



Wakefield District Volunteer Centre

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# Involving Volunteers in your Organisation



This guide will help your organisation identify what you need to consider when recruiting and managing volunteers.

## The Volunteer Centre in the Wakefield District

# Who we are and what we do

### The Volunteer Centre:

- Supports volunteering and promotes good practice in working with volunteers
- Advocates the rights and responsibilities of volunteers
- Provides information on a wide range of volunteer opportunities to all sections of the community
- Works in partnership with local voluntary and statutory agencies
- Helps to develop, where possible, volunteer action in response to local needs

### The Volunteer Centre can:

- Signpost potential volunteers to your organisation
- Provide training on volunteer management
- Offer guidance on any issues relating to volunteers
- Bring together people who work with volunteers to share ideas and good practice

The Volunteer Centre keeps a database of organisations looking for volunteers. The Centre uses this database to provide information to potential volunteers about what opportunities are available.

The Volunteer Centre will include your details on the VBase database and 'do-it', the national website, where people search for local opportunities.

If your organisation is not already registered with the Centre - you should get in touch! If you need help finding volunteers or developing volunteer policies the Volunteer Centre can help. Contact details are on the back of this booklet.

The Volunteer Centre is the accredited Volunteering Development Agency for Wakefield District and is part of a national network of agencies concerned with volunteers and volunteering

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# Introduction

The Volunteer Centre works with a wide range of voluntary organisations and community groups. Our aim is to help your organisation to recruit and keep your volunteers. One of the best ways of doing this is to consider how you manage your volunteers. By ensuring that good practice is in place, your chances of keeping your volunteers and helping them to make a positive contribution to your group are increased.

Due to the diversity of the voluntary sector, this guide cannot give you all the answers to every situation you may face with volunteers. However, it does answer some of the more frequently asked questions and provides a step by step guide to what you need to know.

Of course, the Wakefield District Volunteer Centre can offer your organisation one-to-one support at whatever stage you are at - so get in touch.

# First Steps

## **I want to involve volunteers in my organisation. What are the first steps?**

If you have not involved volunteers before, think carefully before you start the recruitment process. Lack of planning leads to a poor volunteering experience. Volunteers need to have a clear idea of their role and to be given access to appropriate training. Someone should be available to support them throughout their volunteering.

A volunteer will only continue to help you if you are giving them a valuable experience. Individual volunteers have different motives for volunteering. They may want the opportunity to meet new friends, to gain skills, to improve their job prospects, to recover from a life crisis or to change the world. You need to tap into their motivation to provide the appropriate rewards for them.

### **Where do I start?**

Take time to talk within your group and to your management board about why you want to involve volunteers. If everyone knows that volunteers are joining, volunteers are likely to feel welcomed and able to ask for help. Other people may have tasks for volunteers too. The next step is to develop a volunteering policy.

# Volunteering Policy

This is a written document which sets out your group's approach to involving volunteers. The policy should be clear and easy to understand.

### **Topics which may be included are:**

- Why you want to involve volunteers
- An introduction to the organisation – its aims and principles
- The recruitment process – volunteer agreements and task descriptions
- Disciplinary and grievance procedures
- Insurance
- Equal opportunities
- Induction
- Confidentiality
- Supervision and support
- Training
- Expenses
- Health & Safety

This then needs to be adopted by your management board and signed and dated. It needs to be revisited on a regular basis for any updates. It is best to keep the Volunteering Policy quite short and to the point.

# Recruitment and Selection

Finding volunteers can be challenging – but don't give up! You can find volunteers but you need to let them know about your group and what you do. Once you have their attention, you need to sell the benefits of volunteering.

## What are the main ways of recruiting volunteers?

- Word of mouth – motivated volunteers attract new volunteers. Talk to family and friends about your organisation
- Wakefield District Volunteer Centre – we signpost potential volunteers to your group and advertise your opportunities on the national 'do-it' website
- V-involved – a youth volunteering programme that finds volunteering opportunities for people aged 16 - 25
- Local media – free publicity if you can come up with a good story
- Events and exhibitions - take a stall to promote your work
- Talks and presentations – use every opportunity to say you need volunteers

- Printed materials – leaflets, posters, brochures, annual reports
- Partnerships – team up with schools, colleges, employers
- VIP support – persuade a celebrity or politician to champion your cause.

