

THE GOOD PRACTICE GUIDE

TO VOLUNTEER MANAGEMENT

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Produced by:

Volunteer Centre Dorset
The Coach House, Acland Road
Dorchester Dorset DT1 1EF

Tel: 01305 269214
Email: info@volunteeringdorset.org.uk
Website: www.volunteeringdorset.org.uk

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Introduction

This booklet will help your organisation meet the challenge of volunteer management by showing how you can be more welcoming to potential volunteers.

When considering whether or not to volunteer there are number of questions that potential volunteers may ask themselves. Your organisations need to consider how to answer those questions.

This booklet can help you to consider why and how you might extend your reach to potential volunteers, and how you can overcome the barriers that are stopping them from volunteering. It also suggests how you can support volunteers once they are in place and ways to recognise and reward their contribution to your organisation.

What is volunteering?

Volunteering is the practice of people working on behalf of others without being motivated by financial or material gain. Volunteering may be done for other people or for organisations.

Many of the organisations and groups which play such an important part in maintaining and supporting the community rely heavily or wholly on volunteers. These include medical and humanitarian charities, education and childcare groups, elderly welfare organisations, arts, cultural and sports bodies, and environment and conservation organisations.

The variety of work done by these organisations and groups is enormous and so the range of skills which potential volunteers can bring is almost limitless.

What is a volunteer policy and why do you need one?

Quite simply, a volunteer policy is the foundation on which your organisation's involvement of volunteers should be based.

It forms the basis of your entire volunteer programme, giving cohesion and consistency to all the elements in your organisation that affects volunteer (recruitment, management expenses, health and safety and so on). It is key to involving a diversity of volunteers, because it helps to define the role of volunteers within the organisation, and how they can expect to be treated.

A volunteer policy demonstrates an organisations commitment both to its volunteer programme and to its individual volunteers. By having a policy in place, you are showing that care and thought has gone into the volunteer programme.

It helps to ensure fairness and consistency. Dealing with volunteers means dealing with a diverse range of people. Being able to refer to a written policy ensures that decisions are not made on an ad-hoc basis, and that all volunteers are treated equally and fairly.

A policy enables volunteers to know where they stand. They know how they can expect to be treated, and where they can turn to if they feel that things are going wrong.

It also helps ensure that paid staff, senior management and trustees fully understand why volunteers are involved, and what role they have within the organisation.

If your organisation is not yet working with volunteers then drawing up a volunteer policy is the ideal starting point in planning exactly how you will involve them in your activities.

Where to start

The first step in drawing up a volunteer policy is to think about exactly why you are involving volunteers. How do they fit into the day-to-day life and work of the organisation? If you are considering introducing volunteers for the first time, this could be very enlightening. You may discover that different staff members have different ideas about why you are bringing in volunteers.

Always consult as widely as possible when drawing up the policy. The more input you receive, the more relevant the policy is likely to be and the more people are likely to feel ownership of it.

Make sure all colleagues from all levels of the organisation are involved in the consultation. If you already have volunteers include them in the consultation, so that they feel the policy is something they have contributed to rather than something that has been imposed upon them.

Involving paid staff is equally important. If your organisation is planning to involve volunteers for the first time, employees may be concerned by the implications of this, so involve them in clarifying the role of the volunteers in the organisation.

Involvement from trustees, directors and senior management is also important, as it helps to ensure that the document is taken seriously within the organisation.

It is also a good idea to regularly review your policy, so you can reflect on the needs of the organisation and ensures it stays up to date and 'live'.

What should be in the policy?

There is no set format for volunteer policies. Each organisation has its own unique needs that should be reflected in its policy. An organisation that works with volunteers befriending people with learning difficulties is going to have a different policy to that of one carrying out conservation work.

Most organisations prefer to have a short volunteer policy that covers the key points and then refers to other separate sources of information (such as on health and safety). This is probably the best option, as a long document with too much detail can be overwhelming. Try viewing the document as a statement of intent, with the details covered in separate documents.

What paperwork do you need by law?

Insurance

Insurance is a very important issue, but one that many people forget about in relation to volunteers. Including a mention about how volunteers are insured is an easy way of making sure that everyone who comes into contact with your organisation can see that volunteers are covered.

Volunteers should be insured under both public and employers liability cover.

Health and safety

Organisations have a duty of care to avoid exposing volunteers to risks to their health and safety. Your organisation should have a health and safety policy in place already, with volunteers being made aware of the policy and practical safety issues as part of their induction. Include basic information on this issue in the volunteer policy document.

