

# The Bigger orange Book on Involving Volunteers

**best** practice / 2011 / 2nd edition

...useful information available to your organisation



There are a number of agencies in Suffolk that can advise you on best practice around involving volunteers in your organisation and provide a wealth of resources, support and training.

## County Organisations

Suffolk Volunteering Federation –  
a project of SAVO  
01473 273273  
enquiries@savo.co.uk  
www.volunteeringsuffolk.org  
www.savo.co.uk

Young Suffolk  
01473 744187  
youngssuffolk@suffolkonline.net  
www.youngsuffolk.com

## Local Organisations

Ipswich Council for Voluntary Services  
(ICVS)  
01473 261110  
www.ipswich-cvs.org.uk  
www.ipswich-cvs.org.uk

Mid Suffolk Action in Partnership  
(MAP)  
01449 673947  
www.midsuffolkaction.co.uk

Suffolk Coastal Resource Network  
(SCRN)  
Co SAVO 01473 273273  
www.scrn.co.uk

The Community Forum (Waveney)  
01502 582201  
www.thecommunityforum.org.uk

West Suffolk Consortium for Voluntary  
Organisations  
01284 766126  
www.wscvo.org.uk

## Volunteer Centres

Volunteer Centre Babergh  
0845 260 6340  
volunteering@bctssuffolk.org.uk  
babergh@volunteercentresuffolk.co.uk

Volunteer Centre Bury St Edmunds  
01284 766126  
vol-coordinator@volunteercentre.co.uk

Volunteer Centre Framlingham  
01728 621210  
framvc@btconnect.com

Volunteer Centre Forest Heath  
01638 608048  
terri@thevoluntarynetwork.org

Volunteer Centre Haverhill  
01440 708444  
info@hvc.org.uk

Volunteer Ipswich  
01473 261116  
kirk.jackson@ipswich-cvs.org.uk

Volunteer Centre Lowestoft  
01502 562299  
lowestoftvb@tiscali.co.uk

Volunteer Centre Mid-Suffolk  
01449 612486  
midsuffolk@volunteercentresuffolk.co.uk

Volunteer Suffolk Coastal  
co 01473 261116  
kirk.jackson@ipswich-cvs.org.uk

Welcome to the 2nd Edition of the Bigger Orange Book on Involving Volunteers. Volunteers are a fantastic resource and never more so than in these times where many services are being shifted to the voluntary and community sector. A good volunteer is worth their weight in gold and needs to be cherished.

This guide is packed full of information on the best practice around how to recruit, involve and retain volunteers in your organisation, signposting you to sources of further and more in-depth information, as appropriate. The changes from the 1st Edition reflect the changes to legislation and best practice guidelines, also new areas to explore in recruiting and supporting volunteers, such as social media.

The original edition was written by a former colleague, Gill Robinson, whose lifeblood and passion was volunteering. Gill is sadly no longer with us and we would like to dedicate this book to her memory, so that her legacy continues.

We would like to thank the following for funding the printing of this edition:  
Capacitybuilders, Big Lottery & Suffolk 2012 Legacy.

Whilst information is correct at the time of going to print, legislation and guidance changes on a regular basis. We therefore encourage you to check with the appropriate sources as we cannot be held responsible for any wrong information given. This resource is intended as a guide only. The latest version will be available online via the [www.sav0.co.uk](http://www.sav0.co.uk) website.

**Laura Hack**

Suffolk Volunteering Federation - a project of SAVO.

**Volunteer policy** / 02

**Role Descriptions** / 04

**Attracting and Recruiting Volunteers** / 06

**Young Volunteers & Using Social Media** / 08

**Application Forms and Interviews** / 10

**References and CRB Checks** / 12

**Induction, Training, Support and Supervision** / 14

**Expenses, State Benefits and Tax** / 16

**Volunteer Retention** / 18

**Insurance and Liabilities** / 20

**Health and Safety** / 22

**Dealing with problems** / 24

**Equality and Diversity** / 26

**Confidentiality** / 28

**Legal Issues** / 30

**Risk Management** / 32

**Events & One-Off Volunteering** / 34

**Resource Bank** / 36

# Volunteer Policy

A volunteer policy is a framework for a volunteer programme. It enables an organisation to look at the benefits and challenges that come with working with volunteers.

Why should your organisation have a volunteer policy?

## Commitment

- A volunteer policy demonstrates your organisation's commitment to its volunteer programme and its individual volunteers. It shows that care and thought has gone into the volunteer programme.

## Consistency

- Volunteers are a diverse range of people. Being able to refer to a written policy ensures that decisions are consistent and not made on an ad hoc basis and that all volunteers are treated equally and fairly.

## Clarity

- A policy allows volunteers to know where they stand. It offers some security, in that they know how they can expect to be treated and where they can turn to if they feel that things are going wrong.

## Unity

- It also helps ensure that your organisation's paid staff and trustees fully understand why volunteers are involved and what role they have within the organisation.

The process of writing a volunteer policy is almost as important as having the document itself.

- Consider exactly why your organisation wants to involve volunteers and how they fit into the day-to-day life and work of the organisation.
- Consult as widely as possible when drawing up the policy. The more input there is, the more relevant the policy is likely to be.

## What should the volunteer policy focus on?

The needs of your organisation — there is no blueprint for volunteer policies. Every organisation has its own unique needs that should be reflected in its policy.

Keep it short — most organisations have a relatively short policy as a statement of intent, with the day-to-day issues covered in separate policies or a volunteer handbook.

## What should the volunteer policy cover?

Start with an explanation of what your organisation does and why it wants to involve volunteers in its work. Explain in what way volunteers' input helps your organisation's aims.

- A statement of intent e.g. why your organisation uses volunteers and to what aim
- Some information about your organisation's recruitment process
- Role descriptions, induction and training for volunteers, trial period, expenses such as travel, meals, child care etc., support and supervision processes
- How volunteers are insured

- Basic Health and Safety information - signposting volunteers to the main Health and Safety policy
- The complaints procedure - there should be clear procedures in place to deal with complaints by or about volunteers, separate from those for paid staff
- Information about grievance and disciplinary procedures for volunteers showing how your organisation deals with any problems
- Information about confidentiality
- Whilst volunteers are generally not covered by equal opportunities legislation, it is clearly good practice to include them in your equal opportunities policy.

### **Introducing the volunteer policy**

- Once the policy is written it will be necessary to ensure that it is read, understood and implemented properly as part of the everyday work of your organisation.
- All staff, volunteers and trustees should receive a copy
- The organisation could use the policy as a framework for induction meetings with volunteers
- The policy can also be the basis of the information given to the people with which your organisation works, about why the organisation involves volunteers.

### **Accessibility**

- Clear English — Any document given to the volunteers should be straight forward to read and understand.
- Identifying needs — discussing the policy with volunteers at induction helps identify needs; volunteers with English as a second language or a learning disability may require some parts of the policy to be clarified
- Format — the policy should be clearly legible for people with sight problems.

### **Revising the policy**

The flexible nature of volunteering means that it makes sense to review the policy every year. Input from volunteers and paid staff will help in evaluating its relevance and usefulness.

### **FURTHER RESOURCES**

SAVO has developed free toolkits such as a starter pack for new gaps and policies and procedures. Find them at [www.practicaltoolkits.org.uk](http://www.practicaltoolkits.org.uk)

## Role Descriptions

“When designing any volunteering opportunity, the key is to ensure that there is a clear beginning, middle and end so that volunteers do not feel that they are signing their life away”. (“The 21st Century Volunteer” Elisha Evans and Joe Saxton)

### What are volunteer role descriptions?

A volunteer role description (also known as a task description) details the specific activities in which a particular volunteer is involved. It is rather like a job description, although using separate terminology is recommended to avoid implying a contract of employment for volunteers.

### Elements of Volunteer Roles

- In order to cater for a range of potential volunteers and promote diversity, organisations should try to design a variety of volunteer roles, which suit people with varying motivations, skills and interests
- Planning is also needed for the different amounts of time people are able to offer
- Volunteers also have different motivations; a volunteer wanting work-related experience will look for a different experience from a volunteer hoping to meet new people or find an activity that gives them a change from their daily routine
- Having defined a volunteer role, be prepared to adapt and amend it to suit the skills, knowledge, interests and availability of potential volunteers.

### Writing a volunteer role description

When writing a volunteer role description, you should try to make it detailed but concise. Building the description around different headings is useful. Some suggested headings could be:

- Title of role - be specific
- Purpose of role - the difference it will make to the work of your organisation
- Main activities/tasks
- Qualities/experience/skills needed (where relevant)
- The time commitment and when this will be needed
- Training available
- Location
- Who will be the main point of contact.

While volunteers should not feel over-committed or overloaded in their work, it is also important that they are engaged in productive tasks and get a sense of achievement from their voluntary work. When creating volunteer roles, it is useful to think about whether a particular role offers the volunteer a chance to plan their work or to measure their results. These factors will not appeal to all but some volunteers might be motivated by a greater sense of ownership. Volunteer roles should make best use of the unique talents or personalities of the people contributing their time. Writing a volunteer role description will also help you to focus on the practical elements of your organisation’s volunteering programme. It is important to make sure that all the necessary resources and procedures are in place before the volunteer arrives.