## How can I reach a wide variety of people?

You cannot target everyone at once and be effective. The best recruiters have a rolling programme targeting different groups at different times. Make sure that you tell your target group what benefits they will gain from volunteering within your group. For example, a retired person does not need to improve his or her job prospects but this would be a big motivation for someone seeking employment. Remember that Wakefield District Volunteer Centre can give advice on targeted recruitment of different communities. When selecting volunteers, you need to make sure that you create a win-win situation. Your organisation will require certain attributes, skills or experience according to the type of work the volunteer will be doing. Equally, volunteers have a wide range of motivations for volunteering. If you meet their needs, they are likely to make a positive contribution to your group.

## Do I need to prepare job descriptions for volunteers?

Job descriptions are not appropriate for volunteers as they suggest an employment relationship. A suitable alternative is a Volunteer Task Description. This will specify what the volunteer role entails and any skills which may be required. It will help potential volunteers to self-select, perhaps deciding that the opportunity on offer does not appeal to them. Volunteer Task Descriptions also reassure volunteers who are rejected that they were not discriminated against but simply did not meet the need of the voluntary role.

## Is an application form necessary, and what should I include in it?

An application form is a good idea as it provides basic information about the person. However, there is the danger that a long application form might put people off, so keep it as short as possible. Remember to offer support to people who may need help to complete the form. You may wish to meet potential volunteers before giving them an application form. This is a less intimidating approach.

Make sure that there is space for personal details on the form, and give the potential volunteer room to describe the attributes, skills and experience which they can bring to your group. Do not forget to ask them what they want to gain from volunteering. This is crucial information for the support

of volunteers, giving you a better chance of keeping them. Standard practice is to ask for two referees who are not family members. However, some volunteers may struggle to provide these especially if they have not been in employment for some time. You may decide to be more flexible about references or to accept one referee only. Make it clear to the volunteer and the referee that references will be treated in confidence. If you have any doubts about the validity of a written reference, follow it up with a telephone call.

APPLICATION FORM  
Information for Applicants before completing this form. For complete the application on-line, visit our website at  
E POST OF:  
PERSONAL DETAILS  
Initials only:  
Evening Tel. No.  
Mobile Tel. No.  
Daytime Tel. No.  
REFERENCES  
The references must be your present or last employer. NEITHER reference be that of a relative or close personal friend. The references must cover the of 3 years employment prior to engagement.  
Name:  
Address:  
Telephone No.  
Job Title:  
Relationship:  
May we take interview?  
e:  
dress:  
ne No.

## How should I interview volunteers?

Formal interviews can be off-putting to a volunteer especially if they have not been in paid employment for some time. Be friendly and give the volunteer plenty of information about what to expect on the day of the interview. Don't forget to send a map of how to find your premises.

These measures should result in the volunteer feeling less nervous and telling you more about themselves.

Ideally, two people should carry out volunteer interviews. You may wish to involve clients or volunteers in the selection process.

You should not ask about a volunteer's general health unless it is directly related to the task that they will be doing (asking about a volunteer's general health without a valid reason, i.e. unless a risk assessment has deemed it appropriate, is against data protection principles). Knowledge of a medical condition can enable the organisation to provide extra support or amend task descriptions.

To help a prospective volunteer further may mean talking to them about their specific needs, getting a medical opinion or talking to a national body e.g. National Society for Epilepsy. Remember that a person with an existing medical condition will be the expert in their own field.

## What happens if we feel the volunteer is not suitable?

Explain to the volunteer why you came to this decision. Consider if you have any other volunteering opportunities, which may be more relevant to their skills.

If not, please refer them to Wakefield District Volunteer Centre so that their contribution can be used in another voluntary organisation.



