



Third Sector Leaders

acevo

Essential Guide to Involving Volunteers



Written by:

Volunteering England

Foreword

The value of volunteering is increasingly gaining public recognition, as governments seek to encourage more people to volunteer; businesses adopt employee volunteering schemes and the benefits to the individual volunteer are more and more widely understood and appreciated. Over 23 million people volunteer in the UK each year, and volunteers can bring a wide variety of benefits to organisations that involve them in their work. Yet many volunteer-involving organisations say they are experiencing problems in recruiting and retaining volunteers. This guide aims to help organisations to develop a volunteer programme which will not only survive but prosper.

Whether an organisation has been working with volunteers for years, finds it has taken on volunteers without really noticing, or is planning to involve them for the first time, it is vital that volunteer involvement should be undertaken thoughtfully and within a framework of good practice. Good management is the key to attracting and keeping happy and motivated volunteers. acevo and Volunteering England hope that this guide will enable organisations which involve volunteers, or are considering doing so, to manage their volunteers in a way that will provide maximum benefit for the organisation, the individual volunteer, and everyone else involved.

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1. Introduction

The successful involvement of volunteers depends upon a positive commitment to volunteering and a clarity about their purpose that runs through a whole organisation, from the board of trustees, through senior management, to all paid employees. It needs the organisation to provide a supportive environment where volunteers can flourish and develop and where their individual needs will be taken into account. This Essential Guide looks at the key elements involved in establishing a successful volunteering programme and gives practical guidance on how organisations can get the most out of their volunteers and ensure that volunteering with them is a worthwhile and stimulating experience. It covers all the steps involved, from establishing why the organisation is involving volunteers at all and what their role will be, through the basic principles of recruitment and retention, to the legal and practical issues relating to volunteer involvement.

2. Starting a volunteer programme

Why involve volunteers?

It is all too common for organisations to simply drift into involving volunteers without having given any real thought as to why they are doing so. They may feel it is the only way they can afford to carry out their work, or just that it's vaguely a good thing to do. However, this can lead to many problems, both with the volunteers, who don't really know why they're there, and with paid staff, who suspect that volunteers are being used as cheap labour or as a substitute for paid staff. For a volunteering programme to succeed, there need to be positive reasons for involving volunteers.

These might include:

- Complementing paid work by "adding value" – for example, volunteer befrienders in hospitals can save time for busy nurses while also improving the patients' experience.
- Providing local knowledge and a door into the local community
- Helping to raise awareness of the organisation and communicate its messages convincingly – people know they're not just doing it because they're paid to.
- Bringing a diversity of skills and experience into the organisation, as well as different perspectives.

- Providing an element of passion and enthusiasm sometimes missing from the workplace.

The reasons will be different for every organisation, but the important thing is that the organisation thinks about why it is involving volunteers and makes a positive commitment to doing so.

Do you have the resources to work with volunteers?

Another key issue to consider before bringing volunteers into an organisation is how much it will cost. It is common to assume that because volunteers are by definition unpaid, there is little or no impact on the organisation's resources, financial or otherwise. However, there will be some costs involved, including:

- Recruitment costs
- Reimbursement of expenses
- Training costs
- Insurance costs.

Volunteers also need space and equipment – a desk to work at, a computer to use. There are implications for paid staff too. Managing volunteers is a skill, so staff who are going to be managing volunteers may need training, and it will also take up a portion of their time. Some organisations choose to employ a volunteer manager/co-ordinator to take specific responsibility for managing volunteering within the organisation. If not, then it is still important to identify a staff member within the organisation to take on this responsibility.

Developing a volunteer policy

The next step is to draw up a volunteer policy for the organisation. A volunteer policy is the foundation on which the organisation's involvement of volunteers should be based. It serves a number of purposes, including:

- Demonstrating the organisation's commitment to its volunteering programme.
- Pulling together all the various policies and procedures that affect volunteers (expenses, health and safety, and so on).
- Ensuring that everyone in the organisation is clear about why volunteers are involved and what role they have within the organisation.

- Detailing what the volunteer can expect from the organisation and what the organisation can expect from the volunteer.

It is important to consult with all staff, volunteers and trustees within the organisation when drawing up the policy, as this will help to ensure that it feels relevant and “owned” by everyone.

There is no blueprint for the perfect volunteer policy, as each organisation has its own unique needs that should be reflected in its policy. However, guidance on developing a volunteer policy, including a downloadable publication (Get it Right from the Start), is available from the Volunteering England web site at www.volunteering.org.uk.

