

**A GUIDE TO DELIVERING  
BEHAVIOUR CHANGE PROJECTS  
IN COMMUNITY SETTINGS  
THROUGH VOLUNTEERS**

# WHO IS THIS GUIDE FOR?



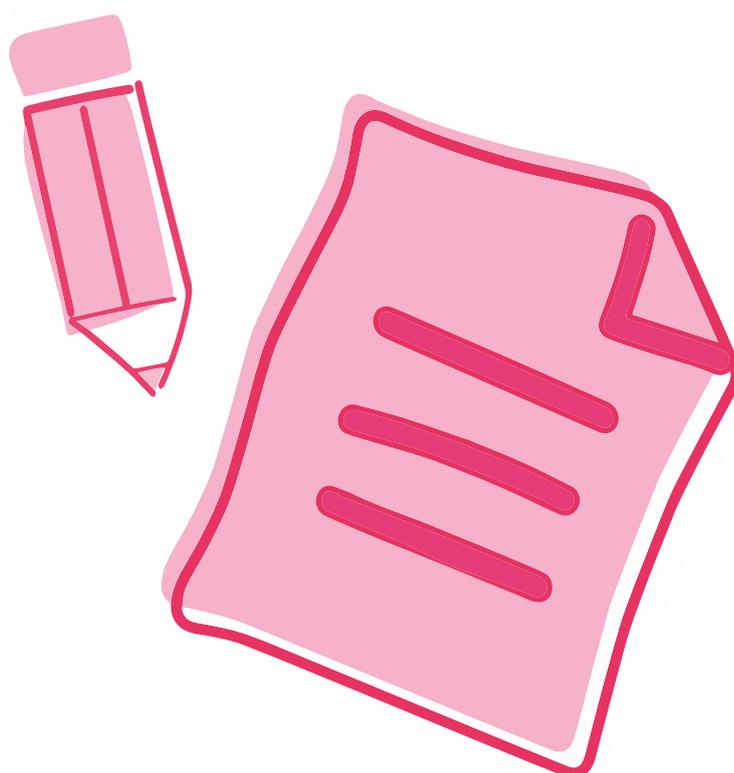
**This guide has been developed for organisations working on volunteer-led services in community settings and showcases the example of ActWELL, a lifestyle behaviour change project helping to reduce the risk of developing breast cancer.**

The project supported women over the age of 50 to make sustainable lifestyle changes, focusing on physical activity, diet and body weight.

This guide may also be helpful for:

- Community and voluntary organisations
- Public sector organisations like the NHS and local authorities
- Academics and researchers
- Funders and policy makers who want to work with community-based organisations to help develop and plan volunteer led services similar to ActWELL

Whilst the ActWELL project looks at supporting lifestyle behaviour change in a one-to-one setting, the learnings can be useful across a variety of settings. Especially where projects involve volunteers providing face to face support in a community setting and where multiple stakeholders are involved.



# ABOUT ACTWELL



**At Breast Cancer Now, we're driven by our goal to make sure by 2050, everyone who develops breast cancer lives – and is supported to live well.**

ActWELL was a collaboration between Breast Cancer Now, the University of Dundee, NHS Scotland Breast Screening Programme (NHSBSP), leisure trusts and other academic institutions. The University of Dundee was responsible for designing the trial and recruiting women to take part in the study as trial participants.

Women were made aware of the trial at routine NHS breast screening appointments. Participation was voluntary, and consent was obtained when they were assessed for eligibility to take part by a research nurse. Only women with no previous history of breast cancer were invited to participate.

Breast Cancer Now supported the delivery of ActWELL by recruiting and managing a team of trained volunteer lifestyle coaches to deliver the ActWELL lifestyle intervention. The lifestyle intervention was delivered through one-to-one lifestyle coaching sessions, made up of two face to face meetings (one lasting 60 minutes and the other 45) in leisure centres, followed by up to 9 telephone calls over a 12-month period. The focus was to help make sustainable lifestyle behaviour changes that are known to increase risk of breast cancer:

- Being overweight or obese
- Alcohol consumption
- Being inactive

A dedicated ActWELL Project Officer, employed by Breast Cancer Now, co-ordinated and managed the delivery of ActWELL across the 4 ActWELL sites in Aberdeen, Dundee, Edinburgh and Glasgow. This involved recruiting and managing volunteers, receiving trial participant data, matching participants to volunteers, ensuring visits took place, liaising with participating leisure centres and taking care of any problems at the venue.