# Screening Volunteers

## Should I ask potential volunteers about criminal records?

Not all organisations will need to screen volunteers (i.e. check if they have a criminal record). The need to screen will depend on what the volunteer is doing and the clients they are working with. Except for organisations who fall under the remit of the Care Standards Act or are 'childcare organisations' under the definition in the Protection of Children Act, the only legal obligation that organisations have to screen their volunteers is the 'duty of care' they have towards the people they work with. This requires you to do everything 'reasonable' within your power to protect others from harm. So if your organisation involves volunteers working with vulnerable people, it could be argued that part of your duty of care is to screen volunteers.

Under the Rehabilitation of Offenders Act, ex-offenders normally have the right not to reveal spent (old) convictions. However, where work involves contact with 'vulnerable people', organisations can require applicants to declare spent convictions too.

## How can I check if a volunteer has a criminal record?

The Criminal Records Bureau (CRB) is a 'one stop shop' for criminal record checks, which are called 'disclosures'. CRB checks for volunteers are free but must be done through an 'umbrella organisation' which will charge an administrative fee.

In July 2010 a new Vetting and Barring Scheme will be launched by the Independent Safeguarding Authority (ISA) which will improve the current provisions for screening both potential and current volunteers.

For more information on the CRB and ISA, and to find your local umbrella organisations, visit their websites at [www.crb.gov.uk](http://www.crb.gov.uk) and [www.isa.gov.org](http://www.isa.gov.org)

Many people have criminal records. It would be grossly unfair to reject every person who has made a mistake in the past or whose conviction is irrelevant to the voluntary task in hand. If someone has a criminal record, use your judgment as to the likelihood of them committing a criminal act whilst volunteering.



# Induction

Induction is the process whereby a volunteer is welcomed and introduced to your organisation. It is important that the volunteer gains a good insight into the group as a whole as well as their particular area of work. If a volunteer knows what is expected of them in the first few days and weeks, this will increase their confidence and help them to function more effectively. How can I ensure that the volunteer gets a good induction? It is useful to set out a written induction programme. This should give the volunteer an opportunity to meet staff and other volunteers. If the volunteer is confident, it is acceptable to ask them to make appointments with individuals themselves. Induction does not need to be a lengthy process if it is handled properly. If several volunteers join at the same time, induction can be provided to them all together.



## So what subjects should be covered in the induction programme?

Be careful not to include too much information in the induction, as this could be overwhelming. A volunteer's knowledge of the organisation will grow as they continue their volunteering experience.

### Here are some topics you may wish to include:

- An introduction to the history and aims of the organisation
- A tour of the premises and introduction to staff and volunteers
- Volunteering policy and volunteers' handbook
- Volunteer agreement and task description
- Expenses procedure
- Supervision and support
- Equipment and how to use it
- Background reading
- Feedback on the induction
- Health and safety.

# Training

## **Is it important to train volunteers?**

Definitely! By training volunteers in the tasks that they will be involved in, you will build their confidence and help them to contribute to your group more effectively. The subject of an individual's training needs can be discussed during induction. It can then be returned to and monitored during regular supervision sessions.

## **Is there any other training I should consider?**

Many people volunteer to access training opportunities. Additional training will motivate a volunteer who is hoping to improve their job prospects. It also makes them feel valued for their efforts. This training doesn't always have to be external and expensive, it could be "on the job training" where someone takes some time out with volunteers and explains the tasks that need doing. A word of caution, always ensure that the training is relevant to that person's task description or else it could be viewed as a 'consideration' (that is, a payment in return for work forming part of a contract). It is also important to make sure that any training is open to all volunteers and that being eligible for training is not reliant on them having volunteered for a set period of time.

Obviously you will need to set a budget for training costs or these could spiral out of control. You can reduce costs by joining up with other organisations if you have similar training needs. By providing extra training you improve the skill base of your group. You will see positive results from training volunteers in issues which are important to you, such as equal opportunities. Also, some training is free of charge so it is worth keeping a look out for these opportunities.

