



Mansfield

Community & Voluntary Service

Good Practice Guide to Volunteering



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Volunteers' Job Satisfaction

The longer a volunteer is around, the more likely they are to notice that elements of good volunteer management are not in place.

Retaining volunteers, like retaining paid workers, depends mainly on motivation. However, unlike paid workers, their motivation is not money, it is job satisfaction.

Unless we fulfil the need for job satisfaction by providing volunteers with the good management they expect and are entitled to, they are likely to feel de-motivation, disappointment, frustration and resentment will inevitably lead to the volunteer leaving.

Why do Volunteers Leave

Research conducted by Volunteer England has highlighted the following:-

- Volunteers feel that their voluntary work could be much better organised.
- Many volunteers were dissatisfied with the tasks they were given.
- That their work was not appreciated.
- Volunteers did not have their out-of-pocket expenses reimbursed.

In order to avoid this situation, it is important that volunteers are valued and managed properly.

A Volunteer Policy

A volunteer policy is the foundation on which your group/organisation's involvement of volunteers should be based on. It forms the basis of your entire volunteer programme, giving cohesion to all the elements in your group/organisation that affect volunteers. It is the key to involving a diversity of volunteers, because it helps to define the role of the volunteers within the group/organisation and how they can expect to be treated.

Why Have a Volunteer Policy?

- A volunteer policy demonstrates a group/organisation's commitment to involving volunteers.
- It shows you care and thought has gone into involving volunteers and developing a volunteer programme.
- It ensures that decisions are not made on an ad hoc basis and that all volunteers are treated equally and fairly.
- A policy enables volunteers to know where they stand. It offers them some security, in that they know how they can expect to be treated and where they can turn to if they feel they things are going wrong.

The Role of Volunteers

Before embarking on involving volunteers within your group/organisation, you should think carefully about why you want volunteers, what specific duties you expect the volunteer to perform, the personal qualities and skills you are looking for and what you can offer them in return.

What role a volunteer can have within your group/organisation must be carefully considered and agreement needs to be sought from all committee members. Make sure there is a genuine role for and a commitment to involving volunteers before you starts to recruit.

To involve volunteers in a constructive and positive way is demanding. It will involve the committee's time, in term of ensuring policies and practices are adhered too, time and resources involved in on-going training and support and money to pay expenses.

Selecting Volunteers

When an organisation is recruiting volunteers, it is important to remember that not every volunteer will be able to meet the requirements of every voluntary vacancy. Therefore, the people responsible for recruiting volunteers are faced with a choice and are required to select which volunteer they consider to be best suited to the task.

Before recruiting volunteers, your group/organisation should be clear about its 'selection policy'. This is 'steps you go through to select volunteers'. It may include interviews, information sessions, and presentations by volunteers, references, police record checks, application forms – or a combination of some of the above. Having a 'selection policy' also means making decisions on practical issues, such as who and how many people are interviewing, how many interviews you are offering, what questions you ask on an application form. Alternatively you may to choose to take on all volunteers initially and have a two-staged selection process.

Unsuitable Volunteers

Everyone should be given the opportunity to volunteer. Unfortunately not every potential volunteer will be able to meet the requirements of every voluntary vacancy. When selecting volunteers it is likely you will have to say no to some people. This is acceptable on the grounds that:

- They cannot do the work.
- Their attitudes and philosophy are not appropriate for the place of volunteering.
- You do not have the resources to support the volunteer.
- You do not need any more volunteers.

Volunteers should not be turned down on the basis of other factors, which would constitute discrimination. The possibility of rejection should be built into your procedure from the start, so as not to give false expectations.

Be positive and supportive – explain that their skills don't fit this particular work and may be better used in a different situation.

- Tell the volunteer exactly what you thought their skills and abilities were.
- Assure them that your decision was related only to the requirements of the job and not based on subjective assessments.
- Check if the volunteer has any questions or concerns.
- You may refer interviewees back to Mansfield Volunteer Centre for more volunteering opportunity information.

Accepting Volunteers

Once you have decided to accept a volunteer the next stage is to agree a course of action with the volunteer. This might include:

- Taking up references
- CRB checks
- Agreeing a start date
- Planning the induction process

Recruiting Volunteers

Basic Steps in Volunteer Recruitment

There are five basic steps to recruiting volunteers namely:

1. Know Your "Opportunities"

- Be sure your volunteer opportunities are truly integral to achieving your group/organisation's aims and objectives
- Prepare volunteer task outlines which clearly explain volunteer tasks
- Accustom yourself thoroughly with each volunteer opportunity, including its purpose, responsibilities, and what the value of the experience is for the volunteer

2. Create a Clear Path to your Door

- Put together a procedure including recruitment campaign, screening process, support and training, in that order
- Don't start recruiting volunteers until you're ready to move them right into your screening, support and training procedure
- Don't let poor communication ruin your recruitment efforts. A large number of volunteers report lack of response from group/organisation/organisations as the reason they don't volunteer. Be clear and realistic about your needs. Answer initial phone calls within 24 hours

3. Make your Recruitment Message "User-Friendly"

- Produce publicity that answers the volunteer's unspoken question: "Why should I volunteer for you? Not your question "Why you should volunteer for us?"
- In your publicity, answer other typical questions that new recruits ask: "What will I be doing? How often and when? Where?"
- Reassure volunteers that they will be trained and that you will support them
- Avoid "red flag" words like "need" and "desperate" that scare volunteers away
- Be honest --- truth in advertising counts!

4. Get to Know your Market

- Acquaint yourself with all the ways you can get the word out
- Keep informed of your "competition" and how they compete with you successfully

5. Advanced Volunteer Recruitment

- Decide who your ideal volunteer is, then use what you know of their personalities and interests to compose a message tailored to them

- Although you should still target the general public (using general resources), use what you know of your "ideal volunteer" to specifically target your marketing

What's in a Recruitment Message?

Would you go to a restaurant whose advertisement read, "Please eat here because we have all this food we have to sell"? Of course not! You'd prefer the one that described how delicious and reasonably priced their food is, not to mention how great the service and atmosphere is!