This is the first time a breast cancer charity has offered volunteer capacity for cancer prevention action on weight management through NHS breast screening services. The approach taken in ActWELL meant Breast Cancer Now could offer supportive action on breast cancer risk reduction by using volunteers in a community setting, offering the potential to address gaps in public health efforts.

While delivering ActWELL, we had both successes as well as faced some challenges which meant developing new ways of working. This guide focusses on our experiences of recruiting, training and managing a team of volunteers, handling personal data as well as working with multiple partners to deliver the project. We've shared our key learnings and considerations for designing and delivering similar projects.

# PROJECT PLANNING

**Before you start planning, make sure you have identified:**

- **The overall aim of your project**
- **Your budget and staff resource**
- **Your target audience**
- **Your key stakeholders (the people that will support, endorse or be a partner on the project)**

When you've got these in place, you can start the planning process. Make sure you allow at least 6 months' lead in before project delivery begins.

## **Project management**

Create a project team made up of people who will support the delivery of your project. Start with a project plan, setting out timelines and key milestones to keep you on track. Make sure everyone involved understands their roles and responsibilities at the outset, and that you all agree on how the project will be delivered.

At this point, it's important to identify any risks that could impact delivery of the project. These can be recorded in a risk register outlining approaches taken to overcome them during the development of your project.

Ensure there's ongoing communication with the project team and key stakeholders throughout. That way, everyone will be up to date with progress and have the chance to highlight and report any challenges along the way.

## **Project staffing**

Think about having dedicated staff in place to work with volunteers, to provide project management, co-ordination and delivery of your project, alongside general admin and maintaining relationships with key stakeholders. For ActWELL, we had a dedicated Project Officer in place, as well as administrative and IT support throughout the project.

Think about where your staff will be based in relation to the volunteers supporting the project. If you're managing volunteers remotely, make sure you consider how you can make this work as this will require putting additional processes in place.

## **Handling personal data**

Processes for collecting, storing and sharing any personal data required for your project is crucial. Where multiple partners are involved in a project, you need to make sure you have data sharing agreements and processes in place to allow you to share personal and sensitive data between different organisations.

You must make sure that people are confident you will treat their data with respect. Whenever sharing personal information with third parties, there are special requirements which organisations need to meet to comply with data protection legislation. Always make sure you find out what your obligations are before you handle any data.



### Data handling – how we did it

The ActWELL project had two data handling processes:

1. Breast Cancer Now was responsible for collecting and processing the personal details of all applicants to the ActWELL volunteer lifestyle-coach role.
2. The University of Dundee was responsible for collecting personal details on trial participants. Breast Cancer Now were required to receive and securely process this personal data and send it to volunteers.

The University of Dundee arranged the secure file transfer of trial participants personal data to Breast Cancer Now. Microsoft SharePoint was used to share this personal data with volunteers. This platform allowed the secure online storage of documents which needed to be accessed and viewed securely from different locations by different users.

Giving clear guidelines to volunteers about confidentiality and how to handle the personal data they receive is essential. To make sure our volunteers were clear on personal responsibilities around data handling, they had data protection training and were provided with a Confidentiality and Data Handling Procedure guidance document. This also outlined processes that were in place to deal with any data breaches

### Find the right venue

Think about the location you choose to deliver your project. It needs to be accessible to everyone involved – think about public transport. Is there enough parking? Is the building easily accessible for everyone?

If you decide to use an external venue, or one that belongs to one of your project partner's, make sure you agree to expectations and procedures for your volunteers in advance of use.

- Are meeting spaces only available at certain days or times?
- Will there be a cost attached?
- Is there a key contact for any issues that may arise?

Make sure you have signed partnership agreements in place with any partners hosting meeting spaces. This will help keep things clear as you move forward.



# RECRUITMENT TO YOUR PROJECT



## Finding your participants

For ActWELL, women who were attending their routine NHS breast cancer screening appointments were invited to take part in the lifestyle intervention. Consider what settings might be appropriate for you to recruit the target audiences for your project.

