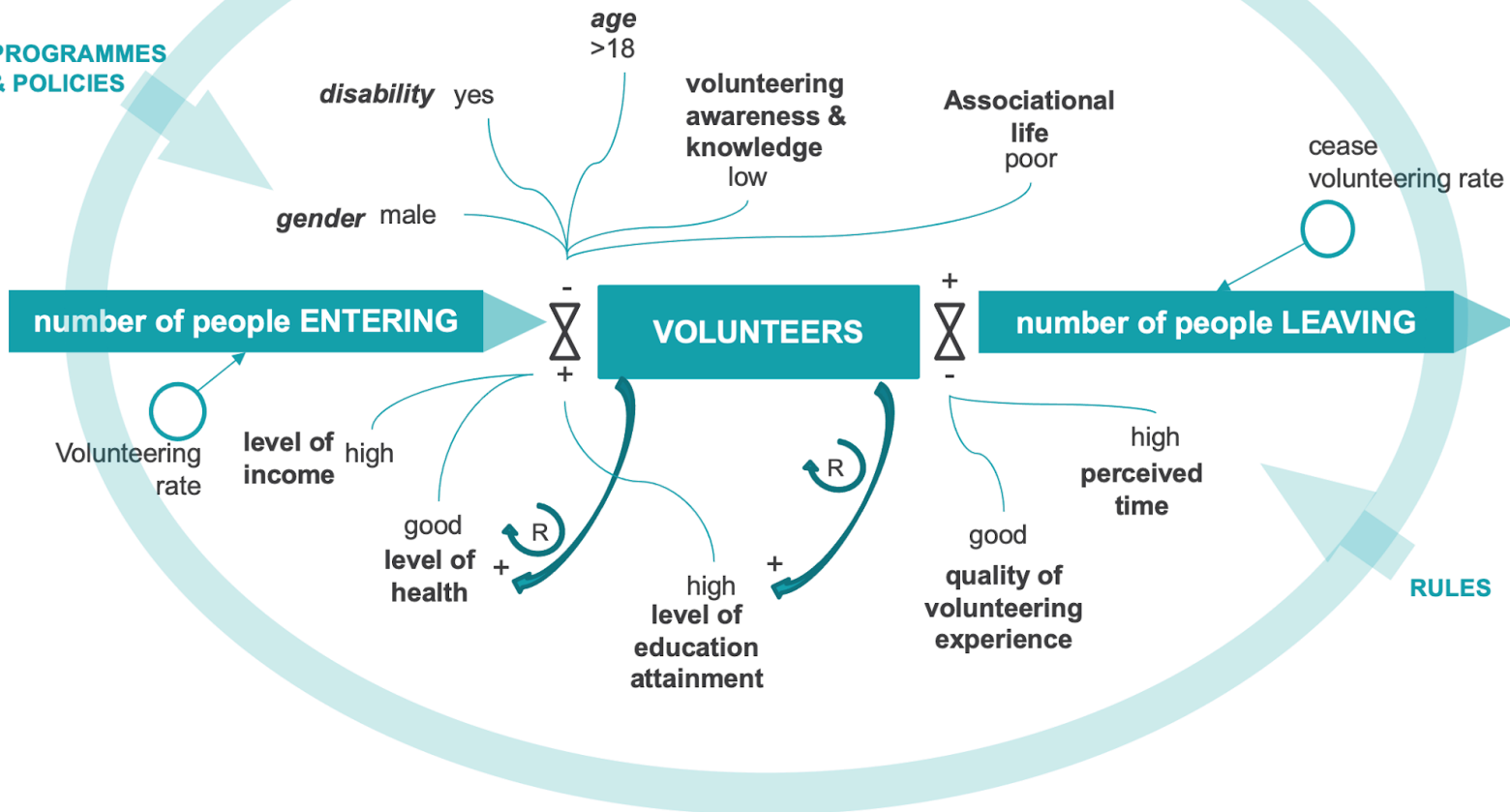
Volunteer Scotland has sketched out the Volunteering System and its related systems (see next page). This is based on the 5Rs (see Explore topic 3). You need not take this approach.