But most volunteer recruitment adverts read much the same way. They talk about the group or organisation and what it needs. "We need..." At best those adverts simply blend in with all the other similarly worded adverts. At worst they ignore the simple truth that, however sentimental we may prefer to be, volunteers come to you because of something they want, not something you want.

The key to successful volunteer recruitment is figuring out what you have to offer the volunteer and selling it. Ask your current volunteers - at least the happy ones! - what they get out of volunteering. Try to find something unique about your group/organisation. Then make sure you mention it prominently in your recruitment publicity drive.

A succinct, straightforward recruitment advertisement will draw more and better volunteers. Let the advert do half you're screening for you!

Pattern for Recruitment Adverts:

[Motivational appeal/goal] by [task] for [persons or goal] for [time required] in/at [general location]. [Reward]. Training provided. [Any requirements/qualifications]. For more information call [recruiter's name] at [group/organisation/organisation/organisation/programme] at [phone number].

Examples:

You can help older people remain independent in their homes by delivering meals three days a week in your neighbourhood. Here's a chance to put in a great day's work helping others! Training provided. Must have car. For more information call...at Meals on Wheels at...

Earn the smile and appreciation from a homebound neighbour simply by dropping in once a week with flowers, your child's school artwork and an hour of your time. Only the Lonely is a program offered by the Old Stone Church in Mansfield. We value our volunteers and provide them with all the help they need to bring companionship into the lives of lonely seniors and disabled people. Training provided. Call...at...for information.

Four Steps to Better Volunteer Recruitment

When people ask, "Which volunteer recruitment techniques work best?" they mean public service announcements or speeches or posters. This is actually the least effective way to learn great recruitment skills.

Volunteer recruitment is a more organic process. Follow these four steps to boost your results.

1. Design coherent volunteer task outlines with well-defined duties. Unless volunteer opportunities are well thought out and clearly tied to your aims and objectives, you'll have an uphill climb with today's volunteers who are looking for meaningful work. Decide what you want to accomplish in

your community, and then see what you need to make it a reality. Identify how volunteers can help you achieve that goal.

2. Put in place the systems and tools you need to bring volunteers into your group/organisation quickly. When volunteers respond to your recruitment adverts, make sure they get their questions answered right away, they get interviewed and trained immediately and they get placed as soon as they're ready. More volunteers are lost through neglect or poor "customer service" than any other problem. Begin to recruit only after you've done all these things.
3. Imagine your ideal volunteer, and speak to her/him, either figuratively or by actually identifying your best volunteer and talking to her/him. Shift your focus entirely away from what you need. Instead, find out what the prospective volunteer wants and is interested in.
4. When composing your adverts, be upbeat and informative. Use the word "want" instead of "need." And never use any form of the word "desperate." The medium you use will depend on your potential volunteers, but your message is far more important than how you get it out.

Places and Ways of Recruiting Volunteers

Here are some ideas for recruiting volunteers

- Social media posts
- Community and neighbourhood newsletters
- Paid adverts
- School newspapers
- Professional association and club bulletins
- Church bulletins
- Local Radio and community radio
- Yellow Pages ads
- Posters on community bulletin boards, at library, grocery stores, Laundrettes, community centres,
- College campuses
- Posting services
- "Bring a Friend" teas for current volunteers
- Short, upbeat talks at community or professional organisation meetings
- "Just ask"
- Buttons/bumper stickers
- Public talks/education/demos on area of service
- Public recognition of your volunteers
- Volunteer fairs
- Stall at community events/fairs
- Recruitment services through Mansfield Volunteer Centre
- Articles in your own newsletter
- A web page of your own

Short Listing/Interviewing Volunteers

When short listing and interviewing, ensure consistency of selection criteria and personnel throughout the selection process. The Chair of the interview panel should ensure that the criteria (task description, person spec etc) are clearly understood by the panel beforehand, and that the panel is the same throughout the selection process.

Short listing

Application forms (see appendix 7) are useful in preparing for interviews. They are a good way of recording information for future use as well as monitoring and evaluation. Keep your application form as simple and clear as possible. Where individuals 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. Also you may be able to offer support in filling in application forms.

Interviewing

Volunteer recruitment and development strategies need to emphasise "getting the right person for the job." Any group or organisation that is recruiting volunteers' needs to ensure that they are trustworthy and if they are working with young people or vulnerable people you want to be sure that they are the right type of person.

It is also considered good practice to have face-to-face contact with a volunteer before they join your group/organisation. The meeting may take the form of an informal chat or a more formal interview. It is important to be clear about what you want to achieve from the interview and also to be aware of what the potential volunteer may hope to get from it.

Why interview volunteers?

- Interviews provide an opportunity to explain about the work of your group/organisation and the volunteer role.
- To find out about the applicant's skills and previous experience.
- To check out the potential volunteer's understanding of issues relevant to your group/organisation's work.
- To give some preliminary details about the group/organisation's policies and the rights and responsibilities of volunteers.
- To explain practical details such as hours, payment of expenses, support and training.
- To show that your group/organisation takes volunteer involvement seriously.
- To give the potential volunteer an opportunity to ask questions.

Before the Interview

- Be clear on your interview policy – do you have a policy of 'non-rejection', where you find a place for all volunteers, or a policy of selection, where you are finding the right volunteers for the post?
- Decide who is interviewing. A 'panel' may be intimidating, but can avoid subjectivity on the part of the interviewer.

During the Interview

- Introduce yourself/selves.
- Break the ice before you begin formal questions: Help to put everyone at ease by finding things you have in common. Do this by exchanging general comments about friends, work, vacations or the neighbourhood. This builds rapport.
- Explain the interview structure, e.g. how long it will take, why you are making notes.
- Ask everyone the same questions, which will encourage the volunteer to give full information, e.g. 'what skills can you bring?'
- Allow the volunteer time to think and respond.
- Never make assumptions about a volunteer – if you want information and then ask for it directly.
- Encourage the volunteer to ask any questions they might have.

After the Interview

- Tell the volunteer when and how you will contact them with a decision and ensure you do this.
- Thank them for coming.

