



VOLUNTEER MANAGEMENT HANDBOOK

A guide to managing volunteers for voluntary organisations

CONTENTS

Introduction

1. Using volunteers within your organisation
-how volunteers can help deliver your services
2. Recruiting volunteers
-finding volunteers and filling your vacancies
 - Role descriptions/profiles template
 - Advert template
3. Application
-making sure your volunteers are suitable
 - Application Form template
 - Example Interview Questions
 - Volunteers Agreement template
 - Reference template
4. Induction
-getting volunteers started
 - Induction Pack suggested content
 - Induction Checklist
5. Managing volunteers
-looking after volunteers throughout their role
 - Supervision template
 - Annual Review Template
 - Training Needs Template
 - Expenses Claim form Template
6. Retaining Volunteers
-keeping volunteers involved and motivated
 - Thank you letters and certificates
 - Volunteer Feedback Template
7. Policies and Procedures
-making sure you are set up and compliant to support volunteers
 - Volunteer Policy Template
 - Recruitment Policy Template
 - Risk assessment template
 - Health and Safety Guidelines
 - Confidentiality policy Template
 - Data Protection and GDPR Policy Template
 - Safeguarding Policy Template
 - Equal opportunity policy Template
 - Lone Working Policy
 - Expenses policy Template
 - Complaint Procedure Guidelines
 - Volunteer Handbook Template

Introduction

This booklet has been written to assist organisations who involve volunteers and to implement good practice.

This is not intended to be a representation of the law and where necessary you should seek appropriate legal advice.

Please be aware that recommended policies and practice change over time.

We hope that you find this booklet helpful

Find out more about Stronger Kent Communities at:

www.strongerkentcommunities.org.uk



1. Using Volunteers Within Your Organisation



Planning for volunteers in your organisation

Careful planning is the key to building a good foundation for involving volunteers.

Consider the following:

- Is everyone in the organisation aware of plans to involve volunteers?
- How will different people be affected – staff, trustees, service users, other volunteers?
- Do we have the human resources to adequately support volunteers?
- Are the people who will support volunteers suitably skilled and trained?
- Have we budgeted the costs of involving volunteers such as payment of out of pocket expenses, training, staff costs for supervision and admin costs for DBS checks if required?
- Are we able to provide roles that are rewarding for volunteers and meet the needs of the organisation?
- Do we have the necessary space and resources (such as a spare desk or computer)?
- Volunteers bring fresh ideas, enthusiasm and experience – are we ready for this?
- Have we considered any risks associated with involving volunteers? (this includes risks to the volunteers and to the organisation)
- Is our insurance cover adequate?
- What policies and procedures do we already have that should be reviewed in the light of involving volunteers?
- Do we need any new policies and/or procedures such as a Volunteer Policy?

When is it not appropriate to involve volunteers?

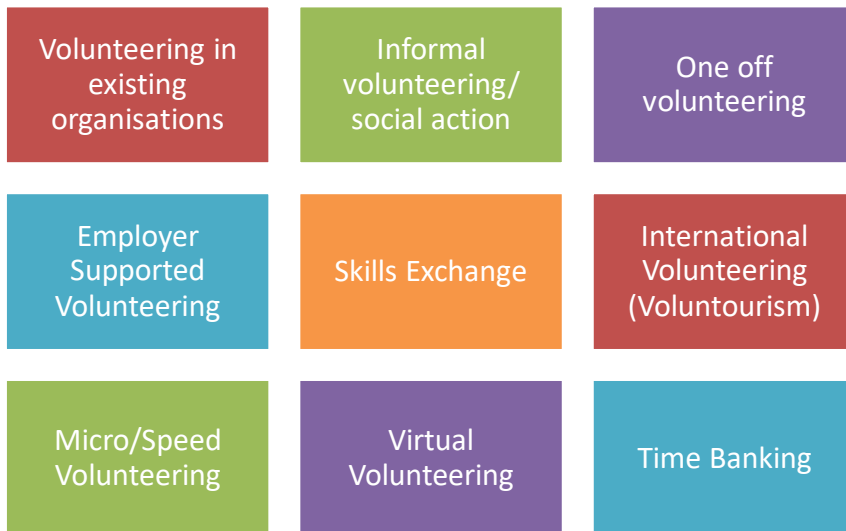
- When answers to the questions above have raised issues for the organisation that cannot be resolved
- To replace a paid member of staff
- When volunteers will be delivering a service that is usually paid for and the recipients could clearly pay
- When the work is intended to make a profit

Creating roles for volunteers

For a successful volunteer programme the benefits need to be two way. The roles that the volunteers undertake should assist the organisation to meet its aims whilst at the same time being of benefit to the volunteer.

The key when designing new roles is to ensure that this is so. For roles to be meaningful it should be possible to describe how they contribute to the organisations overall aim.

Different ways of volunteering:



Who should be involved in the process?

Everyone in the organisation should be aware of that you intend to introduce volunteering or when you create new roles.

- Staff should be consulted, particularly when the involvement of the volunteer/s will affect their workload
- Existing volunteers may have valuable insights and it is always helpful to look at roles from a volunteer's perspective
- Service users/clients may have ideas about how services could be enhanced or developed with the help of volunteers
- Be aware that all three groups could feel threatened by the introduction of new roles and may need re-assurance - for example that volunteers will not be used as a substitute for paid staff or that the quality of a service will not be less because it is delivered by volunteers
- Trustees, though volunteers themselves, will through their governance role need to ensure that any organisational policies are consistent with involving volunteers and include the volunteers where appropriate

Some points to consider

- Are you able to attract a broad range of people by having opportunities that include those that can be done by any willing helper and those that are more specialised and require particular expertise?
- Is there flexibility in when the role/s can be carried out to fit in with the availability of volunteers?
- Is the role of benefit to the volunteer? How interesting/challenging is it? What will they gain through it?
- Are you able to involve volunteers who may have additional needs? What support is available? What form could this take?
- Do you have the resources available to support the role/s - supervision time, physical resources (desk, PC etc.)?
- Does the nature of the role require taking up references and/or DBS checks.

