

**Invitation to Quote**

**Active Kindness Programme**

**Volunteering Software Provider**

## Confidentiality

Community Leisure UK is inviting organisations to submit bids for providing a volunteering software platform to support our Active Kindness programme over the next five years. All tenders must be submitted in accordance with the instructions contained in this document. Tenders not complying with these instructions may be rejected by Community Leisure UK, whose decision in the matter will be final.

Any contract resulting from the tendering process will be with Community Leisure UK and will be governed and interpreted in all respects by English Law. The terms and expressions in this invitation to tender shall bear the same meaning as those set out in the Conditions of Contract.

The following document sets out the background, aims, objectives and outline methods, as well as timescales, reporting requirements, management arrangements and tendering details for those organisations or individuals invited to do so. Organisations or individuals should not feel constrained by this brief and should feel free to add any points they think relevant to the execution of the work.

All information contained in this invitation to tender is confidential. Likewise, all information included by tenders in their proposals will be treated in confidence. The tenderer undertakes to treat as strictly confidential all information which may be derived from or obtained in the course of the contract or which may come into the possession of the tenderer or employee, servant or agent of the tender as a result of or in connection with the contract. The tenderer agrees to take all necessary precautions to ensure that their employees, servants or agents treat all such information as confidential.

The tenderer must enforce applicable data protection laws and regulations, including GDPR. All data collected during the project must be securely stored and used solely for the purposes outlined in the contract. In the event of any data breach, this must be immediately notified to Community Leisure UK for appropriate remedial action to be taken.

## Background

Community Leisure UK wishes to invite applications to tender for the development of a volunteering software platform as part of the National Lottery funded 'Active Kindness' programme. Through working with a specialist volunteer management software provider, participating trusts in the Active Kindness programme will be supported to recruit volunteers and engage with them in a meaningful manner. The software will also establish a peer-to-peer support network which can be used by trust staff and volunteers across the membership, fostering a sense of community and collaboration. Finally, the software will empower members to collect and disseminate data on their volunteering programmes, as well as providing CLUK with national view of the data across members, giving a pioneering insight into volunteering in public leisure and culture.

Community Leisure UK, founded in 1997, is the membership association that represents leisure trusts and social enterprises across the United Kingdom. Community Leisure UK is a member led organisation, and our Board is made up of volunteers from our members. There is a current membership of approximately 100 trusts, covering the length and breadth of the nation, with experience of working with various publicly funded programmes.

Active Kindness has ring-fenced funding from the National Lottery to support the rollout and expansion of the programme, which was previously funded by Sport England from its beginning in 2019 until December 2023. Through the UK Fund, the National Lottery is providing five years of funding for the programme from May 2024. In this period Community Leisure UK will roll out the programme and

learning across all members, including those in Scotland and Wales, and to include culture services delivered by members.

Through the programme Community Leisure UK aims to empower trusts with the necessary resources and support them to revolutionise their volunteering programmes in a sustainable manner that best suits their unique circumstances. This rejuvenation may encompass various facets, including enhancing equality, diversity and inclusion (EDI) within the volunteer base, aligning volunteer demographics with the trust's local community, boosting participation in historically less active groups, and amplifying the community's voice to allow for co-production of services and strategies within the trust.

There is a Programme Manager employed by Community Leisure UK to oversee the programme, with cohorts of 10 trusts participating in a learning curriculum each year, with support to develop and deliver individual action plans for their organisations. No funding is passed to the participating trusts, but they will receive individual support from both the Programme Manager and a volunteer development consultant who will be contracted by Community Leisure UK for this role.

Further details on the programme and its vision are available in the appended abbreviated application form (Appendix two).

## Contract Management

Payments will be made in phases according to the agreed milestones. The timescale for the services required is: from September 2024 to May 2029.