References

Why ask for references?

There is no legal requirement to obtain references but they can be used to:

- Gain a basic check the person is who they say they are.
- Add useful information not discussed at interviews.
- Check out an individual's suitability to the volunteer role.
- Demonstrate to volunteers and clients that volunteers are a real part of the service and therefore need to be checked formally.
- Satisfy insurers that reasonable precautions have been taken to ensure duty of care.

There are limitations to references:

- They may be no more than confirmation of a person's name and address.
- The referee will have their own agenda. The reference is their view.
- A volunteer may find it difficult to identify a referee.

Obtaining references

If you do choose to take up references as part of the selection procedure there are some questions to consider:

- Why do you want references?
- What information do you want?
- Who should provide the reference?
- Who will see them?
- How will they be used, e.g. will they help you to make a decision, or will they be used to back up your decision to take a particular volunteer?
- Where will they be kept? There could be an issue of confidentiality.

Suggestions for good practice

- Ask all volunteers for references. It is unfair just to check out people that you have doubts about.
- Make it explicit to potential volunteers who your organisation will/will not consider as a suitable referee. Encourage the volunteer to contact you if they cannot find a suitable reference rather than abandon the whole process.
- Make sure you ask the referee some specific questions, avoiding vague answers and some open-ended questions. It's a good idea to enclose any description of the volunteer's role.
- Do not read references before an interview. Reading references beforehand may affect the way that you treat the volunteer.
- Be clear about whether volunteers can start before the references are received.
- Take up references promptly.

Unsatisfactory references

- Seek the referee's permission to discuss with the volunteer.
- Review in context with your original impression of the volunteer.
- Consider the volunteer role, support, training and supervision available.

The Criminal Record Bureau

The CRB deals with the paperwork and day-to-day bureaucracy of checking and gives support to police stations to actually carry out the checks. The general idea is that organisations anywhere in the country will be able to receive up-to-date checks on an individual within an agreed time-scale. This means that not only will more organisations working with children have access to checks, but also that organisations working with vulnerable adults will be able to check staff and volunteers.

The general principal of the new checks is that organisations have different levels of need to access information, so three levels of check have been introduced. To make the process less threatening to individuals being checked, police checks have now been re-named 'disclosures'.

- **Enhanced Disclosures**
For posts involving substantial contact with children or vulnerable adults regularly training, supervising or being in sole charge of individuals or group/organisation/organisations. Also for individuals seeking gaming or lottery licences or judicial appointments. The Enhanced Disclosure would contain details of all convictions current or spent as well as details of cautions, reprimands or warnings. It would also detail inclusion on the lists held by the Department for Education and Employment and the Department of Health of individuals unsuitable to work with children. In addition, they will include any other 'relevant' information held by the police, including so-called 'soft' information. Enhanced Disclosures will be free for volunteers and will cost £12 for staff.
- **Standard Disclosures**
For posts involving regular contact with vulnerable people and people entering 'positions of trust' such as accountancy and veterinary professions. The Standard Disclosure will be the same as the Enhanced Disclosure but without the addition of extra information held by the police. Standard disclosures will be free for volunteers and will cost £12 for staff.
- **Basic Disclosure**
Available for anyone. Contains details of convictions that are 'unspent' under the Rehabilitation of Offenders Act. These checks are of limited use and will probably not be used widely in the voluntary sector. The charge for Basic Disclosures has not been announced yet, but it is unlikely that they will be free for volunteers as they are not seen as a vital check.

Enhanced and Standard Disclosures will be issued directly to individuals, who can then show them to organisations themselves when applying for a position.

In order to get Enhanced and Standard Disclosures, organisations need to either become registered bodies. Registration forms are available from the CRB website. To register, organisations will need to:

- Pay a £300 fee
- Satisfy the CRB that they are entitled to ask for the information under the Exceptions Order of the Rehabilitation of Offenders Act
- Show that they have a code of practice vis a vis employing ex-offenders

- Show that their confidentiality policy is clear about who will need to know information, how it will be stored, and when it will be destroyed.

If the CRB is satisfied that all this is in place, then the organisation need to nominate a lead signatory who will have overall responsibility for checks and counter signatories. All signatories are checked by the CRB to see if they have any offences that would make them unsuitable to receive confidential information. All applications for Enhanced and Standard Disclosures have to be signed by a signatory and the individual being checked.

If organisations cannot afford the £300 registration fee themselves, then it is also possible to get disclosures via an 'umbrella body'. Where appropriate, an umbrella body can register and sign on behalf of other organisations, or register them as counter-signatories. The umbrella body has ultimate responsibility for checking that members are abiding by the Code of Practice and are dealing with disclosure information strictly within the bounds of their confidentiality policy. Passing on information unless it is strictly necessary could be a criminal offence, and therefore organisations will need to think carefully about their relationship with the other organisations and the extra work involved before taking on the umbrella role. Because all the extra administration, umbrella bodies have to charge organisations for checks. Inevitably, therefore, some private companies have taken on an umbrella role and are hoping to operate at a profit.

Induction of Volunteers

Having a well thought out induction for new volunteers is extremely important. All too often inductions consist of just reading policies and being introduced to staff and then that's it. Remember that for the first few weeks that they are with you the volunteer will still be making up their mind about whether they want to stay with the group/organisation.

It is essential that any new volunteer joining an organisation receives appropriate induction training. This process should help the volunteer feel welcome in the group/organisation and give them the information they require to take up their volunteering role.

A good induction will be of benefit both to new volunteers and to voluntary groups/organisations. Induction can:

- Provide volunteers with the information and skills they need to perform their task.
- Give volunteers more confidence when starting work
- Provide an opportunity to explain the organisation's policies and procedures
- Show that the organisation values the contribution made by volunteers.
- Ensure that volunteers are aware of equal opportunities issues.
- Help clarify and avoid potential problems.
- Ensure that all volunteers have a consistent approach to the task.
- Ensure that legal requirements are met (e.g. health and safety).

In order to achieve these benefits, the induction needs to be well prepared and confidently presented within a realistic time-scale.