2. Recruiting Volunteers

Tips for advertising:

- Use straightforward terminology. Is what you've written likely to be understood by someone completely new to your organisation?
- Expensive media campaigns are generally not very successful at generating enquiries at a local level. It is far better to put the time, money and effort into more locally focused efforts.
- Always be positive. Negative adverts (e.g. 'Our organisation to close unless you step forward now') are very unlikely to elicit a good outcome in the long term. You want people to respond enthusiastically to a positive opportunity – that way they are far more likely to stay involved.
- Some Volunteer Centres can support your advertising via their brokerage and social media platforms and their outreach events.
- Local community radio, local press and newsletters are effective in reaching potential volunteers.

Events

Running either an individual event or attending one arranged elsewhere (e.g. church fetes) is a way to meet a lot of people at once. This approach requires having people who are willing to enthusiastically approach people to talk to them about your organisations volunteering opportunities. This is not for everyone and some will undoubtedly find it out of their comfort zone.



Choosing an eye-catching activity that shows your organisation at its best is most likely to make an impression. Expect to talk to a lot of people and for many of them to not be interested.

Printed resources can appear in many forms and are a way to give information that can be taken away to digest, such as newsletters. Some of the templates in this booklet could be suitable, particularly the role descriptions. Getting people to register their interest is one thing, giving them information to take away to find out more is even better.

Leaflets are a good method to make an impression about the type of activity as well as giving information about the role. For both, having someone to contact and ideally an event to attend would be ideal. Printed resources can be expensive and thought needs to be put into where to put them.

Online advertising has the potential to reach a large number of people who are actively searching for opportunities online. Having your own website or social media pages is a very useful tool to refer potential volunteers to and you can use them to put up information about the role and your organisation.



Do-it/Kent Volunteers

Do-It is a national volunteering database and there are other regional volunteering databases such as Kent Volunteers or Simply Connect. There are many other options for online volunteer advertising that cover your local geographical area or via certain types of volunteering.

Shortlisting Volunteers:

- Application forms are useful in preparing for interviews. They are a good way of recording information for future use as well as monitoring and evaluation.
- Keep application forms as simple and clear as possible.
- Where people have to handwrite information leave them plenty of space. For example leave plenty of space if people have to write their name and address on a form.
- You may be able to offer support in filling in application forms.

What do you need to know about the Volunteer:

Before collecting data ensure you comply with the latest Data Protection Act/ GDPR.

- Name, address, telephone numbers (home/mobile), e-mail address, etc.
- What is the volunteer's length of commitment and availability?
- Does the volunteer have any special needs or requirements?
- Are there any possible restrictions? E.g. police record
- Are there any limiting factors such as transport availability or personal commitments?
- Has the volunteer any previous experience, relevant skills or interests?
- Can the volunteer show an understanding of the importance of confidentiality?
- Would the volunteer prefer group work or one-to-one work?
- Does the volunteer prefer a structured or flexible environment?
- Does the volunteer have the ability to take on responsibility?
- Can the volunteer relate to others?

What do volunteers need to know about your organisation?

It is best to have information in writing for volunteers to consider:

- Who is the contact person and what is his/her role?
- What does your organisation do?
- What does the voluntary role involve?
- When and where does the voluntary role take place?
- What sort of commitment is required? E.g. two days a week for 6 months?
- Are working times fixed or flexible to suit the volunteer's needs?
- What skills are needed? Which skills are necessary? Which are desirable?
- To whom are the volunteers responsible?
- What support is offered? Who provides this support?
- What are the expenses available? E.g. transport, childcare, lunch.
- Are references required?
- Is a Disclosure and Barring Service (DBS) check required?
- Is information on relevant policies provided?

Template for a Volunteer Role Description/Advertisement

This template will help you form a specific role for a volunteer.

It will assist you in attracting people with the skills you want and gives any prospective volunteer a sense of purpose.

Title of the post:

	The Role	The Volunteer
Main task summary	What do you want done?	What skills, experience, attitudes or qualities are required?
Time and Place	Set days/hours or Flexible? Location of volunteering? Are there access implications? What do you have in place to overcome barriers eg hearing loop, reserved parking spaces etc	Estimate minimum/maximum time commitment. Do they need their own transport be willing to use public transport?
Volunteering with	As a team or alone? Accountable to?	Do you need a reliable team member or someone who can work independently?
Support	What induction, training, support and supervision is available? Is there a trial period? Is equipment provided?	Do you need someone who will ask for help when they need it? Is training compulsory? Does a volunteer have to supply their own materials or equipment?
Expenses	Are expenses paid? If yes, what is covered – travel, meals etc?	Are you expecting people to be out of pocket?
Other	Do people need to undergo vetting?	
Benefits	What will a volunteer get out of this role?	What will motivate somebody to do this?
Key person to contact for more information	This needs to be someone who knows about the vacancy and is skilled at dealing with phone and email enquiries.	How do they apply or contact to find out more.

All the above can be used in a volunteer advertisement.

This template is also a good way of starting to prepare information for registering of the vacancy with your local Volunteer Centre.

Template Role Description

Volunteer Role Title: [Insert Title]

Aim of volunteering role:

Tasks:

Skills required:

Days and time required:

Location:

Volunteer manager:

Transport needed:

Benefits offered:

References:

- Two references required.
- Volunteers who will be directly and significantly involved with children or vulnerable adults will be required to undergo a DBS check.

The information in this document is for information only. It is not a substitute for professional advice and we cannot accept any responsibility for loss occasioned as a result of any person acting or refraining from acting upon it.

3. Application



Volunteer Application

Although practices will vary, and there is no one ideal application process, asking volunteers to formally apply for a role (e.g. through completing an application form) has a number of benefits.

- It may be the first opportunity for the organisation to collect their contact details and other relevant information.
- It is a positive way to find out more about them, why they want to do the role and make sure you can welcome them to the organisation properly.
- Most importantly, it should be part of your process for deciding if they are a suitable person for the role and for your organisation.

For many volunteers, overly long or officious application forms will be a 'deal breaker'. So make it positive, informative, welcoming and non-threatening. Here are three tips on creating an application form:

- Keep it simple. Too much information on forms will not give a good impression to most adults.
- Ideally go through the role description and application form together, in person. This allows you to expand on the role and the application process, without needing to overwhelm the volunteer with documents.
- Make sure you add in to the application form any other relevant organisational procedures you have.

The Selection Process

Planning an interview:

An interview should provide an opportunity for you to learn about the applicant and it should allow the potential volunteer to understand what is expected of them and what they can expect from your organisation.