This contract is anticipated to include

- Provision of a fully functional digital volunteer management platform for Community Leisure UK member trusts. Trusts will be onboarded every four to six months in cohorts of 10-15. There are currently 99 members in Community Leisure UK, and we anticipate a total of c50-75 trusts will take up the offer of the software platform, although this is optional for trusts and therefore may be subject to change.
  - The digital volunteer management platform will be co-created with input from a selection of Community Leisure UK's member trusts, however the below list gives an indication of the features it will likely include:
    - Volunteer information database
    - Volunteer shift scheduling
    - Volunteer attendance tracking
    - Event management
    - Calendar management for volunteers and volunteer managers
    - Communication tools to allow volunteer managers to message volunteers
    - Option to manage rewards and volunteer recognition
    - Self Service Portal for volunteers and trust staff
    - Volunteer recruitment capability
    - Compatibility with Apple iOS & Android devices
- Provision of the full implementation process to set up, configure and launch the platform with participating trusts and within Community Leisure UK.
- Pre and post implementation training and support in the form of both group sessions as well as tailored individual support where required. Full ongoing support for trusts and for CLUK to ensure prompt resolutions to issues and minimal barriers to implementation.
- Regular workshops for participating trusts, co-designed with the trusts to ensure maximum efficiency.

- Creation of a digital dashboard to allow Community Leisure UK access to the whole data landscape for volunteering across all members using the software.
- Ability to integrate with leisure and culture management systems currently utilised by trusts. This includes but is not limited to: Gladstone, Legend, XM, LeisureMost, Elite, SDA and Scuba.
- Regular engagement and collaboration with other partners involved in the programme, including the consultants engaged to deliver the volunteer development, evaluation and social value strands of the programme.
- Flexibility to adapt the product based on feedback from trusts using the software, with options to consider areas such as the impact of volunteering on organisations and the impact of volunteering on membership uptake or donations.

### **Risk management**

A risk register will be produced with the Programme Manager, with regular updates to ensure there is a clear plan for the management and mitigation of risks throughout the contract.

In the event that the tenderer fails to deliver the agreed work as described in the contract, Community Leisure UK shall give one month's notice to remedy this. If no remedy is found or if the failure is not remedied to Community Leisure UK's reasonable satisfaction, then Community Leisure UK may terminate the agreement immediately.

## **Award criteria**

### **Essential**

- Value for Money – clear outline and breakdown of costs and expenses as detailed in Appendix One, against the delivery of the technical specifications.
- Clear methodology for delivery, with ability to deliver within the timeframe and budget envelope.
- Ability to deliver software that encompasses the features set out above.
- Proven track record of providing volunteer management software to third sector organisations.
- Experience training and supporting organisations to use software effectively to capture their volunteering.
- Confident and engaging style for working with organisations to support their volunteering software upskilling.

### **Desirable:**

- Experience of working with multiple organisations as a collective to deliver training and support sessions.
- Knowledge and understanding of the voluntary sector, and volunteering within the third sector.
- Knowledge and understanding of charitable trusts delivering public leisure and culture services in the UK.
- Knowledge and understanding of the different policy contexts of volunteering within England, Scotland and Wales.

All quotes will be scored against the above criteria, also taking account of the degree of experience of the bidder and the ability of the bidder to deliver demonstrate value for money and delivery within the stipulated timetable. Further details on the scoring criteria are detailed in Appendix One.

Should prospective tenderers require any further information, or have any queries, Community Leisure UK will be available for meetings on Wednesday 24<sup>th</sup> July as set out below.

Costs should include VAT and expenses alongside a plan outlining the different stages and likely timescales for the duration of the five years.

**Deadlines for quote returns:**

Please return all quote submissions via email to Kirsty Cumming: [kirstycumming@communityleisureuk.org](mailto:kirstycumming@communityleisureuk.org)

**Deadline for submissions is: 12 noon, Friday 2<sup>nd</sup> August.** An indicative timeline for decisions is detailed below.

**We will be available on the 24<sup>th</sup> July for conversations with any interested individuals or organisations who wish further information on the project or clarification of the tender requirements.** Please contact Kirsty on the email address above to arrange a mutually convenient meeting.

Discussions with organisations that are shortlisted will take place on **Wednesday 7<sup>th</sup> August.**

Final decision and communication with tenderers **w/b 12<sup>th</sup> August.**

Contract due to start: September 2024, subject to availability.