## Using volunteer role descriptions

- Volunteer role descriptions form an important part of an organisation's recruitment process. They help to give the volunteer an accurate idea of the work they will be doing and also ensure that the volunteer is attracted by the tasks as well as the organisation's wider aims. They also help a volunteer manager to focus on what kind of volunteer they actually need and avoid mismatching people and tasks.
- A detailed volunteer role description is particularly useful if you are recruiting volunteers through a Volunteer Centre. It saves time and disappointment on both sides if a potential volunteer knows as much as possible about the role before contacting the organisation.
- It is also important for volunteer managers to offer ongoing support to volunteers and a volunteer role description can help you to structure supervision sessions. Referring to role descriptions is also a good way of evaluating the volunteer programme of an organisation and demonstrating the breadth of what the volunteers do.

## Developing a volunteer person specification

A person specification exists to make it easier for both volunteers and volunteer involving organisations to realise what skills and abilities volunteers have or need. The person specification should come about as a result of the volunteer role description.

From the role description, pick out the duties, grouping together those that are similar then translate duties into the abilities and skills needed to do the voluntary role.

- Specify necessary skills as far as possible in precise role-related terms
- Identify any specific knowledge requirements for the role or requirement of some evidence of the ability to learn
- Where relevant, indicate qualifications and level of education required for the role - be as precise as possible
- identify the experience required to carry out the role and define the extent of that experience.

Once you have thought through these points it is time to start preparing a person specification attributing the words "desirable" or "essential" to each of the skills and abilities needed to fulfil the role.

Volunteers will not always be able to show that they have the necessary attributes at a first interview. They may lack confidence and/or be very nervous and so induction training over a longer period of time is a better measure of volunteers' qualities as the training in itself will make volunteers confident of their own abilities.

## FURTHER RESOURCES

For best practice examples of role descriptions visit the Volunteering England, Good Practice Bank - [www.volunteering.org.uk](http://www.volunteering.org.uk) or type in <http://tinyurl.com/44hr7e4> for a direct link.

# Attracting and Recruiting Volunteers

## Attracting and recruiting volunteers is not the same!

You first have to attract a person's attention before you can recruit them to become a volunteer for you. So how do you attract people's attention? Be proactive rather than reactive in recruiting volunteers, as people sometimes need to be asked! Think about the volunteer roles you have and the type of person you want to recruit to them, this might give you a clue as to the best way to attract them.

## We are constantly bombarded with messages

Many organisations can't understand why their past 'attraction' techniques are no longer working. Well, it's not because fewer people are volunteering - it's because we're now part of the 'information age' and are constantly being bombarded with information. Be clear about what you want from potential volunteers and why they should volunteer with you. What is your unique selling point? Review your written advertising brochures, flyers, etc. so that they do attract people's attention for the right reasons. Look at other ways to attract volunteers, such as Social Media (see Page 9) and always list your opportunities on Do-It.org.

## It's always the Headline

If you have only a limited time to work on a brochure or flyer then spend most of that time on only one thing - the HEADLINE. Just look at any newspaper - it is the headlines that dominate the print. The overwhelming purpose of a headline is to catch people's attention. It is not to tell your whole story. It is not to convince people to volunteer. It is to get people's attention to read on to your next paragraph, and then your next paragraph and hopefully the whole brochure or flyer.

## "Volunteers Wanted"

The most used and least eye catching of headlines found on volunteer recruitment material - does this really 'fire you up' to read on? It is really time to get more creative with headlines.

## What's unique about your organisation?

In some way your content has to explain what's unique, what's special about your organisation or group, in order to maintain interest. What will make the reader think "I want to know more about this organisation"?

## People always buy on emotion, so sell it

If you want your written material to be unique then write from the heart and not the head. People always buy on emotion, so sell it. The decision to volunteer is most often an emotional decision - to help people, animals, the environment, etc. Stop writing emotionless jargon and talk to people's emotions. Tell a story of what your volunteers have done to change people's lives, save the planet, etc. so that the reader says "I want to be part of that".

## Recruiting Volunteers

"I think with volunteer recruitment, it's about understanding that we're selling a product and that we need to learn how to sell products. You don't sell a particular product by saying 'if you want to volunteer, come here' - that's not how you sell it. You've got to target your customers with what you're offering, you've got to target them with what they want from it and convince them that we will meet their expectations." (The 21st Century Volunteer - Elisha Evans and Joe Saxton)

## Recruitment

Recruiting volunteers can be seen as a similar process to advertising (sell the benefits of the volunteering product) and, as with any advertising, it is critical that you have a clear message. The nature of this message will depend on your organisation and the work that you want volunteers to do. However, in general, it will include:

- what the volunteer will do
- what the organisation as a whole does
- how a new volunteer can make a difference
- how to find out more.

Most methods of recruitment elaborate on these four elements of the basic message.

## Motivation

It is useful to think about why people might volunteer, and motivations might include:

- commitment to the cause, so it is important to emphasise how their contribution will make a difference
- meeting people - volunteering can be a very sociable activity
- gaining skills - stress the skills and experience that volunteers can gain
- utilising existing skills - some people want to put their skills to a good cause
- keeping active - more and more older people are volunteering
- moving into paid employment - skills and experience for their CV

## Making it easy

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

It can be useful to offer tasters of volunteering, so that the volunteer and organisation can get to know one another better. Remember, not everyone will be right for a particular volunteer role and you have the right to refuse them, as they have the right not to accept.

## Volunteer Centres

There are a number of Volunteer Centres across Suffolk, putting people in touch with organisations that need volunteers. Organisations need to register with their local Volunteer Centre, which will also be able to provide advice and support on working with volunteers. Your volunteering opportunities will be registered on [www.do-it.org](http://www.do-it.org) through the Volunteer Centre; See the inside front cover for details.

## Diversity in recruitment

Organisations sometimes find it difficult to get a diverse range of volunteers, especially if they rely on word of mouth. Diversity can be important in reflecting the composition of your local community and/or service users, in meeting your organisation's mission and pursuing an equal opportunities policy. Diverse volunteering programmes are often also the most exciting and dynamic.

## FURTHER RESOURCES

Do-it - the online database of volunteer opportunities - [www.do-it.org.uk](http://www.do-it.org.uk)

## Young Volunteers

Young volunteers are an excellent resource and ensuring there are relevant opportunities for them could mean attracting a volunteer for life! Think carefully about how to recruit young volunteers and the types of roles they might be interested in.

Organisations wanting to involve young volunteers do need to be aware of a range of legal and practical matters when deciding what roles are suitable or adaptable for a particular age group. Whilst there are legal restrictions on employing young people, they do not apply to volunteers. It is worth being aware of the legislation, even if you are not bound by it.

### Parental permission

Parental consent should be sought when involving young volunteers. Parental responsibility continues until the age of 18, unless the young person is 16 or older and married, or is living independently.

Both the young person and their parent or guardian should fully understand what the voluntary work entails. Provide clear information about the organisation and the work the volunteer is expected to do, preferably a role description. Make sure that they are aware of time commitments, where the work will take place and how it will be supervised.

### Health and Safety

The Children Act 1989 Section 3 (5) states that 'an individual shall do what is reasonable for the purposes of safeguarding or promoting a child's welfare while the child is in his or her care'.

There is also an enhanced duty of care towards young volunteers, reflecting their relative maturity. This means that risk assessments cannot take responsible behaviour for granted, and are likely to imply increased supervision, more explicit instructions and so on.

Think about the situations in which a young volunteer might be in and whether any adults supervising them will need to have a CRB Disclosure check. For example, any adult regularly training young volunteers would need a CRB check, but other adults who come into irregular contact with young volunteers may not.

In terms of best practice:

- Young people should not be left unattended
- It is safer if young volunteers are supervised by two or more adults
- Any potentially dangerous activity should have constant adult supervision.

### FURTHER RESOURCES

Young Suffolk has lots of specialist resources for organisations around involving young volunteers, visit [www.youngsuffolk.com](http://www.youngsuffolk.com)

Volunteering England has a section on youth volunteering at [www.volunteering.org.uk](http://www.volunteering.org.uk)

## Using Social Media

The simplest form of volunteer recruitment is to ask someone – and this is the best way of using Social Media in your relationship with volunteers. The term Social Media is about using technology (the internet and mobile phones) to communicate and it usually implies a very informal style that encourages the volunteer to be as communicative as the organisation they volunteer for.

Facebook and Twitter are far and away the most popular forms. As a social network, Facebook offers you an opportunity to create pages, groups and profiles that enable you to converse regularly with volunteers – events, requests, rewards and opportunities can be circulated to a lot of people at a few strokes of the keyboard. Twitter – in 140 characters- usually takes you directly to a mobile phone with a short message or request that can be very immediate. If you are not familiar with these, go online and visit their sites and experiment.

It could also be worth your time visiting other sites – these can be very powerful tools: Flickr enables you to use and share photos; You Tube allows you to upload video clips. Other sites include: LinkedIn; myspace; stumbleupon; reddit; del.icio.us; meetup; Friendster; dig; and many more. Using your search engine to search these words could open up a whole new world of opportunities for you and your volunteers. Also – you must visit [www.wearewhatwedo.org.uk/suffolk](http://www.wearewhatwedo.org.uk/suffolk) (see below).

### Recruiting Using Social Media

All the principles elsewhere in the book apply to all these forms of media. Using networking sites, encourage your existing volunteers to talk about their experiences, share photos and most of all invite others to join in the fun. Become pro-active: open a Facebook page for your group and experiment with various approaches – ask your members to download a recruitment poster and put it up in their place of work, ask them to invite their friends to join your group.

