



# Volunteer Centre

Sefton

*Promoting Supporting and Developing Volunteering in Sefton*



## Managing & Supporting Volunteers Good Practice Guidelines

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Volunteer Centre Sefton is managed by:

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### a) INTRODUCTION

These guidelines are based on good practice information from a variety of sources and are intended to assist organisations with the effective management of volunteers. The management of volunteers is not dissimilar to the management of staff, albeit more informal. The first stage is to recruit volunteers and this process is perhaps as important as the process for recruiting employees, as the appointment of a poor volunteer can often be as damaging as the appointment of a poor employee.

This guide is intended to assist you with this process by providing practical advice and assistance.

**Please note: Volunteer Centre Sefton has endeavoured to check the accuracy of all the information in this guide and to ensure that the advice is up-to-date. However, in the light of legislative or other changes we cannot guarantee accuracy or completeness.**

## **b) VOLUNTEER CENTRE SEFTON**

Volunteer Centre Sefton is part of a national network of agencies concerned with volunteers and volunteering.

Volunteer Centres:

- Promote volunteering
- Promote good practice in working with volunteers
- Advocate the rights and responsibilities of volunteers
- Develop, where possible, volunteer action in response to local needs
- Liaise and work in partnership with local voluntary and statutory agencies
- Offer, where possible, voluntary opportunities to all sections of the community
- Provide information and advice on a wide range of volunteering opportunities

Volunteer Centres believe that:

- Everyone has the right to volunteer without experiencing discrimination, and that VCs have a responsibility to advise volunteers appropriately and sensitively.
- Volunteering is a matter of free choice and there can be no compulsion to become a volunteer.
- Volunteering is a valuable and integral part of society and as such volunteers deserve support and recognition.
- Volunteers assist in effecting social change and improving quality of life and play an essential role in alleviating the effects of poverty, ignorance, inequality and injustice.

Volunteers are important because they contribute time and energy, ideas and ideals to many parts of life. Volunteers help communities to respond to their problems. Volunteers increase the ability of groups in our communities to benefit many people. Volunteers expand the delivery of services in ways that benefit the whole community.

There are many reasons why people choose to help local groups and organisations. Volunteering has a lot to offer people from a wide variety of backgrounds and walks of life. Being a volunteer enables you to:

- face new challenges, take on some responsibilities and make decisions that you would not normally get the opportunity to
- develop creativity and expertise in areas of personal interest
- meet new people in interesting and varied settings as part of a team doing meaningful work
- explore new careers and upgrade skills such as team work, teaching, communicating and organising.
- make a difference by contributing to an important service, or by influencing public policy
- grow personally, by learning new skills, gaining new experiences, and achieving a sense of accomplishment.

There are over 300 local groups registered with Volunteer Centre Sefton, allowing potential volunteers the fullest range of opportunities possible.

Volunteer Centre Sefton supports the work of these groups by providing advice, information and guidance to volunteer co-ordinators and others who work with volunteers.

### **c) VOLUNTEERS' CHARTER**

Every individual has the right to volunteer and volunteers have rights, which should be met in the course of their volunteering. Volunteering is a legitimate activity in its own right and not a substitute for paid work.

Volunteers should have a clear idea of the tasks they are being asked to perform and of the responsibility, which goes with those tasks.

Volunteers should be told who is responsible for their support and supervision. They should have regular access to this person, and the person should ensure that each volunteer is given adequate support.

To ensure the fair representation of the needs and interests of volunteers, volunteers should have access to, and play a part in, the decision making process of the organisation where they are volunteering.

Volunteers should be protected against exploitation of their interests, both as volunteers and as individuals. Volunteers should not be put under moral pressure to undertake work, which is against their principles.

Volunteers should be adequately protected against any risks involved in volunteering. (The organisation should have adequate public liability and motor insurance. Some organisations may have additional personal accident cover).

Volunteers should not suffer financially by volunteering. Volunteers should receive all reasonable out-of-pocket expenses (including travel, meals and child/dependent care costs) and be provided with the appropriate equipment/tools/materials to enable them to carry out their tasks.

Volunteers should not undertake work which agency staffs are being paid to do. Also volunteers should not be used to replace previously paid workers.

The relationship between paid workers and volunteers should be complementary and mutually beneficial. Paid workers should be fully aware of the areas of work undertaken by volunteers and of the distinction between paid work and volunteering.

Volunteers should have the right to join a Trade Union relevant to their area of voluntary activity.

Volunteering should be a fulfilling experience. Through adequate support and supervision, volunteers should be able to develop, expand and change their work.

### **d) THE RIGHT TO VOLUNTEER**

Everyone has the right to volunteer. Volunteer Centres actively support this principle and work to ensure that everybody wanting to volunteer has access to volunteering opportunities.

This principle is based upon the recognition that our society is made up of a wide variety of people and that it is appropriate and beneficial for organisations to reflect that diversity. In general, the more representative an organisation is of its community the better able it is to serve that community.

Clearly, not everybody is suited to every type of volunteering opportunity, so there needs to be some sort of selection procedure. However, an organisation should only take relevant (such as skills, experience and aptitude) criteria into account when making a decision about a person's suitability for a particular opportunity.

The Bureau wishes to encourage people from all sections of the local community to consider voluntary work and to promote the recruitment of volunteers by organisations from across the whole of the community, which they serve. Individuals should not be excluded from any volunteering opportunity

without due reason.

Therefore, a potential volunteer should not be discriminated against simply on grounds of race, sex, age, ethnic or national background, religion, sexual orientation, disability, or any other form of discrimination which hinders the promotion of equal opportunities.

It follows, for instance, that a criminal record should not prevent a person from volunteering, although it may mean that it would be inappropriate for the person to do certain types of volunteering. For example, a criminal conviction for fraud may mean it is inappropriate for a volunteer to deal with a project's finances.

## **e) VOLUNTEER POLICY**

### **Why Involve Volunteers?**

Even if you already work with volunteers, or are a completely voluntary organisation, it is useful to the understanding of volunteering to ask this question. If you or your organisation are new to the idea of volunteer support it is the first question you should ask when planning a volunteer programme.

There are many reasons for using volunteers in an agency:

- For some services (such as befriending) it is imperative that it is voluntary
- Some agencies choose to use volunteers to add to their services.
- For smaller organisations, volunteers can bring a variety of skills, experience and enthusiasm that may otherwise be unavailable to them.
- Volunteers can bring with them a different perspective to an agency - one that reflects the views of the community or client group.
- Volunteers can add credibility to an organisation - giving their time free of charge suggests that the work must be of value.

Agencies should also recognise that volunteering is a two way process. It does not simply imply that the volunteer gives and the agency takes. Volunteers gain from their involvement - the chance to meet people, develop skills and gain experience.

### **Volunteer Policy**

To ensure that you work with volunteers in a consistent manner it is useful to develop a Volunteers' Policy. The policy sets out an agency's approach and commitment to volunteers. More effective work will go on within your agency if everyone involved knows why volunteers are there, what they do and what they can expect from the agency.

Ideally, a Volunteer Policy should be a short document with supporting material (like a volunteers' handbook) for further reference.

Developing a policy should be a process of research, consultation, distribution and evaluation;

- Consider the policies of other organisations.
- As many people as possible should be allowed to contribute to the document, this will include trustees, senior management, paid staff and existing volunteers.
- Think about who the policy is aimed at and write a draft, agree a final version and distribute it (make sure that the people who you want to see it get a copy).
- Establish when the policy will be reviewed to evaluate it.

A Sample Volunteer Policy is included in the 'Sample Documents' section of this document (Page 30).

## **f) STAFF-VOLUNTEER RELATIONS**

The success of a volunteer programme depends as much on staff motivation as it does on volunteer motivation.

In reality, volunteers may work more closely with staff on a daily basis than with the volunteer co-ordinator. This demands well-trained staff. A key task of the volunteer co-ordinator is to ensure that increased staff job satisfaction is linked to the work of volunteers. To make a volunteer programme successful, volunteers must be seen by staff as strengthening their role rather than weakening it.

It is largely the role of the volunteer co-ordinator to help staff to better understand volunteer issues. To become effective, each staff member who works with volunteers must understand and be able to implement volunteer management and fully understand the diversity of the volunteer work force. This will enable staff to create imaginative and meaningful roles for volunteers and carry out supervision. They must, in essence, become volunteer managers.

### **Dealing Directly With Staff Concerns**

Ivan H Scheier offers advice on dealing with staff concerns in "Building Staff/Volunteer Relations"

"Staff may hold genuine reservations about the use of volunteers within an agency. These fears need to be turned into a sense of confidence that volunteers will be a useful addition to the organisation."

### **Staff tend to express four main fears about volunteers.**

*Volunteers will take up too much time and will become an additional burden rather than a help.*

"It's easier to do it myself" is a death sentence for any volunteer programme. It is a reality that volunteers take up time, especially in the early stages of their volunteering. Staff may contribute 2 or 3 hours for every volunteer hour returned to begin with, but you should normally expect to get back **at least** 10-15 hours of work from volunteers for every hour you invest in them. Staffs are more likely to be satisfied with the volunteers they work with if they can see that there is a greater return on their efforts.

Careful recruitment, selection, training, placement and support of volunteers should help to reduce any time wasted. Time spent pro-actively working with volunteers, especially at the start, will pay dividends in the long term.

If an individual is taking too much of your time it may be appropriate to reconsider their volunteer role, and potentially change their roles.

*One can never get rid of volunteers, even when they can't or won't do their jobs.*

From the very beginning, in all volunteer programme policy statements, volunteer supervision guidelines, and orientation materials, make it crystal clear to volunteers and staff that a volunteer's services can be terminated with reason. The philosophy behind this should be publicly stated and be based on quality of service to clients or service users.

This is not, however, to allow any bad practice. Volunteers must always be given sufficient and appropriate support and supervision. Thought should be given to disciplinary and dismissal procedures. Regular and relevant feedback to the volunteer should be an integral part of supervision by staff. Failure to provide feedback is unfair to the volunteer because it can deny them any useful feedback, but also keeps them uninformed about any deficiencies in their work and ways in which they might improve. Do not be afraid to criticise someone just because they are "nice" enough to volunteer, most volunteers are much more interested in being useful and efficient than "nice" and most will accommodate any useful feedback.