Grievance and disciplinary procedure

What will you do if a volunteer has a grievance with your organisation? Or if a volunteer has acted in an inappropriate manner? Including information about grievance and disciplinary procedures shows that you have a well planned strategy around involving volunteers and have thought ahead about how you would deal with any problems.

Make sure that you have clear procedures in place to deal with complaints by or about volunteers. It's a good idea to have separate procedures from those paid staff, both to ensure that they are as understandable and user friendly as possible, and to keep some distinctiveness between paid staff and volunteers.

Confidentiality

Volunteers should be bound by the same requirements for confidentiality as paid staff. Including information about this in your policy may well be helpful.

Safeguarding

In many areas of work employees are asked to complete Criminal Records Bureau applications. The CRB scheme was introduced to try to protect children and vulnerable adults from people with criminal intent. The application will check if the person has a criminal record. The practice should also be used when recruiting volunteers if they are likely to be in contact with children or vulnerable adults. It is not required for all types of employment or voluntary work.

The CRB is a national body but in each area there are organisations authorised to complete and submit applications. They must treat all personal information given to them as confidential. Once a CRB Disclosure is issued it remains the property of the applicant. You are allowed to ask to see the document when received but must treat the information as confidential. If the volunteer has had criminal conviction this does not bar them from volunteering; the decision whether to take them is at your discretion.

Safer recruitment does not start and finish with applying for a CRB disclosure. Remember that a disclosure will only provide you with information that is known to the police or other authorities. You should also seek references for a potential volunteer if appropriate. Relying on disclosures may also lead you to discriminate against people who would be suitable to work with your clients or volunteers even if they have previous convictions. Instead, groups and organisations need to look carefully at their working and volunteer involvement practices, to create a safer environment for all.

When working with vulnerable clients or volunteers, it is important to have a thorough recruitment procedure in place for everyone who applies to work with you. Face to face interviews and the taking up of references help give a feel for the prospective volunteer. An introductory period can be useful for the same reason. It also allows volunteers to gain a taste of the role, and an opportunity to leave without embarrassment if they do not enjoy it or are unsuited to it.

Thorough induction and adequate training are equally important for ensuring a good start to volunteering. Inductions sessions should help to make volunteers aware of their roles and understand what they are and aren't expected to do. Training should also address where volunteers' boundaries lie and what to do in any unexpected or difficult situations.

Equal opportunities and diversity

Volunteers should be treated in the same way as paid staff and the organisation's equal opportunities policy will apply to volunteers.

What paper work do you need for good practice?

Induction and training

Pre-arrival

This forms part of the recruitment process, and will consist of any information about the organisation and the role that you send the volunteer before they start with you. For example:

- Leaflet or similar about the organisation and what it does
- Volunteer role description
- Contact details and directions and/or map of how to get there

Organisational induction

Explaining what the organisations goals are, and how it goes about achieving them, and helping the volunteers understand where they fit within the organisation as a whole. You might include:

- Background/history of the organisation
- Mission statement
- Services provided and client groups
- Organisation chart
- Talks from paid staff and established volunteers about their roles in relation to volunteers and the organisation as a whole

Local induction

Ensuring that volunteers have a clear understanding of their role and how they will carry it out, as well as site-specific information and guidance on support and supervision mechanisms.

- Health and safety issues e.g. H&S policy, first aid procedures, accident reporting, policy on smoking, emergency exits and evacuation procedures
- Financial issues e.g. how to claim expenses (and what can be claimed)
- Volunteer agreement (what the volunteer can expect from the organisation, and vice versa)
- Arrangements for support and supervision, including if appropriate allocating a key member of staff, mentor or buddy
- Problem-solving procedures (discipline/grievance/complaints)
- Training programme/training needs identification process
- Relevant policies e.g. confidentiality, data protection, phone/internet use

Responsibility for induction sometimes lies within the HR function of a larger organisation, but in a smaller one it might all fall within the remit of the volunteer manager. It's a good idea to try to involve other members of staff or

volunteers, if you can, to help deliver specific parts of the process where they have special expertise or interest.

Group v. individual induction

The way you go through the induction process will depend on a number of factors, including the number of volunteers you have starting at the same time and the amount of space you have for group activities. Group induction can take less time overall, and allows for discussions to take place where appropriate. It can also enable volunteers to start to build relationships and provide a support system for each other. On the other hand, if you only have volunteers starting from time to time, it might put them off if they have to wait a while for enough others to join and form a group, so it could be as well to start people one at a time. Some things might be covered more effectively in a group context, such as confidentiality for example, and you may choose to wait and deal with that as part of a specific training session when you have more people to contribute to the discussion.