All new volunteers should be given an induction, but the level of detail may vary depending on the type of opportunity and level of responsibility required.

The crucial parts of an induction should include:

- The volunteering role.

- Arrangements for supervision and support. Who to go to if they have questions.
- Introduction to other volunteers/members of staff.
- Tour of building.
- Volunteer rights and responsibilities, including days and times to volunteer.
- Personal welfare, including toilet facilities, refreshments, heating operation, how to claim expenses.
- Health and Safety, including fire procedures, first aid provision, personal safety, manual handling and risk assessment.
- Policies, including equal opportunities, disciplinary and grievance procedures.
- Confidentiality policies
- Boundaries
- Training opportunities (and accreditation)
- Team meetings and social events

There may also be additional background information that would be useful know. This may include:

- How the group/organisation is funded
- The history of the group/organisation
- Explain your group/organisation's policy on volunteers using telephones/internet for their own use.
- The structure of the group/organisation e.g. make up of the committee.

Induction can be delivered in groups or on a one to one basis. It can be helpful to involve an experienced volunteer in the induction process.

By the end of an induction a new volunteer should have a clear understanding of what their volunteering role is and how they fit within the group/organisation.

The volunteer will have had to take on a lot of information both formal and informal so you will need to reiterate who they can go to in the group/organisation to ask questions and where for example they can find copies of policies.

The rest of the induction period will probably be taken up with training and the volunteer trying out the type of work they will be doing. Obviously a lot will be dependent on resources, but if you work closely with the volunteer in this initial period you should be able to gain a much better picture of how they work, what interests them, what support they need and what they are hoping to get out of volunteering for you.

Supporting Your Volunteers

Supporting volunteers means giving them a space to find out how they are finding the work, providing feedback, involving them in decision making and gathering information.

Different Forms of Support

Support is vital for everyone and can be offered in a variety of forms, for example:

a. Initial Briefing Meeting

This is where potential volunteers have an opportunity to ask questions and find out where, what, who, why, how and when of the group or organisation. You may want to involve other people at this stage, as it

is a good time to introduce other volunteers, members of the Management Committee and development workers.

b. Regular Group Meetings

Members of the group can offer one another support and reassurance, as well as develop friendships and group identity.

c. Informal Support

Regular opportunities for chats and get-togethers, between volunteers, at meetings, socials or in the office.

d. Training Needs Reviews

These meetings are important, to find what support and training your volunteers require and how they have found the training already received.

e. Advice and One to One Support

Contact time for volunteers with a member of the management team to deal with difficult situations or offload.

f. Others

Annual General Meetings, social events, meetings with link groups or organisations, professionals, staff, training events and celebration events.

Regular Formal Support and Supervision

If your group or organisation is serious about its commitment to equal opportunities it will need to continue discussion with volunteers after they have begun their volunteering with the group or organisation.

This is an opportunity to receive feedback from volunteers, offering them time set aside to air any concerns or difficulties they might have, and be supported.

These do not have to be formal events, but a structured supervision session can help to ascertain the information necessary to ensure that your volunteers can feel that you are interested in their opinions and will include them in the future development of the project.

It is a good idea to keep notes of these meetings. It may not be practical to try and hold individual supervision sessions with everyone. In accordance with best practice, groups or organisations should utilise support systems that may already be in place. For example, Management Committee, Trustees could be trained so they can run supervision sessions for volunteers.

The information you require during these sessions will be unique to your group or organisation. However you should maintain continuity in the questions you ask volunteers and users involved in your group or organisation. You can monitor progress in responding to the needs and concerns of volunteers.

Aims of a Supervision Session

1. For the group or organisation to gain

- An improved understanding of the tasks and issues involved in volunteering for each part of the group or organisation
- A perception of how things are going
- To hear the volunteers views and ideas of the development of the group or organisation

2. For the volunteer to gain

- Direction from the Management Committee or Trustees
- Feedback on their work
- Support and advice

3. The sessions may cover

- Problems that have been encountered by either side
- Things the volunteer needs more information or training on
- Relationships with others
- Time management

It is also good practice to offer volunteers the opportunity to participate in an appraisal session, perhaps annually, particularly for volunteers who are moving on from the group or organisation.

Aims of an Appraisal Session

1. For the group/organisation to gain:

- An improved understanding of the tasks and issues involved in their volunteering role
- A perception of how things are going
- To hear the volunteer's views and ideas of the development of the group or organisation

2. For the volunteer to gain:

- The opportunity to reflect on their work
- Feedback on their work
- Support and advice
- The opportunity to voice their views on the direction of the project
- To consider their own personal development

3. The appraisal may cover:

- The extent to which the objectives have been met
- What, if any, were the restrictions in achieving those objectives
- What part of the activity did the volunteer feel they did particularly well
- What part of the activity did the volunteer feel they did least well, noting reasons
- What changes could be made in the group or organisation that would be an improvement
- What area of work would the volunteer personally like to develop
- Future plans for self development
- Future targets, both quantitative and developmental

- Has the volunteer been sufficiently supported?
- Relationships with other volunteers, staff and Management Committee or Trustees

Losing Volunteers Due to Bad Supervision

An increase in volunteer turnover, requests for moves to other areas, or high "no-show" numbers, are all indicators that there might be a problem between the supervisor and the volunteer. Here are some tips to get to the bottom of the situation.

- **Listen to volunteers:** "Oh, the activity is fine. I am just under lots of pressure at home." Meet individually with volunteers to try to determine the problem. Using exit interviews with all volunteers can make this an easy task.
- **Develop volunteer "check-in" reports on a quarterly basis:** A satisfaction survey can prevent long-term festering of problems.
- **Talk to volunteers:** Ask how things are going? Do they need help? Do they have suggestions to improve things? A group meeting can sometimes raise issues that are important to the volunteers.
- **Talk to the supervisor:** Find out from them how the volunteer is getting on.

Do not assume the supervisor is at fault before getting the facts from both sides.

Investing in Volunteer Training

The training process takes time, effort and requires an input of resources. So why do it?