When faced with the reality that a volunteer is unsuitable for a role, even after the opportunity to improve, there are several options still open:

- It may be possible to offer the volunteer a different role within your organisation, is better suited to their stronger points. If the volunteer declines this offer it is more likely the volunteer is rejecting the agency, rather than the agency rejecting the volunteer.
- If another role within your agency is not feasible you could refer the volunteer to the Volunteer Bureau.

When a volunteer does leave your agency, you should offer them the opportunity for an exit interview, to allow feedback from both sides in an amicable manner.

*Volunteers pose a threat to confidentiality.*

Confidentiality is a vital concern for all agency personnel, be they trustees, staff or volunteers. An excellent principle to use is that staff and volunteers only have access to information that is absolutely necessary to their role.

The key to assuaging staff fears is to ensure that all volunteers will be thoroughly inducted, trained and supervised with regard to confidentiality.

*Volunteers will take jobs away from employees, and/or be used as justification for a reduced budget.*

One of the fundamental principles of volunteering is that it should not be a substitution for previously paid work.

Volunteers are not the deliberate natural enemies of paid staff. Volunteers are usually found to be on the side of the agency and its clients or service users, rather than the individuals who have a notion that full time staff can be replaced by volunteers.

### **Volunteer Co-ordinator**

It is sensible within any agency, especially large ones, to have at least one person to act as a volunteer co-ordinator; to be the main person to recruit, train, place and support volunteers. It is essential that this person firmly believes in the positive attributes that volunteers bring with them to an agency and is suitably trained or experienced to work with volunteers.

The co-ordinator works as a link between staff and volunteers. However formal or informal, there needs to be a process in place for creating roles which are meaningful to the members of staff and to potential volunteers.

Volunteers will fit in to an agency better if existing staff help to design their roles. It is better to use staff who are initially enthusiastic around issues of volunteering - this could be because of their previous experience working as a volunteer or supervising volunteers.

Ultimately, volunteer retention results from having roles, which are interesting and rewarding enough that volunteers really enjoy doing them. The role must be flexible enough for the volunteer to bring skills or talents to the role as long as it fits in with an overall view of improving services or products.

### **Key Points**

Try to spend as much time working with staff as you do directly working with volunteers. In the initial development of a new volunteer programme you should spend much more time with staff.

Deal with problems as soon as they arise. Do not let any fears fester, and do not force reticent staff to come on board.

Your ultimate objective is to get staff to do the core work of day-to-day volunteer management. If you spend time enabling staff to manage volunteers, then as a co-ordinator, you can spend more time developing creative roles, recruiting more volunteers and troubleshooting. If you attempt to supervise all volunteers, then you will become overwhelmed by the smaller things and lose sight of the wider picture.

## **g) IDENTIFYING VOLUNTEER OPPORTUNITIES**

Once your organisation has developed its volunteering policy, the next step is to decide what you want volunteers to do within your organisation.

The first step to identifying volunteering opportunities is to ask yourselves “**why your organisation wants to involve volunteers**”.

The answer to this question should:

- Determine the roles and responsibilities that your organisation will create for volunteers
- Enable you to explain to volunteers how and why their involvement contributes to the overall aims and objectives of the organisations
- Enable your organisation to develop a plan for evaluating how effective the deployment of volunteers has been.

Potential reasons for involving volunteers include:

- To provide an outreach service
- To supplement staff resources and experience, therefore adding value to the work of the organisation
- To allow channels for further local input into your organisation
- To build new links and partnerships with other organisations
- To better increase fundraising activities

These are only a few examples. Every organisation’s reasons for involving volunteers are unique.

Once you have established why your organisation wants to involve volunteers, the next step is the recruitment process.

## **h) THE RECRUITMENT PROCESS**

The recruitment process for volunteers is very similar to the recruitment of employees, albeit more informal. However, this does not mean that good practice should not be followed, as the poor appointment of a volunteer can be as damaging as the poor appointment of an employee.

The recruitment process for volunteers involves the following stages:

- The creation of a Volunteering Role
- Developing a task description for that role
- Developing a person specification for that role
- Advertising the opportunity
- Recruitment & selection of the right volunteer for that role
- Screening the selected volunteer
- Starting the volunteer with your organisation

## **CREATING THE VOLUNTEERING OPPORTUNITY**

Volunteering opportunities that are boring or unsatisfactory lead to recruitment difficulties and a high turnover of volunteers. It is worth creating volunteering opportunities that are interesting, challenging and rewarding, as they attract volunteers who will be enthusiastic and committed.

## WRITING TASK/ROLE DESCRIPTIONS

The role should be clearly defined and have within it specific responsibilities. Giving specific responsibilities to volunteers is a critical element to ensure that volunteering is worthwhile and serves a specific purpose. It does not mean that you are abdicating responsibility for what the volunteer does. Giving volunteers some authority over what they do creates a personal sense of ownership.

Volunteer Task/Role Descriptions are useful for both the organisation and the volunteer. They give volunteers a clear picture of the types of things they can expect to be involved in within the organisation, thus preventing confusion or misunderstandings.

For the organisation, composing task/role descriptions helps to establish exactly how volunteers fit into your organisation. Task/Role descriptions and person specifications make the process of interviewing and selecting volunteers easier as they can be used to find out whether potential volunteers fit the volunteering vacancy or not.

### What Task Descriptions Should Include

A good task/role description should contain all or some of the following elements

**TITLE:** What the volunteering opportunity will be called, or the title of the vacancy being offered. For example, a volunteer who is needed to provide administrative support could have the title 'Volunteer Administrative Assistant'

**PURPOSE:** What result this particular volunteering role will accomplish. For example, the purpose of the above role could be 'to provide administrative support to the Administrator and the rest of the staff team'

**RESPONSIBLE TO:** This shows exactly who is responsible for the management of the volunteer

**ACTIVITIES:** This is a list of the types of tasks which the volunteer will be responsible for carrying out, such as word-processing, routine correspondence, dealing with incoming and outgoing post etc.

### Other useful additions could be

**TIME:** The days needed, minimum commitment etc. (although this should ideally be expressed to the volunteer in terms of the organisation hoping that he or she will be able to attend a given number of hours per week rather than as an absolute obligation.)

**LOCATION:** Where the volunteering will take place (this is particularly useful if the volunteering will not be from your main place of operation)

**BENEFITS:** This could include things such as training, re-imburement of expenses etc. (It is unwise to give volunteers a flat rate of expenses, only actual out of pocket expenses should be paid)

In some circumstances a volunteer may have the right personal qualities and attitude, but lack some of the skills needed. Offering them appropriate training may solve your recruitment problems.

A task description is for guidance as to the expectations of the post and should make it clear that the volunteer is not under any obligation.

## CREATING A PERSON SPECIFICATION

A person specification is an essential tool for selecting volunteers. It is the part of the task/role description which sets out the type of skills, attitude and knowledge your organisation requires from the volunteer. It is useful to break these three headings down into what are considered essential criteria for selection and what are simply desirable. The person specification is the main tool for selecting volunteers and should be used to measure whether the volunteer is suitable for the role or not.

In order to ensure that your organisation is complying with anti discriminatory legislation, person specifications must not require a volunteer to be of a particular:

**SEX** – The Sex Discrimination Act makes it unlawful to discriminate against a person on the grounds of gender or sexuality.

Section 7 of this act provides an exemption for a circumstance where being a particular gender is necessary. These circumstances are as follows:

Where the activity involves providing persons of a particular gender personal services. Circumstances where the volunteer is involved in providing physical care for a person which involves the need for decency or privacy. For example a female volunteer carer is required to do voluntary activity in a residential home for the elderly. The volunteer's role involves the direct physical care and supervision of bathing and helping dress. In these circumstances gender restrictions can be applied to the person specification.

**ETHNIC ORIGIN** – The Race Relations Act 1976 makes it unlawful to discriminate against a person on the grounds of race, colour, ethnic or national origin.

The Act provides an exemption for activities where being of a particular race is a genuine requirement for the volunteering activity where the activity involves for example:

An Asian advice worker required for a Community Centre. The Centre is situated in a multi-racial area and a high proportion of the clients are from the Asian Community. The advice worker will provide advice on housing, welfare benefits, immigration and racial harassment. The Race Relations Act Section 5(2) (d) applies. In these circumstances racial restrictions can be applied to the person specification.

It is also unlawful to discriminate against a person on the grounds of religious belief, sexual orientation and disability. The United Kingdom also recently committed itself to legislate against age discrimination in employment, by signing up to a recent European Commission Directive, which comes into effect in October 2006. As volunteers, under certain circumstances, can claim their rights as 'employees', it is important not to discriminate against a person on the grounds of age.

## RECRUITMENT AND SELECTION OF VOLUNTEERS

Recruitment of volunteers can be difficult.

Every day we are at the receiving end of recruitment messages encouraging us to volunteer - in the paper, on the bus, the radio and notice boards. Within Sefton there are hundreds of organisations who involve volunteers and are on the lookout for more. So when it comes to finding volunteers for your own organisation, what can you do to get your own recruitment message noticed? How can you catch people's interest, harness their concern and motivate them to volunteer?

Despite the competition to recruit volunteers, it's not difficult to make your message stand out. Many organisations' messages are vague or bland, largely in a misguided attempt to avoid putting people off. Ironically, they do just that because they fail to provide people with the clear and specific information they require to make an informed choice about volunteering.

If your message is explicit about the sort of people you are looking for, unsuitable prospective volunteers can de-select themselves out of your recruitment process before you've spent valuable time on processing applications, interviewing or even training.

In recruiting new volunteers, the goal is to find people who are attracted by the challenge of the role and achieving the results outlined in the volunteer opportunity. You may want to picture the process of matching two sets of needs - those of the volunteer and those of the organisation.

It is always essential to bear in mind that the recruitment process begins, and is completely reliant upon, the creation of a good volunteering opportunity. If you asked a stranger "What would it take to get you to volunteer for our organisation?" the answers are unlikely to include "a colourful recruitment drive" but will tend to revolve around the opportunity you are offering. Most people would say something like "It would have to be an interesting job." or "It would have to be something worthwhile."