### Communicating Using Social Media

Technology enables you to regularly communicate with volunteers and supporters – it is a very immediate way of letting them know what you are doing and how important they are to your organisation. It is a great way to say thank you and to celebrate success.

### We Are What We Do Suffolk

This site has been developed to nudge or prompt people to undertake a simple action that could – if they want – grow into a full scale volunteering action. In addition to getting your group's charitable purpose better known, it offers a different route to volunteering. Sign up at: [www.wearewhatwedo.org.uk/suffolk](http://www.wearewhatwedo.org.uk/suffolk)

### FURTHER RESOURCES

Watch a video on YouTube about the Social Media Revolution by Socialnomics09 – search for the latest version at [www.youtube.com](http://www.youtube.com)

# Application Forms & Interviews

A logical first step when dealing with potential volunteers is to get them to fill out an application form. This is a good way of recording basic information like name, address etc, but in most cases it is not the best way of assessing a volunteer's suitability for a role.

By asking someone to fill out a complex form you may be unintentionally putting barriers in the way for people, who have problems with their sight, for whom English is not their first language, or whose level of literacy is not high (all of whom may have lots of other skills and experience that you would not want to lose). Remember too that there are a lot of people who do not like filling out forms!

Remember that the overall aim of any fair selection process is to allow all potential volunteers to give the best of themselves and application forms do not allow everybody to do this.

If you are going to use a form to take details, be clear about what information you need and why. For example many organisations ask for a volunteer's date of birth when all they actually need to know is if someone is above or below a minimum or maximum age.

Information you need for equal opportunities monitoring purposes should be asked for on a different form kept separately from other personal details and the reasons for asking should be clearly stated.

## FURTHER RESOURCES

For an overview of recruitment plus templates and best practice examples of forms around recruitment, visit the Volunteering England Best Practice Bank at [www.volunteering.org](http://www.volunteering.org) The institute for Volunteering Research has now provided a guide on collecting and using volunteer data, which can be accessed from <http://tinyurl.com/6cwztrf>

## Interviews

Volunteer interviews are a key tool in a recruitment and selection process. The key things to bear in mind about volunteer interviews is that they should be informal and a two way process. Part of the point of having them is to allow people to get the information they need to decide whether or not they would like to volunteer for you.

So, firstly, make the informal, mutual nature of the interview clear to the potential volunteer. Rather than use the term 'interview' some organisations prefer to simply say that they'll invite the person in for a chat. Find out if the person coming in has any support needs or accessibility requirements.

When the interviewee comes in, make sure that you're ready for them, and have arranged a quiet room where you will not be interrupted. Consider changing the seating arrangements to make them friendlier if appropriate. Make sure you have any information, forms or policies you need.

How the interview itself unfolds will depend partly on the particular role. If a volunteer is going to be working with vulnerable clients, the information and feel for the volunteer that you get from the interview is much more important. In any case, although the interview is informal it should have some structure. There will be some information you need to tell the volunteer and some you need from them.

It's good to start by explaining the purpose of the interview, to put the person at their ease. Let them know that anything they say will remain confidential. You can also start with any form filling that needs to be done, checking personal details and so on.

Have a list of the information you want to give the volunteer, and what you want from them, but don't let it stifle natural conversation. You might want to tell them about the aims of the organisation and how volunteers fit into this; discuss the role description for the volunteer; how they will be supported; your expectations regarding equal opportunities, health and safety and other volunteer conduct.

The information you would like from volunteers might include: what made them want to volunteer with you; what they know about your client group; what support needs they have; what skills or experience they have; what their expectations are from volunteering. Ask them what time they can offer the organisation, but don't expect them to be able to commit to you full time.

Ask open questions, that is, ones that demand more than a yes or no answer, and give as much space as you can for volunteers to ask their own.

The interview allows you to see whether or not the role description can be adapted to better suit the individual. If you are making notes, let the volunteer know what you are doing and what sort of information you are recording. Make sure you keep this factual.

At the end of the interview you can discuss with the potential volunteer whether or not you're both happy for them to volunteer with you. If you really need time to decide whether or not the person is suitable or if, for example, there is scope to change the role to suit them, then give a clear deadline for your decision. It might help if you have a trial period for volunteers. Again, this is as much to allow volunteers to gain a taste of the role as to give you a chance to see how well they fit it.

If you are taking the volunteer on, make sure they leave knowing exactly what the next step will be - when you will contact them or when they are expected to start.

## **FURTHER RESOURCES**

Volunteering England has a Good Practice Guide on volunteer interviews, accessible at <http://tinyurl.com/6fy04af>

Victoria, Australia has a great resource for volunteer interviews accessed through <http://tinyurl.com/3w5suk>

## References & CRB Checks

### What are references?

References are comments from people who know the person in either a work or social context. They can range from a basic check that the person is who they actually say they are, through to a detailed recommendation of their suitability for the role.

### Are references needed?

Obtaining references does give your organisation added security. References can also add to your picture of a volunteer, helping you to identify their strengths and weaknesses, and occasionally alerting you to serious problems. The need for references will depend on the type of task that the volunteer will be undertaking and the risks involved.

### Who should references be from?

Most volunteer involving organisations do ask for references from their volunteers. However, without proper thought, references can act as another barrier to groups, who already find themselves excluded.

- You should bear in mind that a lot of potential volunteers may not have been employed for some time. Some people may have genuine difficulty in finding referees e.g. asylum seekers,
- Others such as young volunteers may not have past experience to draw on. In order to avoid creating barriers, you will need to be flexible about who you will accept a reference from.
- You will need to make a balanced assessment of the risks involved and decide whether there is a safe way of involving people unable to provide references.
- Explain to volunteers why you take references, what you ask and what you do with them.

Remember the more flexible you can be, the more people will be able to volunteer for you.

Guidance from the Office of the Information Commissioner notes that there is more of a duty of confidentiality towards personal referees than towards a previous employer or similar corporate body

### FUTHER RESOURCES

The Information Commissioner ([www.ico.gov.uk](http://www.ico.gov.uk)) has produced a leaflet about protection of personal data accessible from <http://tinyurl.com/6jlrnml>

### Criminal Records Bureau Checking

Checking if someone has a criminal record by carrying out a Criminal Records Bureau (CRB) check is one way of reducing the risk of recruiting volunteers who may be unsuitable to work with children and/or vulnerable adults.

Whilst it is a useful tool in helping to identify unsuitable volunteers, it is not enough just to rely on carrying out a CRB check and this should be used as part of a recruitment process which involves interviews, references etc. and ongoing training and supervision once the volunteer has started in their role. Organisations that fall under the remit of the Care Standards Act 2000 or are 'childcare organisations' under the Protection of Children Act 1999 have a legal requirement to undertake CRB checks on their volunteers.

Where organisations work with children and/or vulnerable adults but are not covered by either of those Acts, the only legal obligation which those organisations have to carry out CRB checks is the duty of care which they have towards the people they work with. The duty of care requires that organisations do everything reasonable within its power to protect people from harm. It could be argued that if an organisation works with children and/or vulnerable adults, part of this duty of care is to undertake CRB checks on volunteers who are going to work with those people.

An organisation which works with children and/or vulnerable adults should carry out a risk assessment for their volunteers to see whether the children and/or vulnerable adults might be at risk if CRB checks were not undertaken. If a potential risk was identified then one way of reducing the risk would be to carry out CRB checks.

If a volunteer is going to work with children and/or vulnerable adults an organisation can include a sentence on their application form which says that because of the nature of the work to be undertaken, the role is exempt from the Rehabilitation of Offenders Act 1974 and so all convictions including spent convictions should be declared and the role will be subject to a CRB check. The statement should also include wording which says something like 'having a criminal conviction will not necessarily prevent you from becoming a volunteer'. The reason why you should include this statement is that a CRB check will include all convictions however minor or long ago they took place and you would not want to put off a potential volunteer who perhaps had a conviction 30 years ago for shoplifting whilst a teenager and had not been in trouble since.

An organisation which wants to carry out CRB checks will, unless they are going to do more than 100 checks a year, have to apply to the CRB via an 'umbrella body' which will help the organisation process the applications. A list of umbrella bodies can be found on the CRB website. The CRB do not make a charge for processing a CRB check but most umbrella bodies will make a small charge to cover their costs.

At present the usual advice is that each organisation should obtain a CRB check for their organisations regardless of whether the individual has already been checked by another organisation. There are good reasons for this as an older CRB check may be out of date if the person has been to court since that check was carried out. In addition the person may not have been checked for a similar role and as different information may be revealed, particularly about what is known as non conviction information, as a result of checks on different roles the full background about a person might not be known if a 'second hand' CRB check is used.

There are proposals for this situation to change, probably from 2013, when a system may be brought in which allows an individual to apply for a CRB check and then to present it to as many organisations as they wish.

## **FURTHER RESOURCES**

[www.savo.co.uk](http://www.savo.co.uk) - SAVO offers a CRB Disclosure Checking Service and advice on CRB for volunteer involving organisations

## Induction, Training, Support and Supervision

Volunteers need to feel welcome. Most people want to do a good job within their voluntary role. They need to know from the outset what is expected and involved.

