Get it right from the start

The boring reality of volunteer management is that if we get it right from the start then management becomes a lot easier and volunteering benefits us all and this means POLICY. This need not be a difficult process but it will embed in your organisation what it is that volunteers do, where they fit, who manages them and how.

Having a volunteer policy helps you show:

- **Commitment** – it demonstrates your commitment, care and thought to your volunteer programme and to your individual volunteers.

- **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.

- **Clarity** – a policy enables volunteers to know where they stand, it offers security for both you and them and it gives you both some structure as to what happens if anything goes wrong.

- **Unity** – a policy helps ensure that staff, management and trustees fully understand why and how volunteers are being involved.

*Continued overleaf…*
What needs to be in a volunteering policy?

A copy of the Volunteer Centre’s Volunteer Policy is enclosed, you will see that it has:

- an overview of the organisation,
- notes on recruitment,
- a volunteer agreement,
- expenses,
- induction,
- support,
- feedback,
- insurance,
- health and safety,
- equal opportunities,
- confidentiality,
- and problem solving.

You are welcome to use this as the basis for your policy, you could also look at: http://www.volunteering.org.uk/Resources/goodpracticebank/Core+Themes/volunteerpolicies/

As all organisations are different all policies will be different too, you need to make this document work for you.
2. Creating volunteer roles

Once you have your policy in place you can begin to think how and why you need a volunteer.

- What are the tasks that you need the volunteer to do?
- How much time will these tasks take?
- Are these tasks ‘one offs’ or ongoing?
- Will these tasks need more than one person?
- Are they daytime, evening or weekend?
- Where will the volunteering happen, on site, off site, e-volunteering?
- Will the role need specific experience, skills or qualifications?
- What will the supervision, management and training requirements be?
- Are there implications for the organisation’s insurance?
- Is the role ‘safe’, has it been risk assessed?

When you have looked at these issues it will be important that you put as much detail into the role description as you can, this way everyone concerned has a clear idea of what is happening and what can be expected.

When writing a volunteer role description it is not the same as a job description, it needs to really sell the role. Remember that volunteers could spend their time doing all sorts of other things and that you’re competing with:

- Other organisations
- Work
- Leisure
- Family

*Top Tip:*

It is good practice to not refer to volunteering roles as ‘jobs’. This helps clear any confusion with staff and employment law. The terms ‘role’ and ‘task’ are more appropriate for volunteers.
Think about what the volunteer can gain from this role, are you providing training, support, expenses, work experience? What makes your role stand out from all the others?

Here’s an example of a poor role description…

**Administrator**

Wanted, an administrator to do filing and general office duties

This is gives no detail of specific skills required, times, location, no detail of the organisation and it really doesn’t sell the role. How about this…

**Administrator**

Successful and friendly local voluntary organisation supporting young mums seeks an administrator for four hours each week (any morning Mon-Fri). Duties include data input, filing and answering the telephone. Full support and training given but applicants are required to have experience of Microsoft Office. There is the possibility of an NVQ, travel expenses paid and free tea and coffee!
3. Recruitment

There are any number of ways to recruit volunteers. A good first port of call will be the Volunteer Centre, we have a great deal of experience in helping all kinds of organisations in recruiting, managing and retaining volunteers. (See Sheet 9 Volunteer Centre Processes to find out how we work). We can list your role in our directory, we can highlight it in our promotional work, on the radio and in the local paper, we can register it on www.do-it.org.uk the national volunteering database and we can promote it to volunteers during our one to one and drop-in sessions.

But we are only one way that you can recruit volunteers, you can also use:
● The local and national press
● Talks and presentations
● Make A Difference – the youth volunteering project
● Posters in community centres, GP Surgeries, shops or churches
● The annual Volunteers Fair
● Jobcentre Plus
● Local networks – Round Table, Chamber of Commerce etc.

You will have to give some consideration to the recruitment process.
● Are you going to have an application form?
● Will you take up references or run a CRB check?
● How will you select?
● Have you thought about equal opportunities?

When the potential volunteer enquires about your role it is good practice to meet them as soon as possible (the Volunteer Centre requires you to do this within 14 days). The quicker you meet with them the better chance you have of recruiting them.

It is good practice to drop the Volunteer Centre an email or give us a call to let us know how the process is going. We particularly need to know when a volunteer is placed.