"The value of training is directly proportional to the effort which management puts into it. Whether you have only a few volunteers, or are entirely dependent upon them, if you don't train them then the organisation will inevitably suffer in the long run."

Some volunteers value the provision of training enormously, regarding it as an essential part and tangible benefit of their volunteering experience. In these cases, training will undoubtedly increase volunteer confidence and satisfaction.

However, others may not see the need for training, or even if they do, they may find the idea very off-putting (possibly because it reminds them of unhappy school days). If this is the case, the need for training must be 'sold' with great sensitivity. In all instances, training must be well-planned and appropriate to the needs of the group or organisation and to the needs of the individual volunteer.

Functions of Volunteer Training

- Training demonstrates that the group/organisation believes in a high standard of work
- Training lessens the likelihood of mistakes and other problems
- Some group/organisations use training courses as a part of their volunteer selection procedure
- Training allows new volunteers to learn about the group/organisation and their specific tasks
- Training also allows existing volunteers to perform their roles better and to take on new work as the group/organisation changes
- Training gives volunteers an opportunity to learn about the political, social and economic setting in which the group/organisation operates
- Training can heighten personal skills and awareness, so the volunteers can function more effectively as individuals and therefore do their voluntary work more successfully
- It can also improve interpersonal and group awareness, so volunteers can both work more effectively with colleagues and deal more sensitively with the group/organisation's client group

- Providing standardised training can ensure consistency in approach by different volunteers and continuity over time.
- Training helps to minimise risk (for example, health and safety training)

Design and Formal Training

Design of Training

Determining what training a volunteer may need requires answering three questions.

- What information do they need to successfully perform the work?
- What skills do they need to successfully perform the work?
- What attitudes or approaches do they need to successfully perform the work?

Training to provide this information, develop these skills and engender these attitudes can be provided in formal training.

Formal Training

Formal training comes in many guises. Its main aim is to prepare volunteers for specific jobs. Sometime this can be very lengthy, particularly when the volunteer lacks the specific skills for the job. Training can be presented in many ways and may be done in-house, externally, or jointly with other groups/organisations, and includes:

- On-the-job training
- Practical demonstrations
- Work shadowing
- Buddying/mentoring systems
- Visiting other organisations/inviting outside organisations
- Attending conferences, workshops, lectures, seminars, etc.
- Role plays and simulations
- Problem-solving exercises, group discussions, brainstorm, etc.
- Speakers and films at meetings
- One-off training sessions of varying lengths
- Telephone conferencing
- Linked or modular courses, consisting of several sessions over a period of time
- Distance learning
- Structured reading programmes.

It is recommended that a variety of techniques are used, which combine listening, discussing, observing and doing, as this will help to maintain attention and interest.

There are two main areas to cover in volunteer training regardless of the job for which the training is being provided.

First communicate to the volunteer:

1. This is what you should do and accomplish in your job;
2. This is what you should not do;
3. This is what you should do in the following situations...

The second area might be in terms of the description of roles and responsibilities. It would include training which communicates to the volunteer the web of relationships in which they will work:

- this is with whom they will be working and this is your task;
- this is the role and how it fits into the task.

For longer term and more experienced volunteer's continuing education may be a way to develop personally, prepare for more responsibility, adapt to change and prevent burn-out.

Paying Volunteer Expenses

Volunteers should be encouraged to claim their expenses and we recommend establishing a culture within your organisation where expenses are paid as a matter of course. This is for three main reasons:

- Volunteers should not be out of pocket as a result of volunteering.
- Paying every volunteer out of pocket expenses provides a true picture of your service's running costs.
- If some volunteers within your organisation are not claiming expenses, it may be difficult for other volunteers to say that they would like their expenses paid.

Employee or volunteer

A contract of employment is created if a volunteer receives anything of economic value in return for volunteering (legally referred to as a 'consideration'). Whether this is money, gift vouchers, training unrelated to their role, or boxes of chocolates. If the volunteer expects to receive the 'consideration' in return for work, then a contract of employment is set up. This does not mean that volunteers cannot receive expenses and training, just that the way in which these are given out has to make it clear that they are not a payment.

How to pay expenses

Reimbursement of actual out-of-pocket expenses is not a payment you are reimbursing the volunteer for something that they have already spent. An expense is any cost that a volunteer has to pay out that they would have incurred if they had not been volunteering for you. To show that any money you pay out as expenses is a reimbursement and not a payment, it is important that you ask for a receipt and reimburse the exact amount that the volunteer has paid. It is a good idea to keep receipts and records of money paid to prove that you have not been making payments. Expenses could be paid to volunteers for any or all of the following:

- **Travel costs** to and from the organisation or travel undertaken during the course of their volunteering, either by bus or car.
- **Meals** eaten during the period of volunteering (if it exceeds three hours or over a meal period).
- **Postage and telephone calls.** Volunteers operating from their own home may need to claim telephone, postage, stationary costs. This is quite acceptable as long as good practice principles are maintained.
- **Care or childcare fees**
- **Specialist equipment** (e.g. protective clothing)

- **Training** that the volunteer needs in order to do their role is fine, because it is seen as necessary training and would not count as a 'consideration'. It does not matter whether the training is in-house or external or whether it leads to a qualification. Training is only regarded as a consideration if it is not relevant to the volunteer's work. Groups and organisations should be aware that because training has to be 'necessary', any training offered should be open to all volunteers carrying out that particular role.

Flat Rate Payments

Volunteers should be reimbursed for the exact amount they have incurred, as opposed to paying honoraria or flat rate payments. Organisations who make flat-rate expense payments are putting themselves at risk. This may be seen as making payments and creating a contract of employment.

Groups/organisations may worry that moving from a system of flat-rate payments to a system where the volunteer has to provide receipts and will only receive a reimbursement of what they have actually spent, will result in them losing volunteers. But this should not happen as long as the changes are explained and volunteers understand why they are important.

Rewarding Volunteers

Instead of paying out honoraria or giving volunteers individual gifts, organisations could make sure that all volunteers are able to claim expenses for meals, travel and care costs and that spare money is invested in making volunteer roles more rewarding - for example, by offering more training, social activities, extra resources, tools to make the group/organisation more accessible, etc. It is also fine to arrange social events and group outings to say thank you to volunteers.