- Interviews, however informal, are conversations with a purpose.
- Decide on a formal or informal approach.
- If you are taking on a number of volunteers you may want to organise a 'taster day' and hold group interviews.
- Be clear on what you do or do not need to know about an applicant.
- Ensure there is a clear arrangement for time and place.
- The environment should be comfortable and free from interruptions, away from telephones, other personnel and the public if at all possible.
- Allow sufficient time for the interview to take place.
- Bring relevant information to the interview (application form, expense claim form, documents to give to the interviewee, etc.)
- Decide how you will record the details of the interview.

Interviewing:



- Relax.
- Introduce yourself and help the interviewee feel as comfortable as possible.
- Clarify the purpose of the interview.
- Let the interviewee know they can ask for questions to be repeated.
- Give some details about the organisation and where volunteers fit in.
- Outline any relevant policies.
- Summarise the main points at the end of the interview and agree on the next steps: e.g. when you will let them know the outcome, taking up of references, starting date, induction details, etc.

Do's:

- Listen closely to what is said.
- Ask open questions as these gain more information and more honest answers.
- Follow up answers you are unclear about, ask for more details if required.
- Allow the interviewee the chance to ask questions.
- Thank interviewees for their time and interest.
- Be clear about what happens next. If you are unable to give the result of the interview on the day let the interviewee know your decision as soon as possible.

References and Checks:

- References are good practice and a useful way of gaining insight into the volunteer's qualities.
- It may be appropriate to talk through possible referees with the interviewee and make suggestions, e.g. colleague, family friend, college tutor etc.
- Referees should not include close relatives or people under 18.
- A reference that indicates a problem does not necessarily mean the volunteer is unsuitable. For example, the information can be used to identify sensitive situations that should be avoided.
- Consider whether a DBS (Disclosure and Barring Service) check needs to be taken. Will the volunteer be working with vulnerable clients? E.g. The elderly, young children. What is your organisation's policy? Remember DBS checks are free for volunteers though there will be a small admin cost to your organisation.

After the Interview:

- Look over your recorded information and make clear evaluations.
- Ensure that any decisions you make are based on the needs of the organisation and reflect your equal opportunities policy not personal prejudices. It is useful to have an interview 'panel' so you can discuss the candidate's suitability with colleagues and avoid personal bias.

For the successful applicant:

- Make sure their starting arrangements are clear and introduce them to other workers at the time of interview if possible.
- Start the volunteer in the role as quickly as possible. If there are any delays be clear as to why and set a start date.
- If there is a delay in a successful applicant's DBS Check then he/she can sign a disclaimer form and work, in a supervised manner, can start prior to the check being processed.

For the unsuccessful applicant:

- If a person is not suitable give them your reasons for not accepting them in a clear, sensitive and honest way. Where possible suggest possible ways of strengthening their areas of weakness.
- If appropriate offer an alternative voluntary opportunity.
- Give the applicant the chance to discuss the decision you have made.
- You may refer interviewees back to your local Volunteer Centre for more volunteering opportunity information.

Volunteer agreement

Many organisations have a volunteer agreement, where the volunteer signs to say what they are committing to do. We prefer to suggest a volunteer policy as it is more aspirational. A 'memorandum of understanding' is a similar idea to a volunteer policy, with a list of hopes and expectations on both sides. Asking volunteers to be committed is one thing and of course you want people to be reliable. But a fundamental element of volunteering is that you are not bound by a contract. The application form is another way to ask volunteers to sign their agreement, but be cautious and remember they are not staff members



Volunteer application form template

Thank you for expressing an interest in volunteering for (insert organisation).

Please complete the below and return to <Insert Manager name>.

Personal details

Name	
Address	
Post code	
Email	
Date of birth	
Contact phone number	
Additional needs	

Volunteer role details

Role applied for	
Group/centre	
Time/availability	

Suitability for the role

Experience, training or Qualifications	
Why interested in the Role	
Comments on suitability	

Referees (We will contact them for a reference)

1. Name	
Address	
Email	
Relationship to you	
2. Name	
Address	
Email	
Relationship to you	

Please contact <Insert Manager name> if you have any questions and return the form to them once complete. They will contact you as soon as possible to discuss the next steps (which may include a Disclosure and Barring Service Check, depending on your role).

Thank you again for your interest.

(Your Organisation and logo)

Sample volunteer interview questions

(Ideally the conversation will be informal – use these to help get started)

1: Have you volunteered anywhere else?

2: What do you hope to gain from volunteering with us?

3: What support can we give you to make your volunteering a more positive experience?

4: Do you have any questions about the role?

5: How much time do you have available to volunteer?

6: Do you have any limits on travel?

7: Why do you want to volunteer for us?

Have a list of questions about the specific role, to determine if the person is suitable:

Volunteer reference form template

<Insert Volunteer's Name> has applied for a voluntary role at <Insert Organisations Name>.

As part of our appointment process, we ask for two references and they have given us your name.

We would very much appreciate your response to the following questions, to help us make sure they are suitable for the role. All replies are strictly confidential.

How long have you known him/her?

In what capacity?

Is he/she reliable?

Is he/she honest as far as you know?

In your opinion does he/she understand confidentiality? YES/NO
(Please delete as appropriate)

Does he/she have an understanding of other people's needs?

Is there any other information that would be helpful?

Signed..... Date.....

Please sign and return to <Insert organisation's address>.

Thank you very much for your response.

Template Volunteer Agreement

This Volunteer Agreement is a description of the arrangement between us, <OrgName>, and you (the volunteer) in relation to your voluntary work. The intention of this agreement is to assure you that we appreciate your volunteering with us and to indicate our commitment to do the best we can to make your volunteer experience with us a positive and rewarding one.

Part 1 <OrgName>

We commit to the following:

1. Induction and training

- To provide thorough induction on the work of <OrgName>, its staff, your volunteering role and the training necessary to assist you in meeting the responsibilities of your volunteering role. The Volunteers Handbook provides full details of the organisation.

2. Supervision, support and flexibility

- To define appropriate standards of our services, to communicate them to you, and to encourage and support you to achieve and maintain them as part of your voluntary work
- To provide a personal supervisor who will meet with you regularly to discuss you're volunteering and any associated problems.
- To do our best to help you develop you're volunteering role with us and to be flexible in how we use your volunteering.

3. Expenses

- To reimburse the expenses incurred by you in doing your voluntary work in accordance with the procedures set out in the Volunteers Handbook.

