

**Volunteer Centres Essex**

# **Valuing Your Volunteers**

## **Guidance for Volunteer Management**

The involvement of volunteers is often vital to the running and operation of a community group or charity. As such, thought and consideration needs to be put into their management and recruitment.

Good management of volunteers helps them to understand their role within an organisation and where to find support; it gives them a sense of value and encourages them to stay with the organisation.

Clear guidance and procedures reduce the risk of misunderstandings and reinforce safe working practices.

Great if you are just starting out or a good tool to help to review your organisation's practices.

This booklet is designed to provide guidance on how to involve and support your volunteers. For further information please contact your local volunteer centre or visit the Volunteering England or NCVO websites. Further information factsheets are also downloadable from the Volunteer Essex Website, [www.volunteersex.org](http://www.volunteersex.org)



**Volunteer Centres**

Essex

# Checklist

**Volunteer Policy**

**Copies of Relevant Policies**

**Volunteer Role Description**

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**Volunteer Agreement**

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# Volunteer Policy

Your volunteer policy is the foundation upon which you are involving volunteers in your project. It is a single document which lays out how you will recruit, involve and support volunteers. A volunteer policy demonstrates an organisation's commitment to its volunteer programme and to its individual volunteers. It helps to ensure fairness and consistency. It is important that all staff, volunteers and Trustees/Senior Management are involved in developing your volunteer policy so that everyone is working from the same page and has ownership of the document. Most organisations prefer to have their volunteer policy as a short document which refers to other policies (ie. health and safety). They may also want to expand on the practical information for the volunteers by producing a separate Volunteer Handbook (see Checklist). Either way the Volunteer Policy should be a working document, forming part of the volunteers and paid staffs induction process, and should be reviewed on a regular basis to ensure that it still reflects the needs of the organisation.

Points to consider :

- Start your policy with an explanation of what the Organisation does and why it involves volunteers in its work.
- Statement of intent and the principles that will inform your involvement of volunteers.
- Your recruitment process.
- Diversity – a simple statement referring to a Diversity Policy will suffice.
- Equal opportunities.
- Induction and training.
- Expenses.
- Supervision and support.
- Insurance.
- Health and Safety.
- Problem solving procedures.
- Confidentiality/Data Protection/Social Media/Safeguarding Policies – where relevant. Volunteers should be bound by the same policies as paid staff so reference should be made to the policies that apply.

For further information and examples of volunteer policies go to [www.volunteeringengland.co.uk](http://www.volunteeringengland.co.uk) and click on resources/policies and agreements.

Or, visit [www.volunteering.org.uk](http://www.volunteering.org.uk) for the information service at the National Centre for Volunteering.

# Copies of Policies

It is important that your volunteers are as informed as possible when they start volunteering for your organisation. So it is good practice to incorporate copies of any other relevant policies into your volunteer's induction process. An easy way to ensure that your volunteers have read these policies is to include these other policies with your Volunteer Agreement Form. That way the volunteer signs to say that they have read and understood them. The Volunteers Role Description will be your guide as to which policies are relevant for each volunteer. The policies that could be relevant may include:

- The Equal Opportunities and Diversity Policy
- The Confidentiality Policy
- The Data Protection Policy
- The Health and Safety Policy
- The Child Protection Policy
- The Vulnerable Adult Policy
- The Screening Policy
- The Employer Supported Volunteering Policy
- This list is by no means exhaustive.

As every Organisation is unique and every volunteer role slightly different you will need to decide which copies of policies are relevant for your volunteer to read.

# Role Descriptions

Creating a role description for volunteers has a number of benefits. Firstly, taking the time to create a volunteer role can make you think about different aspects such as whether certain skills are required to carry out that role and what attributes you should look for when recruiting the volunteer. You should consider whether training will be required or who will be responsible for the management of the volunteer.

Secondly, giving specific information about a role will attract the right sort of person and help with recruitment. Potential volunteers are more likely to come forward if they can see exactly what the role involves and if they feel it is the role for them.

Thirdly, a role description helps potential volunteers know what is expected of them and what their role in the organisation will entail. It will explain who they will be responsible to, what support they can expect and also whether relevant training will be required.

## **What to include:**

- Role title
- Main activities or tasks
- Skills required and whether they are desirable or essential
- Training offered
- When, where and how often they will be required

Due to employment legislation, it is important to avoid any misunderstanding and to make it clear that this is a voluntary role and not paid employment. When writing a volunteer role ensure the terminology used reflects this, for example, use the words “role” instead of “job”, “tasks and duties” instead of “work”.

A copy of the role description should be kept on the volunteer’s personal file and updated in accordance with any changes.