Continued overleaf…
Sometimes waiting for application forms, references and CRB checks can take longer than you’d like. It’s important during this time that the volunteer is assured that things are progressing and that they’ve not been forgotten. It may even be possible to get them in to do some induction or well supervised volunteering while the paperwork is being processed (obviously this all depends on the nature of the role).

Remember that this is a two way process so you can find out about the potential volunteer and that they can find out about you. Try to make the volunteer feel as relaxed as possible, refer to this as a ‘meeting’ rather than an ‘interview’ and make sure that you have set enough time aside for it without interruptions. At the meeting you can:

● Provide the volunteer with more information
● Assess the volunteer’s suitability for the role
● Discuss the practical details
● Establish a time frame for what happens next

Most organisations will take up references to establish the suitability of the potential volunteer, we recommend asking for two referees. Your organisation may also ask for CRB checks, and we highly recommend this if the volunteer will be working with children or vulnerable adults. When you risk assess the role you will be able to gauge the potential for hazards, this includes access to data, money and financial details and working with vulnerable individuals, staff or volunteers. (see Sheet 8. Screening, CRB and ISA).

Sometimes you may have to say ‘thanks, but no thanks’ to a volunteer. For some this may be quite difficult so please be tactful and phrase your rejection so as not to damage their self esteem or dignity.

Above all please be honest as to why you feel you cannot involve them. This is why having a good role description and meeting checklist can be very helpful. You can also refer them to the Volunteer Centre as we have a huge range of other volunteering possibilities which may be more appropriate.
4. So who volunteers and why?

At this stage it may also be worth considering what kind of people become volunteers and why? The simple answer is every kind of person volunteers for all sorts of reasons. In the UK on average 48% of the population volunteers for at least an hour once a week.

In broad terms our research shows that the volunteers of Milton Keynes reflect the population in terms of age, ethnicity and educational achievement. There are slightly more female than male volunteers and because of the way we work we see a larger percentage of non-employed people. We do also see people who may have language, learning and basic skills needs, we see people recovering from ill health and ex-offenders.

People volunteer for different reasons too. Our client group includes:
- mothers returning to work
- unemployed people wanting to learn new skills
- the recently redundant wanting to keep their CV up to date
- stroke or heart illness patients rehabilitating
- the retired looking to share their experience and fill their time
- people wanting to improve their language skills
- those on benefits looking to contribute to their communities
- people with disabilities looking for independence
- people looking to build confidence and self esteem

All volunteers are human beings and deserve to be respected as such, we take our responsibility to equality and human rights extremely seriously and need our members to do the same. Being open and accessible to all sections of our community and having a diverse set of volunteers will only strengthen your organisation.

It’s also important to remember that people’s lives and priorities change so to keep your volunteers you must be flexible and grow with them.
5. Induction, training and support

Just as you would conduct an induction process for new staff it is important to do something similar for volunteers. This should be more than just reading policies and meeting staff and volunteers. By getting the induction period right you will give the volunteer a clear idea of how your organisation works and where they fit in and make them feel welcome and valued. You may wish to include some of the following:

- Their role and that of any other volunteers
- Support, supervision and grievance procedures
- Aims, policies and procedures
- The role of any paid staff
- Opportunities for training
- Confidentiality
- Health and safety, first aid and fire procedures
- Location and use of equipment
- Appropriate use of IT and phones
- Dealing with difficult situations
- The building, toilets and refreshments
- Introductions to staff and volunteers
- Emergency numbers

At the Volunteer Centre we issue a Volunteer Information Pack, this contains:

- A history of the organisation
- Mission Statement
- Role Description
- Statement of Service
- Induction Paper
- Volunteer Agreement
- Expenses Form
- Volunteer Centre leaflet
- Policies – Volunteer Policy
  – Equal Opportunities Statement
  – Confidentiality Statement
  – Comments / Complaints Form

Top Tip:
Training and induction can be made more fun if it's done in groups rather than one to one. Also make it clear the training that they must attend and that which is optional.

Continued overleaf…
It may be useful to develop your own Volunteer Handbook containing this information and it may be useful to get them to sign an agreement showing that they have been made aware of your policies.