## **Will volunteers find training off-putting, especially if they have not worked for some time or have retired from employment?**

Possibly, it is important that you explain what training involves and provide a level of support appropriate to the individual. A volunteer who lacks confidence may worry that they will "fail". Volunteers may feel more comfortable if training is delivered in-house or if they are accompanied to external training courses. Volunteer meetings are also a useful forum for delivering informal training through inviting relevant speakers.

# Supervision

## What does it mean?

Supervision is a structured opportunity to discuss how a volunteer is getting on. This is normally a one-to-one meeting between the line manager and the volunteer. You could consider experimenting with different methods such as group supervision and peer supervision. However, we will stick to the traditional model for the purposes of this guide.

## Good practice guidelines for supervision:

- Give the volunteer the chance to tell you about their achievements
- Give lots of positive feedback - this will help them to know they are valued members of the team
- Use this time to discuss any actual or potential problems. Problems can often be resolved during supervision
- This is also the time to look at any training needs - remember your aim is to help the volunteer to contribute to your work
- You might find it helpful to give the volunteer questions to consider before the supervision session takes place.

## How often should supervision sessions take place?

This is a matter for your own judgement. You may want to have supervision more frequently for new volunteers to help them settle in. Supervision sessions may only last for 30 minutes. As a minimum, it is best to have a supervision session every two months.

## What can I do if I am not happy with their performance?

Often volunteers may be unaware they are doing anything wrong. A volunteer can't be expected to improve or change the way they work if an issue hasn't been brought to their attention. Perhaps the volunteer needs a change of role. They may be bored in their current one, or feel under-used. You should discuss this with them.

If problems can't be resolved through supervision, you will need a grievance and disciplinary procedure, just in case there are serious issues to be dealt with.

If the volunteer is not suited to the role they are doing – or any other role in your organisation, they may have something to offer a different organisation. You should refer them to the Volunteer Centre or to another organisation that you feel may be able to make use of their skills.

# Disciplinary and Grievance Procedures

People often feel uncomfortable using the terms 'discipline' and 'grievance' around volunteers, but whatever name you give them, when things go wrong it's important to have clear policies and procedures in place, so everyone knows where they stand.

Avoiding tackling a problem usually only results in it getting worse and increasingly difficult to deal with. Putting it off can also lower the morale of other volunteers and paid staff who see that the problem is not being resolved.

It is generally better to have separate procedures for volunteers. Working with volunteers is different from working with paid staff, and some policies and procedures should recognise this. You may wish to make the procedures for volunteers simpler and clearer.

## What is meant by 'grievance'?

Most grievances are the result of misunderstandings and communication. Should the circumstances be more serious,

procedures need to be in place to ensure that volunteers have their cases fairly heard. Offences by volunteers might include persistent bad timekeeping, taking on tasks which go outside the agreed remit, failure to respect client confidentiality, breach of health and safety regulations, misuse of the organisation's equipment or facilities, or theft.

## What should be in a disciplinary policy?

For guidance purposes, a disciplinary code or procedure should go through the following stages:

- 1. Informal or oral stage** - here, mitigating circumstances can be discussed. Careful notes must be taken and a time frame for improvement agreed.
- 2. Written warning** - if there is insufficient improvement, or in the case of a very serious offence, a further meeting should be arranged, after which a written warning should be given, stating what further improvements are expected.
- 3. Dismissal** - if there has been no improvement at the conclusion of the previous stages, or in the case of gross misconduct, the volunteer can be asked to leave and any further offer of help from them refused.
- 4. Appeal** - a right of appeal should be included at every stage and carried out within the agreed time limits.

# More Support for Volunteers

## **Do I need an equal opportunities policy?**

Volunteers are generally not covered by equal opportunities legislation but it is good practice to include volunteers in the equal opportunities policy of your organisation.