ENVIRONMENT

HUMAN CAPITAL SOCIAL CAPITAL CULTURAL CAPITAL POLITICAL CAPITAL

Volunteering system

PROGRAMMES & POLICIES



STRUCTURE MATERIAL & ECONOMIC RESOURCES ORGANISATION PERSPECTIVE

Related systems



<p>HUMAN CAPITAL</p> <ul style="list-style-type: none"> • Relative lack of access to skills, training, education in deprived communities (d); • Possible disparities in recruitment (status signals), • Disproportionally accumulates in those more affluent (d) 	<p>POLITICAL CAPITAL</p> <ul style="list-style-type: none"> • Acquisition tends to accrue with those more affluent (d). • Political trust tends to be concentrated in more affluent and educated sections of society (f) 	<p>MATERIAL & ECONOMIC RESOURCES</p> <ul style="list-style-type: none"> • Poor educational attainment, housing issues, local labour market issues (unemployment / worklessness) and health - disproportionately affect deprived communities (focused geographically) (c). • More unequally material and financial resources are distributed the more unequal social capital is distributed (c) and this reinforces other forms of inequality (human, cultural, political) (c).
<p>SOCIAL CAPITAL</p> <ul style="list-style-type: none"> • Working class (0.5 associations on average) compared to 1.4 on average in the highest class (c); • Middle class twice as many affiliations as working class (half within f). • Participation in many associations helps create bridging capital (c). 	<p>CULTURAL CAPITAL</p> <ul style="list-style-type: none"> • Arts, landmarks, celebrations, traditions (d) can draw in people more reluctant to engage with authority or take part in more formal processes (f); • It can overcome barriers or mistrust or fear (f) 	
<p>STRUCTURE</p> <ul style="list-style-type: none"> • An aging population puts pressure on our services. • Population density has an interesting impact; in rural areas we're more likely to know our co-residents and volunteer. 	<p>ORGANISATION PERSPECTIVE</p> <ul style="list-style-type: none"> • Nature of non-profits are different in deprived communities, often dealing with community issues sometimes that others don't want to tackle (addiction, food banks etc.) (i). • Lower income communities have fewer organisations, leading to inequality and inefficiency (i). • Lower income communities have fewer organisations with higher av. incomes 	



Appendix 4: Experiment

We've created a 5-step process for Groups inspired by the book Sprint: solve big problems and test new ideas in just 5 days.

1. Each 'lever' could be thought of as a 'problem space'. Start by framing "how might we..." questions #
2. Conduct a 4 step sketch - make it visual. Everyone sketches...concrete beats abstract...work alone together...avoid group think
 - **Notes** 20 mins (make notes from the system map and discussion)
 - **Ideas** 20 mins (jot down rough ideas, circle the most promising ones)
 - **Crazy 8s** 8 mins (sketch a variation of your best ideas in 8 squares. Spend a minute per sketch.
 - **Solution sketch** (30-90 mins). 3 panel storyboard. Self-explanatory. Anonymous. Ugly ok. Words matter. Give it a catchy title.
3. Choose your strongest ideas #
 - Art museum (Space to review all ideas); Heat map (add dots to the ones you like); Speed critique (3 mins / sketch); Straw poll (silently vote); Supervote (casting vote) *
4. Make a storyboard / plan of your WG prototypes
 - Draw a grid; Choose an opening scene; Fill out the storyboard
5. Experiment, test and learn #
 - Prototypes = just enough to capture real feedback and learn; prototypes should feel real
 - Experiments = see what an experiment is and isn't from EDUFI.

[# Opportunities to bring "voice" into the process]

Appendix 5: Volunteering Action Canvas

What is this action (in a few sentences)?		What are you trying to change ?		
What is the unique value of this action?	Who are the key delivery partners ?	What are the key activities ?	Who do we need to build relationships with for success?	Who is the target audience ?
	How will we Test and Learn ?		How will we communicate this action?	
What are the costs for the most basic version (fail fast)?		Resources needed, both financial and non-financial?		