As with paid staff, induction is an important stage in the recruitment process for volunteers. It acts as an introduction and welcome to the organisation for the prospective volunteer and can give them a “taste of what’s on offer”. Induction gives organisations an opportunity to provide volunteers with further details and information needed to do the job. This may also involve explaining to volunteers the policies and practices of the organisation, clarifying any queries or potential problems, setting ‘boundaries’ or ‘ground rules’ and encouraging them to work to a set of principles - the ethos of the organisation.

Induction takes place over a period of time. People are very nervous when they start a new volunteering role and explaining exactly what they will be doing over the next few weeks can help to put them at their ease.

Induction and training for volunteers form parts of the same process, the purpose of which is to ensure that volunteers are able to carry out their volunteering role as effectively as possible.

You need to remember that for the first few weeks, volunteers will still be making up their mind about whether they want to stay. The induction helps them work through this process - this way both you and the volunteer are much more likely to understand what motivates them and you will end up with a happy and committed volunteer.

To make this process easy, it can be a good idea to introduce the induction as a taster or trial period, at the end of which you and the volunteer can both discuss how the volunteer feels they are doing, what kind of support they feel they need, the areas of the work in which they would like training and which type of work interests them most.

On their first day you will probably want to keep things very basic. You may want to cover fairly informal things; practical things like knowing where the toilet is and where they can make a cup of coffee can help to make the volunteer feel comfortable and relaxed.

There will of course, be some formal things that you need to cover quite early on. It is a good idea to go through any important policies and procedures with the volunteer; by going through them you can make sure that the volunteer understands them and is comfortable with them. It is also good for anyone with limited literacy or English, who may otherwise be too embarrassed to ask for help. These areas may include Health and Safety, the Volunteer Agreement, equal opportunities, confidentiality, and problem solving procedures.

Many organisations find it useful to have a volunteer handbook or pack, which contains all the information the volunteer needs. make sure this is updated regularly and ask current volunteers if anything could be added to make it even more comprehensive.

The rest of the induction period will probably be taken up with training and the volunteer trying out the type of work they will be doing.

Effective induction will give volunteers more confidence, especially in the early stages of their work, and demonstrates that the organisation values the involvement and work of a volunteer.

### **Training may be formal or informal but it can:**

- Enable volunteers to do their tasks more efficiently and effectively
- Make volunteers feel their work is being taken seriously by the organisation, and is not just a marginal activity
- Provide job satisfaction for the volunteer, offering help with personal development and career progression
- Provide a benefit to volunteers - training may be used by the organisation as a means of rewarding their volunteers and thanking them.

### **Support**

Once a volunteer has been recruited, selected and trained and is undertaking their role effectively, they have become a valuable resource to an organisation. This does not, however, mean volunteers can be just left “to get on with it!”. It is common and justifiable, for example, for volunteers to look to their organisation for continuing help and support. In turn, by valuing people, enabling their personal development, building skills and experience, making them feel motivated, needed and wanted, an organisation is demonstrating a commitment to its volunteers. Support for volunteers should be integral to the volunteering experience.

Support is essential to help ensure that volunteers can perform to the best of their abilities and also to ensure they are gaining satisfaction from their experience. Support needs to be made easily accessible and volunteers need to know who they can go to when they require support. The support needs of volunteers will change over time, so the organisation needs to constantly review its procedures.

Support is primarily about meeting the needs of volunteers; supervision is likely to be more concerned with the needs of the organisation. Supervision ensures, that through regular review sessions, individual volunteers are working to their role description and acting in accordance with the guidelines and policies of the organisation. Support encompasses a far wider range of issues and concerns. Supervision can, for example, provide an opportunity to assess the training needs of a volunteer, consider whether their role is too demanding (or not sufficiently demanding) and ascertain if they are receiving adequate support. Therefore, supervision can perform a supportive function and will often form part of a volunteer's support.

Support for a volunteer should begin at the first point of contact and remain continuous throughout their time spent with the organisation. Support is integral at all times and underpins the whole volunteering process.

### **FURTHER RESOURCES**

The Institute for Voluntary Research has produced a report on volunteer's views on involvement and support accessible from <http://tinyurl.com/6188sfl>

## Expenses, State Benefits and Tax

Expenses are extremely important to many volunteers and are also important to your organisation in helping to attract a diverse volunteer 'workforce'. Any organisation serious about involving a diverse range of volunteers should reimburse expenses. Some organisations simply cannot currently afford to do this. However, organisations should realise that reimbursement is an aspiration and volunteer expenses should be built into any future funding applications.

Reimbursing volunteers' expenses is an equal opportunities issue and means that volunteering is accessible to all, regardless of income. It also makes it clear that your organisation values its volunteers and is actively making sure that barriers do not exist to volunteer involvement. Guidance on mileage and subsistence rates can be found on the HM Revenue and Customs website.

However, it is important that volunteers are paid out-of-pocket expenses only i.e. costs that they have actually paid out. Beware of paying a flat rate amount or your organisation could fall foul of national minimum wage legislation or of creating a contract of employment. Advise volunteers that reasonable previously agreed expenses can be claimed via the organisation's claim form, backed up by appropriate receipts.

Pay expenses as soon as possible after they have been incurred - by cheque where convenient for the volunteer or in cash where it is not. Ask volunteers what suits them best - remember what is a small amount of money to some may not be small to others. A weekly or monthly reimbursement system may be easier for your organisation but it may be that you have to develop different systems for different people. It is also permissible (under the Social Security Amendment (Volunteers) Regulations 2001) to pay expenses in advance - with unspent money being returned with evidence of money spent.

### **NOTE:**

Some volunteers may feel that they do not need or should not even be offered expenses. Explain the equal opportunities issue - not everyone can afford to write off costs incurred through volunteering. It's important that there is no stigma attached to claiming expenses, so it would be better if everyone put in a claim, even if they returned the sum as a donation. (which can be gift aided if they are also a UK tax payer) Another key reason for encouraging everyone to take their expenses is so that organisations have an accurate picture of volunteer costs for funders.

### **Volunteering and State Benefits**

In theory, genuine voluntary work should not affect entitlement to any benefit. But in practice this is not always the case and so it is useful to be aware of the rules and regulations. Benefits are handled by Jobcentre Plus. Where benefits legislation defines voluntary work, it is always described as unpaid and where 'volunteers' receive more than out-of-pocket expenses they will be treated as if they are in paid work. Volunteers can receive money to cover expenses connected with volunteering. This may include the cost of:

- travel to and from the place at volunteering
- any special equipment such as waterproof clothing
- any meals taken away from home during the voluntary activity
- childcare costs while volunteering

## Rules concerning some of the most common benefits are:

- Jobseeker's Allowance - claimants are fully entitled to volunteer as long as they remain available for and actively seeking work. There is no limit on the number of hours, but it is likely that someone volunteering full-time may be regarded as not having time to actively seek work
- Income Support - claimants can volunteer for as many hours as they like but must not receive any income from volunteering
- Incapacity Benefit and Employment and support Allowance - claimants are fully entitled to volunteer and this should not call into question a person's capacity to work. There is no limit to the number of hours.

Individuals in receipt of benefits should be asked to inform their advisers if they take up volunteering role. It is good practice to let them know, but in fact it is entirely up to the volunteer whether they tell their adviser or not.

As an organisation you have no duty to inform the benefits office of who is volunteering for you - leave it up to the individual volunteer to decide. Do bear in mind that if someone has not informed the benefits office that they are volunteering, they may be wary of their name or photograph appearing in any publicity, so do always check first before 'outing' someone as a volunteer.

## Tax and National Insurance

If volunteers receive nothing more than out-of-pocket expenses, then this reimbursement will not have tax implications. If they receive some form of payment, then this will be taxable. Simply referring to a payment as 'expenses' does not make it exempt, nor does describing it as an honorarium, pocket money or sessional payment and may also create a contract of employment.

## FURTHER RESOURCES

For up to date mileage rates visit: [www.hmrc.gov.uk/rates/travel.htm](http://www.hmrc.gov.uk/rates/travel.htm)

There is a useful document on volunteering while getting benefits, available from [www.dwp.gov.uk/docs/dwp1023.pdf](http://www.dwp.gov.uk/docs/dwp1023.pdf)

Job Centre Plus has a range of information at [www.direct.gov.uk](http://www.direct.gov.uk)

# Volunteer Retention

Thinking about retention should start even before volunteers are recruited. A considerable amount of resources - for induction, training, support and supervision are “spent” on each volunteer and so it makes sense to look at keeping volunteers for longer. The nature of volunteering means that volunteers are free to come and go. This means thinking more creatively than you might if you were managing paid staff. There aren't any magic solutions, but there are some steps you can take to make volunteering with you a valuable enough experience to stick around.

## Creating rewarding volunteer roles

You need to put a lot of thought into designing rewarding volunteer roles. Obviously not everything a volunteer will be doing is going to be fun, but, when drawing up a volunteer role description look at the tasks you are pulling together. What is there in the role that would attract and keep volunteers? Is there a chance to learn new skills? Meet new people? And what does the role have to offer a volunteer in the medium to long term?

Role descriptions need to be flexible enough to allow for some adaptation to suit individual volunteers. If a volunteer has some say over the role they are coming into then there is more chance that they are going to be happy in it.

Role descriptions should also be open for negotiation further down the road. Once volunteers are within the role they may be looking for new challenges, or find they really hate a task they thought they'd enjoy. Clearly though there are limits to flexibility, your organisation has its own needs that need to be met.