Remember people volunteer for various reasons including:

- Social contact
- Wanting to feel needed
- Wanting to give something back
- To learn new skills
- To gain experience in a field they are hoping to work in
- To try something different or do something enjoyable
- To use their skills in retirement
- To get back into the world of work after being ill, at home with children etc.

### **Recruitment is the third step**

Susan Ellis, in "The Volunteer Recruitment (And Membership Development) Book", states that "recruitment is the third step" in a process that begins with good planning and ends in genuine teamwork of everyone working toward a common goal.

### **Step One: Know why your agency wants volunteers**

The development of a Volunteering Policy will lay out your agency's commitment and approach to volunteers and will include why you use volunteers.

### **Step Two: Valuable Roles for Volunteers**

Once you have shown why you want to use volunteers you need to show what you want them to accomplish. Having volunteers is not an end unto itself. Volunteers are a resource that allows your agency to fulfil its mission.

### **Step Three: Develop and Implement a Recruitment Plan**

For Steve McCurley and Rick Lynch in *Essential Volunteer Management*, there are 3 identifiable methods of recruitment:

1. Warm Body Recruitment
2. Targeted Recruitment
3. Concentric Circle Recruitment

## **WARM BODY RECRUITMENT**

Warm body recruitment consists of spreading the message about potential volunteering opportunities to as broad an audience as possible. This method works on the theory that somewhere amongst the audience will be enough people who find the opportunities interesting.

The primary methods of warm body recruitment are:

### **Distribution of organisation literature advertising the need for volunteers**

There are a large number of possible sites for the distribution of printed information. The prime need on each occasion is that it is somewhere where people are likely to pick up leaflets and brochures or read posters.

Possible sites include:

- Job centres and employment training centres
- Libraries
- Secondary Schools
- Student Community Action groups at colleges and universities
- Community Centres
- Youth clubs
- Clinics, doctors surgeries and hospital waiting rooms
- Post offices, garages, supermarkets and local shops
- Leisure centres
- Advice and information centres
- Volunteer Bureaux
- Religious and faith based venues
- Delivering leaflets in the neighbourhood door-to-door where you are based

For one off, short-term projects you could also consider

- Lions, Rotary Clubs, Soroptimists etc.
- Uniformed organisations

### **Use of public service announcements in newspapers, TV and radio**

Despite the efforts to involve volunteers through the mass media, it is difficult to rely on this method to solve all of your recruitment problems. Estimates suggest that only 6% of volunteers found out about their volunteering opportunity via mass media.

It may be difficult to describe a complicated job in the brief framework of a newspaper ad or radio broadcast. It is advisable therefore to concentrate on “selling” the needs of your clients rather than describing the whole opportunity. If possible you should also mention any training or support your organisation will offer their volunteers.

It is important to remember that these short adverts are only useful in attracting potential volunteers, of pricking their conscience or grabbing their attention - these adverts will not in themselves ensure that this interest will lead to a successful recruitment. You will need to be able to go on to motivate the potential volunteer to work for your organisation.

### **Contacting community organisations which may be able to provide potential volunteers**

One of the best methods of warm body recruitment is to arrange presentations to local clubs and community organisations. These presentations serve two purposes: informing the group of your services and attempting to recruit new volunteers.

The groups you give presentations to should be chosen for the improved likelihood of success in recruiting new volunteers. There are, in general, two types of group who are most useful:

- Groups whose membership regularly participate in helping in the community (Rotarians, Lions club, Church groups etc.) Appealing to these groups is particularly useful for short-term projects.
- Groups whose memberships are likely to have a common interest with your cause - it is these groups who are likely to offer more long-term support.

There are several common sense key points to consider when making presentations to groups:

- Do it at an appropriate time when your appeal will be most effective,
- Try and gain support from someone within the organisation before you attend one of their meetings,
- Try and make your presentation look professional and effective.
- Remember at some point in your presentation to directly ask the audience to volunteer - do not assume they will automatically volunteer without being asked to do so.

One extra point to remember is to be prepared for people to offer their services at the meeting. Take along leaflets and brochures, volunteer application packs, sign up sheets etc. If someone shows an interest, do not leave without their name and phone number - **Remember, you must follow up their enquiry as soon as possible.**

## TARGETED RECRUITMENT

A targeted campaign involves answering several questions.

### 1. What is the job that needs to be done?

It is the voluntary task, and the opportunity to do something that meets the volunteers motivational needs that is the key to attracting most volunteers. Your organisation may be attractive to potential volunteers, but different jobs within your organisation will also appeal to different people with different motivations to volunteer.

### 2. Who would want to do the task that needs to be done?

One area where recruitment messages are often vague is when they describe who would make a suitable volunteer. Phrases such as 'we need caring people' or 'all you need is enthusiasm' are often misleading and ultimately counter-productive. They don't tell prospective volunteers anything specific and, anyway, most of us consider ourselves to be caring.

Most groups do not ask this question, but it makes the recruitment task far easier - you can recruit the right person for the job because you can target your appeal to that particular group. Targeted recruitment tends to work best when you are looking for a particular skill, such as experience in accounting, driving etc.

The type of volunteers who are suitable for your organisation are more likely to be drawn to you if you expressly define your requirements. So if you are looking for particular skills, or have selection criteria which have been set up to protect your clients, say so.

You may find that you want people from a particular age group, or people with particular skills and experiences. The advantage now is that you can send slightly different messages to each group so that you have an improved chance of appealing to that group's own motivational needs.

### 3. Where will you find them?

If you are looking for a certain type of profession, are there certain societies or clubs where such people may be found?

If you are looking for members of a certain age group are there places where they may gather together? Where do they shop? Where do they go in their spare time?

### 4. How should you go about communicating with them?

This is partially answered in 3. If you have discovered where your target can be reached, developing an appropriate message is easy.

Generally, the most effective methods of recruiting a volunteer are those in which two-way communication is possible.

### 5. What are the motivational needs of these people ?

It is important that recruitment messages speak directly to the motivational needs of the potential volunteer.

Possible motives for volunteering:

- To get out of the house
- To get to know important people within the community
- To put something back into the community
- To improve future employability
- To gain new skills
- As part of a rehabilitation programme
- To make new friends
- To build self esteem
- To investigate a possible career change
- To gain knowledge about the problems of the community

- To respond to a need
- To maintain skills no longer used
- To impress present employer
- To escape boredom
- To feel part of a group
- To use skills in a different context
- To express religious or philosophical belief
- An inability to say “No”

It is important to remember that, as wide as these motivations may be, they are all perfectly valid reasons to volunteer. None should be dismissed as potential angles to approach a recruitment message.

## 6. What will you say to them?

An effective recruiting message has 5 parts:

- **A statement of need**

Start your message by describing the purpose of your organisation or group. This tells the potential volunteer why the job is important. This is often the forgotten part of a recruitment message - most focus on the activities involved and leave it up to the volunteer to figure out what the need for those activities is. In some cases, the name of your organisation might communicate what you are all about. If not, add a brief explanation e.g. St. Swithins Day Centre provides a range of services to homeless and vulnerable people’.

By including a statement of need in the recruitment message, you show how people can help solve a problem rather than just undertake an activity. Statements of need naturally lead the potential volunteer to think “That is terrible, somebody should do something about that.” Once a person is thinking this way, it is the next simple step to recognise that they could be that person. Recruiting them becomes easier.

- **A description of the opportunity**

An outline task description should show the volunteer how they can help to solve the problem. The picture you create should stress the positive elements of the job in order to encourage the person to volunteer, but you should also be honest. At all costs, avoid vague generalisations such as ‘Volunteers make a real difference to our service users’: which are not at all informative. Your message should always talk about what “you” will be doing, and not what “a volunteer” will do.

Briefly describe the type or nature of the voluntary work in broad terms. Also include information about where and when the work is done, and how much time it requires: ‘Huddersfield Day Centre, Age Concern, need help in our centre for 1 or 2 days per week to serve lunch and chat with elderly members. Hours 10 - 2, Monday to Friday.’

- **Cancel any possible fears**

For some situations, it will be necessary to address potential fears that a volunteer might have about a job, fears that discourage people from volunteering. You should list the ways in which your organisation attempts to overcome these fears. Explain how you will support volunteers in doing the work, for example providing extensive training, a sound induction period, by paying travel expenses, back-up services etc. These measures overcome the fear of the unknown by addressing fears openly and in a responsible fashion. **Increase your number of applicants by mentioning the measures you’ve put in place to make volunteering easier.**

- **Address any potential volunteer needs**

In addition, the recruitment message should also talk about how the volunteer can benefit from the job. This is a more neglected aspect of recruitment messages, but is one that can really tune in to the motivational needs of volunteers and energise them to respond to your message. The message needs to show the potential volunteer that their needs will be met by the organisation and the volunteering opportunity.

The volunteer co-ordinator should list some of the benefits they believe will appeal to their target group.

Don't simply say that the voluntary work is rewarding; describe why it is rewarding, for example learning new skills, meeting new people, being part of a team, learning about issues or lifestyles etc. **If you're not sure what volunteers get out of working with you, ask your existing ones what they find most rewarding about it.**

The statement of benefits is often left out of the recruitment message because of the naive assumption of more altruistic motives. However, omitting them reduces the number of people you appeal to and therefore the possible numbers of those successfully recruited.

Stating the need, the task, the negating of fears and stressing the benefits are all essential if you are to have the best chance of recruiting as many effective people as possible.

The final part of a recruitment message should be contact information. It is surprising that some recruitment messages fail to tell the public who to contact or where to go for more information. This person should be ready to deal with applications from potential volunteers.

Regardless of the types of recruitment methods you use, these five factors should form the backbone of your message.

## **CONCENTRIC CIRCLE RECRUITMENT**

Concentric circle recruitment is the lazy way to ensure you have a flow of replacement volunteers applying to work at your organisation.

This method uses the theory that those people who are already connected to you and your organisation are best targets for recruitment.

You may wish to look among former clients to start volunteering or your current volunteers for "promotion" or their close friends or families. This will lead to an increased likelihood of success because the targets are already favourable to your organisation.