How much information do I include?

It's important to pace yourself. Don't overwhelm new volunteers with masses of detail on their first day. At the same time, you need to make sure that what they need to know is covered. Just remember that it doesn't all have to happen on the first day. It is a good idea, though, to keep a checklist so that you and the volunteers can keep track of what has been covered and what has not. Some organisations use online self-access packages for volunteers to work through at their own pace; an alternative version of this might be using the induction checklist to direct volunteers to various sources of information such as written policies, particular members of staff or online resources such as the organisations website. How you get the information across is up to you the important thing is that you make sure that it happens.

Training

The training your volunteers receive will depend entirely on the kind of work they will be doing, and on the numbers of volunteers you need to train at any one time. Initial training may be required to enable the volunteer to carry out their role effectively, and depending on the role may take hours, days or weeks to complete. Ongoing or refresher training may also be required to keep volunteers skills fresh, or to enable them to develop within the organisation and to take on further tasks.

When developing a training policy you will need to decide what will best meet your organisational requirements, bearing in mind the resources you have at your disposal.

.External trainers

A second method is to send volunteers on a training course with a trainer from outside the organisation. This can work either with groups or individual volunteers, as you can either send one or two people on a public open course, or book the trainer to do the course purely for your organisation. This can be an expensive way to buy training, but is worth it if your volunteers need to learn some more complex skills. You can also make it more economical, if you are buying the training in, by letting other local organisations participate, and sharing the cost.

To identify appropriate courses or training providers, you will need to do some research in your area. Your local Volunteer Centre may run courses, or have knowledge about other providers in the area. Local further education colleges or adult education centres may offer suitable training opportunities, and are often happy to negotiate specific provision if you have enough participants to make it worth their while. Sometimes they can access special funding streams that will help keep your costs low, if your volunteers come from particular groups such as unemployed people, young people or people for whom English is a second language. Private training providers are usually more expensive, but for specialist courses they can be worth it. Ask around, make use of local networks and forums to find out what other organisations are doing you might find that someone else is keen to run something similar, and running something jointly could be more cost-effective.

In-house training

Another method of delivering training is to develop an in-house programme. This works best if you can take on volunteers in groups and you need to train them in fairly complex tasks or ideas. Organisations whose volunteers give legal advice, for example, usually have to devise a fairly rigorous in-house training programme that volunteers need to complete before being able to work with members of the public. Similarly, where volunteers are working with vulnerable people there will be a need for some fairly in-depth training around areas such as setting boundaries, protection of children or vulnerable adults and confidentiality. These issues are best dealt with in-house so that the examples and case studies used in the training will be relevant and realistic, and so that volunteers' concerns will be addressed by people with in-depth knowledge of the organisation and its procedures. You may even consider sending your staff or experienced volunteers on 'training the trainer' courses, to enable the people delivering the training to keep up to date on current ideas on learning styles and training techniques.

However you decide to address your volunteers' training needs, the key is to make sure that it is designed around their roles. Current volunteers can be extremely useful in helping identify the elements in which they feel some formal training would be useful, and they will be able to feed in examples of situations that could form interesting case studies for discussion. Experienced

volunteers might even find it interesting to deliver, or at least co-deliver, elements of a training programme for new volunteers.

First things first

A volunteer policy is a framework for the volunteer programme. It summarises and signposts on to other policies and procedures. It can place your use of volunteers in context, by explaining their role within your organisation, and their distinctiveness from paid staff.

Start your policy with an explanation of what the organisation does, and why it involves volunteers in its work. Understandably volunteers like to know why they are being asked to donate their time and in what way their efforts are helping the aims of the organisation.

Role description

In order to give a prospective volunteer a good idea of what will be expected of them and clear guidelines once they are involved in the organisation, it is important the organisation has a clear understanding of the role or the volunteer. Preparing a role description helps concentrate the mind and ensure that you do have a viable role to offer the volunteer. Don't consider them to be fixed indefinitely, though, peoples' interests can change.

Recruitment

Though it is tempting to jump straight into a recruitment campaign, you should first ensure that you are well prepared. There is no point in recruiting volunteers if you do not have procedures for recruiting, don't know what they will do or how you will support them. You would not recruit paid staff in such a careless way so don't do so for volunteers.

Support

All volunteers need support. What kind of support you provide will depend on the nature of their work and their needs.