It's good to make it clear what your project will expect of them. Be clear about:

- How often they'll be contacted
- How much they'll need to travel
- What's expected of them
- How long they will be involved in the project

When you're recruiting people to a project, you need to think about who's responsible for:

- Finding somewhere for recruitment to take place
- The information they'll get about the project
- Looking at the suitability of each person to take part (where applicable)

## Finding your volunteers

When finding volunteers, think about the range of life skills and work experience your volunteers will bring and what value this will add to your project.

It's crucial that appropriate organisational volunteer policies and procedures are in place before you begin volunteer recruitment. This will help define the role of volunteers within the organisation and your organisations commitment to its volunteers. Describing your decision-making processes will outline how

volunteers can expect to be treated, ensuring it is done equally and fairly.

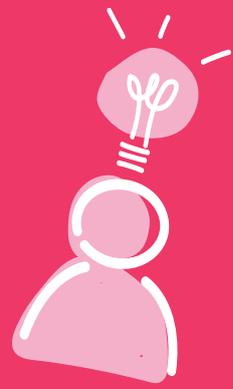
Make sure you have a role description outlining the following:

- What's expected of them
- The hours they'll need to give
- Their responsibilities
- How long they'll be committed for
- How much training is involved
- Any specific skills and knowledge required
- Equipment they will need to have access to (like access to a phone, computer, or laptop)

People choose to volunteer for many reasons - it brings people together, builds confidence, develops new skills and can provide an opportunity to try something new. Highlight any benefits you believe the role will offer them.

When it comes to advertising, think about who you're trying to attract to the role and where they are likely to see it. Have you thought about diversity? Who's in your existing networks? What social media and community media channels do you have access to? Do you have a local volunteer centre? Do you have links with local colleges and universities? Think about any links with local community groups.

As part of one recruitment campaign we produced a case study focussing on the experiences of an existing volunteer. This highlighted her reasons for volunteering on ActWELL and how she got involved in the project. This helped us to target the role at those with relevant skills and experiences.



### Case Study: Emily Cleland, volunteer lifestyle coach

Emily is a new lifestyle coach for the ActWELL trial in Aberdeen. Having previously worked as an Active School's Coordinator to promote and improve participation in physical activity for young people, she had always had a keen interest in health and lifestyle and jumped at the opportunity to apply for the role. Here's what she had to say:

**“I would highly recommend becoming a lifestyle coach to other people. It's been an exciting and interesting experience and, most importantly, I feel like I can make a real difference.**

**“I have a degree in Sports and Exercise Science and I worked in the health and physical activity field for many years before putting my career on hold to focus on my family. When I heard about the ActWELL research trial from Facebook I thought it was the perfect opportunity to get back into doing something I've always loved.**

**“The application process was really simple. I filled out an online form and then I was invited to attend a selection day. I was absolutely delighted to be selected as a volunteer!**

It's always a good idea to ask applicants where they heard about the role as this can help focus your efforts in the future. Most of our applicants found the role being advertised on social media.

Volunteer recruitment is an important thing to get right, but it's also important to be flexible. Where necessary phase volunteer recruitment across multiple project sites to allow sufficient time to promote opportunities and carry out selection. Initially, we had so many applications for the volunteer lifestyle coach role that we decided to hold group recruitment sessions in each location due

to time constraints, so be prepared to adapt to allow for the unexpected.

If your project is aimed at children or protected adult groups, it could be seen as 'regulated work'. It's always a good idea to check if volunteers need criminal background checks or similar before they start. As we recruited healthy women at routine screening to become ActWELL trial participants, our volunteers didn't require these checks.

# VOLUNTEER TRAINING AND MANAGEMENT

**Volunteers need to feel confident and have the skills and knowledge to deliver their role. Make sure time is built in to train volunteers before they begin any delivery element of the project and they have access to ongoing support throughout their involvement.**

Our volunteer lifestyle coaches received 2 full days of training which focussed on the background to the project, how to deliver the ActWELL intervention, how to complete trial paperwork and data protection. This was followed up with practical sessions where volunteers practiced delivering the intervention before taking on any participants. They were also required to attend an induction session with Breast Cancer Now and the Leisure Trust that providing the venue for meetings to take place.

It's important that volunteers feel valued and supported in their role. Keeping in touch regularly and recognising their contribution is fundamental to achieving this.

Consider who your volunteers are, how much support the role requires, and what communication methods would be most suited to them. If it helps, put together a project communication plan that sets out the different communication tools you might use to keep in touch with them and how often that might be.