Useful links:

Webpage with further information and the Evaluation Report for Active Kindness 2022-23: [Active Kindness - Community Leisure UK](#)

**End.**

## Appendix One – Scoring Criteria

Criteria	Criteria Type	Scoring Guide (points available)
Proven track record of providing volunteer management software to third sector organisations.	Essential	10
Experience training and supporting organisations to use software effectively to capture their volunteering.	Essential Detailing pre and post implementation and group/individual delivery	10
Knowledge and understanding of the voluntary sector, and volunteering within the third sector	Desirable	5
Knowledge and understanding of charitable trusts delivering public leisure and culture services in the UK.	Desirable	5
Knowledge and understanding of the different policy contexts of volunteering within England, Scotland and Wales.	Desirable	5
Flexibility and agility of approach	Consideration of the potential for flexibility and adaptation of the programme as it progresses, with agility around: 1. Pricing (margin to cover any amends/adaptations) 2. Implementation (recognising the need to co-create the approach and implementation with a steering group) 3. Support (recognising the differing approaches and experience of participating trusts)	15
Pricing	To include a breakdown of: 1. Development 2. Maintenance 3. Hosting 4. Support 5. Improvements	20

Deliverability	Proposal fulfils all the 6 requirements detailed, including the list of technical requirements, in the ITQ and outlines delivery timelines and availability for work to commence	30
<b>TOTAL</b>		<b>100</b>
Added value	An additional score of up to 5 points is available for each of the following: 1. Surpassing expectations on any of the above criteria - going above and beyond 2. Creativity and innovation - bringing a new element or process to enhance the value of the software to the programme	10

## **Appendix Two - Application for Funding to the UK Fund (Abbreviated)**

### **1. Your organisation**

#### **Relevant experience and skills**

Community Leisure UK ('CLUK') is a members organisation specialised in representing Charitable Trusts and Social Enterprises in public leisure and culture. Our members put their communities first and are driven by the social value they place on supporting them to live healthier, happier, and more creative lifestyles through the development of tailored services including wellbeing and cultural outreach programmes. Our members are uniquely aligned to the UK Fund project aims due to their innate social purpose to do good across all communities. Our proposal unlocks even greater inclusivity and community cohesion through a consistent sector specific volunteering programme that we call Active Kindness ('AK'). And because our 99 members are spread across urban and rural communities in England, Scotland, and Wales, it will undoubtedly have a UK-wide impact.

CLUK has an impressive track record of delivering high-quality externally funded programmes such as Make Your Move and AK, which further underscores our ability to lead this effort. Our firsthand experience of the potential impact of this programme through the 2+ years of delivery to date has equipped us with an in-depth understanding of the challenges and opportunities inherent in the next 5 years. Our agility, reactivity, passion, and comprehensive knowledge is exemplified by our Big Swim Day 2023. We can deliver a national level campaign tailored to local circumstances and generate positive engagement with the public, users of facilities and national decision makers.

#### **Leadership structure and governance processes**

We are a member led organisation, and our Board is made up of volunteers from our members. We comply with Sport England's Tier 2 Governance Code and have embarked on a programme of continuous improvement with our Board to ensure it is functioning to the best of its ability. We have seven Directors who each represent a geographical region or nation of the UK, with responsibility to engage with and represent the views of members to steer our work and ensure we remain genuinely member led. Our members are all governed by their own Boards made up of volunteers, ensuring that local services are overseen by representatives from the local community. The CLUK [equality, diversity, and inclusion \('EDI'\) strategy](#) underpins all we do, supporting the work of our team and wider membership to be fully inclusive. Our goal is focused on the long term, but we've pinpointed specific short-term actions to enhance the inclusivity and accessibility of services.