4. Health and safety

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

5. Insurance

- To provide adequate insurance cover for volunteers whilst undertaking voluntary work approved and authorised by us.

6. Equal opportunities

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

7. Problems

- To endeavour to resolve in a fair and just manner any problems, grievances or difficulties which may be encountered while you volunteer with us.
- In the event of an unresolved problem, to offer an opportunity to discuss the issues in accordance with the procedures set out in the Volunteers Handbook.

Part 2 The volunteer

I, (volunteer name), agree to be a volunteer with <OrgName> and commit to the following:

1. To help <OrgName> fulfil its volunteering support services.
2. To perform my volunteering role to the best of my ability
3. To adhere to the organisation's rules, procedures and standards, including health and safety procedures and its equal opportunities policy in relation to its staff, volunteers and clients.
4. To maintain the confidential information of the organisation and of its clients.
5. To meet the time commitments and standards undertaken, other than in exceptional circumstances, and provide reasonable notice so that alternative arrangement can be made.
6. To provide referees, as agreed, who may be contacted, and to agree to a DBS check being carried out where necessary.

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

Agreed to: _____

Volunteer signature

On behalf of (<OrgName>)

Date: _____

Volunteer role: <RoleTitle>

4. Induction

Induction

Two factors can contribute to volunteers leaving their roles. Firstly, volunteers may feel they don't have the skills or information to do the role. They may also become bored and feel they are failing to progress with their volunteering.

Having an induction plan is essential to making sure they start off on the right foot. Induction should happen throughout the period you are getting to know the volunteer and helping them to choose a suitable role. Think of it as three steps to get them involved, with a supportive induction running alongside. Induction continues in earnest when their role starts. They need to be given the tools to do their role, to meet people and to feel a part of the organisation. The template overleaf can be added to or deleted as appropriate, but think about it in advance of their first day in the role.



Induction pack

Creating an induction (or information) pack can be an ideal way to make sure you give all the key information/policies/documents to the volunteer when they start. You may have included this information elsewhere already (most of it is referred to in the induction checklist template)



Induction checklist template

- Volunteer induction for <Insert Volunteer name>
- First day in role: ____/____/____
- Volunteer Manager: <Insert Volunteer Manager name>.

What Who When Complete Personal Introduction to staff & volunteers

Tour of the building - e.g. use of kitchen, bathroom

The role

Role description

Volunteer agreement - e.g. confidentiality

Training

The organisation

Organisational chart

Staff job descriptions

Role of volunteers and staff - Volunteer policy/ethos

Policies & procedures

Health & safety (including emergencies)

Equal opportunities

Volunteer Policy

Child protection (depending on organisation)

Data protection and data access

Code of Behaviour

Practical Support

Support and supervision

Expenses

Volunteer Management catch ups

Induction pack – suggested content

Information about the organisation

- Organisational chart and key staff roles
- Overview of the organisation
- Contact list
- Forthcoming events (with sign-up details)
- Organisational kit (e.g. polo shirt)
- Staff ID card/lanyard
- Volunteering leaflet

Organisation policies

- Equal Opportunities Policy
- Volunteer Policy
- Information on health and safety, confidentiality, data protection, risk assessments

Information for the role

- Induction checklist
- Role description
- Training Needs Analysis
- Training information
- List of useful websites
- Code of Behaviour
- Administration
- Application form
- Supervision review form
- Expenses claim form
- Welcome letter



5. Managing Volunteers

Supervision and reviews

Volunteer reviews are often shied away from and seen as too formal and similar to a paid role. This perception can be avoided. Reviews can be an excellent opportunity for both volunteer and Volunteer Manager to see how they are getting on and if any further support, training or information would help.

'Informal' reviews

Reviews can and should be an ongoing feature of the relationship between a volunteer and a Manager, the kind of interaction that often happens naturally. This might include:

- Phone calls; 
- Email exchanges; 
- Other online communication;
- A quick chat at the end of the volunteering session.

Reviews allow Volunteer Managers to maintain a positive relationship and to check if volunteers have any worries, concerns or questions.

The Supervision form included in this booklet can be used by both volunteer and Manager to record any issues they want to discuss the next time there is an opportunity.

It does not need to be a long-term record that replaces informally catching up, but some people may find it gives a helpful structure to discussions. Make the atmosphere relaxed and in a calm environment if possible.

Adapt the template printed overleaf to include some key questions to ask them.

'Formal' reviews

This could be done once a year or as felt appropriate and is a more formal opportunity to reflect properly on what's happened – and to identify any skills, training or information that is needed. They don't need to be 'formal' in a business sense and are a defined opportunity to discuss things away from the normal busy schedules. Use the template to structure volunteer reviews:

Depending on the role and your organisation, the review may be a way to decide if someone is still suitable for the voluntary role they have and to make a recommendation for their future volunteering. Some suggested options might be:

- To stay with the same role (e.g. with a new set of goals and targets, or training to look forward to);
- To move on to a new role;
- To leave the role entirely (e.g. for a break and to consider whether to return).

This is not always an easy process to complete but it often means that long-term volunteers are given new challenges and options, rather than remain doing a role they have long since stopped enjoying.

Training, learning and development

Voluntary roles can change over time and you may ask volunteers to do new and different tasks. This is generally good and is likely to keep people interested. There shouldn't be an expectation that they will want to.

Having an accessible training calendar (e.g. on your website) makes it easier for staff and volunteers to prepare for and consider new training opportunities. It is important to make sure that a volunteer continues to have the skills to do the role (and any new tasks). It is important to retain existing skills and gain new ones. Whilst you may not always have the resources to put volunteers on expensive training courses, you can assist their learning in other ways. Consider:

- 'Buddying' newer volunteers with more experienced volunteers;
- Running internal training courses or information sharing sessions;
- Linking up with established training sessions where possible;
- Asking departing volunteers to share their learning experiences with you and pass that on to volunteers when needed.

Training needs

Use the Training Needs Analysis template below to try and identify the learning needs of a volunteer. Training Needs Analysis documents can take many forms but the main aim is to work out which parts of their role need extra learning and what training can be done to help.

Communication

Communicating with volunteers is a key component of dealing with volunteers. Picking an appropriate communication method is important. Volunteers are unlikely to respond well to formal or business-like communications. Try instead to find out their communication preferences (e.g. email, letter, phone calls, in person etc.) and use them where possible.