## Motivation

Looking at the reasons why people volunteer is extremely helpful when recruiting but motivations are equally important when thinking about volunteer retention. Volunteering is a two-way relationship. Volunteers may not be paid, but there is always something that they are seeking from the experience. This is the hook that gets them into volunteering in the first place.

It helps a lot to be aware of a volunteer's particular motivation. It's one of the things to ask during an informal recruitment interview. If someone comes into the organisation because they want to feel ownership of a piece of work and end up doing bits and pieces of everything they're not going to be too happy.

Motivations can change, which makes communication with volunteers very important. Someone may have started volunteering because they wanted to get out of the house for a couple of afternoons a week, but later on it might be the opportunity to develop within the role that really keeps them coming in. Talking to volunteers, both informally and as part of supervision meetings, again allows you to keep an eye on their motivations, and if possible shape their role to continue meeting them.

## Recognition

Volunteers should feel that they are an important part of the organisation. They should be involved in decision making, and their achievements should be recognised. There are many ways of making volunteers feel involved, welcome or recognised.



## Different people value different forms of recognition:

- You can involve them in decisions about the day-to-day running of the organisation
- Any event held to celebrate achievement is also an opportunity to acknowledge the work of volunteers
- Include volunteers in staff discussions and staff training where appropriate
- Add their names to published lists of staff
- Put them forward for volunteer awards - local, regional and national
- Perhaps think about volunteer recognition awards inside your organisation
- Volunteer events - a thank you event, as part of Volunteers Week, for example.
- Certificates - a once a year thank you, or after a fixed term
- Accredited training opportunities
- Invite volunteers on to working groups - reviewing the volunteer's handbook as an example
- Send them a card for key celebrations

## But always

- Say thank you when they leave at the end of their volunteering day
- Make sure they have enough quality tasks to do during their volunteering

## Good practice

The better and more efficiently volunteers are treated, the better they feel about the organisation they are donating their time to. Key things to bear in mind are clarity and consistency. Volunteers should know where they stand. This means:

- Fully inducting volunteers
- Keeping volunteers advised of their rights and responsibilities
- Having a volunteer policy in place
- Having a named supervisor to go to with problems
- Clear discipline and grievance procedures
- Taking equal opportunities and diversity seriously.

## Exit interviews

If you are worried about a high turnover of volunteers, one of the best ways of finding out if there is a specific problem is to talk to leaving volunteers. This could be through a questionnaire or an informal chat (it's perhaps better if it isn't an immediate supervisor doing this!).

Even if you don't think there's a problem, exit interviews are a useful tool for monitoring your use of volunteers. People leaving the organisation are likely to be more candid than they would otherwise be.

## FUTHER RESOURCES

A Choice Blend: what volunteers want from organisations and management. Katherine Gaskin, 2003. Available as a pdf download from Volunteer England at <http://tinyurl.com/2fzn57t>

[www.morevolunteers.com](http://www.morevolunteers.com) is an American website filled with useful resources. SAVO is now offering the ASDAN Community Volunteering Qualification - a formal award for anyone over 13 in a volunteering role. Telephone 01473 273273 or email [enquiries@savo.co.uk](mailto:enquiries@savo.co.uk) for more information.

## Insurance & Liabilities

Insurance is a very important issue in relation to volunteers. Make it clear to prospective volunteers as to how they are covered by your organisation's insurance.

Basically volunteers should be covered either under employer's liability insurance or public liability insurance and, depending on the type of work involved, the organisation may need professional indemnity insurance as well. Policies should explicitly mention volunteers because they may not automatically be covered. Insurance companies should also be aware of the types of work that volunteers are doing because if the tasks are high risk then the insurance policies may have to be changed to accommodate these risks.

Every organisation should check its insurance cover at least once a year. There are several insurance options and policies to consider. Some are required by law, while others are optional. The more common insurance policies are listed below. Please note this list is not exhaustive. There are several types of insurance, which might be needed by a volunteer-involving organisation. These should be determined by an assessment of the types of exposure and losses that may occur. The main types of liability insurance for the voluntary and community sector in the UK are as follows:

- Employers' liability (EL) insurance is compulsory by law for employers and covers all staff, permanent and temporary. Trustees are advised to regard volunteers as being employees for insurance purposes and to ensure that they are appropriately covered (Charity Commission, 2003 and see also Health and Safety Executive, 1999).
- Public liability (PL) insurance provides cover for injuries to the public or damage to or loss of their property caused by the negligence of the organisation, which includes the actions of employees and volunteers. The term public means anyone other than an employee and includes volunteers, participants, spectators, visitors and clients.

The following policies are also taken out by some organisations:

- Contents and Building insurance covers premises
- Professional Indemnity insurance
- Product Liability insurance
- Trustee Indemnity insurance
- Directors and Officers (D & O) insurance
- Business Continuity insurance
- Fidelity Insurance

Other policies such as motor insurance, equipment insurance and medical malpractice are held by some organisations, depending on the nature of their work.

### Registering your organisation's activities

Any organisation employing staff, regardless of size or location, must register its existence with the Health and Safety Executive or the local Environmental Health Department. You should always check with the authorities if you are in any doubt about the need for registering activities.

## Quality Standards & Volunteer Training

If you want to become more formally recognised for the way you work with volunteers (and staff), there are a number of commonly used organisational standards and quality systems you can use. Relevant standards include Investing in Volunteers, Investors in People, ISO 9001:2000, the European Excellence Model, PQASSO) as well as standards used in particular sectors (such as the National Minimum Standards for Care Homes and the Guidance Quality Standards for Learning and Careers Advice Work).

Most, if not all of these have a cost attached and will take time and effort to achieve. However, in terms of attracting and retaining volunteers, achieving such a standard will be appealing as it will show that you have the relevant policies and procedures in place and your organisation 'invests' in the value of volunteering.

The process usually involves registering for a standard and then working towards a particular level of achievement, which will depend on your size, income and the type of organisation you are (usually through building a portfolio of evidence). You may have an external assessor come to audit your organisation and interview staff, volunteers and your service users as appropriate; whereas other Standards require self-assessment only.

There are also a range of training courses your staff and volunteers can attend on an individual basis on the theme of volunteering and volunteer management. SAVO run a one day course on Managing Volunteers and are a registered provider for the Community Volunteering Qualification (CVQ) at Level 1-3, which gives volunteers a formal qualification for their volunteering achievements.

### FURTHER RESOURCES

To find out more about Investing in Volunteers follow [iiv.investinginvolunteers.org.uk](http://iiv.investinginvolunteers.org.uk)

Young Suffolk offers Quality Standards for Suffolk based organisations working with Young People: [www.onesuffolk.co.uk/youngsuffolk/qualitystandards](http://www.onesuffolk.co.uk/youngsuffolk/qualitystandards)

SAVO has qualified PQASSO mentors who can guide you through the process. Contact Robin Hodgkinson on 01473 273273 for more information.

To find out more about the SAVO training, visit [www.savo.co.uk](http://www.savo.co.uk)

Read more about the CVQ suite of qualifications at [www.asdan.org.uk/Qualifications/CVQ](http://www.asdan.org.uk/Qualifications/CVQ) or email [laura.hack@savo.co.uk](mailto:laura.hack@savo.co.uk) for more details.

## Health and Safety

Despite the increasing importance of volunteering, the legal obligations of organisations towards their volunteers with regard to health and safety are less clear than they are for employees. Nevertheless, organisations do have legal obligations towards their volunteers and it is clearly good practice to treat volunteers with equal consideration when it comes to health and safety.

This means that reasonable steps should be taken to reduce the probability and seriousness of injury to volunteers. This could mean giving them proper information, training, and use of safety clothing, closer supervision and so on. There are also duties on employers under Section 3 of the Health and Safety at Work etc Act 1974 to take account of the health and safety of those people (other than their employees) who may be affected by their activities, and to give them relevant health and safety information.

### Duty of care

The duty of care is a general legal duty on all individuals and organisations to avoid carelessly causing injury to persons. The duty is regardless of the size of the organisation, its income or whether the organisation has paid staff.

If your organisation asks a volunteer to do a task, which results in them injuring themselves or anyone else, the members of the governing body may be liable. No matter what activities your organisation is involved in you will have to consider the duty of care owed to your volunteers. Liability depends on establishing that the organisation failed to take reasonable care. The notion of duty of care needs to be considered in all aspects of an organisation's work and activities.

### Health and safety law for organisations with paid staff and volunteers

The main piece of health and safety legislation is The Health and Safety at Work Act 1974. It also gives employees the general duty to ensure the health and safety of themselves and others, who may be affected by what they do, or pay to do.

Health and safety law lays down your duties to your employees. The law also imposes further responsibilities on you as an employer with regard to people not in your employment, such as volunteers and other members of the public, who may be affected by your work activities.

### Organisations with responsibility for buildings and premises

Anyone controlling non-domestic premises must take reasonable steps to provide employees and volunteers with equipment and premises that are safe, including safe routes of exit.

### Health and Safety Policy

A health and safety policy is the foundation on which to develop health and safety procedures and practices. The policy announces the organisation's commitment towards good health and safety standards. The policy can help to clarify procedures and areas of responsibility.

Organisations with five or more employees must have a written health and safety policy, setting out the organisation's commitment and clarifying procedures. Smaller organisations should also strongly consider writing such a policy as a matter of good practice. Volunteers should be included in the policy and have access to it.



Volunteers should be made aware of the policy and practical safety issues as part of their induction. This is a good way of reminding people about it and signposting them to the health and safety policy proper.