Training is an important issue, if you want your volunteers to work well they need to be effectively trained in the role. This needs to start before they take up the role and continue as they progress. This will enable them to develop their skills, become more effective in their role and gain a sense of real satisfaction at the things they achieve.

Once your volunteer is up and running it is important not to take them for granted, just as paid staff need supervision, support and thanks, so do volunteers. The volunteer will develop if they feel happy in their role and supported in the tasks that they are undertaking. It may be useful to make a record of the volunteer’s progress over time, any training that they receive and any other issues that may arise. This is also useful if the volunteer goes into paid work for providing references.
6. Retaining Volunteers

We have listed a number of key ways in which organisations can ensure a greater retention of volunteers

Grow with them. Change is inevitable, peoples’ circumstances, life, work and family commitments all move on, so it’s important to be able to be flexible and move with your volunteers allowing them to develop and keeping hold of their experience and dedication.

Thank them. It seems obvious but volunteers really appreciate your thanks. Thanking them after every session says that you are acknowledging the difference that they are making, it’s easy and costs nothing. If you have the chance why not organise an event to thank all of your volunteers, perhaps use National Volunteers Week (1st week of June each year) or International Volunteers Day (every 5th December)

Keep their role interesting. Volunteering is a two way relationship, by understanding what motivates a volunteer you will be able to keep them satisfied in their role. So get the role to work for both of you. Consider what they’re after is it:

● To learn new skills
● To share old skills
● To address a community issue
● Have fun
● Gain work experience
● Feel useful
● Make friends

Create a secure environment.
Having a safe place to come and volunteer is very important, even if the volunteering takes place in a stressful environment there should be a clear way of identifying any potential hazards and coping or avoiding them. It is also absolutely vital that all of your volunteers are covered by your insurance.

Communicate and work through problems openly. Occasionally problems arise for volunteers and voluntary organisations, it’s important to be as open, honest and tactful about these as possible. Ensuring good communications at all times between staff and volunteers will help prevent and resolve issues as they arise.

Top Tip:
It is good practice to pay ONLY out of pocket expenses rather than a flat fee each time they volunteer. Paying a flat fee may have an impact on both benefits and tax. It also establishes a contract of employment between you which can have complicated consequences.

Continued overleaf…
Manage expectations. By being clear with all your staff and volunteers what is expected of them and what they can expect from you, you will help prevent any confusion. It always helps to know exactly where you stand and exactly what is expected.

Pay out of pocket expenses. (See also Sheet 7. Legal Issues) Volunteering should not simply be the privilege of those who can afford to do it. In all your budgeting and fundraising planning you should include a small provision to pay for any out of pocket expenses such as transport, parking costs and refreshments, and this may also mean refunding costs of telephone calls and stationery if the volunteer is working at home, any specialist or safety equipment and in some instances it may be appropriate to refund childcare costs.
7. Dealing with problems

Volunteering is usually an extremely positive experience however from time to time problems may arise, however they can be minimised by dealing with them in a swift, thorough and fair manner. These problems may include:

- Poor timekeeping or absence
- Taking on tasks outside the agreed remit
- Failure to respect confidentiality, dignity, independence or individuality
- Breach of health and safety regulations
- Misuse of facilities or equipment
- Theft
- Discrimination
- Abusive language or behaviour
- Arriving under the influence of drugs or alcohol

Also remember that complaints can be made by the volunteer as well as about the volunteer so it is important to have a consistent approach to grievance and discipline. In broad terms a complaint should be dealt with in three stages

- Discussion
- Complaint or warning in writing
- Right to appeal

Having clear procedures to deal with issues will help greatly but only if all concerned are aware that they exist so this should be a key part of your volunteer induction process. All complaints and disciplinary action should be confidential.

You can find a problem solving procedure on Volunteering England’s Good Practice Bank, this also includes practical advice in the worst case scenario of having to suspend or dismiss a volunteer.

www.volunteering.org.uk/Resources/goodpracticebank/Information/Problem+solving.htm
8. Legal Issues

There are several aspects to your legal responsibilities to your volunteers which we will briefly explore in this section, for further information Volunteering England has a really useful guide called ‘Volunteers and the Law’, there can be a lot of misunderstanding, confusion and often incorrect assumption when it comes to the legal issues so tread carefully and take advice. The Volunteer Centre and Volunteering England website will help.