Performance management

Volunteers are not paid members of staff and so issues of performance must be seen and considered differently. With volunteers it is often forgotten that training, information or support might be the factors that need addressing. Agreeing a procedure in advance can help to avoid disputes or complaints becoming complicated to deal with. Managing volunteers may lead to dealing with difficult situations that need to be addressed – e.g. disagreements between volunteers and issues of performance. Think about these things in advance and try to stop issues from developing beyond the initial problem or situation.

Expenses

Agree an expenses policy for volunteers and make it available to a volunteer when they apply for the role. Make it flexible to take into account the different activities for different roles – e.g. travelling to different parts of the country for expeditions. Whilst volunteers ideally should not be out of pocket for volunteering, many organisations find it difficult to pay them. Having a clear policy allows potential and new volunteers to understand the position before they start the role. Some things to consider:

- Only out of pocket expenses are normally reimbursed;
- Define in advance what an acceptable expense is;
- Be very clear if you have a limit on the amount/type of expense claim that volunteers can make;
- Not paying expenses limits the type and number of potential volunteers;
- Some people will be reluctant to claim expenses. There shouldn't be any expectation that they will decline to claim for them.

Supervision form template

Use this form to record the regular, perhaps informal, discussion meeting between volunteers

<Insert volunteer role title> and their <Insert Volunteer Manager name>.

The main points of the discussion, made by either the volunteer or Volunteer Manager, can be recorded (including any actions) for future reference and to ensure nothing gets lost.

Volunteer name:

Volunteer Manager name:

Date: ____/____/____

Main discussion points

Actions agreed upon

Issues to refer to next time

Proposed date of next meeting: ____/____/____

Volunteer review form template

It has been <XX months/years> since the last review.

This is an opportunity to review your recent experience and to help plan some goals/things you'd like to achieve in the next <XX months/years>.

Volunteer name:

Volunteer Manager name:

Date: ____/____/____

Since the last review, consider:

What has gone well?

What have you enjoyed the most?

What challenges have you faced?

Are you happy with the level of support and amount of meetings we've had?

Do you need any further training?

Have your personal circumstances changed – do you still have the same amount of time available?

Do you have any goals we can try and achieve in the next period?

Learning Points (a record for the Volunteer Manager for issues to raise at a later date):

Proposed date of next meeting: ____/____/____

Training Needs Analysis template

Name:

Volunteer role:

No	Main tasks of volunteer role	Training required (Y or N)	Training need identified	How it will be achieved	Action taken
1					
2					
3					
4					
5					

Date of next discussion: ____/____/____

6. Retaining Volunteers

Keeping volunteers motivated, interested and happy in their role is a key task of the Volunteer Manager. Making a proactive effort to retain your volunteers will help the running of your volunteer programmes and you may avoid spending a lot of time finding new volunteers. This section looks therefore at the ways you can show your appreciation of your volunteers and keep them involved with the organisation when they finish one particular role. Making this an ongoing feature of managing your volunteers is the easiest way to set this up.

Thanking volunteers

Showing your appreciation of volunteers should be a central aspect of managing them. You don't need to go overboard and many volunteers will not be actively seeking praise or recognition. However, showing your appreciation will be welcomed and is an important aspect of managing volunteers. You can use a number of different methods, including the following:



In person

In a large organisation this won't always be possible but at training, events, meetings etc thank you messages can be adopted where possible.

Messages

Emails and other communication methods are an effective way to get more adhoc messages out, for example after a particularly busy expedition season or after a very successful group of Awards achieved. You can use one-off messages such as Volunteers Week www.volunteersweek.org to show general appreciation. Thank you cards may be difficult to do for large groups but can also be well received.

Thank you letter

Sometimes a more formal letter of appreciation is going to be needed. This might be after a particularly busy time of year, to celebrate a milestone or something similar. Use the template overleaf to create your own version.



Thank you certificates

Thank you certificates are probably not going to be useful every week and will benefit from being reserved for special occasions. This might be when a volunteer leaves or when they reach a certain number of years volunteering with you.

Rewarding and recognising volunteers

Again, volunteers will not be expecting huge rewards every week but setting your organisation up to have a system of reward and recognition is a very good way to show

appreciation, especially in a larger organisation. Some have very well established systems of awards, certificates, badges and more. Adopt a few of them if they seem suitable.

Award ceremonies

These could be one off or regular events, awarded at a national or more local level. However you decide to set them up, they are a good opportunity to thank volunteers for their efforts and present certificates/awards/gifts etc. Although there is likely to be a cost involved, they are often popular and are a great way to talk to a volunteer group at the same time. They can also generate positive publicity and be an opportunity to recruit potential volunteers.

Long service

Showing that your organisation remembers when volunteers reach a certain length of time with you is also likely to be well received. Choose a number that fits your organisation (e.g. one, three or five years) and select a way to mark reaching that milestone.

Volunteers leaving their roles

Moving on to other roles:

Always be on the lookout for other roles that a volunteer could be doing. Volunteers can stick with the same role for considerable lengths of time. Volunteer Managers can help to avoid those volunteers becoming tired of the role or the organisation.

Volunteer feedback template

Thank them for their time and efforts whilst volunteering with <Insert organisations name>.

Volunteer name:

Volunteer Manager name:

Date: ____/____/____

Please help us to improve the volunteer experience at <Insert organisations name>.
The information provided here will help us to improve the way we support all volunteers.

Do you enjoy your volunteering?

Is there anything we can do to make your experience better?

Do you feel you have enough information to do your role properly?

If 'no', please record which areas are missing.

Is there anything you would like us to know?

Many thanks for your continued support.

Sample volunteer thank you letter

(Date) <Insert organisations name/address/logo>

(Name and address)

Dear <Insert Volunteer's name>,

I would like to take this opportunity to thank you for your brilliant efforts with <insert organisations name> this year.

We have had another outstanding year, this simply wouldn't have happened without your help. We particularly benefited from your time on <XXX>

My thanks again for all your hard work.

Yours sincerely,

Volunteer Manager

7. Policies and Procedures

Volunteer Policy

A volunteer policy will give an overall framework for volunteer's involvement in your organisation. It will refer to any other policies that include volunteers, bringing it all together in one document. It can be helpful to look at other people's policies to get an idea of the style, language and complexity that would suit your organisation although you should work through the process of writing the policy by involving volunteers, staff and trustees.