## **I want to include volunteers with extra support needs. How can we make our volunteer opportunities inclusive?**

By involving volunteers with learning disabilities, physical disabilities or mental health issues you are empowering them to make their individual contribution to society. You and your organisation will also learn from the experience.

Remember that people with disabilities or mental health issues are often the experts in their own needs. Specialist advice can be obtained from relevant local or national bodies.

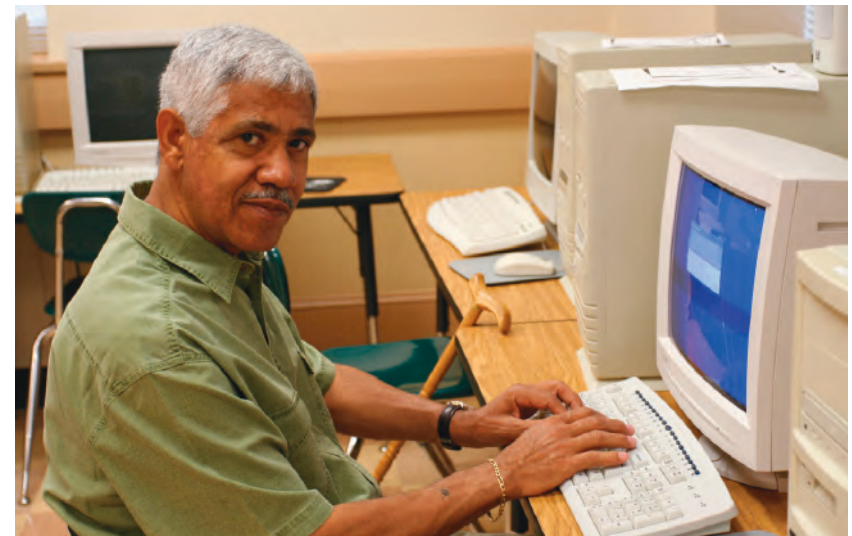
## **We live in a multicultural area and I would like our volunteer team to reflect this. How can I support volunteers from ethnic communities?**

The key advice is to remember that every volunteer is an individual and to ask for advice rather than making assumptions. Once you have volunteers ask them how you can support them. Check this out during supervision and team meetings.

You may also find it useful to develop networking with community groups.

## **What are the guidelines on volunteering for Asylum Seekers and Refugees?**

Refugees and their family members are allowed to do any work including volunteering. Asylum seekers cannot take up paid employment but are allowed to volunteer and claim usual expenses.



# Money Matters

## I understand some groups pay expenses to volunteers. Do I have to do this?

Ideally, you should pay a volunteer's out-of-pocket expenses. If you do not pay expenses, you are preventing some people from volunteering. This is a breach of equal opportunities.

Expenses will vary according to the individual and the organisation, but may include:

- Travel to and from the place of volunteering
- Travel undertaken in the course of volunteering
- Meals reimbursed where it is reasonable, for example when a volunteer does more than 4 hours volunteering
- Childcare or care of other dependants
- Protective clothing and other essential equipment
- Postage and telephone costs if working from home.



Paying some of these expenses may be unrealistic for under resourced groups; however, volunteers will usually expect the reimbursement of travel expenses.

Payment of travel expenses should be the actual amount and paid to the volunteer on receipts or mileage rates.

No flat rate expense should ever be paid as this can be seen as a contract of employment. By creating a contract you could in effect make a volunteer an employee, which means that they could then be entitled to full employment rights including the National Minimum Wage etc.

The cost of volunteer expenses should always be included in any funding bids that are written as it is difficult to secure funding which only covers volunteer expenses. Records of expenses claims prove useful when writing funding bids.

## **I would like to recruit volunteer drivers. How do I work out their travel expenses?**

The Inland Revenue sets tax-free mileage rates under the Fixed Profit Car Scheme. This allows for the payment of mileage allowances without the need for either the volunteer or the organisation to keep detailed records. For more information on current mileage rates look on the Inland Revenue website. (details on page 33).