Good Practice

- Your group/organisation should have a clear expenses policy on what expenses can be claimed for, which could include an upper limit for each item.
- All volunteers should be made aware of your expenses policy. They should not have to ask for expenses before this information is given to them.
- It should be made clear to volunteers that they are required to provide receipts.
- You should have a clear procedure for volunteers to claim their expenses.

Volunteer Recognition

An important and often overlooked aspect of volunteer management is recognising and celebrating the work of volunteers. The simplest and most effective volunteer recognition is to say “thank you” each time a volunteer makes a significant contribution to the work of the group/organisation. An other techniques that are useful as a means of recognising volunteers are:

- Send birthday or Christmas cards
- Meals out, Picnics
- Certificates of achievement

It’s not all about giving...

Recognising the work of volunteers isn’t just about giving them things. The inclusion of volunteers in the planning and evaluation stages of an organisation’s work will also demonstrate that there is a commitment to volunteering beyond just service delivery. Such inclusion may also assist with volunteer retention as they’re more likely to stay with a group/organisation where they have had a say in where it is going. Annual reports offer an excellent opportunity to recognise the contribution that volunteers make to an organisation. To include names and photos of volunteers in your annual report demonstrates commitment to volunteering to outside organisations and also shows the individual volunteers that their work is something that the organisation is proud of. An additional “spin off” benefit of involving volunteers with planning and evaluation of your work is that management committee members get to see and hear about volunteers at first hand.

Celebration Events

Celebration events are aimed at a team of volunteers and give the opportunity for a time out of the workplace to have fun, relax and meet informally. Such events might include:

- A trip to the cinema
- A meal out or a picnic
- A visit to an attraction
- Bowling or Bingo
- A karaoke evening

With a diverse range of volunteers it may not be possible to find a single celebration event that all volunteers can or want to attend. Where this is the case, two different events should be organised rather than doing nothing at all.

Use of Language

The word ‘using’ when referring to volunteers is to be avoided. Using volunteers implies a way of working where volunteers are disposed of when their work is done. The phrase ‘working with volunteers’ will imply a more co-operative and team working approach.

Volunteering and State Benefits (Information provided by Volunteer England)

There is a lot of confusion over whether volunteering affects an individual's benefits. This is not helped by the fact that many benefits advisers are poorly informed about volunteering and often give people the wrong advice. In actual fact the rules are quite simple, and it's well worth knowing them so that you can advise volunteers if they have any queries.

Definition of volunteering

The most recent leaflet published by the Department for Work and Pensions (DWP) and Jobcentre Plus network about volunteering provides the following explanation:

"What is volunteering?

This is when you choose to give your time and energy to benefit other people without being paid for it.

"As a volunteer, you could:

- volunteer with a charity or other voluntary organisation
- volunteer with a public-sector organisation, or
- help your community."

"It is not volunteering if you:

- do something for a family member
- are given money apart from your expenses, or
- are under contract to do it (this does not include any 'volunteer agreement' you may have)."

("Volunteering while receiving benefits", DWP/Jobcentre Plus, September 2008, page 5)

Are you allowed to volunteer if you are claiming state benefits?

The short answer is yes. People are allowed to volunteer while claiming state benefits, including means-tested benefits such as Job Seekers' Allowance, Incapacity Benefit and Income Support. But, there are some guidelines and rules which claimants should be aware of. Some of these rules are general and others relate specifically to a certain type of benefit.

The general rules

Informing benefits advisers

It is compulsory for claimants to notify benefits advisers that they are volunteering. They will have to complete a form describing what they do (currently known as form ES672VJP). Organisations have no duty to inform the Jobcentre Plus or benefits office about who is volunteering for them, so it is the responsibility of the volunteer to do this. Some people may worry about declaring their volunteering. It is sometimes reported that advisors are not well informed about volunteering and can discourage or misinform claimants about rules on volunteering.

As part of good practice in supporting volunteers, volunteer co-ordinators can help volunteers to feel more confident about explaining their volunteer role to a benefits advisor. This could include providing publicity leaflets about the organisation's work and a simple volunteer role description to clarify what the volunteer usually does.

Volunteer expenses

Although volunteers give their time freely, it's important not to forget the costs incurred through

volunteering. For example, the cost of travelling and a meal eaten out could be significant to someone on a low income or who receives state benefits.

But, remember that only actual expenses should be reimbursed. If a volunteer pays £4.30 for travel every day, it might seem easier to round the sum up to £5, but this is not a reimbursement of an actual expense and would constitute a payment. Any kind of paid work would jeopardise a person's right to claim state benefits, and they may find that their benefits claim is reduced or suspended. Furthermore, making payments to a volunteer can potentially cause legal or tax problems for an organisation.

For these reasons it is important to reimburse 'out of pocket' expenses only, which means asking volunteers to produce receipts, bus tickets etc. It makes sense to use a simple claim form which can be submitted with receipts. A template expenses claim form is available in A Good Practice to Volunteering Forms.

Lastly, note that sometimes benefits claimants need to inform their Jobcentre Plus or benefits advisor about their volunteer expenses. People receiving Housing Benefit should also inform their local authority about their volunteer expenses. This process should be made easier if volunteer co-ordinators give a photocopy of the expenses claim form and receipts to new volunteers.

The rules for different types of benefits

Job Seeker's Allowance (JSA)

People receiving JSA can do as much volunteering as they want, as long as they remain available for and are actively seeking work. This means that claimants have to show that they are looking for work and applying for jobs where appropriate. As an organisation you will have to give your volunteers some flexibility, as they will need to visit the Jobcentre Plus office for meetings and to sign on, and will need to attend interviews when they come up. If an individual is volunteering, then they are entitled to 48 hours' notice if they are asked to attend an interview and a week's notice before starting work. (These are concessions to the 24 hours' notice normally allowed.)

Income Support

Volunteering should not affect someone's Income Support as long as they are not receiving any money other than reimbursement of expenses.