### **2. Project description (This is the practical nature of the plans for implementation)**

#### **Overall aims and long-term vision of this work.**

We want to leverage the power of volunteering in our sector to create greater community cohesion, stronger personal development of individuals and increase the diversity of those taking part in health, wellbeing, and creative programmes. Our aim is to empower trusts with the necessary resources and support them to revolutionise their volunteering programmes in a sustainable manner that best suits their unique circumstances. This rejuvenation will encompass various facets, including enhancing EDI within the volunteer base, aligning volunteer demographics with the local community, boosting participation in historically less active groups, and amplifying the community's voice for co-production of services and strategies within the trust. An example is the embracement of activities such as wellness walks; LED Leisure have partnered with a small local charity, Honiton Memory Café, and together they have set up a new walking group to complement the services offered by the café. These volunteer-led walks have reconnected an older demographic with their local leisure centre and



facilitated social connections and physical activity in an accessible way, with volunteers at the heart of the project's delivery. Our proposal envisages volunteers providing a crucial bridge, linking previously disengaged communities with leisure and culture opportunities in their area, connecting different groups within the community and fostering a stronger sense of unity.

"By the end of the programme we'll have made enough little changes to count as a big one" – Ian Hodgson, Community Activator, Hyndburn Leisure (pilot AK trust)

#### Activities to be delivered:

##### **Strand One**

Strand one of our proposal involves the development and scaling out of the existing work we have done in the AK programme with 14 trusts in 2022 and 2023. Momentum is building within our membership to continue this in 2024 and beyond, expanding the programme to all our 113 members across the UK, and specifically including the cultural, outdoor and community venues operated by our members. The AK programme to date has focused on volunteering in the sport and physical activity setting, but there is a fantastic opportunity to extend to our members' wide network of cultural venues, including museums, galleries, community halls, libraries, cinemas, greenspaces, and theatres. 40% of our members in England have some form of cultural assets within their portfolios, which increases to 50% of members in Wales and 60% of members in Scotland. The potential here is truly exciting.

Following the approach taken in 2022 and 2023, trusts will be supported by the AK programme manager in collaboration with a volunteering consultant to create individual action plans. They will also be asked to complete an initial assessment, the results of which will provide a helpful audit of volunteer management in trusts at the start of the programme. We will use the action plans and assessment results to inform the curriculum of monthly training and development workshops delivered, drawing on workshop resources from the previous years. Previous topics covered included volunteer recruitment, reward and retention, and more theoretical subjects such as social value. Where appropriate, guest speakers will be invited to the workshops. Feedback from surveys sent to attendees in 2023 showed 100% of respondents rated the quality of the workshops 4 or 5 out of 5. Alongside this approach, participants will receive specialist training and mentoring from an evaluation consultant, upskilling them in data collection, monitoring, and evaluation. This is important for the sustainability of the programme and ensures trusts can continue to monitor and evaluate their own work and progress beyond the funding period.

Alongside the group learning and support, trusts will also receive ongoing one-to-one support from the AK programme manager and volunteering consultant. This is an 'on demand' offer, to be requested as required by trusts, but will include a six month check in with the trusts to discuss their progress and address any concerns. This has proven valuable to participants in 2023. The second aspect of the support is the AK network of volunteering professionals representing the participating trusts, which is established at the learning workshops and network meetings. This key feature of the programme reflects the work of the CLUK team outside the AK programme to bring together trusts in Special Interest Groups ('SIGs') creating a vital forum for discussion and collaboration. We will establish a Volunteering SIG which will run alongside the AK network and provide space for sharing learning, peer to peer networking, and sharing insights and updates with our members.

In addition to the support and workshop offer, we have a toolkit on volunteer management. This is an online resource available to all member trusts, with resources tailored to volunteering in the context of charitable trusts delivering public leisure and culture services. This includes template role profiles and volunteer policies, practical help, and signposts to further guidance and training available to trust staff and volunteers. To ensure the valuable insights and ideas explored by participating trusts in 2023 are not lost, we produced an AK podcast series which will complement the toolkit. The podcast was launched in January 2024, and formed part of CLUK's launch of the final evaluation from the 2022 and 2023 phases of the project and be an easily accessed online resource available to members on demand.

Drawing upon consultations with the participating trusts in 2023, we have pinpointed two specific areas where trusts can further enhance their operations. These are detailed below as Strand Two and Strand Three.