Risk assessments

Risk assessments should be done by organisations on behalf of their volunteers, minimising the amount of risk they are subject to. Risk should be considered when deciding on a role description and when deciding what activities participants and adults will do. The Health and Safety Executive (HSE) identify the following five steps to risk assessment:

1. Identify the hazards;
2. Decide who might be harmed and how;
3. Evaluate the risks and decide on precaution;
4. Record your findings and implement them;
5. Review your assessment and update if necessary.

Health and safety

Organisations have a general responsibility to make sure adults who volunteer for them are properly looked after. If your organisations staff policies don't cover volunteers, either adapt them to make sure they do – and/ or create a Health and Safety Statement.

Confidentiality

Many organisations will decide that information is confidential between a volunteer and an organisation. You may decide to have a similar policy and make it a part of the application or induction process.

Data protection

Data protection applies to volunteers too and it is essential to have a well-planned policy on dealing with all documents that relate to your volunteers. The information you collect and store needs to comply with the current General Data Protection Regulations. Make sure volunteers are aware of their responsibilities under the Act.

Safeguarding policy

Everyone involved in delivering your organisation's activities needs to be kept safe and each organisation must have a safeguarding policy. Safeguarding is a very important area to get right. Disclosures (e.g. a DBS check in England and Wales) are only one method of making sure volunteers are suitable for their roles and for volunteering with young/elderly people. Criminal record checks should only be carried out if they meet the

criteria of 'Regulated Activity'. Volunteers should know and accept your organisations safeguarding policy and be informed of any amendments.

Equal Opportunities

Diversity means difference, and people's differences can be many and varied. They may include; race, culture, national origin, region, gender, sexual orientation, age, marital status, politics, religion, ethnicity, disability, socio-economic differences, family structure, health, values and many more. Ensure that all policies and procedures incorporate diversity, are relevant, easy to understand and simple to put into practice. You should have an Equal Opportunities Policy, even for a small organisation. It is important that you understand what this means in practice and act on it otherwise the words are merely empty and well meaning.

Lone working policy

It is good practice to have a lone working policy that covers volunteers. This will be more suitable for some roles than others. You might include:

- Who does the Lone working policy cover?
- Emergency contact information and procedures;
- Risks to lone working volunteers

Expenses

Volunteers should not be out of pocket as a result of volunteering. Typical expenses may include (but not necessarily be restricted to):

- Travel to and from the organisation (or where the voluntary work is taking place)
- Travel while volunteering.
- Meals taken while volunteering.
- Post and phone costs.
- Care of dependants (for example, children, elderly parents) while volunteering.
- The cost of protective clothing or special equipment needed for role.

But, please note, that expenses should only cover out of pocket expenditure incurred by the volunteer.

Complaint Procedure

For problems which cannot be solved informally, organisations should have a 'problem solving procedure' to follow. This should deal with complaints, problems, issues or concerns (either raised by or about a volunteer) in a fair, consistent and equitable way.

These procedures often have several stages. This gives volunteers the opportunity to appeal to higher levels of management.

Volunteer Handbook Template

A volunteer handbook is a reference guide for volunteers. It can be used as a recruitment tool and given out to volunteers at the start of their voluntary involvement. It should however be different to the Induction Pack (although some content may be shared across the 2 documents). A smaller organisation may decide to have either an Induction Pack or a Handbook but bigger organisations could create both and use the Handbook as a personalised 'volunteer record book' including information on training etc.

Insurance

Your organisation will need insurance relevant insurance policies in place for involving volunteers e.g. Public Liability Insurance, Employer's liability insurance, Professional Liability Insurance that covers volunteers for whatever activity they are doing. Volunteers need to be specifically referred to in your policy.

The Charity Commission states that charities must take out Employer's Liability insurance only from a company working under the Financial Services and Markets Act 2000.

If you are introducing new activities for volunteers, let your insurers know - there is often no impact on insurance costs.

Ensure the health and safety at work poster is visible and that volunteering environments conform to this.

Sample Volunteer Policy

Introduction

This volunteer policy is the foundation on which <OrgName> involvement with volunteers is based and helps to define the role of volunteers within the organisation, and how they can expect to be treated.

<OrgName> exists to (add your mission statement here)

In line with this mission <OrgName> seeks to involve volunteers to:

- ensure our services meet the needs of our clients
- provide new skills and perspectives
- increase our contact with the local community we serve

Principles

This Volunteering Policy is underpinned by the following principles:

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

The following information deals with the practical aspects of the involving of volunteers. More detailed information is available under the relevant policy and procedures documents.

Recruitment

Volunteer opportunities will be promoted in a manner that ensures there is wide accessibility to the positions we offer. Written role descriptions will explain what is expected of volunteers in relation to time, necessary skills, experience and specific duties required.

Volunteer agreements and voluntary work outlines

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

Induction and training

All volunteers will receive an induction into <OrgName> and their own area of work. Training will be provided as appropriate.

Expenses

All volunteers will endeavour to reimburse volunteers reasonable out-of-pocket expenses for travel and other expenses in line with the Volunteer Expenses Policy.

Support and Supervision

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

Insurance

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

Equal opportunities

<OrgName> is committed to building a diverse organisation that is responsive to the needs of our stakeholders and welcomes people of any age; disability; gender reassignment; marriage and civil partnership; pregnancy and maternity; race; religion or belief; sex; and sexual orientation.

Health and safety

Volunteers are covered by <OrgName>'s Health and Safety Policy.

Problem solving

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

Confidentiality

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

Template Policy for the Recruitment of Volunteers

The Management Committee/Trustees/Executive of (your organisation's name) is fully committed to the recruitment and support of volunteers within their organisation.

Further, all staff at (your organisation's name) are fully committed to the recruitment and support of volunteers within our organisation.

The staff and management of (your organisation's name) hold the belief that volunteers can provide a variety of skills and experience that would not otherwise be available.

Volunteers also bring a different perspective to our work that reflects the views of clients and/or the local community. Further, it is recognised that volunteers bring credibility to our organisation – by giving their time for free it suggests that our work is of value.

Before recruiting volunteers (your organisation's name) will ensure that:

- Staff understand why we are recruiting a volunteer.
- Staff understand the levels of support we offer to individual volunteers.
- There is work for the volunteer to do.
- This work will contribute clear value to our organisation and the volunteer.
- There will be both an adequate selection and support system for the volunteer in place.
- Consultation with trade union representatives takes place.