The legal position of volunteers is not straightforward, volunteers are not covered by most legislation around the workplace, so they are not for example protected by anti-discrimination legislation nor do they have access to employment rights. They do however share the rights we all have as citizens and legislation such as the Data Protection Act and the Health and Safety At Work Act are relevant.

In terms of Health and Safety you have a duty of care to all your staff, clients and volunteers and must take all reasonable steps to prevent harm coming to them this is for activity taking place at your premises or beyond. The Volunteer Centre requires that you undertake a risk assessment of each volunteering role that you register, this is good practice and is very easy to complete (see Appendix? For a sample risk assessment sheet).

The Volunteer Centre also requires you to have a Health and Safety Policy, this should explicitly include reference to volunteers and all staff and volunteers should be aware of it. You may also need to look at your policy for lone workers, drivers and volunteers who operate away from your premises. For advice on all of this please call the Volunteer Centre.

Benefits. As a general rule volunteering will not have an impact on a person’s entitlement to state benefits as long as it is genuine voluntary work, this includes Jobseekers Allowance and Incapacity Benefit. See Jobcentre Plus leafle


Continued overleaf…
In terms of paying out of pocket expenses this too will have no impact on the volunteer’s state benefits. However it is important to stress this applies only to out of pocket expenses, and not to regular flat rate payments or honoraria.

**Young volunteers** again are not covered by employment legislation as long as the activity is not for profit, so while you can involve younger volunteers it is best practice to get parental consent (and work in Charity Shops and other profit generating projects may be limited). If involving younger volunteers it may be advisable to look at a Child Protection Policy and consider the volunteering environment in terms of the safety of the child and your other staff and volunteers (see Sheet 8. Screening, CRB and ISA)

**Refugees, asylum seekers and migrants as volunteers.** This can be a difficult area and there is great detail on the Good Practice Bank at [http://www.volunteering.org.uk/Resources/goodpracticebank/Information/whoisallowedtovolunteer.htm](http://www.volunteering.org.uk/Resources/goodpracticebank/Information/whoisallowedtovolunteer.htm) Broadly anyone who can work in the UK can volunteer, asylum seekers can volunteer in most cases (it is worth checking on the above link) most people holding a visa can volunteer as long as their visa states they can undertake paid work, it is also possible to get a visa to come to the UK specifically to volunteer.

**Ex-offenders.** Under the Rehabilitation of Offenders Act, it is only acceptable to ask someone to declare spent convictions if they will be working with “vulnerable people”. The establishment of the Criminal Records Bureau has meant that more organisations have access to Disclosures (also known as CRB Checks), but you are only entitled to apply for a Disclosure if a volunteer will have regular contact with vulnerable individuals.

Very few people are banned from working or volunteering with children and vulnerable adults. Individuals who are banned will usually know that they are banned and are unlikely to apply for work with these groups. In the unlikely event that they did, this information would show up on a Disclosure.
9. Screening, CRB and ISA

At the time of writing a new national initiative called the Independent Safeguarding Authority (ISA) is being launched, further details of this will be added to this guide as more information is released. Basically the ISA will require anyone working or volunteering with vulnerable groups to register on their database, this will enable organisations who deal with vulnerable groups to check the suitability of potential staff and volunteers in a quick and accessible way. This is being phased in over a number of years and will run alongside Criminal Records Bureau (CRB) checks.

Only by effectively assessing the risk of each volunteering role will you be able to determine the level of screening that you require. Some organisation as a matter of policy will CRB check every volunteer, even if there is no chance that they will have unsupervised access to vulnerable groups, their data or money. Your screening policy is a matter for your management committee but we would recommend that it is:

- Thought through, thorough and above all consistent
- Subject to the legal requirements of the ISA
- Tailored to the volunteering role
- Based on a better safe than sorry approach
- Two references are a minimum requirement

Although asking for references and undertaking CRB and ISA checks are not a foolproof way of protecting your clients, staff and volunteers, they are an important way of managing and showing how you manage risk. It is also worth considering the volunteer’s role, will they ever be unsupervised and have access to vulnerable people, their data or finances?
Volunteer Management Best Practice Guide

10. Volunteer Centre procedures

We think it would be helpful to give you an idea of what we do at the Volunteer Centre and how we work, this way you will understand our processes and be better able to get the best from us. So what happens when you register a role and what happens when a potential new volunteer comes to us?