### **Strand Two**

We will develop bespoke volunteer management software in collaboration with a volunteering software provider. This will enable trusts to recruit volunteers and engage with them in a meaningful manner. It will also establish a peer-to-peer support network which can be used by trust staff and volunteers across the membership, fostering a sense of community and collaboration. Finally, the software will empower members to collect and disseminate data on their volunteering programmes, as well as providing CLUK with national view of the data across members, giving a pioneering insight into volunteering in public leisure and culture.

### **Strand Three**

We will furnish trusts with the tools they need to successfully showcase the social impact of their work. By engaging the expertise of social value consultants and our social value lead at CLUK, we will create a tool to quantitatively measure the social value of their volunteering programmes.

CLUK will publish annual reports using the data collected under Strands Two and Three, bringing a brand-new insight into volunteering in public leisure and culture in the UK. In a comparable manner to the NCVO's "Time Well Spent" reports on volunteering, CLUK's reports will enhance the profile of volunteering, amplify volunteer voices, and present influential evidence-backed policy suggestions. This could bring a revolution to the understanding of volunteering in communities across the UK.

### How and where it will take place

Our proposal will build upon the progress achieved in the AK programme, extending its impact to all 113 member trusts and their communities throughout England, Scotland, and Wales. We will continue to deliver the programme through a mixture of virtual and in person workshops and one-to-one Zoom meetings, due to the overwhelmingly positive feedback from participants. We will use this experience to find a balance between the benefit of in person interaction, and the advantages of virtual sessions such as easier access for attendees irrespective of physical location. The toolkit and podcast will be accessed online on the members area of the CLUK website, available to any trust staff or volunteers on demand. The social management tools and volunteer management software can simply be incorporated into any online systems already used by trusts.

## The impact outcomes the project aims to achieve/what difference will it make.

### **Improved volunteer experiences**

We will support trusts to deliver improved volunteer experiences to their local communities. Our learning workshops and support networks will share best practice for embedding volunteers into their trusts, such as the formation of working groups and the strategic inclusion of volunteering in policy documents. Volunteers will be seamlessly integrated into trusts, and given a tangible role in shaping the strategies, decision-making processes, and services within their communities. For example, one of the AK pilot trusts used their experience in the programme as a springboard to establish a strategic oversight group, which they used to refresh their policies and procedures and identify priority areas for recruitment supporting their libraries, healthy eating, and school holiday activity programmes. This led to the creation of an internal delivery group, agreement on key volunteering metrics and a commitment to commission software to support their efforts.

### **Enhanced diversity**

Our objective is to make sure every community can enjoy the many advantages of volunteering, physical activity, and cultural engagement. We know that trusts want to mirror their communities more accurately, and that recruiting volunteers from currently under-represented demographics serves to establish deeper connections with these communities, ultimately allowing trusts to better cater to their evolving needs and expectations. For example, Rossendale Leisure Trust introduced volunteer Leaflet Distributor roles to address an identified need to engage with their local refugee community. Volunteers have reported improvements to their wellbeing and confidence, feeling more grounded in the community, improving their local knowledge, and improving their English language skills. The trust hopes that this role will be an entry point for people to progress to other roles within the trust, if desired.

### **Amplified volunteer voices**

Empowering volunteers and amplifying their voices is central to our strategy. We'll accomplish this by publishing annual reports based on UK-wide volunteer experiences and our software will facilitate direct communication between volunteers, enabling them to share their experiences and knowledge with one another. It will also establish a crucial line of communication for trusts to be able to easily collect feedback and suggestions from volunteers.

### **New relationships and connections**

Volunteering can be a leveller to engage people from all backgrounds. For example, Active Luton introduced "Maintenance Mates," a unique volunteering programme for individuals with learning difficulties in the local community. Eight volunteers in this programme have worked alongside the trust's estates team, performing tasks like cleaning and maintenance, adding to their confidence and employability skills. Trusts participating in AK have also experienced the advantages of forging new connections with each other. The diverse range in trust sizes and geographical locations means that many trusts have, for the first time, identified common goals and discussed their operational challenges and achievements. Irrespective of their size, those trusts that have advanced further along their "volunteering journey" have been eager to engage in open discussions, sharing their progress, acknowledging mistakes, and distilling valuable lessons for the benefit of the network. This spirit of collaboration has extended to the sharing of template documents, illustrating the trusts' recognition of the mutual benefit of working together to achieve their objectives. Smaller trusts, including those consisting of just a single swimming pool or lido, have leveraged the resources of their larger counterparts. For instance, larger trusts have generously provided them with marketing strategies

designed by their expert marketing teams, a valuable resource that smaller trusts may not have at their disposal. Equally, larger trusts have gleaned helpful insights from the smaller trusts, especially because the latter often manage a larger pool of volunteers which they connect with more directly.