It should also be noted that, although this is an easy and effective recruitment method, it also leads to the recruitment of the same type of people. Do not rely on current volunteers or clients to bring in more diversity. People tend to know only a few people who look and think like themselves.

We would always encourage you to use the first two methods of recruitment - they are most likely to broaden participation within your organisation.

## **i) VOLUNTEER SELECTION**

Selecting volunteers is about finding a good match between the prospective volunteer and the opportunity on offer. It is an attempt to find a successful blend where the person has the right skills, experience and enthusiasm and the opportunity satisfies the needs and interests of the volunteer.

Every year thousands of people volunteer. Almost without exception these volunteers are keen to give up their time and efforts for the benefit of others without expecting personal gain. Lack of care in accepting volunteers can, unfortunately, lead to dissatisfaction and disappointment for both the individual and agency when a person is placed in an inappropriate opportunity, causing the volunteer to stop working with you or any other agency.

In a very small number of cases, lack of care in selection could lead to serious danger for the service user. Good selection procedures recognise that the vast majority of volunteers deserve our best efforts to find suitable opportunities for them, whilst at the same time setting up careful acceptance procedures so that a very small minority will not be placed in positions where vulnerable people may be at risk.

## Interviewing Volunteers

There are a number of reasons why organisations find it beneficial to interview potential volunteers:

- It provides you with a chance to explain more about the work of your organisation and how volunteers fit into its activities.
- It gives you the opportunity to assess the suitability of the volunteer and enables you to match their skills most effectively.
- It also gives the volunteers a chance to decide whether your organisation is the right one for them, thus saving everyone's time.

The interview should be based on person specification (ideally the best volunteer for the role will be someone that meets all the essential criteria). It is fine to test for personal qualities related to the task, such as communication skills etc.

Conducting a good interview requires special skills. If you haven't had experience in interviewing others, it makes sense to get some training, or at least get someone with experience to help you plan and conduct the interview. A badly conducted interview will put volunteers off. Here are some basic pointers to assist you in preventing this from happening:

- Make sure that all staff know that a potential volunteer is coming and ensure that someone is available to welcome them.
- Have any background information to hand as the volunteer may ask you questions.
- Draw up a list of questions in advance based on the volunteer task description. Remember the interview is your main selection tool, the time spent planning can save time later sorting out problems with volunteers.
- Use open questions. As an interviewer you should be doing more listening than talking (except when giving information about your organisation or the volunteering opportunity, insurance, expenses, training etc.)
- If you are interviewing several volunteers, you may need to take notes. It is less intimidating if you explain to the volunteer why you are making notes, just in case they think they have said something wrong.
- If you are not going to make a decision during the interview, then tell the volunteer when you will let them know.

Remember the aim of the interview is to match the right person with the task. It is useful to try and find out what motivates each volunteer and then match this to a suitable opportunity. A good interviewer will give the volunteer an opportunity to 'self-select', i.e. to reject the task if they feel it isn't right for them.

## Saying No

It may be difficult to say no to potential volunteers, but accepting someone who is not suited to the task will be more difficult in the long run than saying no in the beginning. Following fair recruitment procedures makes it easier to reject unsuitable volunteers. If you use a task description and person specification you will have evidence to back up your decision. Explaining that someone does not fit the named criteria helps them to see why the placement is not suitable. It will also reassure the volunteer that you are not making subjective judgements about them. Be clear why you are rejecting someone.

Being honest gives potential volunteers the chance to correct anything you may have misunderstood and helps them to think about more suitable alternatives.

If the volunteer is not suitable for the tasks, are there other options within your organisation that may be suitable? If not, then refer them to (or back to) the Volunteer Agency to look at alternative volunteering opportunities or training opportunities.

## **SCREENING OF VOLUNTEERS**

### **Disclosing Criminal Convictions**

This is often the first step in the screening process, asking on the application form for volunteers to declare whether they have a criminal record. Ex-offenders have the right not to reveal 'spent' (old) convictions under the Rehabilitation of Offenders Act 1974.

### **The Rehabilitation Of Offenders Act 1974**

The Act:

- gives ex-offenders the right not to reveal convictions in most situations when these have become spent after a rehabilitation period without a further offence.
- for most jobs, makes it unlawful for an employer to dismiss an employee or refuse to employ a person because they have a spent conviction.
- Defines some jobs and occupations which are excepted from the Act and where, if asked, the person must declare the conviction even if it is spent, and where the employer can refuse to employ the person or can dismiss them because of the conviction.
- The Act applies not only to convictions in the UK, but also to convictions abroad if the offence would also be an offence in the UK. Where convictions must be disclosed, this applies only if the person is asked. There is no obligation to reveal any information if not asked.

### **The heavier the sentence the longer it takes for a conviction to be spent, rehabilitation periods are as follows:**

10 years	if the sentence is for 6 to 30 months
7 years	if the sentence is for six months or less
5 years	if the sentence is a probation order, fine or community service order
1 year	if the sentence is a conditional discharge, bind-over, care order or supervision order

### **Exemptions to a person's right not to reveal a spent conviction include:**

- Anyone employed by a Local Authority or any other body for social services involving access in the course of normal duties to people over 65, people with mental illness, people living with disabilities or who are chronically ill, people recovering from alcohol or drug addiction.
- All workers and volunteers who have substantial access to people under the age of 18 in the course of their duty. This includes the provision of accommodation, care, leisure and recreational facilities, schooling, training, supervision or social services.
- Workers in any establishment which has to be registered under the Homes Act 1984
- Teachers, barristers, solicitors and chartered or certified accountants
- Medical practitioners, dentists, dental hygienists, midwives, nurses, pharmaceutical chemists, opticians and veterinary surgeons
- Judicial appointments, justices clerks
- Police and probation officers

If you have a volunteering opportunity that is not exempt, such as an opportunity involving unsupervised access to money or expensive equipment, or people going into clients' homes, it may be appropriate to ask whether the applicant has any unspent convictions. However, somewhere on the form you must state the following: 'You are not required to reveal any convictions which are spent under the Rehabilitation of Offenders Act 1974'. It is also good practice to indicate that a conviction does not necessarily disbar a volunteer from consideration.

## Criminal Records Checks

The Criminal Records Bureau (CRB) has been set up by the Home Office to improve access to criminal record checks for employment-related and voluntary appointment purposes. In particular, it provides protection for children and other vulnerable people against those who might wish to harm them.

The CRB provides a service to employers and voluntary groups of all kinds, called Disclosure. The employer/group are able to use the Disclosure service to help establish whether a successful candidate has a background that might make him or her unsuitable for the job or voluntary position in question.

The current two levels of Disclosure available are dependent on the type of work involved. The general details are as follows:

### Enhanced Disclosure

- For posts that involve regularly caring for, supervising or being in sole charge of children or vulnerable adults.
- Provides spent and unspent conviction information and cautions, reprimands and final warnings held at national and local level.
- May also include relevant non-conviction information held by local police forces.

### Standard Disclosure

- For posts that involve regular contact with children or vulnerable adults.
- Provides spent and unspent conviction information and cautions, reprimands and final warnings held at a national level.

### Who is affected?

Any person who, whilst in the course of their duties, are:

In positions that involve regular contact with children or vulnerable adults; or Employed in one of the excepted professions, Offices, Employments and Regulated Occupations as listed in the Rehabilitation of Offenders Act 1974 (Exceptions) Order 1975. The Education Secretary, David Blunkett, announced on the 07/02/01 that the Government had dropped plans to require volunteers to pay a £10-£15 fee to the Criminal Records Bureau for Criminal Records Certificates. Checks for employees through the Criminal Records Bureau cost £24 for Standard checks and £29 for Enhanced checks.

The CRB has since 'clarified' this announcement. Only the two highest levels of check – that is, those applying to people who regularly work with children and vulnerable adults are free to volunteers.

An organisation wishing to access the Disclosure service will have two choices. Larger organisations can register in their own right as a **Registered Body** and will then be able to receive Disclosure information, whilst smaller organisations have to access the service through an **Umbrella Body** who will perform a similar service on behalf of organisations who do not wish to be a Registered Body but still want to use the service. Registered/Umbrella Bodies are organisations who in the course of their business are likely to ask exempted questions under the Rehabilitation of Offenders Act 1974 (Exceptions) Order 1975. Currently very few organisations are offering Umbrella Body services to small voluntary organisations however it is hoped that this situation will improve very soon.

- Fees (From 1 April 2005)
- Registration will be a one off fee of £300
- Additional Countersignatures will be £5
- Standard Disclosures cost £29, Enhanced Disclosures cost £34
- Standard and Enhanced Disclosures are free to volunteers working with children or vulnerable adults.

For further information about the CRB can be obtained from:

Criminal Records Bureau. Websites: [www.crb.gov.uk](http://www.crb.gov.uk) or [www.disclosure.gov.uk](http://www.disclosure.gov.uk).

Telephone: 0870 90 90 811. Post: PO Box 91, Liverpool, L69 2UH.

## Using the information

The fact that someone has a criminal record does not automatically make them unsuitable for voluntary work with children. In deciding the relevance of convictions, the following points should be considered:

- The nature of the offence
- The nature of the post
- How long ago the offence was committed
- The frequency and pattern of offence

It is also worth noting that potential offenders will not automatically have a previous conviction for a similar offence. There is no evidence to suggest that a volunteer with a criminal record is any more likely to offend than a volunteer who has not. Outright rejection of ALL ex-offenders hugely narrows the available volunteer base and the human potential on offer to an organisation. For example it is estimated that at least twenty percent of the working population has a criminal record and one in three men under the age of 30 have criminal convictions.

As such organisations registering with the CRB are required to have a written policy on the recruitment of ex-offenders and sign up to the CRB 'code of practice' which will include guidance on when disclosure should be asked for, making the applicant aware of the need for disclosure and storage and handling of data.

**Screening should not be used as a substitute for good selection procedures. Adequate support, training and supervision are necessary wherever volunteers are working with any vulnerable group of people.**

## References

No organisation should be satisfied with only the information provided by the prospective volunteer. Some form of independent verification is essential good practice.