(Your organisation's name) is committed to recruiting volunteers from a diverse range of backgrounds and will advertise our volunteering needs in a cross-section of the media e.g. (Your target group media outlets, publications newsletters etc) to reach reflect the diversity of the community we serve.

We will ensure that promotion of our volunteering needs takes place in all local centres including those run by and/or used by minority groups within our local neighbourhoods.

Recruitment of our volunteers will involve a process of formal/informal interviews/DBS checks/application form/taking up of references/a trial period/etc.

We will regularly evaluate and monitor our progress towards diversity of our volunteer recruitment.

Template Health and Safety Guidelines for Volunteers

- The health & safety of our volunteers and members is of paramount importance to (your organisation's name).
- If at any time you have any questions about Health and Safety issues, talk to (named person).
- If in doubt about anything at all – ask.
- Risk assessments are carried out in all our workplaces and before any special event or trip.
- All risk assessments are carried out by (named person).

All volunteers ultimately undertake their duties at their own risk, having been briefed on safety procedures and having a full knowledge of accident/emergency procedures. Volunteers will be expected to act in a responsible manner and never to carry out actions, which would put themselves or others at risk.

If a volunteer sees anything that constitutes a health/safety risk whilst volunteering for (your organisation's name), they have a duty to report the matter to (named person) or (named person)

Volunteers should know:

- their nominated first aider(s).
- the location of the nearest telephone.
- who to contact in an emergency.
- the fire assembly point for whatever building they are in.

All accidents must be reported. An "incident/near miss" form should be filled in and returned to (named person) or (named person) and entered in the accident book.

Template Confidentiality Policy

(Your organisations name) is committed to confidentiality on a “need to know” basis. The full policy is available on our website or from (your organisations name) manager. A summary is given below.

- If a child under 16 makes a disclosure of physical/ sexual/ emotional/ mental abuse to a volunteer then they are obliged to inform Social Services (you may feel it necessary to write your own Child Protection Policy)
- Volunteers should feel free to discuss any worries, questions or general observations with project co-ordinators.
- Other information about service users does need to remain confidential: personal information about any client is to be treated respectfully. A client may not wish what they have told you to become common knowledge. Assume this unless it's a disclosure of abuse or you have any other concerns to address.
- Personal information about both clients and volunteers, even if disclosed in a social setting, should not be repeated or discussed outside the project/organisation.
- Do not mention names when talking about individuals outside of your group. For example it is ok to talk but instead of referring to someone by name, try 'a child' or 'a client' instead.

Date:

Name:

Signed:

Template Equality & Diversity Policy

We are committed to ensure equality of opportunity and to ensure that all our systems are fair, open and objective and visible to those inside and outside the organisation.

We recognise that everyone has a contribution to make to our society and a right to equal treatment. We aim to ensure that no job applicant, staff member, volunteer organisation or individual to whom we provide services will be discriminated against by us on the grounds of:

- sex, sexual orientation or gender reassignment status;
- race, colour, nationality, ethnic or national origin;
- age;
- parental or marital status and caring responsibilities;
- physical or mental disability or ill health;
- political belief, religion, colour, race, ethnic or national origin or socio/economic background;
- trade union membership (or non-membership);
- unrelated criminal conviction or conditions or requirements which cannot be shown to be justifiable;
- working pattern (i.e. permanent, fixed term, part or full-time).

We endeavour to promote this approach in those with whom we come into contact. Also we believe that we are all, both paid staff and volunteers, responsible for ensuring that the highest principles of equal opportunities policy are put into effect.

We aim to ensure that both paid staff and volunteers commit themselves to taking positive action against discrimination. All staff, volunteers and users of the Centre are able to challenge discriminating attitudes and practices and have a responsibility to enforce this Policy.

Exceptions will be made only where such discrimination can objectively be justified.

Any volunteer is free to challenge a decision made
via the Complaints Procedure.

Lone Working Policy Template

1. Introduction and Purpose

(Organisation name) recognises it has an obligation under the Health and Safety Executive regulations for the health, safety and welfare at work of its staff and volunteers. These responsibilities apply equally to staff and volunteers that, for whatever reason, work alone.

(Organisation name) has a duty to assess risks to lone workers and take steps to avoid or control risks where necessary to minimise the risk in these circumstances. The purpose of this policy is to emphasise the need for appropriate risk assessment, clarify responsibilities and describe some of the steps that can be taken to minimise risk and maximise personal safety.

2. Scope

This policy applies to all those carrying out duties for or on behalf of (organisation name) whether or not they are directly employed.

3. Definition of Lone Workers

A lone worker as any individual who, in the process of carrying out their duties on behalf of (organisation name), who may find themselves working alone or in an area isolated from colleagues. This could include:

- Staff/volunteers undertaking home visits
- Volunteer drivers

4. Policy Statement

THE HAZARDS OF WORKING ALONE:

Some examples of hazards facing lone workers are:

- Fire
- Violence and personal safety issues
- Pets
- Moving and handling tasks

High risk activities may include:

- Undertaking work in isolated areas
- Undertaking work within known high-risk areas
- Working/visiting individuals in their own home
- Working alone at base
- Working with people with known risk factors, violence or mental health etc

- Times when employees are travelling between site/homes/offices
- Times when employees are handling cash and/or banking

This policy aims to:

- Increase staff and volunteers awareness of lone working safety issues and ensure that the risk of working alone is assessed to reduce risks to the lowest practicable level.

RESPONSIBILITIES:

The “Chief Executive” has overall accountability for ensuring the (organisation name) puts in place the necessary management systems for the effective implementation of all risk management related policies, including the promotion of this policy.

“Services Coordinators” are responsible for ensuring that suitable and sufficient Risk Assessments are in place and transmitted to all appropriate staff and volunteers. To ensure that in the event of a physical assault or other incident involving a member of staff or a volunteer, systems are in place for immediately reporting to the police and assigned personnel. Further measures will be taken to ensure that staff and volunteers receive appropriate training in violence and aggression and conflict resolution procedures.

Lone Workers will follow the guidance attached to this policy (Appendix A) and will take reasonable care of themselves and other people who may be affected by their actions. Lone workers will assist in carrying out risk assessments and co-operate with (organisation name) by following agreed procedures and will ensure that:

- They have full knowledge of the hazards and risks to which they are exposed.
- That they know what to do if something goes wrong
- That someone knows their whereabouts, and when they are due back.