Volunteer agreements

It is also useful for organisations to have a volunteer agreement, though care needs to be taken to avoid creating a contract of employment with volunteers. Volunteer agreements set out what the volunteer can expect from the organisation in terms of treatment and support, and the level of behaviour expected of the volunteer. It helps clarify exactly where both volunteer and organisation stand, and acts as a declaration of intent.

Organisations should make sure to avoid language that implies obligation on the part of the volunteer. For example, volunteers should not sign something that says they will volunteer for the organisation for the next six months. It would be preferable to make it clear to volunteers that they are free to leave at any time, but that it takes six months for the volunteer, client and organisation to get the most from the roles. It is best to think in terms of expectations and aspirations rather than requirements.

Among the commitments the organisation might make are:

- To provide a full induction and any training necessary for the volunteer role.
- To provide a named supervisor for the volunteer, with regular supervision meetings.
- To treat volunteers in line with its equal opportunities policy.
- To reimburse out-of-pocket expenses.
- To provide insurance cover for volunteers.
- To implement good health and safety practice.

Volunteers might agree to:

- Follow the letter and spirit of the organisation’s policies and procedures, including equal opportunities, health and safety and confidentiality.
- Meet mutually agreed time commitments, or give notice if this is not possible.

There is no need for the agreement to be signed – it is not intended to be a legal document. While it will not hurt to add a disclaimer to the effect that the agreement is not intended to be legally binding, this is likely to be ignored by an employment tribunal if they consider the actual relationship between the organisation and volunteer to be employment. Organisations need to make sure their procedures do not establish such a relationship. For further advice on this contact Volunteering England’s information service (freephone 0800 028 3304, e-mail information@volunteeringengland.org) or visit the Managing Volunteers section of www.volunteering.org.uk

3. Recruiting volunteers

Many organisations are finding it increasingly difficult to attract volunteers – but not all. There are some organisations who do not seem to be experiencing this problem. The challenge for organisations is to develop a recruitment policy that will help it succeed in attracting volunteers.

One of the keys to a successful recruitment strategy is understanding that most people volunteer for a variety of reasons – their motivations stem from self-interest as much as from altruism. To attract volunteers an organisation needs to convey a recruitment message that appeals to both motivations – i.e., to spell out in its advertising the benefits for the potential volunteer as well as the contribution the volunteer can make to the organisation and the wider community.

Another key element is to draw up a clear task description. Task descriptions may seem more suited to paid posts than to volunteer roles, but they ensure that the volunteer role has been thought about carefully. This allows an organisation to make a clear and logical assessment of the skills it needs volunteers to have. It also helps when advertising volunteer opportunities – advertising a specific role makes it easier for potential volunteers to imagine themselves doing it.

Advertising

The exact form of an advert will depend on the volunteer role, the target audience, and where it will be appearing, but there are some basic steps that should always be included:

A **statement of need** is a useful starting-point because it makes potential volunteers stop and think, 'Somebody should do something about that' – a first step in them coming to the conclusion that that 'somebody' could be them.

Once the advert has attracted people's attention and made them see the need for the volunteer role, it should tell them how they can help meet this need. It is useful to bear in mind that potential volunteers may not necessarily understand some of the language commonly used in the sector. Terms like 'advocate', 'support worker', 'befriender' and even 'admin support' can be confusing if they are not explained. People are more likely to take the next step towards volunteering if they can picture themselves in the role, and to do that they need enough information to understand exactly what the role entails.

Next, the advert should **dispel any fears** that potential volunteers may have about volunteering. This could mean including information about who can volunteer (*'No previous experience is needed, just an interest/enthusiasm for...'*); a reassurance that they will be supported in the role (*'Full training is given and volunteers will attend monthly supervision sessions'*); or a commitment to inclusive working (*'We welcome applications from all sections of the community and are keen to diversify our volunteer workforce'*).

By now the potential volunteer should have a definite idea of whether or not they are interested in the role. They are more likely to take the next step if the advert now tells them **how they will benefit**. Organisations should identify why people might want to do this particular role – to meet people, to get training, to build up experience leading to a particular career?

The next step is to choose the method of recruitment that is most appropriate for the role and the organisation. Volunteer Centres can be useful for recruiting volunteers and can also provide valuable support. There are around 500 volunteer centres throughout the UK, putting people in touch with organisations who need volunteers. Members of the public go in and talk to their local centre about the types of work they are interested in, what times they can work, etc, and the centre will search through its database for relevant opportunities. Volunteer centres also upload

their databases on to the Do-It website (www.do-it.org.uk) so that all opportunities registered with them appear on an online database that potential volunteers can search. Organisations can find their nearest volunteer by visiting www.volunteering.org.uk.