Organisations do not have to take up references, nor is there any obligation on a former employer or other person to provide one. But if a reference is provided, the former employer or other person giving it must exercise reasonable skill and care. A person is entitled to claim damages if they suffer loss because of negligent inaccuracies in the reference.

Some organisations ask for all references in writing; others prefer telephone references. It is sensible, both for practical and equal opportunities reasons, to make a checklist of questions to ask and to keep a written record of points raised in telephone references, especially if the reference is unsatisfactory. It is not sensible to accept, without further investigation, written references produced by a prospective volunteer, since the provision of such references is frequently a term of settlement for a contested dismissal from paid employment. Such references are also open to forgery.

## Other Checks and Balances

It is important to develop the best possible procedures to ensure that your organisation protects its clients. The following are useful:

Policies or statements on safeguarding the welfare of clients, access to money and property and other matters where abuse, fraud or breach of trust may occur. The work of the organisation should be planned in a way that minimises risks

All clients or service users should be clear about how to complain to an independent person if they are unhappy about the actions of a worker or volunteer. If clients are unable to make their own complaints, additional safeguards may be needed to monitor workers and volunteers.

All agreed procedures for protecting people, property etc should be applied to all and all workers/volunteers should understand what their work involves and the limits of their activities.

Further information the legal situation regarding the Rehabilitation of Offenders Act and criminal records can be obtained from:

NACRO (National Association for The Care & Resettlement Of Offenders)

Website: [www.nacro.org.uk](http://www.nacro.org.uk)

169 Clapham Road

London, SW9 0PU

Tel: 0171 582 65

## **j) VOLUNTEER AGREEMENTS**

### **Why have a volunteer agreement?**

When working with volunteers it is useful to be able to have a document that clearly and briefly sets out what the volunteer will do for your organisation and the support that the volunteer can reasonably expect from your organisation.

A volunteer agreement helps to provide a focus for your discussions with a new volunteer on their new role.

It helps to demonstrate to the volunteer that your organisation treats all its volunteers equally.

It provides a written check-list of what is agreed between your organisation and the volunteer, that either can refer back to if the need arises.

### **The risk of creating a contract of employment with volunteers;**

In considering the style and content of your volunteer agreements it is essential not to create a document that resembles a contract of employment. The possibility of volunteers being considered as employees has been widely publicised in the voluntary sector press recently. In a number of industrial tribunals, voluntary organisations have been sued for unfair dismissal, race discrimination, gender discrimination and disability discrimination - because their relationship with their volunteers was more akin to the relationship between employer and employee.

The greater pressure on agencies to deliver, particularly where contracts have replaced grant-funding means that the input of volunteers may be crucial. That pressure may lead to organisations, or their local branches and projects offering rewards to volunteers in order to ensure reliable input. Such an inducement or consideration immediately raises the risk of a contract being created.

The most important step is to recognise the distinctive value of what volunteers bring to your organisation. Having a clear volunteers' policy and stressing the role of volunteers in all of your volunteering information are to be advised. It is also advisable to avoid using any language which implies mutual obligation between the volunteer and your organisation - i.e. phrases like "in return for..." should be avoided. The agreement should carefully use language setting out "intentions", recalling "policies" and expressing hopes. It could also be useful to insert a clear statement that no contract or relationship of employment is being created e.g. *This document is not a contract; St Swithin's Day Centre has no intention of creating a contract with any volunteers. Rather it aims to set out expectations and intentions that are only bound by honour.*

The essence of volunteering is that it is a gift relationship. The volunteer can withdraw from it whenever they want. Neither volunteer nor agency can legally force the other party to perform. In trying to be fairer to its volunteers many agencies are quite understandably emphasising that volunteering brings benefits, but they must do so with caution.

The aim should be to detail what volunteers should be able to expect during their time as a volunteer, and what their responsibilities are, but without using the language of mutual obligation.

### **A document could include:**

### **An introduction to the agreement**

A brief description of the mission statement of the organisation and a brief description of the reasons why the organisation involves volunteers.

### **What the organisation aims to offer volunteers**

For example:

- A choice of work based on skills and abilities
- Adequate induction, information, training and assistance to be able to meet the responsibilities of the task
- Satisfactory supervision and support from a named individual
- An opportunity to review progress of the work
- Information about changes to agency policy and protocol relating to volunteers
- To be receptive to comments into the decision making structure
- To treat volunteers as equal partners with the organisation's staff
- A working environment free from discrimination
- Appropriate insurance cover and a safe working environment
- The opportunity to say "no" to activities they do not want to do
- Out of pocket expenses

### **Volunteer's Responsibilities**

These could include:

- To be reliable in their commitment
- To keep within the boundaries of their work outline
- To keep within the organisation's aims, objectives and values
- Not to act in a discriminatory manner and to observe the organisation's Equal Opportunities policy
- To respect confidentiality
- Willingness to learn and undergo training
- Accept supervision and guidance

The implications of the agreement should be discussed openly with all new volunteers and the agreement should be open to regular review, perhaps annually.

The agreement should be dated and signed by the volunteer and a representative of the organisation, usually the volunteer co-ordinator.

## **k) INDUCTION OF VOLUNTEERS**

The induction of volunteers is all about investing in your volunteers to improve their performance and their overall contribution. All volunteers will need induction into your organisation - it gives you the ability to explain how, why and where you operate.

There are several practicalities to remember when planning an induction programme.

- Volunteer organisers need to budget for volunteer induction when considering annual costs. This should take into account the costs of hiring venues, refreshments, expenses and possibly external trainers.
- In order to provide equal access to induction consideration should be given to the location and timing of an event. It is particularly important to make the environment as comfortable as possible especially if volunteers have had limited or adverse experiences of training and education in the past.

The induction process falls into 2 stages:

1. Orientation
2. Training

### **Orientation**

Orientation is the process of making volunteers feel comfortable with, and understand the workings of the organisation. It is designed to provide them with enough background and practical knowledge of your organisation to allow them to understand their potential contribution to the organisation.

The main reason for volunteers leaving volunteer programmes is due to the absence of good orientation. The prime goal of an orientation programme is to show a new volunteer that they are a welcome addition to the team.

There are several subject areas which should be covered during an orientation period. These areas are designed to answer 3 basic questions:

- Why should I be volunteering here?
- How will I be volunteering here?
- How do I fit in with everyone else?

### **You need to clearly explain the purpose of your group**

It should cover aspects of:

- The problem you are working with
- Your client group
- Your mission statement and the values of your organisation (an explanation and discussion on your approach to equal opportunities must be included)
- Your organisational history
- The organisation's programmes and services
- The future plans of the organisation.

The aim of this discussion is for the volunteer to commit themselves to the basic purpose of the organisation - to "join the cause" as it were.

### **You need to explain how volunteers fit into the mechanics of your group**

This should include:

- An explanation of how volunteers contribute to the structure of the organisation and its programmes
- The policies, procedures and structures of volunteer involvement within the organisation.
- An introduction to facilities and equipment - where you file, how the photocopier works, what resource books you use, where the kettle is etc.
- A description of volunteer rights, responsibilities and benefits.

The purpose of this structural explanation is to allow the volunteer to understand how they fit into the processes of the organisation.

### **You need to set out the social context in which the volunteer will be working**

Included in this section is:

- An introduction to the leadership of the organisation
- A welcoming by staff and current volunteers
- A description of the culture and etiquette of the organisation (dress code, customs etc.).

This section will be integrated the orientation period. It does, however, allow volunteers to make personal connections that will help to sustain involvement.

### **Training**

Training is the process of equipping volunteers with the essential skills needed to perform the tasks associated with their volunteering. It should be noted that, while all volunteers will need a period of orientation not all volunteers will need training. It is also important not to turn volunteers into semi-professionals by overestimating the amount of training needed. You should be clear how much training is required by your agency.

Working out what training a volunteer will need requires answers to 3 questions:

- What information does a volunteer need to perform the task?
- What skills does a volunteer need to perform the task?

- What attitudes or approaches does a volunteer need to perform the task?

Volunteers can be given the appropriate training.

### **Formal Training**

This can be given through a variety of lectures, readings, discussions, field trips, videos, demonstrations, role-play and case studies.

Formal training should cover 2 major content areas:

1. **A description of the functions of the job** - This is what you should accomplish. This is what you should not do, this is what you should do if this happens.
2. **A description of roles and responsibilities** - Including an introduction to the people with which they will work.

### **Coaching**

Coaching is a process of teaching or upgrading skills and is provided by either the volunteer co-ordinator or a senior co-worker.

Effective coaching follows a 3 step process:

1. A demonstration of the skills to be learned or improved
2. Observation of the volunteer trying out the skill
3. Feedback and analysis.

The purpose of effective coaching is not just to allow the volunteer to see what is being done but to understand it.

### **Confidentiality**

The area of confidentiality is an important issue as volunteers often have access to personal information of clients/users of your service - **volunteers need guidelines on how to handle this**. Many organisations ask volunteers to sign agreements stating that they will not disclose confidential information about clients or internal matters relating to your organisation.

## **I) VOLUNTEER SUPPORT**

### **How is support different from supervision?**

Support is the chance for your organisation to work towards your volunteers' needs, whereas supervision is largely concerned with ensuring your volunteers are meeting your agency's needs, working within their job description and maintaining your guidelines and policies.

### **Why support volunteers?**

Volunteers are more likely to feel valued, accepted and satisfied with their roles if your agency provides adequate support. In its various forms, support helps to provide an opportunity to off load problems, gain feedback and learn from the experience of other volunteers and paid staff.

Well supported volunteers will find it easier to cope with their task and provide a better service, with the added benefits for your agency and possible clients.

### **Which support?**

Methods of support for volunteers vary from one agency to the next. However, some of the most frequently used are:

- open door - where the volunteer co-ordinator is always available to volunteers
- regular telephone calls to volunteers - especially for volunteers who work away from the agency
- surgeries - specific times when the co-ordinator is available to volunteers
- fixed supervision sessions
- meetings of staff and volunteers
- meetings solely for volunteers

- a volunteer newsletter or notice board
- regular social events when volunteers get together on their own or with staff, trustees etc. It makes sense for these events to be as inclusive as possible, so make sure you cater for all dietary needs and that the activities are as inclusive as possible.