Risk Assessments

Risk assessments form the basis of a sound health and safety management system. Risk assessments must be carried out for all lone workers/volunteers annually

References:

- The Management of Health and Safety at Work Regulations 1999
- Health and Safety at Work Act 1974

Template Expenses Reimbursement Policy

Volunteers working for [organisation] will not be out of pocket as a result of their involvement. Approved out of pocket expenses will be paid and should not affect benefits claims or have any other legal or tax implications.

Volunteers may claim out of pocket expenses when they are involved in any activities relating to their work with [name of organisation]. The expenses paid will be actual costs incurred. All expenses claimed should be supported by valid receipts as evidence of expenditure.

The expenses that volunteers are entitled to claim whilst working at [name of organisation] are listed below: [Organisation to delete/add approved expenses claims as appropriate]

- travel to and from the place where the volunteering activity takes place
- travel during the course of volunteering
- meals taken during the course of volunteering may be available where a volunteer works more than 4 hours continuously (up to £5 is recognised as reasonable or the reasonable costs to eat at locally venues if greater.)
- postage, stationery and telephone costs
- care of children and other dependants during the period of voluntary work (see over)
- the cost of protective or special clothing
- other approved expenses

If unsure whether expenditure is valid, please check with the volunteer manager, your staff contact person or the HR manager*. [*Organisation to delete as appropriate]

These expenses are in accordance with the Inland Revenue and the Department for Work and Pensions guidelines.

Rates for claiming Expenses

Travel:

Expenses will be reimbursed for any travel incurred to and from the place where the volunteering activity takes place and travel during the course of volunteering.

Travel expenses will be reimbursed at the following rates:

- Public transport fares- Second class fares will be reimbursed on production of receipts/ tickets.
- Mileage Allowance:

Cars – 45p a mile

Motorcycles – 24p a mile

[Organisation] encourages the use of public transport where possible.

- Care of children during the period of voluntary work [Delete this section if not applicable]

If you use childcare whilst undertaking activities for [name of organisation], you might be able to claim for the cost of this, check with your contact staff member or HR manager. If approved, a registered childcare provider must be used, in order for you to claim this cost back. Childcare costs will be reimbursed for up to £5 per hour per child. The claim must be supported by valid documentation (receipts, invoices or timesheets) detailing the date and duration of the childcare provision.

Payment of expenses

To claim expenses, complete the relevant expenses claim form. Please ask if you need any help to complete the forms.

Once completed, expenses will be processed as soon as possible.

It may be possible, in some circumstances, to claim expenses in advance. Ask your Volunteer Manager for more details.

The information provided in this sheet is intended for guidance only. It is not a substitute for professional advice and we cannot accept any responsibility for loss occasioned as a result of any person acting or refraining from acting upon it.

Template Volunteer Problem Solving Procedure

Introduction

<OrgName> aims to create an environment where volunteers feel valued at work. We also recognise that there may be occasions when volunteers have concerns and this Problem Solving procedure enables individual volunteers to raise their concerns more formally. The procedure provides an open and fair way for volunteers to make known their concerns and aims to enable problem solving to be resolved quickly.

Informal Discussions

In the first instance, if any volunteer has a concern about their volunteering or a colleague they should discuss it informally, as soon as possible, with their Line Manager. The Line Manager will take the concerns seriously and ensure that everything is done to try and resolve the issue informally. It is hoped that the majority of concerns will be resolved at this stage.

Formal Procedure

Stage 1

If a volunteer feels that the matter has not been resolved through informal discussions, they should put the complaint in writing to their line manager. If the complaint involves the volunteer's line manager the complaint should be put in writing to another manager in the organisation.

A meeting will be held between the volunteer and their line manager (or other appropriate person) to respond to the complaints raised. The meeting will be an opportunity for the volunteer to explain their concerns and share how they would like them to be addressed. The volunteer has a right to be accompanied to the meeting.

Following the meeting, the line manager (or other appropriate person) will give a written response within five working days of the meeting outlining how the complaint will be responded to. If the complaint is against another member of staff or volunteer or requires further investigation, the line manager (or other appropriate person) will need to carry out further meetings or investigations. In this case, the five working days limit above, may need to be extended. The response will follow this meeting and include a reference to the right of appeal.

Stage 2

If the volunteer feels the issue has still not been resolved satisfactorily, the volunteer must raise the matter, in writing, with the Director. The Director will advise the Chair of the Trustees and will invite the volunteer to a meeting where they can discuss the matter and establish how best to resolve the situation. The volunteer has a right to be accompanied to the meeting.

Following the meeting, the Director will give a written response within five working days of the meeting outlining how the complaint will be responded to. If the complaint is against another member of staff or volunteer, or requires further investigation, the Director will need to carry out further meetings or investigations. In this case, the five working days limit above, may need to be extended. The response will follow this meeting and include a reference to the right of appeal.

Right of Appeal

If the volunteer wishes to appeal against any decision, they must appeal, in writing within five working days of the decision being communicated to them to Chair of Trustees. Who will convene a meeting to hear the appeal from the volunteer. The volunteer will have the right to be accompanied to the appeal meeting.

The Chair's decision will be final.

Volunteer Handbook Suggested Content

Welcome message/foreword

(From a key volunteer, staff member or supporter.)

Organisations name

(Information about your organisation and its set up)

Volunteering with <Insert Organisations Name>

- Key organisational information (e.g. Organisations staff and volunteer numbers).
- Voluntary roles available (include volunteer locations).
- How we value volunteers (e.g. Volunteer policy, volunteer charter).
- Our hopes and expectations (e.g. behaviour, availability).

Your voluntary role

- Role description (with examples of existing volunteers).
- Support available to you (e.g. volunteer supervisor/manager details, review and support meetings).
- Application process (i.e. how to get involved once interested).

Induction information

(Overview of key information, ideally make a separate induction pack.)

- Key policies (e.g. Safeguarding, expenses, data protection).
- Practical information (e.g. forthcoming events, dress code).
- Communication with volunteers (e.g. regular email updates).

Record of volunteering

- Training needs/forthcoming courses (i.e. include any mandatory training)
- Training Log (e.g. recording personal development, Expedition Assessor accreditation details)
- Record of key events and notable achievements

Further information/links/notes

(e.g. key contacts, websites, useful resources)

Appendix and forms

(Documents to refer to throughout your volunteering e.g. expenses.)

Conclusion and thanks

(From whoever did the welcome message.)