Diversity

Not everyone finds it easy to volunteer. Those least likely to volunteer include young people, old people, disabled people, unemployed people, and people from black and minority ethnic communities. Organisations that don't try to recruit from these groups are substantially reducing the pool of potential volunteers available to them, so it's worth taking some practical steps to ensure no one is being excluded, consciously or unconsciously. These might include:

- Thinking about where advertisements are placed – making sure, for example, that the minority ethnic press is used.
- Thinking about the organisation's literature. Does it need to be in languages other than English? Do the stories and images represented reflect the community as a whole?
- Removing blanket age bars, both minimum and maximum.
- Paying out-of-pocket expenses so that people with low incomes or without paid work are not deterred.
- Organising transport where necessary.
- Employing a diverse paid staff group.

Selection

The next task faced by the organisation is how to deal with the people who come forward in response to the recruitment campaign. Organisations need to decide which approach is right for them. This can be a difficult task as the organisation has to balance the needs of the agency with the needs of the volunteer, and it may involve dealing with the sensitive task of telling someone they are not suitable for a particular volunteering opportunity.

There are three main types of approach to selection:

- The non-rejection policy, where organisations take on anyone who is interested.
- The "recruitment" approach, which is more like a workplace model of selection. It favours more formal

procedures such as person specifications, application forms and interviews, and tends to place the needs of the organisation above those of the volunteer:

- The matching approach, which tries to achieve a balance between the needs of the volunteer and the needs of the organisation – so, for example, the organisation might have a portfolio of tasks that it needs to be carried out and will use the interview as a means of assessing the skills, interests and preferences of the potential volunteer to see if they can match the individual's needs with one or more of the tasks available.

Whichever approach an organisation decides is most appropriate for its requirements, it should endeavour to develop a system that suits its needs yet does not put off potential volunteers or place unnecessary barriers in people's way. Ideally, the application process should be as much about the volunteer deciding whether they like the organisation as about the organisation deciding whether they want to take on the volunteer.

Organisations put a lot of time and effort into recruiting volunteers, but an overly formal application process may well mean that a lot of people who would make excellent volunteers are put off before they start. Care should be taken to avoid unintentionally creating barriers by, for instance, asking potential volunteers to fill out a complex application form, which could deter people who have problems with their sight, for whom English is not their first language, or whose level of literacy is not high (all of whom may have lots of other skills and experience that would be valuable to the organisation).

Interviews

Any interview with a volunteer is a two-way process; an opportunity for both parties to find out more. If it is a selection process where not all volunteers will be taken on by the organisation, prospective volunteers should be made aware of this at the outset.

Some people find the word 'interview' very off-putting, and so some organisations prefer to just ask potential volunteers to come in to talk, or for a chat. It is helpful to remind them that this is also their chance to "interview" the organisation and find out if it is right for them.

The key elements to a successful interview have been identified as follows:

- Help volunteers feel at ease (choose the right location etc)

- Talk about the range of opportunities on offer
- Invite people to talk about why they want to volunteer and what they want to do
- Look for a possible match between the two
- Feed back positive information to the volunteer and discuss how they can best be involved
- Clarify any problems
- Communicate the outcome of the discussion
- Make clear the rights and responsibilities of the volunteer, if selected.

It can be very hurtful for applicants who are not suitable for the organisation, for whatever reason, to be told they are not required. Organisations should be careful to handle such situations sensitively. It may be that the individual, while not suitable for this particular opportunity, could do something else of value in the organisation. At the very least the organisation should refer them to their local Volunteer Centre or Bureau, which can help them find something suitable.

References

Most volunteer-involving organisations ask for references from their volunteers. Unfortunately, this can sometimes act as yet another barrier to groups who already find themselves excluded. Organisations need to think carefully about why they take up references, who they should be from and how they ask the volunteer for them.

References can serve many purposes, from a basic check that the person is who they say they are, through to a detailed recommendation of their suitability for the role. Whether or not an organisation asks for references should depend on the type of work that the volunteer will be doing and the risks involved. There is no legal requirement to routinely ask for references, but organisations do have a legal duty of care towards their clients, and it could be argued that they had failed in this duty if they did not take them up and a client was harmed. Therefore, most organisations where volunteers will be working directly with clients are likely to decide that it is appropriate for them to ask for references. Some organisations also feel that asking for references demonstrates that they take the role of volunteers and their intended commitment seriously.

If it is decided to take up references, then it is important to communicate to the volunteer the purpose of the exercise, to get their permission, and to reassure them

that the information will be treated in confidence. Again, some organisations prefer not to use the term “references” and find it more appropriate and less intimidating just to ask prospective volunteers for the name of someone who can vouch for them.