#### How success will be measured

Our approach to monitoring and evaluation is to embed it as part of the ongoing learning process throughout the programme, with the opportunity for participants to learn, test approaches and feedback forming a key pillar of the success. Volunteer experience surveys will play a vital role in monitoring the success and impact of our project. These regular surveys will serve as a valuable tool for gathering direct feedback from the volunteers themselves, offering insights into their experiences, challenges, and their contributions within their trusts. By regularly administering these surveys, we can gauge the level of volunteer satisfaction, identify areas that require improvement, and measure the alignment of the programme with the volunteers' expectations and needs. This data will allow us to make informed adjustments to the support mechanisms we have in place, ensuring that they remain tailored to each trust's unique context. Volunteer experience surveys will also help us to track the evolution of volunteering within trusts over time, providing concrete evidence of the impact the programme is making in terms of increasing diversity, participation, and community engagement. Through these surveys, we can maintain a dynamic feedback loop that informs our strategies, enhances the overall success of the project, and ensures that volunteers play an integral role in shaping the future of volunteering within their trusts. These surveys will be delivered primarily using the volunteer management software, which will minimise the time required from trust staff to deliver this aspect of the programme's monitoring. We will also commission an interim evaluation report at the project's mid-point, as a fresh, evaluation perspective on the work will be invaluable to assess progress and to inform the remainder of the project and any amendments that may be needed. A full, comprehensive evaluation report at the end of the project would provide a resource of key learning.

#### What are the plans for sustaining the work once the grant is at an end?

Ensuring the long-term sustainability of this programme has been a primary consideration from its inception. We have been consistently focused on understanding the support and assistance that trusts require and have strived to deliver it in a way that is easily accessible to them in terms of time and resources required. We have tailored the learning and support framework to align with each trust's individual pace, allowing goals and actions to be set in accordance with their unique action plans, which can be adjusted as needed to ensure success. Our five-year funding period will allow sufficient time for programme delivery, implementation, troubleshooting, and the provision of ongoing support. By the end of the funding period, the software will be fully integrated, and the benefits will be evident to trusts.

CLUK is dedicated to ongoing support for trusts and their volunteering initiatives. We've developed tools and resources tailored to volunteering and plan to share these insights within our network of members. We also aim to extend this knowledge through partner organisations and forums to benefit a wider audience beyond our core membership.

With the existing framework of SIGs, CLUK has the experience to support the continuation of the network of trusts improving their volunteering through the introduction of a Volunteering SIG. Our existing SIGs are chaired by members, with agendas created by the chairs with input from members. In this way, the SIGs secure the long-term viability of their continued relevance without being solely dependent on CLUK for their continuity. Furthermore, our existing Social Value and HR SIGs are already

in place and can seamlessly collaborate with the newly established Volunteering SIG, allowing for the exchange of knowledge and the integration of best practices.

## **Background**

### Evidence of need for the project

Many of our members offer volunteering opportunities, but some of this is 'ad-hoc' with no recruitment process and no monitoring of satisfaction levels from volunteers. According to our 2023 Annual HR Survey Results, trusts hold only basic data on their volunteers, with only 24% of trusts collecting demographic monitoring information from their volunteers and only 25% measuring volunteer engagement. There is a clear opportunity here to improve the overall recruitment process and to begin to gather some data as a baseline to identify areas for improvement.