Each of these methods have their own merits and pitfalls. For example:

- An open door policy is very convenient for the volunteer, but makes it difficult for the co-ordinator to effectively time-manage, and may mean that a few vocal volunteers dominate the co-ordinator's time.
- Surgeries are a better use of the co-ordinator's time and if the times are varied will fit in with the volunteer's schedule. However, problems arise if several volunteers arrive at the same time in a fixed time surgery.
- Group meetings allow volunteers to share ideas and opinions, but can be dominated by a minority and not be appropriate for volunteers who have individual or personal issues to raise.

It is advisable not to just offer one fixed style of support. With this in mind, a support programme that involves two or three of the above is advisable to cater for all needs.

Clearly defined and well advertised forms of support are necessary. Volunteers will not respond to vague offers of support unless there is an identifiable means by which they can obtain it. If you expect volunteers to attend support sessions and it is a requirement of their volunteering then it should be made clear when a volunteer first makes contact with your agency.

### **Something else to think about**

As a matter of principle, it is important that all volunteers have equal access to support.

Volunteer co-ordinators also need to be aware that the support needed by some volunteers may be out of the boundaries of the agency. It is important to discuss support with volunteers, and to be realistic if you do not believe your agency has the necessary resources of time, staff etc.

It is important that the volunteer co-ordinator is clear about their own boundaries. Volunteers will inevitably want to share their problems with someone they know and trust, but spending too much time on individual support means that less time is available to other volunteers.

- You may also consider offering extra support to those volunteers who may otherwise not consider volunteering.

(Further information and advice can be found in "A route to opportunity" a series of guides on working with Young People, Black People, Older People, People with Disabilities and Unemployed People published by the National Centre for Volunteering.)

### **m) VOLUNTEER SUPERVISION**

Supervision is the time spent with a volunteer finding out how they are getting on and how they are fitting in with your agency, its aims and goals. It is normally done on a one-to-one basis with the volunteer.

Volunteers should be encouraged to bring their own agenda to a supervision session and see it as a time where they can freely and confidentially express their thoughts, opinions and doubts.

For the member of staff it is an occasion to be informed about work undertaken, planned or forgotten about. It is an opportunity to assess progress, identify problems and plan for the future.

#### **The level required**

The level of supervision may vary and will depend upon:

- How often you see the volunteer personally
- How often you are in contact with them by telephone
- What type of work they do and where (on site or out reach)

- How a volunteer feels about the agency, other volunteers and staff
- The methods you use to supervise staff doing similar work
- How long they have been with you

#### **Points to be raised in supervision:**

- Always put the volunteer at their ease and select the venue carefully
- Does the volunteer have issues they wish to raise?
- How are relations with staff, volunteers, clients and management?
- Are there practical problems emerging (e.g. expenses, health & safety)?
- Are there any policy issues over which the volunteer or supervisor has concerns?
- Would the volunteer benefit from any extra training?
- Are there any comments on the way the agency works?
- Does the volunteer have any personal matters to raise?

Consideration should be given to the recording of supervision sessions. It is a matter for each agency to decide whether they will keep records of supervision sessions, where any records will be kept and who will have access to these records.

### **PROBLEMS AND GRIEVANCES PROCEDURES**

There is no legal obligation for an organisation to have a complaints procedure for volunteers, however not having one can lead to considerable bad will and may even result in the volunteer trying to claim their rights as an 'employee'. A volunteer may also claim that the organisation, by providing volunteer opportunities, is actually providing a service, and as such is obliged by law not to discriminate on the basis of race, sex or disability. It is therefore strongly recommended that there is a structured volunteer complaints procedure and that every effort is made to make this at least as fair, if not as long, as an employee's complaints procedure. It would be appropriate to provide a volunteer with a route or an individual through which to raise concerns. Care should of course be exercised to ensure that all volunteers are treated in the same way so that there can be no question of discrimination.

### **n) HEALTH AND SAFETY**

#### **Why is health and safety an issue for volunteers?**

Most UK Health and Safety legislation actually refers to paid employees. However all organisations have an obligation to protect non-employees including volunteers. European directives, with their wider definition of "employee", may even cover volunteers. The Health and Safety Executive now states that it considers it good practice for volunteers to receive the same level of health and safety protection as employees.

In any case:

1. Employers must provide a safe place of work for employees - which could be jeopardised if volunteers work to different standards.
2. There is a statutory obligation under the **Occupiers Liability Act of 1957** for agencies to protect the health and safety of the public - this includes volunteers.
3. All organisations have a common law duty of care to the public which includes the health and safety of volunteers.
4. Organisations must ensure that equipment is regularly serviced, that volunteers are properly trained to use it and are aware of any safety equipment needed.
5. Volunteers must not use equipment or perform procedures for which they are not properly trained.
6. Volunteers using computers and other office equipment should be aware of the necessary safeguards governing their use.
7. It is essential to minimise risks of violence etc. Volunteers should never be put in situations of greater risk than would be acceptable for paid staff.
8. Volunteers handling food need to be aware of the rules of hygienic food handling and ideally undergo Basic Food Hygiene training.

9. Volunteers must report any injuries or accidents involving themselves or clients to their volunteer organiser. In training, office based volunteers must be told who is responsible for first aid, and who to contact in the event of an accident.
10. Volunteers should not administer medication of any kind to clients.
11. Volunteers have a responsibility not to interfere with or misuse anything provided in the interests of health, safety and welfare or to put themselves or others at risk
12. Volunteers have a duty to report any concerns they may have over situations they feel are unsafe.
13. Volunteers have a right to expect action if they draw a problem to the agency's attention.

Agencies must have a copy of the **Health and Safety at Work Act 1974** which states you must write a Health and Safety policy. Other relevant legislation may include the **Factories Act 1961** and **the Shops, Offices and Railway Premises Act 1963**.

## **n) VOLUNTEERS AND INSURANCE**

Organisations have a duty to ensure that they are sufficiently insured to offer full protection to the organisation, its staff, **its volunteers** and its clients.

By its very nature, voluntary activity carries with it several risks which can be insured against:

- A volunteer could be injured
- A volunteer could injure a client
- A volunteer may damage property belonging to a client or the organisation
- A volunteer's own property might be damaged or stolen
- A volunteer might give inappropriate advice to a client
- A volunteer may commit a crime against a client or the organisation.

No agency can afford to risk facing a claim for damages without adequate insurance protection. Do not assume it will not happen to you.

### **Types of insurance needed**

**Public Liability Insurance.** This offers cover for any injury, illness or damage to property incurred by members of the public as a result of activities of the organisation. It is important to ensure that this protection is extended to cover the agency's liability for the acts of its volunteers, as well as to protect the volunteers for injuries they may cause to a third party. It does not cover employees. If you use other premises even for half a day then you must check that they have sufficient cover.

*Please note.* Some policies exclude cover for volunteers over the age of 70. Volunteers should be made aware of this and of any arrangements made to protect them.

**Employers Liability Insurance.** You must have this if you employ staff - you must check where volunteers, student placements or government trainees stand. You may have to list all the names of your volunteers. It protects the agency against claims by employees for injury suffered in the course of their employment.

**Personal Accident Insurance.** This will cover volunteers for injury arising from activities carried out on your behalf.

**Professional Indemnity Insurance.** This is important for advice and counselling organisations as it protects them against claims if they offer incorrect advice to a client who suffers financial loss and receives damages as a result of this advice. Ensure that it covers your volunteers - you must be able to show that you have taken reasonable care in your recruitment, training and monitoring of volunteers.

**Fidelity Guarantee Insurance.** This can cover the organisation for theft by, or dishonesty of, employees, volunteers, governing body members and/or others who handle money for the organisation. The Charity Commission recommends that charities have this cover. Again, you must be able to show reasonable care in your recruitment and selection of volunteers having obtained references and having asked whether the volunteer has any un-spent convictions.

**Insurance for special events not part of the agency's normal work.** Many organisations require specialist policies to cover one off events such as garden parties, fun days or residential holidays. You need to check that any policies cover all volunteers at all venues for everything they do.

### **Vehicle Insurance**

Risks involving motor vehicles must be covered by Motor Insurance.

**Organisations' vehicles.** You need to check restrictions on your policy relating to volunteers. Many state that you cannot use volunteers under 25 or over 75 or require clean licences. It is your duty to check this and see you fulfil the requirements of the policy.

**Vehicles owned by the volunteer.** It is wise for a volunteer to let their insurance company know they

are travelling to and from an agency when volunteering - this should not incur any extra premiums, but is an advisable extra precaution. If a volunteer does have to pay an extra premium (THIS IS VERY UNLIKELY) then your organisation should reimburse this as a legitimate expense.

If a volunteer uses their own transport to help your work (do not forget vans and motorbikes) then you must explain the insurance position to the volunteer and, regularly, see a copy of their licence and insurance documents. It may be that a volunteer does not have to pay an extra premium as insurance companies often view it as not for profit - but a volunteer must check this. There are policies by which you can protect no claims bonuses for volunteers. This is a reasonable expense for you to pay.

If a volunteer is involved in a crash then you could still be held liable so you may consider taking out a **Contingent Motor Liability Policy**.

*Fuller details of these types of insurance can be found in the National Centre for Volunteering booklets "Protecting Volunteers" and "Volunteers In The Driving Seat"*

Agencies taking out cover for the first time need to consider the types of risk they need to insure against, whether any policies have restrictions on age or health history, what the policy covers, what it costs and how claims are made.

### **Minimising the risks**

It is possible to establish protocols and procedures that help minimise the risk of problems arising. Insurance companies are more likely to consider that an agency has fulfilled its "duty of care" if the following points are taken:

- Proper selection procedure for volunteers, including interview and reference
- Adequate training, support and supervision for volunteers
- Work outlines which set out the extent of a volunteer's role
- Volunteers keeping within the job description
- Accurate records being kept of all volunteers, their activities and any training undertaken
- Checking for hazards
- Adequate care taken when handling clients' property, and guidelines on handling money
- Provision of storage facilities for volunteers' belongings
- A safe working environment

## **p) VOLUNTEERING & STATE BENEFITS**

There is a lot of confusion over whether volunteering affects an individual's benefits. This is not helped by the fact that many benefits advisers are poorly informed about volunteering and often give people the wrong advice. In fact the rules are quite simple, and it's well worth knowing them so that you can advise volunteers if they have any queries.