Key elements of support can include:

- Providing supervision - regular time to talk and plan
- Explaining the task or providing a job description for volunteers
- Having problem solving procedures
- Training - everyone must be given sufficient training to do their work well
- Recognition - identifying meaningful ways to recognise the contribution volunteers make

Selection

For some voluntary work selection can be very informal, and focus on an introductory chat about the work and the potential volunteer's interests. If the role has some degree of responsibility however (for example, working with people, money or potentially hazardous equipment), selection procedures should be more formal.

Key elements of selection can include:

- Application forms
- References
- Interviews
- Criminal record checks (especially if volunteers are working with vulnerable people)
- Health checks
- Equal opportunities

Recruitment

Recruiting volunteers can be seen as a similar process to advertising (you are trying to sell the benefits of volunteering with your organisation), and as with any advertising it is critical that you have a clear message.

The nature of this message will depend on your organisation and the work you want volunteers to do. However, in general it will include:

- What the voluntary work is,
- What the organisation as a whole does,
- How a new volunteer can make a difference,
- How to find out more.

Most methods of recruitment elaborate on these four elements of the basic message. They are about ensuring that recruits are informed, motivated and know how to get involved!

Motivation

It is useful to think about the possible motivations that people might have for becoming volunteers. This can help you to design volunteering opportunities and influence your recruitment message.

Motivations for volunteering might include:

- Commitment to the organisation / cause, so it is important to emphasise how their contribution will make a difference
- Meeting people - volunteering can be a very sociable activity!
- Gaining skills - when recruiting stress the skills and experience that volunteers can gain
- Utilising existing skills - some people want to put their skills to a good cause
- Keeping active - more and more older people are volunteering

Making it easy

Putting oneself forward as a volunteer can be quite daunting. People might not be sure what they are getting into and might be worried that, for example, they won't be up to it or that the commitment will end up being greater than they want.

It is important, therefore, to be flexible when taking on new recruits. It can be useful to offer tasters of volunteering so that the volunteer and organisation can get to know one another better. You will also need to spend some time finding out what people are looking for and what they have to offer.

Diversity in recruitment

Organisations sometimes find it difficult to get a diverse range of recruits, especially if they rely on word of mouth. Diversity can be important in allowing you to reflect the composition of your local community and/or client group, in meeting your organisation's mission and in pursuing an equal opportunities policy. People who have not been able to enter paid employment may welcome the opportunity to be engaged with the community through volunteering. Diverse volunteering programmes are often also the most exciting and dynamic.

The following suggestions serve as brief introductions to some of the issues associated with recruiting from groups which are often under-represented as volunteers. Publications providing more details are available from Volunteering England.

Disabled people

People's disabilities need not be their greatest concern. Any difficulties they have may be due to a variety of reasons, just as for anyone else.

One of the best ways to deal with potential difficulties is to take a proactive approach. Publicise the fact that you are keen to welcome disabled volunteers and show that you are accessible in the broadest sense; for example, by offering to produce information in large print. It is also important to choose effective places to advertise (for example, day centres and drop-in centres). But remember, disabled people visit the same places as everyone else!

Young people

Recent research has produced a 'wish list' of what young people want from volunteering. It can be summarised by the acronym FLEXIVOL:

Flexibility - the most important factor, in terms of time and commitment

Legitimacy - they need a favourable image of volunteering

Ease of access - many young people simply don't know how to volunteer or who to contact

Xperience - young people want relevant, useful experience and the chance to learn new skills

Incentives - stress the tangible outcomes of volunteering; what's in it for them

Variety - in terms of both the type of work and the level of commitment

Organisation - volunteering needs to be efficient but informal

Laughs - volunteering must be fun!

People from minority ethnic communities

A recent study of the experiences of volunteering within the black community suggests that partnerships between mainstream voluntary organisations and black voluntary organisations are a good way to help bring black volunteering into the mainstream.

You might also want to target your recruitment at community organisations such as religious or cultural centres, but you should seek advice from them about the best way to proceed.

Unemployed people

People who are unemployed often have a huge amount to offer and can gain a great deal from volunteering. They need not put their benefits in jeopardy, although they should tell the Benefits Agency about their volunteering.

Unemployed people can gain skills and experience from volunteering, and it can help them to remain in touch with the world of work. They are likely to want voluntary work that provides them with a chance to gain skills and experience that will be helpful in getting paid work

References

'Future Focus', Third Sector Foresight – a series of booklets
published by National Council for Voluntary Organisations 2009

'Volunteers and the Law', Mark Restall
published by Volunteering England 2005

'Get it Right from the Start'
published by The National Centre for Volunteering

'Volunteering Works: Volunteering and Social Policy'
published by Institute for Volunteering Research 2007

'Volunteering while receiving Benefits'
published by Job Centre Plus/Dept for Work and Pensions

Links

This document provides you with an outline of the key points to consider when preparing to engage volunteers in your organisation. It does not provide full details on every issue. Below are listed a number of useful links to sources of further information.