Membership

As you know, when you take up Volunteer Centre Membership we ask that you have a number of policies and procedures in place, this assures us that you are a safe place for us to refer volunteers, that you will treat your potential volunteers fairly and that you take volunteering seriously.

Our services to you are free but we do ask the following in return:

- That you contact the potential volunteers we refer to you within 14 days
- That you treat all volunteers and staff fairly and professionally
- That you let us know of any changes to your organisation and roles
- That you respond to our requests for information – without this we will lose our funding

If organisations are unable to undertake these requirements we are here to support them, the worst case scenario is that we make the organisation and its roles ‘Dormant’ until the issues can be resolved.

Registering/unregistering Roles

When you register a role with us it goes into our directory and onto www.do-it.or.uk Your role can also be publicised in the local paper and on the radio.

When you recruit a volunteer to the role you should tell us so that we can de-activate it, or we will keep referring people to you. This is a very simple process, just give us a call and we’ll do all the work. It is also just as easy for us to reactivate the role if it becomes vacant again in the future. Again we are only as good as the information that you give us.

Top Tip:

There are over 400 current roles in our directory so you should think about how you can ‘sell’ your organisation. Make it snappy so that it stands out from the crowd and say what you could offer the volunteer.

Continued overleaf…
Dealing With Referrals

When we refer a potential volunteer to you, the process is then yours. We require that you contact them within 14 days. If you no longer require a volunteer for that role or your circumstances have changed it is your responsibility to inform the potential volunteer.

Our Process With Potential Volunteers

Volunteers come to us through a number of channels. They apply online via www.do-it.org.uk, have a one to one appointment with us, turn up at one of our drop-in sessions or give us a call. The amount of advice we give them varies according to the way they come to us.

We get around one third of our enquiries from the roles we advertise in the MK Citizen. Again, these volunteers are self referring, they see the advert, think it’s right for them and call us, we then explain the role and complete the referral.

To all potential volunteers we explain our referral service, and that they can expect to hear from the organisation they’ve been referred to within 14 days. We ask them to call us if they don’t hear in that time and we chase up the referral.

Follow Up

We contact all the volunteers we see (around 1200 each year) 8 weeks after the referral to see how they are getting along. This enables us to measure the quality of our service, to track the number of applicants actually starting volunteering and to see if there is anything else we can do for them.

This follow up also enables us to see the voluntary organisations who are consistently not contacting the people we refer to them. From this information we are able to speak to voluntary organisations to establish why this is happening and to see if there is further support we can give.

Top Tip:
The quicker you get in touch with the volunteer the better, grab that enthusiasm while you can.
II. Links

For any information you need on volunteering and for changes that you may need to make regarding your organisation and your volunteer roles please contact us on 01908 662744 or email enquiries@volunteermk.org.uk.

The more we talk the better our service gets.

It may be worth having a look at the national volunteering database www.do-it.org.uk if you already have roles registered with us they will be listed here and you can see what it’s like for a volunteer to go through the process.

Another important resource is Volunteering England, they have all the up to date info on law, health and safety, volunteering roles and so on, go to their website and have a look at the ‘good practice bank’. You don’t need to be a member, however membership is reasonably priced and they are the body who can represent volunteer involving organisations at government level. www.volunteering.org.uk and their helpline is 0800 028 3304.

For Risk Assessment go to the Health and Safety Executive at www.hse.gov.uk/risk/index.htm it has really easy to follow procedures to take the fear out of risk assessment.

For general information and support for voluntary sector groups in Milton Keynes go to the Council for Voluntary Organisations. MKCVO provides practical support services and a co-ordinated voice from the voluntary sector on local issues. www.vcsmk.org.uk/mkcvo and 01908 661623. Services include:

- **Information and Advice** – for whatever stage you are at in developing your group including help through our Funding Advice Worker and access for members to GRANTnet an on-line grant search programme.
- **Voluntary Sector Gateway MK** – we manage the Gateway website and can train and support you to create your own site on it.
- **Networking and partnership** – we hold regular network events where you can meet with other local groups to share experience and good practice
- **Access to discount services** – including hot desk space and office equipment

For advice on volunteering for younger people in Milton Keynes go to Make a Difference www.mad-uk.org