### **Definition of voluntary work**

All benefits rulings agree that voluntary work is work for a not-for-profit organisation, or work for someone who is not a member of your family, where only reasonable expenses are paid.

### **Job seeker's allowance**

People on JSA can do as much voluntary work as they want as long as they continue to actively seek work. This will mean that they will have to show that they are looking for work and applying for jobs where appropriate. This means that as an organisation you will have to give your volunteers some flexibility, as they will need to visit the Job Centre for meetings and to sign on, and will need to go for interviews when they come up. If an individual is volunteering, then they are entitled to an extra 24 hours' notice if they have to attend an interview.

### **Income support**

Volunteering should not effect someone's Income Support as long as they are not receiving any money other than reimbursement of expenses.

## **Incapacity benefit**

There is a lot of confusion over Incapacity Benefit because there used to be a rule that individuals in receipt of the benefit could only volunteer for 16 hours a week. This rule no longer applies, although many people are still being told that it does. If you are in receipt of Incapacity Benefit then you can volunteer for as long as you want. People often worry that starting to volunteer will automatically trigger an investigation into their need to claim Incapacity Benefit, but in fact this very rarely happens. Occasionally there is also some confusion about volunteering and 'therapeutic earnings'. The therapeutic earnings rule applies only to paid work and should not affect volunteers.

## **Carer's allowance**

Entitlement to Carer's Allowance will not be affected by volunteering unless it prevents a person from providing care for at least 35 hours each week.

## **Disability living allowance**

DLA is an allowance paid in acknowledgement of the fact that life for someone with a disability may be more expensive – for instance, someone with mobility problems may be reliant on taxis. Volunteering will not affect whether an individual receives this benefit or not.

## **Vouchers**

Asylum seekers are now free to volunteer as soon as they enter the country.

## **Informing benefits advisers**

Individuals in receipt of benefits are asked to inform their advisers if they take up voluntary work. As an organisation you have no duty to inform the benefits office of who is volunteering for you.

## **g) EXPENSES & BENEFITS**

Apart from DLA, the above benefits are open only to people who are not in paid employment. Any kind of paid work would jeopardise an individual's right to claim benefits, and they may find that their payments are docked or suspended. However, expenses do not constitute a payment, so volunteers can receive reimbursement of reasonable out-of-pocket expenses (any expenses that they have incurred because they are volunteering) without their benefits being affected. But remember that only actual expenses should be reimbursed. If a volunteer pays £4.50 on travel every day, it might seem easier to round the sum up to £5 – but this is not a reimbursement of an actual expense and would constitute a payment. It is a good idea to collect receipts and keep records of what expenses you have paid, so that if there is any kind of query it can clearly be shown that you are reimbursing expenses rather than making a payment.

There have been some problems in the past where volunteers on benefits have been given advance payments (for instance for something that would cost a lot, such as childcare or a weekly travelcard). The Social Security Amendment (Volunteers) Regulations 2001 has now shown that income support, JSA, and Incapacity Benefit are not endangered if a volunteer receives advance payment for expenses to be incurred in the future. It is still a good idea to keep receipts and records, and the volunteer would have to repay to the organisation any money that was not spent.

Occasionally a volunteer will have problems convincing their benefits adviser that they are volunteering and not working. If this is the case, be prepared to talk to the worker for them and send information about what you do and what the volunteer is doing for you. If they are having a lot of problems then it may be worthwhile using an Expenses Record Form (a sample is available from the VDA). This will enable you to record exactly what money the volunteer is getting and to show that it is a reimbursement rather than a payment.

## **VOLUNTEER EXPENSES**

The reimbursement of volunteers' expenses is a fundamental element of good practice. Volunteers should not suffer financially by volunteering. By not refunding expenses, either through lack of funds or

because your agency has simply never offered it, you are preventing some people from being able to volunteer and are in turn losing out on their skills and enthusiasm.

If your agency is not able to refund legitimate expenses it should be made clear in promotional publicity and in any contact you have with potential volunteers. An agency who do not offer to reimburse volunteer expenses can not claim to be promoting equal opportunities.

Volunteers should be told during induction how the claims procedure works. This process needs to be as simple and as clear as possible. Expense claims should be made regularly (daily or weekly) as volunteers on low incomes depend on not being out-of-pocket when volunteering. Volunteers should always be encouraged to claim their expenses, whether they rely on them or not. If some volunteers do not wish to claim they should be able to donate them to the organisation to be spent in another method.

### **What you can reimburse:**

- Any costs incurred in caring for dependants whilst volunteering.
- Home expenses - if a volunteer uses their home for meetings, supplies refreshments, uses their telephone etc. then you can contribute to their costs.
- Subsistence - if a volunteer is with you all day it is reasonable for you to provide them with lunch or pay for one. It is a good idea to set an upper limit on the amount spent on meals.
- Protective or specialist clothing - groups who use volunteers for outdoor, removal or DIY projects should supply protective clothing or reimburse volunteers who buy them.
- The cost of travel to and from the place where volunteering is done - this includes the costs involved in any necessary training or attending conferences and meetings.

When using their own transport you should reimburse volunteer expenses at agreed rates. It is both simple and fair to apply the same rates of travel expenses to staff and volunteers. The Inland Revenue publishes recommended rates that are updated every year.

When using public transport it is normal to fully reimburse fares spent. It may occasionally be necessary for volunteers to use taxis - if for example the volunteer works in the evening, has a disability or when bus and train services are unreliable.

If a volunteer is required to transport people or move goods in their own vehicle it is likely to affect their insurance premiums. It is perfectly legitimate for your organisation to refund this.

It should be stressed that only the amount actually spent should be claimed.

Unless the person is on a training or return-to-work scheme which specifically allows payment tax-free, all payments above genuine expenses are remuneration and are subject to tax and national insurance.

Payments include:

- Honorarium
- "Pocket money"
- Sessional fees
- Lump sums "to cover expenses"

The amount is irrelevant, and even a token payment is remuneration.

### **Expenses & equal opportunities**

Most people in receipt of benefits are on very low incomes and could not afford to volunteer if their expenses were not paid. When you decide how you will pay expenses, make sure that you are not creating unnecessary barriers. Many organisations prefer to reimburse expenses weekly or monthly rather than daily and some always reimburse by cheque. This can create problems for someone on a low income who cannot afford to wait for money to be reimbursed. If possible, always try to reimburse expenses on the same day in cash. Do not assume that a small amount of money for you is a small amount of money for everyone else. In particular, asylum seekers in receipt of vouchers have very little access to cash so may find it difficult to pay for travel or go out and buy a sandwich. If you are not sure which methods of reimbursement suit people, just ask them – in some cases it may be more efficient to develop different systems for different people.

### **Further information**

WK4 – Financial help if you are working or doing voluntary work. Benefits Agency/Employment Service. Contains some information on JSA not included in this information sheet. This leaflet is available on the Jobcentreplus website at: [www.jobcentreplus.gov.uk/JCP/static/Dev\\_007193.pdf](http://www.jobcentreplus.gov.uk/JCP/static/Dev_007193.pdf)

JSAL7 (Rev) Jobseeker's Allowance. Voluntary work when you're unemployed and it needn't affect your benefits! Employment Service. This leaflet is available on the Volunteering England website at: [www.volunteering.org.uk/NR/rdonlyres/2F916E7F-7163-419A-A47A-AE79B1D17B59/0/JSAL7.pdf](http://www.volunteering.org.uk/NR/rdonlyres/2F916E7F-7163-419A-A47A-AE79B1D17B59/0/JSAL7.pdf)

If you need any further information or want to talk through an individual case you can contact Sefton Volunteer Centre. Tel.: 0151 920 0726 (Ext. 211).

### **ACKNOWLEDGEMENTS**

Information in this pack was obtained from the following:

Rochdale Volunteer Development Agency  
Volunteering England

'Essential Volunteer Management' – Steve McCurley, Rick Lynch

Please note: Sefton Volunteer Bureau has endeavoured to check the accuracy of all the information in this pack and to ensure that the advice is up to date. However, in the light of legislative or other changes we cannot guarantee accuracy or completeness

### **r) SAMPLE DOCUMENTS**

A selection of Sample forms you might use or adapt for the use of your organisation:

- 1) Sample - Volunteer Policy**
- 2) Sample - Volunteer Registration Form**
- 3) Sample - Volunteer Expenses Claim Form**
- 4) Sample - Volunteer Agreement**
- 5) Sample - Volunteer Appraisal Form**
- 6) Sample - Volunteer Exit Questionnaire**

## **1) Sample - Volunteer Policy**

### **Introduction**

AnyOrg exists to...(mission statement or aims and objectives)

In line with this AnyOrg seeks to involve volunteers to:

Ensure our services meet the needs of our clients

Provide new skills and perspectives

Increase our contact with the local community we serve

(state the reasons relevant to your organisation)

### **Principles**

This Volunteering Policy is underpinned by the following principles:

- AnyOrg will ensure that volunteers are properly integrated into the organisational structure and that mechanisms are in place for them to contribute to AnyOrg's work.
- AnyOrg does not aim to introduce volunteers to replace paid staff.
- AnyOrg expects that staff at all levels will work positively with volunteers and, where appropriate, will actively seek to involve them in their work.
- AnyOrg recognises that volunteers require satisfying work and personal development and will seek to help volunteers meet these needs, as well as providing the training for them to do their work effectively.

(state principles relevant to your agency)

### **Practice Guidelines**

The following guidelines deal with practical aspects of the involvement of volunteers. More detailed information, including copies of the various documents referred to, is provided in the Volunteers Handbook. (Do you have a Volunteers Handbook?)

### **Recruitment**

All prospective volunteers will be interviewed to find out what they would like to do, their skills, suitability and how best their potential might be realised.