Incapacity Benefit (IB)

There is a lot of confusion over Incapacity Benefit. This is partly based on misinformation about old rules and partly due to confusion about current rules.

Firstly, it is important to note that the "16 hour rule" which set a maximum time limit on volunteering by anyone claiming this benefit no longer exists. An amendment passed in The Social Security (Welfare to Work) Regulations 1998 removed this rule. Now there isn't a set limit on the amount or type of volunteering that someone can do while claiming Incapacity Benefit.

Secondly, people often worry that starting to volunteer will automatically trigger an investigation into their need to claim Incapacity Benefit. This shouldn't happen and the DWP's most recent leaflet confirms that "you can still be a volunteer and get Incapacity Benefit or Income Support" as long as claimants follow a set of criteria explained in the guidance. (For further information, please refer to page 13 of "Volunteering while receiving benefits", DWP/Jobcentre Plus)

Thirdly, there is occasionally some confusion about volunteering and 'permitted work' (similar to the old 'therapeutic earnings'). The permitted work rule applies only to paid work and should not affect volunteers. Claimants should be entitled to volunteer without it being recognised as permitted work.

Disability Living Allowance (DLA)

DLA is an allowance paid in acknowledgement of the fact that life for someone with a disability may be more expensive – for instance, someone with mobility problems may be reliant on taxis. Volunteering will not affect whether an individual receives this benefit or not. (For further information, please refer to "Volunteering while receiving benefits", DWP/Jobcentre Plus)

Housing Benefit/Local Authority Housing Allowance

This is usually paid to people receiving JSA, Income Support, Pension Credit or who have a low income. It should not be affected by volunteering but claimants should inform their local authority about any volunteer expenses they receive. (For further information, please refer to "Volunteering while receiving benefits", DWP/Jobcentre Plus)

Employment Support Allowance (ESA)

This is a new benefit which will be introduced from 27 October 2008. The ESA will replace both Incapacity Benefit and Income Support paid because of disability or incapacity. (Incapacity Benefit and Income Support will continue to be paid to existing claimants; new claimants will receive ESA).

The new regulations on Employment Support Allowance clearly state that claimants will be allowed to volunteer. The regulations also recognise that reasonable expenses can be reimbursed to claimants who volunteer. For further information about the ESA, please refer to the "further information" section at the end of this document.

Good Practice and volunteers receiving state benefits

Covering expenses 'in advance'

It can be very difficult for people on low incomes to pay upfront for volunteer expenses such as travel tickets. For this reason, your organisation should consider reimbursing expenses in advance. The Social Security Amendment (Volunteers) Regulations 2001 clarified rules on Income Support, JSA, and Incapacity Benefit to make it clear that volunteers can receive advance payment for expenses to be incurred in the future.

Receipts and expense claim records should be kept and the volunteer should repay any unspent money to the organisation.

Problems at the Jobcentre Plus office

Occasionally a volunteer may have problems convincing their benefits adviser that they are volunteering and not working in a role which they should be paid for. As mentioned above, copies of an organisation's publicity leaflets and a volunteer role description should help a volunteer to explain what they are actually doing.

If the volunteer has already supplied these, a volunteer co-ordinator could provide support by sending a letter to the Jobcentre Plus or Benefits office. A sample expenses claim form and template letters to JobCentre Plus are available in A Good Practice to Volunteering Forms

Expenses and Equal Opportunities

Most people in receipt of benefits are on very low incomes and could not afford to volunteer if their expenses were not reimbursed. When you decide how you will reimburse expenses, make sure that you

are not creating unnecessary barriers. If possible, find ways to reimburse volunteers on the same day as the money was spent and avoid reimbursement by cheque. If you are not sure which methods of reimbursement suit people, just ask them. In some cases it may be more efficient to develop different systems for different people.

Further information

Department of Work and Pensions/Jobcentre Plus guidance on volunteering:

“Volunteering while receiving benefits” (September 2008)

This explains what volunteering is and what the rules are for any volunteers claiming state benefits, or anyone who wants to begin volunteering.

- Read this guidance leaflet on the [Jobcentre Plus website](#). You also request a copy from Jobcentre Plus offices.

(For reference, copies of previous benefits guidance can be viewed or printed from the '[Expenses and State Benefits](#)' section of the Good Practice Bank.)

Dealing with Problems

It is important that groups/organisations have some mechanism for Complaints or Grievance and Disciplinary Procedures.

Volunteers should be aware of these procedures so they know the proper route to take should they have a grievance.

- If you believe a volunteer is not coping in their role try working with them to overcome any barriers, which are preventing them from working effectively.
- Your group/organisation should aim to ensure a fair and consistent approach to the enforcement of standards of conduct across the group/ organisation.
- Proper systems of supervision and appraisal should allow volunteers to be offered training and guidance to improve their performance.
- You may offer the volunteer an alternative opportunity or signpost them to other organisations if they need specific help.
- Try and resolve problems informally before using formal Disciplinary Procedure.
- Eventually it may be appropriate to ask a volunteer to leave. This can sometimes be the most supportive action you can take on behalf of the individual as long as you are clear as to your reasons.
- Try to find out why volunteers leave your group/organisation. This information will help you to re-appraise your group's/organisation's structure and support mechanisms. One way to gain feedback is to use a form designed for this purpose which you can use at an 'exit' interview or at a suitable later date after the volunteer has left your group/organisation.

Appendices

Appendix I

A Volunteer Charter

– A template

Your Rights and Responsibilities as a volunteer member of (your organisation's name) .

(Your organisation's name) operates within a framework of equal opportunities to ensure that all of our activities and projects are accessible to all.

As a volunteer you have certain rights and responsibilities that serve to protect you and facilitate your position. These are outlined below.

If at any point you feel that you are being asked to work outside of their limits please inform (named person) or (named person).