## **Fire Assessment**

All public and community buildings are obliged under various pieces of legislation to specify minimum levels of standards so that the risk of fire is reduced.

## **Health, Safety and Welfare**

All employers must provide a safe place to work, which is clean and free from risks, to reduce the risk of ill health or injury.

A safe system of working is required: that is, proper procedures for handling dangerous substances and adequate guards for machinery. All employers should provide adequate supervision.

Employees must be given training and information to give them sufficient skills and knowledge to carry out their work safely.

These regulations do not apply to organisations with no employees. However, they do need to ensure that their volunteers can work in a risk-free and safe environment.

## **First Aid**

All employers have a duty under law to make a first aid assessment. The need for first aid will depend on the organisation's activities. Again, an assessment of the workplace is the key to deciding what first aid to provide. There are, however, minimum standards for organisations with employees.

Voluntary groups with no employees are not bound to do a first aid assessment, although it is clearly good practice. However, in certain circumstances, such as a large public fireworks display, there may be a legal duty to provide first aid facilities. For example, if you hold a public exhibition without first aid facilities and someone is injured, you may have broken your duty of care. If you have any doubts whatsoever, you should always contact the local Health and Safety Executive office for advice.

## **FURTHER RESOURCES**

The Health and Safety Executive has examples of model health and safety policies which can be used as a template. [www.hse.gov.uk](http://www.hse.gov.uk)

Accredited training in Health and Safety, Risk Assessment, Fire Awareness, First Aid for Appointed Persons and Basic Food Hygiene: [www.savo.co.uk](http://www.savo.co.uk)

Free Health and safety and Risk Assessment Toolkits for the VCS available from [www.practicaltoolkits.otg.uk](http://www.practicaltoolkits.otg.uk)

## Dealing with Problems

Volunteering is by and large a positive experience for everyone involved, but sometimes things can go wrong. Good practice in the use of volunteers from the start will minimise problems. In most cases volunteers will make a valuable contribution to the organisation and, with good support, you should be able to resolve any difficulties. However, to protect all concerned it is important to have clear procedures in place to deal with complaints by or about volunteers.

Part of your problem-solving procedure should also give volunteers the right to complain if they feel they have been unfairly treated.

All complaints/concerns should be resolved openly, fairly and quickly to:

- Protect your volunteers
- Minimise any disruption to staff, service users and other volunteers
- Demonstrate that your organisation respects its volunteers
- Protect the reputation of your organisation.

### Assessing the problem

What at first appears to be a serious problem may in fact be an example of a training need. People learn in different ways and at different paces. The 'problem' may in fact end up highlighting ways to improve your induction and training.

Often volunteers may be unaware that they are doing anything wrong. This is why it is so vital to have adequate supervision and regular supervision meetings. After all, a volunteer can't be expected to improve or change the way they work if an issue hasn't been brought to their attention.

### A change is as good as a rest

Perhaps the volunteer needs a change of role. They may be bored in their current one, or feel underused. It may help to look at volunteering in terms of a series of tasks rather than roles. This means that people aren't necessarily locked into a rigid off-the-peg role, and could have more say over their voluntary work. Again, this is a problem that can be spotted earlier through adequate supervision. Communication is a vital part of volunteer management.

If a volunteer is not suited to the role they are assigned to - or any others at your organisation, remember that they may have much to offer to a different organisation. Make sure that they are aware of this, and refer them to their local Volunteer Centre and any other organisations that you feel may be able to make use of their skills.

Having a trial period for your volunteer allows you to see whether or not they are suitable, as well as giving the volunteer a chance to get a taste of the role.

## Point of no return

But with the best will in the world, there may be some situations, which can only end with asking a volunteer to leave. This could be because the volunteer has committed some form of gross misconduct. It is when things get to this stage that you need a volunteer disciplinary procedure in place.

Disciplinary procedures are important not only because they give volunteer managers clear guidelines on how to proceed, but also because they allow volunteers to see that decisions are not being taken on an arbitrary basis.

It is obviously very bad practice to dismiss someone without adequate reasons. Apart from the moral case, volunteers who have been treated poorly tell their friends and family about their experience. These people then tell their friends and family. Word of mouth can affect not only the volunteer programme, but the credibility of the organisation itself.

## A hard decision to take

It does jar with the spirit of volunteering, but sometimes you do have to dismiss a volunteer. Some situations are that serious. A volunteer, who is disruptive can have a negative impact on the organisation, the client group, and their fellow volunteers. Some behaviour simply cannot be tolerated.

While volunteering is concerned with values far removed from the profit motive and narrow economic views of efficiency, if it is to be valued then it does need to have some level of quality, however this is judged.

## Summary

To sum up, the first thought should be ‘what is the cause of the problem?’ Much of this depends on communication with the volunteer. Follow disciplinary procedures to ensure everything is open and accountable. If a decision to dismiss is taken, be clear and direct.

Concerns have been raised that having a complaints procedure in place may contribute to the creation of a contract with volunteers, giving them access to some or all of employment rights. This is a theoretical risk, but a low one. It certainly makes sense to distinguish between the grievance and disciplinary procedures provided for paid staff and procedures for volunteers. Not having clear procedures in place could lead to greater problems.

Your organisation should develop effective and consistent procedures for responding to complaints, concerns and alleged or suspected incidents of abuse. Everyone in your organisation should know how to respond if it is alleged that one of your service users, paid staff, volunteers or the organisation has been harmed or is at risk in any way.

It is unacceptable to do nothing.

## FURTHER RESOURCES

Volunteering England has a range of problem solving procedures available from [www.volunteering.org.uk](http://www.volunteering.org.uk)

# Equality and Diversity

While the Equality Act 2010 does not apply to volunteers an organisation committed to equality and diversity believes that everyone, who chooses to, has a right to volunteer and that everyone has potential to be a valuable, respected and active member of his or her community.

A diverse organisation is one that recognises and values difference. If you draw your volunteers from as many backgrounds as possible you will benefit from the fresh ideas and perceptions offered by people with different skills, attitudes and experiences.

- Organisations can always benefit from fresh approaches, so motivating people with a broader range of backgrounds, knowledge and experiences can help you plan new projects and invigorate long running ones
- Incorporating a wider range of ideas might help your organisation to improve its service and work more efficiently to fulfil its aims
- Reflecting the local community can boost an organisation's credibility and improve its ability to focus on local needs. This could help you to develop new ideas or to meet specific funding criteria
- Volunteering should offer everyone a fair chance to contribute and avoid excluding people by stereotyping or labelling them
- An organisation becomes more welcoming as it becomes more representative of the community in which it works. You can benefit from a snowball effect as your organisation diversifies and is accessible to new clients, customers, staff and a greater pool of potential volunteers
- Also bear in mind that the population is changing, in terms of age, ethnic diversity, technology, family and lifestyle choices. Organisations need to reflect this to be relevant and effective. By recognising and accommodating difference, organisations can ensure they meet individual needs.

Despite our best efforts in promoting diversity, the perception of volunteering demographic has changed very little in the UK over the years.

Volunteering opportunities that promote diversity have these ingredients:

## Relevant and meaningful

If you are going to make a real impact then your focus needs to be less on how potential volunteers think of you and more on how you think about them.

The act of giving time for no material gain has different meanings depending on your class, social and ethnic background and whether your general life experience has been primarily as a giver or receiver of services. If you are going to provide volunteering opportunities that will be relevant and meaningful to others you need to step outside your habitual worldview. People will want to volunteer for something with which they have a sense of ownership.

Bear in mind that formal management structures may turn some people off. Young people in particular tend to be at a transitional point in their lives. They may be between school and work or college so they may not have the time to engage in projects with a long lead-in time.

Bear in mind too that the notion of a “good cause” is very culturally specific. The British style of formal welfare provision is the product of an urban, industrial heritage. It may not make much sense to someone who has grown up in a non-western, rural, economy where family meets social needs not strangers. Similarly ideas of heritage and conservation are culturally determined. The notion of preserving ancient buildings and the landscape is a recent one.

### **Easy to find out about**

When people are asked why they don't volunteer, they typically say that they weren't asked. The invitation to volunteer works best when it is targeted at specific groups or, better still, made face to face.

You need to include information that will encourage people e.g. mention that expenses are reimbursed and that transport is provided if you know lack of money or transport are likely barriers to volunteering for your target group. Consult with individuals in your target group to find out what style or language will make sense to their peers.

### **Convenient time and duration**

When and how much time people have to donate depends very much on their lifestyle. The parents of young children may want to volunteer while their children are at school. Teenagers may want to volunteer in the evenings and at weekends. Employed people may be relatively time poor and only want to volunteer for a couple of hours each week, whereas time may weigh heavy for asylum seekers, who might welcome the chance to volunteer for several hours at a time.

### **Involve social contact**

Most people like company. The opportunity to chat can make boring tasks fun. Create situations where boring tasks can be done by people in groups.

### **Physically accessible**

Develop creative solutions to transport problems. You could encourage volunteers to give each other lifts; make partnerships with community transport organisations; or raise funds to buy a minibus. Make sure that potential volunteers know that you can help them with transport.

### **Enjoyable**

If you want to recruit more volunteers from a wider range of backgrounds then you need to develop volunteering opportunities, which take account of your potential volunteers' priorities. Taking account of volunteer concerns may lead you to question the whole basis upon which you do what you do. That's the real challenge in diversity.