### **Volunteer Agreements and Voluntary Work Outlines**

Each volunteer will have a Volunteer Agreement establishing what AnyOrg undertakes to provide for them. In addition they will agree to a written outline of the specific work they will be undertaking. Neither of these documents is a contract; AnyOrg has no intention of creating a contract with any volunteers. Each volunteer will also receive a Volunteers Handbook.

### **Expenses**

All volunteers will have their travel and other expenses reimbursed. Volunteers working a minimum of five hours per day will be able to claim expenses for lunch (for details see the Volunteers Handbook)

### **Induction and training**

All volunteers will receive an induction into AnyOrg and their own area of work. Training will be provided as appropriate. Where possible volunteers will be entitled to receive additional training on the same basis as paid staff.

### **Support**

All volunteers will have a named person as their main point of contact. They will be provided with regular supervision to feed back on progress, discuss future development and air any problems.

(if you have a volunteer Co-ordinator you could outline their role here)

### **The Volunteer's Voice**

Volunteers are encouraged to express their views about matters concerning AnyOrg and its work.

(what mechanisms can help bring about this? - see Support)

**Insurance**

All volunteers are covered by AnyOrg insurance policy whilst they are on the premises or engaged in any work on AnyOrg's behalf.

**Health and Safety**

Volunteers are covered by AnyOrg's Health and Safety Policy, a copy of which is in the Volunteers Handbook.

(are volunteers covered by your Health and Safety provisions? See Health and Safety)

**Equal Opportunities**

AnyOrg operates an equal opportunities policy in respect of both paid staff and volunteers. A copy is in the Volunteers Handbook. Volunteers will be expected to have an understanding of and commitment to our equal opportunities policy.

**Problem Solving**

We aim to identify and solve problems at the earliest possible stage. A procedure has been drawn up for dealing with complaints either by or about volunteers. A copy of the procedure is included in the Volunteers Handbook.

(do you have a discipline and grievance procedure for volunteers? See Supervision)

**Confidentiality**

Volunteers will be bound by the same requirements for confidentiality as paid staff.

(set out more details if necessary)

**2) Sample - Volunteer Registration Form**

AnyOrg Address.  
AnyOrg Telephone.

*The information you provide on this form will be kept in strictest confidence and will only be used to assist AnyOrg in its selection process  
AnyOrg is working towards equality of opportunity*

Name: .....

Address:.....  
.....  
.....

Telephone:.....

Which AnyOrg role would you like to do? (please tick):

- Role A
- Role B
- Role C
- Role D
- Role E

Why do you want to volunteer with us?  
.....  
.....  
.....

What would you like to gain from your volunteering experience?  
.....  
.....  
.....

What previous voluntary work, paid employment or studies have you done which may assist you in your voluntary work?  
.....  
.....  
.....

Do you have any relevant experience?  
.....  
.....  
.....

How many/which hours are you available each week?  
.....  
.....  
.....

As part of the selection process for volunteers, AnyOrg always asks for references to be taken. Please give the names and addresses of two referees.

Please do not include any relatives or people under 18.

1) Name:.....	2) Name:.....
Address:.....	Address:.....
.....	.....
.....	.....
.....	.....
Tel No:.....	Tel No:.....

How did you hear about AnyOrg?

.....  
.....

I certify that the information given is correct:

Signature:..... Date:...../...../.....

---

**For office use only**

Date returned...../...../.....  
Date of interview...../...../.....  
References requested...../...../.....  
References received...../...../.....  
Police check necessary? Yes/No ...../...../.....  
Follow up action

.....  
.....  
.....

AnyOrg is a Registered Charity No. 12345678

### **3) Sample - Volunteers Expenses Claim Form**

Date: \_\_\_\_\_ Name of Volunteer: \_\_\_\_\_

This form is to be used to record those expenses, which you have incurred whilst volunteering for us. We reimburse the following type of expenditure with a valid receipt.

- Travel to and from the place of volunteering (based upon public transport fares)
- Travel undertaken during the course of volunteering with the Agency
- Other out of pocket expenses as authorised by your Supervisor and with an appropriate receipt.

Date of Expenditure	Description of Expenditure	Total Amount Claimed

Total Amount Claimed: \_\_\_\_\_ Signed by volunteer: \_\_\_\_\_

<b>For Office Use only</b>	
Approved for reimbursement by _____	
Payment Issued on _____	Amount Paid _____
Received by _____	

#### **4) Sample - Volunteer Agreement**

**This agreement is intended to indicate the seriousness with which we treat our volunteers. The intention of the agreement is to assure you both of our deep appreciation of your services and to indicate our commitment to do the very best we can to make your volunteer experience here a productive and rewarding one.**

#### **THE ORGANISATION**

We: \_\_\_\_\_ agree to accept the services of:

\_\_\_\_\_ Commencing on: \_\_\_\_\_

and we hope to provide the following:

- To provide adequate information, training and assistance for the volunteer to be able to meet the responsibilities of their volunteer tasks
- To ensure satisfactory supervisory support to the volunteer and to provide feedback on their performance
- To respect the skills, dignity and individual needs of the volunteer, and to do our best meet any individual requirements.
- To be receptive to any comments from the volunteer regarding ways in which we might mutually better accomplish our respective tasks.
- To treat the volunteer as an equal member of our team.

#### **THE VOLUNTEER**

I agree to carry out my voluntary action and try:

- To perform my voluntary tasks to the best of my abilities
- To adhere to the organisation policies and procedures, including keeping the confidentiality of both the organisation and of their clients.
- To adhere to the equal opportunities policy and challenge discriminatory behaviour, where possible.
- To attend when agreed, or to provide notice so that alternative arrangements can be made.

Signature of Volunteer: \_\_\_\_\_

Signature of Staff representative: \_\_\_\_\_

Date of agreement: \_\_\_\_\_

This agreement is not legally binding and may be cancelled at any time by either party, but will expire automatically on: \_\_\_\_\_ unless both parties renew it.

## **5) Sample - Volunteer Appraisal Form**

This form must be completed and signed by the volunteer (appraisee) and the supervisor as soon as possible after the appraisal interview.

Name of Volunteer:

Name of line Manager:

Date of Appraisal:

### **Key Questions**

1. What Duties are currently being undertaken?
2. In which areas has the volunteer been most successful?
3. In which areas has the volunteer been least successful?
4. What factors have influenced performance?
5. Is additional support requested if so from where?
6. Does the volunteer have any training needs?
7. How does/or does the volunteer wish to develop their role further?

Comments from the volunteer or supervisor

## **6) Sample - Volunteer Exit Questionnaire**

We are always striving to improve the performance of our volunteer management systems. As one of our volunteers, we would appreciate your help in identifying areas where we can improve.

Please complete the following questionnaire as honestly as you can, criticisms ensure that other volunteers receive the best possible treatment from us.

Name of Volunteer: \_\_\_\_\_

Please give a brief description of the tasks involved in your volunteering position

What was the best experience you had whilst volunteering with us?

What was the worst experience?

To what extent did you feel accepted by the staff and other volunteers?

- Well accepted
- Generally well excepted but there were some exceptions
- Generally not well accepted, but there were some exceptions
- Not well accepted
- Other (please state) \_\_\_\_\_

Did you feel comfortable with the tasks you were given?

- Yes
- No
- Don't Know
- Other (please state) \_\_\_\_\_

As a volunteer with us did you feel that you received sufficient information about the organisation and how it works when you started?

- Yes
- No
- Don't Know
- Other (please state) \_\_\_\_\_

Do you feel that you received enough training to enable you to carry out the tasks assigned to you?

- Yes
- No
- Don't Know

Did the voluntary activity you undertook with the organisation match the original task description given to you when you started?

- Yes
- No
- Don't Know

Did you find your volunteering experience interesting, challenging and rewarding?

- Yes
- No
- Don't Know

Did you feel that the contribution you made was appreciated and valued?

- Yes
- No
- Don't Know

Reasons for leaving

- Tasks accomplished
- Did not like the role
- Can no longer commit
- Moving
- Felt under utilised
- Needed a change
- Obtained paid employment
- Other (please state) \_\_\_\_\_

Please feel free to add any other comments or suggestions you feel relate to the way we managed you as a volunteer

**THANKING YOU FOR YOUR CO-OPERATION**  
**Please return in the envelope provided**

## **s) ADDITIONAL INFORMATION**

Volunteer Centre Sefton provides a wide range of advice, support and guidance services in relation to volunteering and volunteer management to local voluntary and community organisations. For further details contact the Volunteer Centre.

### **Volunteer Centre Sefton Guidelines**

These documents are free to download from: <http://www.volunteeringsefton.org.uk/bestpractice.html>

- Writing Volunteer Opportunities for the Internet
- Guidelines for Preparing & Writing Press Releases & Effective Recruitment Messages
- Organising Residential Events Guidelines – 23 Points to Consider
- The Useful Websites Guide

### **Useful Organisations**

**do-it** Address: 2-3 Upper Street, Islington, London N1 0PH.

Tel.: 020 7226 8008 Fax: 020 7226 8118

Email: [info@do-it.org.uk](mailto:info@do-it.org.uk) Website: <http://www.do-it.org.uk>

**Timebank** Address: 3rd Floor Downstream Building, 1 London Bridge, London SE1 9BG.

Tel.: 0845 456 1668 Fax: 0845 456 1669

Email: [feedback@timebank.co.uk](mailto:feedback@timebank.co.uk) Website: <http://www.timebank.co.uk>

**Volunteering England** Address: Regents Wharf, 8 All Saints Street, London N1 9RL.

Tel.: 0845 305 6979 Fax: 020 7520 8910

Email: [information@volunteeringengland.org.uk](mailto:information@volunteeringengland.org.uk) Website: <http://www.volunteering.org.uk>

A range of free 'Managing Volunteers' Information Sheets are available to download from:

<http://www.volunteering.org.uk/missions.php?id=282>

Titles include: Accreditation of voluntary work; Screening and police checking volunteers; Health and safety of volunteers; Volunteer drivers; Volunteer Expenses.

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Tel.: **0151 920 0726 (Ext. 211)**

Email: [info@volunteeringsefton.org.uk](mailto:info@volunteeringsefton.org.uk)

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Website: [www.volunteeringsefton.org.uk](http://www.volunteeringsefton.org.uk)



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