## **What if a volunteer does not wish to claim for expenses?**

You should encourage all volunteers to claim expenses so that those who need them do not feel uncomfortable about doing so. If a volunteer then wants to donate the amount of expenses back to the organisation that is OK.



## **Some of our volunteers may receive welfare benefits. How do I reassure them that they will not lose their benefits by volunteering?**

Most people can volunteer without their benefits being affected. However, it is important that they tell Jobcentre Plus that they are volunteering. Benefits advisers are aware that volunteering can help people to find paid work.

There isn't any limit on the number of hours that they can volunteer, as long as they still meet the requirements for getting their benefits. They can also receive out-of-pocket expenses, but they should keep a record of them. For more information contact Jobcentre Plus for a booklet called 'Volunteering while receiving benefits'.

# Health and Safety

## Should our Health and Safety Policy apply to volunteers and paid staff equally?

With regard to health and safety the general principle should be to regard paid staff and volunteers in exactly the same way.

All organisations have a duty to ensure, as far as reasonably practicable, that no one is exposed to risks to their health and safety. If your organisation asks a volunteer to do a task which results in them injuring themselves or anyone else, the members of the governing body may be liable. If an organisation fails to take adequate measures, it might have to pay compensation to volunteers who are injured whilst in its care. Even if legal obligations cannot be established, health and safety provisions are a part of general good practice in volunteer involvement.

Every organisation should have a health and safety policy setting out the responsibilities of the organisation and of the paid staff and volunteers; organisations with five or more

employees must have a written policy by law. This should include information about issues such as first aid, what to do in the event of a fire etc.

It is important to make the roles and responsibilities of volunteers clear from the start so that any risks involved can be assessed and appropriate training, or other measures, can be put in place. Training will need to be repeated at intervals to refresh people's knowledge and keep them up to date with developments.



# Insurance

## Do our insurance policies have to cover volunteers?

Yes. Volunteers, like paid staff, may face risks such as personal injury, liability for accidents, loss or damage to property. Your organisation may be held liable for such risks if they have failed to take "reasonable care". Each organisation should check their insurance policies at least once a year.

## Surely we cannot be held liable if the volunteer acts improperly or incompetently?

If the volunteer's work was "authorised" it is possible for you to be held liable. You need to meet some minimum standards. These include:

- Taking sufficient care in the selection of volunteers
- Assessing and minimising risks (Risk Assessments)
- Providing training and supervision appropriate to the safe execution of tasks
- Meeting your obligations as an "occupier of premises"

## What types of insurance cover might I have to consider?

There are a number of different types of insurance cover you may need to consider:

## Employers' Liability Insurance

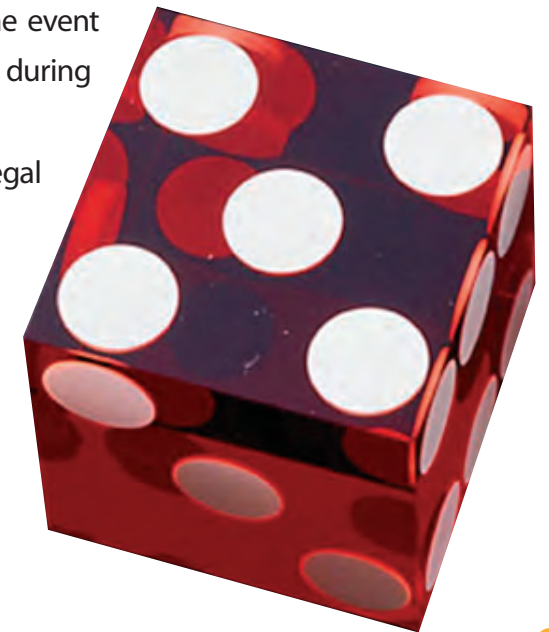
This protects an organisation against claims for injury suffered when someone is working for it. Check it applies to volunteers of all age groups.

## Public Liability Insurance

This protects an organisation against legal liability from accidents that cause injury to persons or damage to property. Check that your policy covers the acts of volunteers even when they are working away from your premises. Without this insurance the organisation or individuals responsible for the organisation could be held personally liable.