### **FURTHER RESOURCES**

The Equality Commission for Northern Ireland has produced a guide for promoting Equality & Diversity in Volunteering. Access it from <http://tinyurl.com/5sqjyuu>

# Confidentiality

Volunteers should be bound by the same requirements for confidentiality as paid staff. Everybody can be affected by confidentiality issues and it is important that volunteers realise that it is not only clients and client information that this applies to, but also to volunteer issues and individuals and the day-to-day work of groups and organisations as a whole.

Organisations need clear guidelines on the handling of information so that everyone knows what is expected of them. Volunteers need to be clear which information can be discussed outside the organisation and which cannot.

Confidentiality is a very complex subject, but both staff and volunteers must understand and respect the need for confidentiality in relation to their roles.

- Confidentiality is about trust – trust will not exist if service users feel that anything they say in confidence will not be treated with respect
- Volunteers should be advised not to encourage service users to disclose irrelevant confidential information
- Volunteers should be asked to use their common sense in matters of confidentiality and to be sensitive and have a professional approach
- Volunteers should also be made aware that breaches of confidentiality are treated very seriously.

The primary duty of an organisation is to advocate for its service users. An organisation will work on the principle that client needs and protection of service user rights is paramount and it will therefore have determined its own policy and must communicate that policy and practice unequivocally to volunteers and follow this policy and practice consistently.

Among organisations there is a range of practices in relation to disclosure about of confidential information about service users:

- Organisations that operate a “confidentiality within the agency” rule i.e. information concerning any service user can be discussed within the agency but is not disclosed to anyone else without permission
- Organisations that always seek and obtain the permission of the service user before disclosing any information
- Organisations that will always operate on the principle that they have a duty to report confidential information if other people may be put at risk unless they disclose.

## Information about Confidentiality

There are different implications for volunteers working with different client groups. For example the issues around children are quite involved, specifying that the child must be protected from harm. While an adult has the right to expect something told in confidence to a volunteer, the volunteer has a legal duty to report any concerns around safeguarding where abuse is suspected, or the person is an abuser.



There are also issues for volunteers, and groups or organisations around the handling of volunteer and client information. There are a number of ways of doing this:

- Formal policy
- Code of Practice
- Accessible information for volunteers
- Training
- Setting out procedures for a confidentiality policy, which covers the disclosure of information about volunteers/clients/staff, when to share and whether it varies for different groups.

### **A Confidentiality Policy should include:**

Guidelines for volunteers, which should include how to deal with:

- One to one situations
- Why confidentiality is important
- Keeping records
- Report forms
- Who to report to.

### **Records**

- The purpose of keeping records should be defined
- Any monitoring system in place will ensure complete anonymity
- That records will be kept accurate and accessible
- All records will be kept in a secure lockable filing cabinet. Only relevant staff shall have access to the cabinet
- All records will be reviewed annually and destruction by a confidential shredding process will be applied where relevant

This policy should be displayed in the organisation's offices and venues, and all efforts will be made to ensure that individuals accessing the organisation are aware of this policy.

Any community group or voluntary organisation, which holds lists of personal details on computer or on paper (known as the data controller) must register under the Data Protection Act by notifying them, unless they are exempt. If in doubt, always check with the Information Commissioner. There is a Self Assessment guide on line.

### **FURTHER RESOURCES:**

Office of the Information Commissioner has guides on data protection. Visit [www.ico.gov.uk](http://www.ico.gov.uk) A template for a Declaration regarding Confidentiality, available in English and eight other languages is available from [www.sheffieldvolunteercentre.org.uk/translated-resources-organisations](http://www.sheffieldvolunteercentre.org.uk/translated-resources-organisations)

## Legal Issues

Eighteen million people make a gift of their time each year. There is increasing government attention on volunteering, with growing numbers of people being encouraged to volunteer. It is therefore vital that organisations understand both the good practice and the legal implications of volunteer involvement, in order to ensure that volunteering remains a valuable experience for all.

### Volunteers and employment rights

People new to volunteering are often shocked to discover that volunteers are not covered by the same protections as paid staff. This means that, in theory, volunteers can be discriminated against or unfairly dismissed with impunity. This is, however, a grey area and in some cases 'volunteers' have claimed their status is that of worker or employee and this has been upheld in court. Other rulings, however, such as under the Equality Act 2010, have not seen volunteers as employees, so they do not have the same rights.

The central issue here is whether or not there is a contract between the organisation and its volunteers; and if so, what are the consequences of this. This issue has been given greater importance in recent years by the introduction of the National Minimum Wage Act. Volunteers are not entitled to the minimum wage if the only money they receive is reimbursement of actual expenses.

It is important, therefore, to know how to reduce risk by avoiding some common pitfalls; by being informed about such matters as reducing obligations, perks and the language of contracts, the importance of creating a distinction between paid workers and volunteers and of treating volunteers fairly. Good practice would advocate the use of volunteer agreements.

As an organisation, you do have a duty of care for your volunteers in terms of health and safety, which is covered in more detail on Page 22.

### FURTHER RESOURCES

"Volunteers and the Law" Restall M. Volunteering England, 2005 available as a downloadable pdf from: <http://www.volunteering.org.uk/resources/publications/volunteersandthelaw.htm>

"The Voluntary Sector Legal Handbook" Adirondack, S and Sinclair Taylor, J, DSC [www.sandy-a.co.uk](http://www.sandy-a.co.uk)

### Data Protection

If information kept on volunteers falls into the Data Protection Act 1998's definition of 'personal data', the organisation has legal duties concerning the collection, storage, use of and disclosure of such information.

### Data protection Principles

Under the law, personal data must be:

- Fairly and lawfully processed
- Obtained only for specified and lawful purposes
- Adequate, relevant and not excessive for the purposes for which it is processed
- Accurate and up-to-date

- Not kept longer than necessary
- Processed in accordance with the rights of individuals
- Kept secure
- Not transferred to countries where data protection legislation is inadequate.

### **FURTHER RESOURCES**

The Information Commissioner's Office has a wealth of information on data protection [www.ico.gov.uk](http://www.ico.gov.uk)

### **Volunteer records**

No clear guidelines exist for the retention of volunteer records, but organisations should follow the data protection principle that data should not be kept longer than for the purpose for which it was taken. The Criminal Records Bureau states that disclosures should only be kept for as long as absolutely necessary and which should rarely be longer than six months.

The sort of personal information about volunteers that you may need to keep could include:

- Contact details
- Details of experience, skills and preferences used to assess suitability for a role (recorded on application form or gained through interview)
- Monitoring information including ethnicity, disability etc.
- Information relating to CRB checks
- References
- Supervision notes.

Volunteers have the right to make a request to access all of the data you hold about them. Requests should be made in writing and you will need to decide a process for this, e.g. will access be by appointment?

### **Copyright**

Copyright normally belongs to the person who created the work. The law says that material produced by employees belongs to their employer but makes no mention of volunteers. Therefore organisations should ask volunteers to transfer copyright to them or agree a licence whereby the organisation can use the work within agreed limits. While this may seem a trivial issue, Volunteering England has heard of cases where volunteers have been producing work for important publications such as annual reviews, but following disputes with their organisations have refused to allow them to use their work.

### **FURTHER RESOURCES**

Volunteering England's Information Team has drafted a form of words which you can adapt for use with your volunteers when dealing with copyright issues. To request a copy, email [good.practice@volunteering.org.uk](mailto:good.practice@volunteering.org.uk) or call 0800 028 3304.

# Risk Management

Risk management is not a one-off event but a process that should cover the whole organisation. Risk management involves integrating precautionary measures into day-to-day operations and should include policy development, programme and service planning, partnership and service agreements, financial management, governance, and personnel and facility management.

The approach to risk management planning depends on the size, activities and management structure of an organisation.

## Risk Management has three central aims:

- Prevention: the first priority; it is clearly preferable to keep things from going wrong in the first place
- Minimisation of harm: minimise the magnitude of harm that accrues in the event that a risk materialises
- Liability reduction: a well-documented risk management system constitutes tangible proof of due diligence and can substantially reduce the likelihood of successful legal action.

There are several models that can be used to identify and manage risk. Risk management systems are unique to their organisations and the particular issues and risks they have to deal with in their area of work. However, there is a basic six step model for volunteering that includes:

- Screening
- Induction and training
- Risk assessment
- Insurance
- Record-keeping
- Review.

Risk management is a process which never ends. It is therefore essential to keep it under review. Monitoring involves establishing systems of data collection and analysis and encompasses not only how well procedures are working, but also takes account of changed conditions or newly emerging risks. This enables organisations to introduce improvements and refinements to their practice so that small gaps are plugged and systems streamlined.

## Successful risk management

The successful practice of risk management has a number of elements which contributes to its effectiveness:

### Getting expert help

There are a large number of sources on risk management, which organisations can consult in developing their own systems.

### Devising plans and systems

Guides on risk management stress the value of having a team or collective, participative process for devising plans and systems. This has the advantage of sharing the load, bringing in as many perspectives on risk as possible and ensuring a sense of ownership across the organisation.

## **Taking a positive and realistic view**

Taking a positive and realistic view of risk management helps organisations embrace and implement it effectively. This includes emphasising the benefits and opportunities, and promoting the view that it makes the organisation safer and more accountable and improves practice overall. Organisations that promote risk management as an enhancement of their volunteer programme generally get a positive response.