Screening/police checks

Screening volunteers is generally used to mean checking whether they have a criminal record. It is one way of reducing the risk of recruiting volunteers who may be unsuitable to work with children or other vulnerable people. Screening is a valuable tool in identifying unsuitable volunteers, but it is not foolproof. For example, 90% of child sex offenders have no relevant criminal record. Even those with a criminal record may be able to avoid detection by giving a false or different name. Organisations should not assume that by screening volunteers they have done enough. It is vital to always carry out effective recruitment, training and supervision of staff. There should also be a clear system for anyone who needs to raise concerns about an individual.

Not all organisations need to screen volunteers. It will depend entirely on what the volunteer is doing and the client group that 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’ that they have towards the people they work with. Duty of care requires that organisations do everything ‘reasonable’ within their power to protect others from harm – so for organisations that involve volunteers in working with vulnerable people, it could be argued that part of their duty of care is to screen volunteers. Organisations should look carefully at their client group and volunteer roles to assess whether screening is necessary.

If screening is deemed to be necessary, police checks for volunteers can be obtained from organisations registered with the Criminal Records Bureau. There are various levels of check available. For full guidance on this visit the “Managing Volunteers” section of www.volunteering.org.uk where there is a downloadable information sheet Screening and CRB Checks.

Ultimately, the decision whether or not to take on an individual with a criminal record will remain almost

entirely subjective. This could well mean that many people are being unfairly discriminated against and that organisations are losing out on perfectly capable and safe staff and volunteers. There are more than five million people in this country with convictions for a crime which could have involved imprisonment, and it is important to have a fair recruitment process so that these people are not written off as potential volunteers. A balance has to be struck between the need to protect vulnerable individuals and the need to allow everybody to have a place and a purpose within the community.

4. Retaining volunteers

Recruiting volunteers is only part of the equation – organisations also need to hold on to volunteers once they have them. One of the principal factors in retaining volunteers is keeping them motivated – and recognising that their motivations may change over time.

Some ways of keeping up motivation might include:

- Recognising volunteers’ achievements
- Involving volunteers in problem-solving and significant decision-making
- Matching volunteers with tasks and roles that fit with their individual needs and interests
- Giving volunteers tasks that offer them opportunities for both personal development and meaningful work.

Organisations also need to have effective systems and procedures in place for managing volunteers – one of the most commonly cited reasons for giving up volunteering activity is “bad management”. The three main planks of an effective volunteer management structure are training, support and supervision.

Training

All new volunteers will require an element of training. At the very least organisations should provide all their volunteers with an induction – an introduction to the work of the organisation and the activity they are being asked to do, together with more informal information such as introductions to other volunteers and staff and a tour of the building and facilities. Induction can be via a one-to-one meeting or in a general meeting for all new volunteers, and is best accompanied by a pack of written introductory information which might include the organisation’s volunteer policy, mission statement, and so on.

For many volunteers, some training in performing the actual task will also be required. The initial training will, of course, provide the minimum that is needed to enable volunteers to carry out their task. Some organisations also provide ongoing training, to extend volunteers' skills, refresh their knowledge, or equip them to take on further roles.

There are three main methods of training:

- **On the job training.** A member of staff or another volunteer simply shows the volunteer how to do a task and then supervises them as they do it. This is most appropriate if only one volunteer is taken on at a time and if the task they will be doing is relatively simple. It is an effective and cheap method, but it does demand a lot of time and patience from the trainer.
- **External training courses.** These work with both individuals and groups of volunteers. This method is more expensive, of course, but is useful if volunteers need to learn more formal or complex skills.
- **In-house training programmes.** This method is most suitable for organisations that take on volunteers in groups and need to train them in fairly complex tasks or ideas – such as advice work, “buddying”, etc, or where specific practical skills are required.

However it is delivered, training is important because it can:

- Enable volunteers to do their tasks more efficiently and effectively
- Help volunteers feel their work is taken seriously by the organisation
- Provide job satisfaction for volunteers and help them with personal development and career progression.

NB Organisations need to ensure that any training they provide for volunteers is strictly relevant to the task the volunteers are performing, in order to avoid the possibility of the volunteers being able to claim employee status and all the employment rights that entails – see “Legal issues and practicalities” section below. For more information on this, contact Volunteering England’s information service (freephone 0800 028 3304, e-mail information@volunteeringengland.org) or visit the Managing Volunteers section of www.volunteering.org.uk

Support and supervision

Alongside training, support is essential in helping to ensure both that volunteers can perform to the best of their abilities and that they enjoy and gain satisfaction from their volunteering experience. Organisations should endeavour to create a supportive environment, where volunteers feel able to discuss issues and ask for help if necessary. Support needs to be made easily accessible, and volunteers need to know to whom they can go when they require support.