## Personal Accident Insurance

This provides payment in the event of injury or death occurring during the course of work for an organisation regardless of legal liability. It is a voluntary benefit and not all groups will want to take out such cover. If you do so, check for exclusion clauses and age limits.



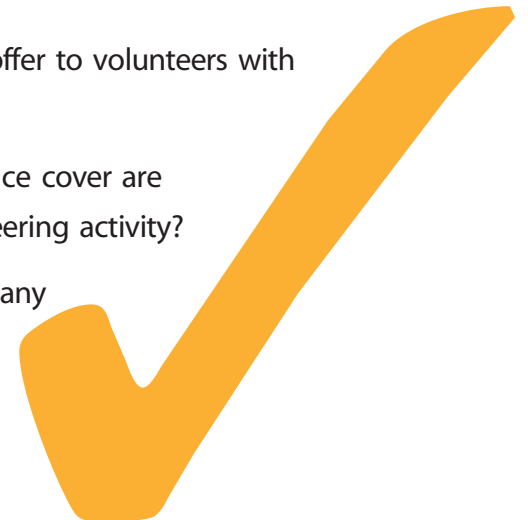
## Motor Insurance

Under the Road Traffic Act 1988, all vehicle users are required to carry insurance that covers their liability for injury to other persons or to animals or damage to other vehicles or property. If an organisation owns the vehicles used by volunteers, it is responsible for arranging the appropriate insurance cover. If the volunteer uses their own vehicle, the organisation must ensure that the volunteer had told their insurance company that they are using their vehicle for voluntary work. Periodically, the organisation should check that the volunteer's motor insurance is up-to-date.



## Checklist - have you considered:

1. Why you want to involve volunteers?
2. Who you need to consult in your organisation, such as board members and paid staff?
3. What you can offer volunteers?
4. What skills and experience you are looking for?
5. Whether you have sufficient funding for their expenses, training and other costs?
6. How you are going to advertise your opportunities, and what needs to be included in your recruitment process?
7. Who will be responsible for their induction and supervision?
8. How you will maintain effective communication with your volunteers?
9. What support you can offer to volunteers with special needs?
10. Which types of insurance cover are appropriate for the volunteering activity?
11. How you will manage any grievances or disciplinary issues?



# Websites and other Resources

## **Voluntary Action Wakefield District**

Web: [www.vawd.org.uk](http://www.vawd.org.uk) Tel: 01924 367418

## **Volunteering England**

Web: [www.volunteering.org.uk](http://www.volunteering.org.uk) - download free publications

Free volunteering helpline: 0800 028 3304

## **The national volunteering programme for young people aged 16 – 25**

Web: [www.vinspired.com](http://www.vinspired.com)

## **Information about the Criminal Record**

### **System and recruitment checks:**

Web: [www.crb.gov.uk](http://www.crb.gov.uk) or [www.isa.gov.org](http://www.isa.gov.org) Tel: 0870 909 0811

## **National Database of Volunteering Opportunities**

Web: [www.do-it.org.uk](http://www.do-it.org.uk) Tel: 0207 226 8008

## **Useful information about benefits and expenses**

Web: [www.inlandrevenue.gov.uk](http://www.inlandrevenue.gov.uk)

# Books and Guides

The following publications and many more are available from Volunteering England at [www.volunteering.org.uk](http://www.volunteering.org.uk)

- The Good Practice Guide – Volunteering England
- The Volunteer Recruitment Book – Susan J Ellis
- Essential Volunteer Management – Steve McCurley and Rick Lynch
- Volunteering and the Law - Mark Restall

## **You may also be interested in other toolkits from Voluntary Action Wakefield District:**

- New Groups' Guide to Starting Up - First Steps
- New Groups' Guide to Starting Up - Project Planning
- DIY Fundraising
- Safeguarding Children and Vulnerable Adults (Spring 2009)
- Changes in Charity Law (Spring 2009)