## **Strong motivation and context**

Organisations that have had a bad experience related to risk or that operate in a context where risk management is non-negotiable, have particular motivation to implement it effectively. An experience of insurance difficulties, allegations, claims or threats of loss of funding is a strong stimulus to get things in order to prevent future risks to the organisation.

## **Implementation**

The approach taken in implementing risk management can influence how successful it is. This includes developing systems and procedures that are as efficient and easy to use as possible and the way in which they are implemented with staff and, particularly, volunteers.

## **Staff and resources**

It is clear that risk management consumes staff time and resources and that these issues have a bearing in this area as in so many affecting the voluntary and community sector. Having the capacity to take on the additional work and implications of risk management definitely helps organisations to be successful at it.

## **The impact on volunteering**

The focus on risk has had significant effects on volunteers, both directly and indirectly through impacts on organisations. Greater caution in programme planning and volunteer role development, and the increased burden of bureaucracy, limit organisation's capacity to engage and retain volunteers.

Volunteers themselves worry about risk and being sued, and some are put off by paperwork and the level of responsibility.

Part of the problem may be the name itself. Risk management implies problems that need to be overcome. But if we see managing risk as maximising opportunities for doing well, it puts a different face on it. So we'd rather call it 'safe keeping'. This suggests that managing risk is about keeping things safe and that everyone and everything that organisations are dedicated to helping can flourish in the safe keeping of volunteers. Whenever you encounter the term risk management, think 'safe keeping'.

## **FURTHER RESOURCES**

Risk toolkit - how to take care of risk in volunteering - a guide for organisations  
Volunteering England [www.volunteering.org.uk](http://www.volunteering.org.uk) (available as a pdf download).

## Events & One-Off Volunteering

The term Events Volunteering in this section refers to any sport, cultural and/or deliver a specific event that requires volunteers to plan, manage and/or deliver. These events are likely to be charitable and non-profit making.

Good practice in terms of volunteer recruitment, selection and supervision for one-off events is essentially the same as for any other aspect of volunteer management. Most, if not all, of the guidance provided in this booklet will apply to any volunteering context, including events. However, there are some aspects of the volunteer management process that may need to be thought through in a slightly different way for a one-off event when compared to more traditional, longer term volunteering contexts.

### Volunteer recruitment:

In recruiting new volunteers for an event there are a number of considerations. Any event is likely to have a core of volunteers who are committed to the cause, the organisation and the event itself; these are the people who will plan the event and have got the event to the stage of being able to identify what additional support is needed. In terms of recruiting additional volunteer support to help on the day this may involve recruiting people as a group through another voluntary organisation, for example the local Scouts/Guides or other methods may be used, such as using the local Volunteer Centre Network or in Suffolk, the 'County Events Team'.

Some considerations in recruiting volunteers may include:

- Appointing a Volunteer Co-ordinator for the event – identify someone on the team who will take responsibility for recruiting and managing volunteers for the event. This role is key to leading the rest of the process. Identifying what skills the existing group of volunteers have and what skills are needed to plan and deliver the event.
- Identifying what involvement and roles new volunteers could have at an event. Volunteering at an event can be a very attractive way of recruiting new volunteers. There are many motivations for new volunteers including social reasons, working in a team, being part of something new and exciting, learning new or improving existing skills, a way of trying volunteering in a controlled, time-fixed way.
- Identifying the volunteer roles that are to be recruited for – it may be useful for larger events to think about specialist and generalist volunteer roles. Specialist roles could include first aid, safety and technical roles that require specific skills and qualifications. Generalist roles are likely to include start and finish marshalling, registrations and setting up and taking down the event site.
- Consider making use of the local Volunteer Centre and do-it.org (the National Volunteer Database) to access new volunteers, as this is another way of promoting your event.
- Consider identifying Volunteer Team Leaders for larger events – people who have some experience of events, who are willing and able to lead and co-ordinate other volunteers on the day of the event.

### Volunteer Selection, Induction & Training:

Considerations for event organisers in this area would include:

- Choosing a suitable selection process – e-mail/telephone contact may be sufficient for some roles, others may require an informal meeting or even an interview.
- Safeguarding checks may be required for some volunteer roles – however this is often not necessary for one-off events (guidance on this issue can be provided by organisations such as SAVO and Suffolk Sport).

- Induction for the volunteers should be considered – for some events/roles this may need to be formalised due to the complexity of the roles or for safety reasons. For other roles/events the provision of an on-site induction on the day of the event may be preferable and sufficient.
- A Volunteer Induction Pack is a useful way of putting all of the relevant information for volunteers at the event in one place – This may include a Volunteer Policy/Statement, Role descriptions, Volunteer Agreement, Statement on volunteer expenses, information about health, safety, insurance and emergency procedures.

### **Management of volunteers on the day of the event:**

On the day of the event itself there are likely to be a number of issues that will need to be addressed, these include:

- Meeting place and time to be agreed – include the need for any set up tasks that may need to be done as well as any induction training for volunteers needed.
- Register the volunteers working on the day, useful in emergencies and essential for your records in thanking volunteers after the event.
- Ensure that the volunteers know who their Volunteer contract is for the day in the event of any problems.
- Distribute any uniform/kit required to be worn by volunteers for the day – they may get to keep this after the event!
- Check that volunteers are happy in their role – monitor volunteers throughout the event. Provide for breaks which may include time for volunteers to experience the event. Ideally, offer the possibility for volunteer rotation during the day so that other roles can be experienced.
- Ensure that cover is sufficient to deal with volunteers who may only be working for part of the day/event, otherwise gaps may appear!
- Ensure that there is an agreed end to the volunteer's involvement on the day – this can avoid people 'drifting off' without thanks and a 'hardy few' being left to clear up the rubbish and take down the event. Try to have an official 'stand-down' time / process in place.

### **Recognise and thank volunteers and collect some feedback:**

The day itself is likely to be hectic. In addition to a 'thank-you' on the day some follow up with volunteers may be needed:

- Recognise the input of volunteers with a 'thank-you' event', certificates, recognition awards
- Thank volunteers by post/e-mail/telephone where appropriate
- Offer volunteers opportunities to provide you with feedback about the event – this may be collected on the day itself or afterwards.
- Offer volunteers opportunities to get more involved in the organisation/charity – they may be keen to do this having helped at the event!

### **FURTHER RESOURCES**

Guidelines for Event Organisers, County Events Team Volunteer Agreement, Events Calendar and advice on Events Volunteering available from [www.suffolkvolunteeringlegacy.org.uk](http://www.suffolkvolunteeringlegacy.org.uk)

Information about Safeguarding in sport, links to Sports Governing Bodies and guidance on volunteering in sport accessible from [www.suffolkspport.com](http://www.suffolkspport.com)

# Resource Bank

**ASDAN Community Volunteering Awards:**

[www.asdan.org.uk/Qualifications/CVQ](http://www.asdan.org.uk/Qualifications/CVQ)

**Do-It – the online database of volunteering opportunities:**

[www.do-it.org](http://www.do-it.org)

**Health and Safety Executive:**

[www.hse.gov.uk](http://www.hse.gov.uk)

**Investing in Volunteers – quality standard:**

[ivv.investinginvolunteers.org.uk](http://ivv.investinginvolunteers.org.uk)

**SAVO's CRB Disclosure Checking service –**

[www.savo.co.uk](http://www.savo.co.uk) or 01473 273273

**SAVO's Practical Toolkits:**

[www.practicaltoolkits.org.uk](http://www.practicaltoolkits.org.uk)

**Suffolk 2012 Volunteering Legacy Project - advice on Event Volunteering:**

[www.suffolkvolunteeringlegacy.org.uk](http://www.suffolkvolunteeringlegacy.org.uk)

**Suffolk Sport – information on volunteering in sport:**

[www.suffolksport.com](http://www.suffolksport.com)

**Suffolk Volunteering Federation – strategic lead for volunteering in Suffolk:**

[www.volunteeringsuffolk.org](http://www.volunteeringsuffolk.org)

**The Information Commissioner:**

[www.ico.gov.uk](http://www.ico.gov.uk)

**The Institute for Volunteering Research:**

[www.ivr.org.uk](http://www.ivr.org.uk)

**The UK Government – resources for expenses, benefits and tax:**

[www.directgov.uk](http://www.directgov.uk)

**Volunteering England Good Practice Bank:**

[www.volunteering.org.uk](http://www.volunteering.org.uk)

**Volunteers and the Law - downloadable pdf:**

[http://www.volunteering.org.uk/NR/rdonlyres/8448CBDA-582E-4A91-8975-6165D6ABE3E7/0/Volunteers\\_and\\_the\\_Law\\_rev.pdf](http://www.volunteering.org.uk/NR/rdonlyres/8448CBDA-582E-4A91-8975-6165D6ABE3E7/0/Volunteers_and_the_Law_rev.pdf)

**Youtube – broadcast yourself:**

[www.youtube.com](http://www.youtube.com)

**Young Suffolk Quality Standards:**

[www.onesuffolk.co.uk/youngsuffolk/qualitystandards](http://www.onesuffolk.co.uk/youngsuffolk/qualitystandards)

**We Are What We Do Suffolk – add your organisation's actions:**

[www.wearewhatwedo.org.uk/suffolk](http://www.wearewhatwedo.org.uk/suffolk)



### Volunteering definition:

“...an activity that involves spending time, unpaid, doing something that aims to benefit the environment or individuals or groups other than (or in addition to) close relatives”.

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