Volunteering England – a national body which sets standards in volunteer engagement and management, and accredits local volunteer centres.
www.volunteering.org.uk

Contracts and work agreements – for information on the difference between contracts of employment and volunteer agreements see...
www.employmentappeals.gov.uk/uploads

Volunteer expenses – for information on what expenses may be paid to volunteers see...

www.hmrc.gov.uk/manuals

Insurance for volunteers – reputable insurance brokers can advise you on what policies will provide cover for volunteers. You should be aware of the following pieces of legislation...

Employers' Liability (Compulsory Insurance) Act 1969

Employers' Liability (Compulsory Insurance Regulations) 1998

Criminal Records Bureau checks – if you think your volunteers need CRB checks information is available from the government websites...

www.crb.homeoffice.gov.uk

www.criminalrecordsbureau.co.uk

Volunteers from Overseas - if volunteers are coming from overseas you may need to check whether visas are required. Check the government website...

www.ukvisas.gov.uk

www.ind.homeoffice.gov.uk

Health & Safety e.g. Risk Assessment - for more advice on good practice in health and safety management check the government website...

www.hse.gov.uk/risk/practice.htm

Fund Raising – useful sources of information are...

www.charitycommission.gov.uk

www.institute-of-fundraising.org.uk

Sample Volunteer Agreement

This Volunteer Agreement describes the arrangement between [*name of organisation*] and you. We wish to assure you of our appreciation of your volunteering with us and will do the best we can to make your volunteer experience with us enjoyable and rewarding.

Part 1: the organisation

Your role as a volunteer is [*state nature and components of the volunteering role*] and starts on [*date*]. This volunteering role is designed to [*state how the volunteering role benefits the organisation*].

You can expect [*Name of organisation*]: to provide:

1. Induction and training

- To provide a thorough induction on the work of [*name of organisation*], its staff, your volunteering role and the induction and/or training you need to meet the responsibilities of this role. The Volunteer Handbook provides full details of the organisation.

2. Supervision, support and flexibility

- To explain the standards we expect for our services and to encourage and support you to achieve and maintain them;
- To provide a named person who will meet with you regularly to discuss your volunteering and any successes and problems;
- To do our best to help you develop your volunteering role with us.

3. Expenses

- To reimburse these expenses following the procedures in the Volunteer Handbook:
 - Travel to and from home to [*the place of volunteering*] and during your work: see the Volunteer Handbook for rules on methods of travel and car mileage allowances
 - Meal expenses to a maximum of £[]. (Expenses should be incurred through volunteering so to be eligible you should volunteer around meal times or for at least [] hours a day).
 - Specialist clothing or equipment where this is required and provided by you.
 - Actual cost of crèche, childminding fees or other dependant costs incurred by you in order to be able to volunteer.
- Please keep all your receipts to give to us when we reimburse your expenses.

4. Health and safety

- To provide adequate training and feedback in support of our health and safety policy, a copy of which is in the Volunteer Handbook.

5. Insurance

- To provide adequate insurance cover for volunteers whilst carrying out their volunteering roles which have been approved and authorised by us

6. Equal opportunities

- To ensure that all volunteers are dealt with in accordance with our equal opportunities policy, a copy of which is set out in the Volunteer Handbook.

7. Problems

- To try to resolve fairly any problems, complaints and difficulties you may have while you volunteer with us;
- In the event of an unresolved problem, to offer an opportunity to discuss the issues in accordance with the procedures set out in the Volunteer Handbook.

Part 2: the volunteer

We expect you:

- To help [*name of organisation*] fulfil its [*describe role/function/services which the volunteer will be helping with*];
- To perform your volunteering role to the best of your ability;
- To follow the organisation's procedures and standards, including health and safety and equal opportunities, in relation to its staff, volunteers and clients;
- To maintain the confidential information of the organisation and of its clients;
- To meet the time commitments and standards which have been mutually agreed to and to give reasonable notice so other arrangements can be made when this is not possible;
- To provide referees as agreed who may be contacted, and to agree to a Criminal Records Bureau check being carried out where necessary.

This agreement is binding in honour only, is not intended to be a legally binding contract between us and may be cancelled at any time at the discretion of either party. Neither of us intend any employment relationship to be created either now or at any time in the future.