Another important point is to make sure budget is allocated to cover volunteer expenses, specifically for things like travel. Where this is possible it can really help bring volunteers together more easily to share experiences and support each

other during the delivery of your project. It also gives you a chance to celebrate successes together, too.

Throughout the project we used a variety of methods to provide ongoing support to volunteers. This included support calls and emails, sending out a bi-monthly newsletter, and organising quarterly group support sessions in each of the 4 ActWELL delivery areas. These support sessions allowed volunteers to come together offering informal peer support to each other. Volunteers also appreciated small gestures of recognition.

**“It was nice to feel valued with little touches e.g the Christmas card and thank you card”**

**“I felt totally supported throughout the trial, both the ActWELL Project Officer and trial manager were easy to access by phone or email and quick to respond which was helpful”**

Towards the end of the project we organised a celebration event which brought together volunteers, the trial team and Breast Cancer Now staff. This was an opportunity to celebrate the trials achievements, recognise the contribution volunteers had made, and to really say thank you to everyone that took part.

# PROJECT DELIVERY



**When it comes to delivering your project, there are a few things you'll need to consider and put in place. Take into account what resources and equipment the volunteers need to deliver the project and how this is allocated to them.**

A mobile phone and email address may be necessary in ensuring safe and secure handling of data throughout the project's lifespan. Make sure you test any equipment for suitability in advance.

For ActWELL each participant received an ActWELL Pack that had an ActWELL participant booklet, health information leaflets and a pedometer. Volunteers were based remotely around Scotland, so we had to ensure they had everything they needed for their initial meetings with participants.

Before you start signing people up to the project, make sure you know how you're going to allocate them to volunteers. How will it work? Who's responsible for the eligibility screening? It's also crucial to agree availability with your volunteers, as well as the maximum and minimum number of people each volunteer is prepared to deal with.

Make sure you keep in regular contact with the venues, and that you have a key contact at each one. Ensure that everything is in place at each venue for the sessions to take place and the process on how to check availability and book rooms are clear. A key learning for us was to make sure we visited each venue to assess the suitability of the meeting spaces ahead of volunteers using them.

Throughout the project it is important that the project co-ordinator is available to deal with any problems or questions volunteers may have. Outline the best way for them to get in touch and be clear as to your availability and who to contact in your absence. As the project progressed, we created a Frequently Asked Questions (FAQ) document which was shared with volunteers regularly to refer to.



# MONITORING AND EVALUATION



Measuring the impact of your work is much easier when it's planned in from the outset of a project. Agree your aims, objectives, what success will look like and how you will measure it. This which will allow you to develop a project evaluation plan.

Put in place appropriate methods for collecting data and be clear about how and when this should be collected. If you are relying on volunteers to collect data, make sure this is made easy and they understand exactly what is expected of them.

While delivering your project, log any issues or challenges you face and how these were resolved. It's important to listen to feedback from volunteers and your stakeholders, this can be through informal feedback or more formally through focus groups, questionnaires or exit interviews with volunteers. This can help inform decision making for future projects and can support the wider organisation find opportunities to implement new ways of working.

Finally think about how you will share results and any key learning from your project. Who do you want to share this with? How will you communicate with each audience?

It's also worth remembering to capture any unintended outcomes from your project. Being involved in ActWELL had a positive impact on the lifestyle coaches including an increased awareness of the link between lifestyle behaviours and breast cancer risk and positive changes to their own lifestyle behaviours.

Some reported using their skills and knowledge to discuss lifestyle behaviour change with colleagues in the workplace and with friends and family, while others used their skills to change career or go back to further education.

**“I have used the information with my husband who is keen to lose weight.**

**“I have told family members about the link between weight gain and breast cancer”**

We were able share results and key learnings from the project to people involved in ActWELL through a series of dissemination events organised by the ActWELL trial team. We created an ActWELL report with the full results as well as this how to guide to empower others looking to recreate a project like this. We've also made sure to deliver updates to stakeholders and our staff on how the projects progress throughout delivery.

# GOOD LUCK!

**From everyone here at Breast Cancer Now who worked on ActWELL, we wish your project every success.**

We know it can seem daunting when you're first starting out, so we hope this guide is helpful in getting your project started.

If you have any questions about anything in this guide, please email us **hello@breastcancer.org** and we'll be happy to help.



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