One of the best ways of encouraging a supportive climate is to ensure that volunteer managers hold regular supervisions with volunteers. These can vary from informal debriefing chats to formal supervision sessions, depending on the volunteer and the task they are doing, but the important thing is that they happen regularly. Regular supervision provides an opportunity to check:

- Whether the volunteer is enjoying the role
- Whether they need extra support
- Whether they would like to expand or change what they are doing
- Whether they would like more training
- How they are getting on with staff, clients and other volunteers
- Whether there are any issues or problems they would like to raise.

Getting into a regular pattern of supervision allows a relationship to develop where both parties feel comfortable about discussing issues and concerns, as well as enabling managers to keep up-to-date with volunteers' changing motivations, support needs and training/development needs.

Organisations can also support volunteers by showing that they are appreciated and an important part of the organisation. Recognition can be as simple as saying thank-you to them at the end of the day, or as big as entering them for one of the major volunteer awards such as the Whitbread Awards. Keeping volunteers informed about what is happening in the organisation and inviting them to social events, AGMs etc, also helps volunteers to feel their role is important, as does involving volunteers in any decision-making groups in the organisation.

Dealing with problems

However good an organisation's procedures and treatment of volunteers may be, problems do occasionally arise. Some organisations adopt formal grievance and disciplinary procedures to deal with such difficulties; others prefer less formal mechanisms for resolving disputes. Whatever the system, the procedures should be as clear and understandable as possible. The key for organisations is to make sure they have some form of system in place so they are not forced to make something up as they go along if a difficulty arises – a rushed policy is never a good policy.

5. Legal issues and practicalities

In recent years there have been concerns about the legal status of volunteers and their rights, and the implications of this for organisations that involve them. These have arisen from a small number of industrial tribunal rulings that have allowed volunteers to claim employee status (and all the rights that brings with it), because they have held that mutual obligations between the volunteer and the organisation were enough to create a contract. Such rulings have caused many volunteer-involving organisations anxiety over perfectly sound volunteer policies and procedures for fear of encountering similar problems.

It would be very damaging to the treatment of volunteers if such concerns were to lead to organisations abandoning the good practice and consistency that such written documents bring. More recent employment appeal tribunal cases have found that volunteers were not in fact employed, in spite of having volunteer agreements, grievance and disciplinary procedures, and so on. Organisations should have nothing to fear if they follow the existing good practice advice: to be careful they involve volunteers in a way that does not imply an intention to create a binding relationship, and to avoid offering or providing material benefits for volunteers in return for their work (such as flat-rate expenses payments or training not relevant to the role).

Detailed advice on this can be found in good practice handbooks such as *The Good Practice Guide* (see the publications section of www.volunteering.org.uk) or by contacting Volunteering England's information service (freephone 0800 028 3304, e-mail information@volunteeringengland.org) or visiting the Managing Volunteers section of www.volunteering.org.uk.

These are also the best resources to consult about other legal and practical issues that need to be taken into consideration when involving volunteers – including expenses, benefits, health and safety, insurance, and specific rules for volunteer drivers and overseas volunteers – which require a somewhat more detailed explanation than is within the scope of this guide.

The time and effort that organisations put into good volunteer management are not wasted. The skills, talents, experience, diversity and fresh ideas that volunteers bring with them make most organisations feel they get as much if not more out of a volunteer programme than they put in. It's definitely worth it!



Jane Heath is Head of Information and Publications at Volunteering England, which is the national volunteering development agency for England. It works strategically across the voluntary, public and private sectors to raise the profile of volunteering as a powerful force for change.

Volunteering England aims to:

- Keep volunteering high on the policy agenda, working with government to promote opportunities for and remove institutional barriers to volunteering.
- Provide authoritative, up-to-date research on volunteering issues.
- Secure and support an England-wide network of high-quality volunteer development agencies, promoting and enabling volunteering and community involvement.
- Support volunteering development through:
 - Building partnerships across all three sectors
 - Promoting accredited quality frameworks for volunteer management and local volunteer development agencies
 - Convening national events and practitioner networks
 - Mounting awareness campaigns
 - Providing consultancy, education, training, publications, information and web-based services
 - Providing grants and strategic support to the work of volunteers
 - Identifying, disseminating and promoting good practice in the involvement of volunteers.

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