Regarding participation, there are differences based on ethnicity, age, and socioeconomic group as well as a slow recovery in participation in some groups, particularly older people and those with health conditions, post pandemic. In terms of volunteering more generally, the most recent NCVO Time Well Spent report lays bare the challenges that all nonprofits are experiencing in the aftermath of the pandemic, to recruit and retain volunteers. This challenge is exacerbated in our members as trusts often lack the resources and capacity to tackle improvements to their volunteering offers independently. We know the increasingly challenging operational landscape necessitates a focus on core services. The AK programme has demonstrated that, with the right support, progress can be made even during the recovery from Covid and amidst a cost-of-living crisis. Other CLUK member trusts who have not been directly involved have shown a strong interest in AK when information and learning has been presented at SIG and regional meetings, and at the CLUK General Meeting earlier this year.

Sport England acknowledged the critical role of volunteers in realizing their vision outlined in their Uniting the Movement strategy. Realising the Power of People and Leadership is one of five 'catalysts for change' through which the strategy supports the development of volunteering in several areas, including: "Working with others to take an honest look at the support and experience for volunteers within our sector, focusing on what's needed to make giving your time easy, meaningful and supported, now and for the future, and in doing so, reducing drop-out rates."

A key element of the programme design is the network for volunteer managers within the trusts participating in the AK programme. This partnership approach was highly valued by all managers in 2023, with the peer network providing a sounding board and a safe space to share ideas. One participant said: "You've got a network of people who are on the same journey. That has saved us time and brought in additional resources without us having to pay for them". For the AK participants, in their roles as volunteer managers or senior leaders with responsibility for volunteering, the ability to reflect on their practices and take inspiration from each other has been hugely beneficial. Many of the participating trusts have commented that this aspect of the programme has been the most useful and helpful to them. As part of our ongoing monitoring of the programme, we have been circulating bi-monthly surveys. In all 2023 surveys, 100% of respondents agreed with the statement "The AK training and network is valuable to me".

## **3. Our approach to Learning and Evaluation**

### **Tell us how you intend to engage with this work as part of this project.**

Co-design has been a key element of the AK project since its inception, with the Theory of Change created during workshops with all partners and participating trusts. The subsequent review and update

of the Theory of Change following the restart of the programme post Covid was also done using collaborative workshop sessions with all partners and participants. We have developed further feedback mechanisms in 2023 following feedback from participating, and non-participating, trusts on their desire for ongoing learning. The proposal of a collaborative enquiry would be a natural fit with the programme and we would welcome the input from the funder, as we have throughout the current project.

How work will be split between project years

	<b>Year 1 April 24 – March 25</b>	<b>Year 2 April 25 – March 26</b>	<b>Year 3 April 26 – March 27</b>	<b>Year 4 April 27 – March 28</b>	<b>Year 5 April 28 – March 29</b>
<b>Network</b>	Set up Volunteering Special Interest Group ('SIG').  First meetings take place.	SIG continues to meet. SIG members contribute to Learning & Support workshops.	As in Year 2.	As in Year 3.	As in Year 4.
<b>Learning &amp; Support</b>	10 Scottish & Welsh trusts join AK, create action plans & receive support & learning workshops. One-to-ones with original AK trusts. (24 total trusts at this point)	10 further trusts join AK, create action plans & receive support & learning workshops. One-to-ones with all AK trusts. (34 total at this point)	10 further trusts join AK, create action plans & receive support & learning workshops. One-to-ones with all AK trusts. (44 total at this point)	10 further trusts join AK, create action plans & receive support & learning workshops. One-to-ones with all AK trusts. (54 total at this point)	10 further trusts join AK, create action plans & receive support & learning workshops. One-to-ones with all AK trusts. (64 total at this point)
<b>Social Value</b>	Workshop tool development with consultants. Consultants create social value tool and onboard 30 members.	Onboard remaining members. First data produced & featured in Report 1.	Data produced & featured in Report 2.	Data produced & featured in Report 3.	Data produced & featured in Report 4.
<b>Software</b>	15 trusts to initially onboard with the software (from the	A further 30 trusts onboarded in two groups of 15 End Of	A further 30 trusts onboarded in two groups of 15	EOY = Report 3	EOY = Report 4

	2022/23 cohorts)	Year (EOY) = Report 1	(total = 60) EOY = Report 2		
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