Your rights as volunteer:

- To information about (your organisation's name) and its projects.
- To information about the tasks that you will be expected to undertake before you start them.
- Equal treatment in recruitment, placement, training and support.
- Time to decide whether or not to volunteer.
- A role in (your organisation's name) decision-making procedures.
- To claim out of pocket expenses.
- To be respected and safe and to be able to say 'no' at any time.
- To go home on time.
- Not to be used to replace paid staff.
- To enjoy your volunteering and have fun.
- To be respected and supported by all volunteers and staff of (your organisation's name) .
- To receive an induction and request ongoing training.
- To know whom you are accountable to for your actions on projects and during activities.
- To progress within (your organisation's name) and to be able to ask for job references.

Your responsibilities as volunteer:

- To be honest about your suitability for specific projects and activities.
- To develop skills and attend training required for a project.
- Act in accordance with best practice and equal opportunities.
- Be responsible and keep (your organisation's name) activities safe and in line with relevant policies and legislation.
- Be reliable and turn up when you say you will.
- Maintain discipline, work as part of a team, respect confidences, supports other volunteers, do not undermine others and set a good example.
- To recognise that whilst volunteering you are a representative of (your organisation's name).

Inappropriate behaviour

- The image that (your organisation's name) portrays to the public is crucial to our professionalism.
- Inappropriate behaviour or any acts which bring (your organisation's name) reputation into disrepute will not be tolerated and will be dealt with using the disciplinary procedure.

Name

Signed

Date

Appendix II
Checklist for a Volunteer Role Description/Advertisement

– A template

This checklist 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	
Main task summary	List the main duties.
Project area	
Based at	
Minimum number of hours required and minimum period of volunteering.	eg A minimum of 2 hours a week for at least six months.
Days and times of day required	eg Monday and Thursday evenings, 6-8pm.
Age/Gender Restrictions/People Unsuitable	
Any special training offered	eg First Aid, Help Line.
Any skills required	eg IT skills, clean driving licence, etc.
Start Date	
Your organisation's standard terms and conditions	Including Equal Opportunities, Health & Safety and other policies. The expenses (childcare, lunch, etc.) you offer. Details of any accreditation/training on offer.
Access	eg. Is the place of work wheelchair accessible, is there a loop hearing system, how many steps are there at the place of work, details of parking and public transport, etc.
Support	Is support provided – if so what kind. List supervision, team meetings, any volunteer forum, etc offered by your organisation.
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 e-mail enquiries.

All the above can be used in a volunteer advertisement.

Add the section below for a complete Role Description.

Main tasks in full for inclusion in the full role description	<ul style="list-style-type: none"> ● List all duties. ● Include to whom the volunteer is responsible.
---	---

This checklist is also a good way of starting to prepare information for registering of the vacancy with Mansfield Volunteer Centre.

Appendix iii

**Policy for the Recruitment of Volunteers
- a template**

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.

We will advertise our volunteering needs in a cross-section of the media e.g.; newsletters of Black & Minority Ethnic (BME) led groups, newsletters of disabled led organisations, and newsletters of gay and lesbian led organisations.

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 Bristol/our local neighbourhoods.

Recruitment of our volunteers will involve a process of formal/informal interviews/CRB 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.

Name..... Signed.....
Date.....

Appendix V
A Volunteer Application Form
– a template

This is a suggested form for you to adapt for your organisation.

Ideally this form would be four pages in length with 14 point lettering and include symbols. There would also be appropriate space for applicants to write in their information.

Volunteer Information

your logo and address here

To join (your organisation's name) as a volunteer,
please complete this form and return it to us.

Your Personal Contact Details

Name _____

Address _____

_____ Postcode _____

Telephone numbers: (daytime) _____ (evening) _____ Mobile _____

Email _____

Date of Birth _____

What is your employment status? Employed Unemployed At home Student Retired (please circle)

Do you have a disability? Yes/No If Yes please specify _____

Do you have any special or personal support needs? _____

Have you your own transport? Yes/No If Yes please specify _____

Emergency Contact Details

Please give details of someone we would be able to contact in an emergency while you are volunteering with us.

Name _____

Address _____

Telephone number _____

Email _____

What is this person's relationship to you? _____

Chosen Project Area(s)/Volunteer Vacancy:

Tell us which project area/Volunteer Vacancy you are applying for.

You can mention more than one.

Why you want to volunteer?

◆ **Please use this space to tell us about why you want to volunteer for (your organisation's name).**

You can tell us about:

- ◆ **the kind of work you would like to do**
- ◆ **the kind of job you are hoping to work towards**
- ◆ **the kind of training you would like to have access to**

We cannot guarantee that we can offer all the work and training you want, but we might be able to point you in the right direction.

About your skills and experience:

Please use this space to tell us about your skills and previous experience (paid or unpaid) that you would like to use while working at (your organisation's name).

by

Which days of the week are you available? _____

If relevant, which evenings are you free? _____

References

Please provide details of two people who we can contact and will provide written references to support your application to become a volunteer with (your organisation's name). If you do not have employment references, we can accept references from friends and others who know you, but not from your immediate family or household.

1. **Name** _____

Address _____

_____ **Postcode** _____

Telephone number _____

How do you know this person? _____

2. **Name** _____

Address _____

_____ **Postcode** _____

Telephone number _____

How do you know this person? _____

Please note: Some areas of voluntary work within (your organisation's name) will require a police check (CRB Check). If this is required, we will discuss it with you first.

Please return this form to the address on the front as soon as possible, and we will contact you about your application. You will be invited to come to (your organisation's name) for an informal interview, which will give you a chance to find out more about our Volunteer Programme and your chosen project area.

Thank you for applying to volunteer at (your organisation's name).

Office use only	<i>Date arrived:</i>	<i>Passed to:</i>
	<i>Interview date:</i>	
	<i>Days and hours agreed as:</i>	
	<i>Start date and induction date:</i>	

References

Brighton and Hove Volunteers Centre

Bristol Volunteers Centre

Charity Commission

National Council for Voluntary Organisations (NCVO)

Voluntary Action Sheffield

Volunteering England

Volunteer Solutions

Further Information on Volunteering

Visit the following websites:

www.crb.gov.uk

www.mansfieldcvs.org

www.NCVO-vol.org

www.navca.org.uk

www.volunteering.org.uk