For more information contact your local volunteer centre or visit the Volunteer Essex Website: [www.volunteeressex.org](http://www.volunteeressex.org).

# Risk Assessments

As a matter of course, all volunteer roles should be risk assessed and a record kept.

## The five steps to risk assessments are:

- Identify the hazards.
- Decide who might be harmed and how.
- Evaluate the risks and decide on precaution.
- Record your findings and implement them.
- Review your assessment and update if necessary.

Don't overcomplicate the process. For many organisations, the risks are well known and the necessary control measures are easy to apply. You probably already know whether, for example, you have volunteers who move heavy loads and so could harm their backs, or where people are most likely to slip or trip. If so, check that you have taken reasonable precautions to avoid injury.

The volunteer should be made aware of any safety precautions or procedures in place including:

- Ensuring they have the right tools for the role.
- Undertaking training before attempting an activity.
- Using protective equipment.
- Working in pairs.
- DBS checking staff and volunteers.

Having a clear and structured recruitment process stating requirements; i.e. DBS checks and references appropriate to the role.

To find out if your role requires a Criminal Records Check (DBS) please refer to the criteria required by visiting [www.gov.uk/dbs](http://www.gov.uk/dbs)

It may be necessary on occasion to write risk assessments specific to people, for example pregnant mothers or young people or for one-off events.

For full guidance on Health and Safety procedures and risk assessments, you can visit <http://www.hse.gov.uk/risk/>

# Insurance

It is important to that your volunteers are covered by the necessary insurance.

A charity should ensure that its volunteers are protected from harm as a result of any negligence on its part. Also, both the charity and its volunteers should be covered in the event of a third party being injured through the actions of a volunteer. The charity should check any insurance policy to see:

- that it definitely includes volunteers
- how the term 'volunteer' is defined for the purposes of that policy
- whether any upper or lower age limits apply
- that the policy covers the types of activities that the volunteers will be undertaking

The charity should keep accurate volunteer records to comply with their insurance policy requirements.

For more information on insurance matters, visit <http://www.charitycommission.gov.uk/>

Source: <http://www.charitycommission.gov.uk>

# Expenses

Although volunteering is unpaid, in order to adhere to good practice, it is vital that volunteers do not incur any out of pocket expenses whilst undertaking activities on behalf of your organisation.

Reimbursement of a volunteer's out of pocket expenses, can reduce economic barriers and enable those on low income or benefits to become involved, therefore ensuring "equal opportunities" for all.

There are laws relating to employment, charity, tax and benefits which organisations should be mindful of when reimbursing out of pocket expenses.

## Key Considerations

- All expenses should be a reimbursement of money spent as a result of the voluntary role. Volunteers must be asked to produce receipts. It is advisable to produce an expenses policy stating terms and conditions and types of expenses payable whilst volunteering with your organisation.
- Volunteers claiming state benefit, should ensure their benefits advisor is informed of their voluntary activities and the out of pocket expenses they receive.
- Any kind of perk, for example discount, gifts or vouchers could be seen by an employment tribunal as "consideration" and could be regarded as contributing to the formation of a contract. This could lead to the volunteer being granted employee rights, such as national minimum wage, holiday pay, unfair dismissal and/or other employment rights. There are many alternative ways of showing your appreciation some of which are shown in the Recognition and Farewells section of the Handbook.

For more information contact your local Volunteer Centre or visit the Volunteering England Website.

[www.volunteeringengland.co.uk](http://www.volunteeringengland.co.uk)

# A Volunteer Handbook

If you are involving a number of volunteers on a regular basis you may wish to consider having a Volunteer Handbook as well as a Volunteer Policy.

Generally speaking, a volunteer policy is a document that sets out the overall principles that will govern how the volunteer programme is run. It acts as a central hub from which other policies and procedures spring, f. A volunteer handbook on the other hand carries information that will be helpful for the volunteer as part of their day to day work for the organisation. Although not as important as a volunteer policy, handbooks can be extremely useful for volunteers.

So while a policy might state that all volunteers are entitled to be reimbursed for their out of pocket expenses, the handbook would inform the volunteer how to go about claiming, which forms to fill out, which finance person they have to see and so on. An important distinction is that volunteer policies are for everyone in the organisation; they are guidelines for the involvement of volunteers in the life and work of the organisation, while handbooks are solely to be used as a reference guide for the volunteers - a back up to the information they will receive during their induction. Handbooks might tell the volunteer about tea making facilities, practical advice on health and safety, information on the role of the volunteer co-ordinator and how volunteers will be supervised.

The content depends largely on the particular situation of each individual organisation. It makes sense to discuss with current volunteers what information they would like to have to hand, especially in their first few weeks. Induction is one good place to start to look for likely content; the information you give volunteers in their induction meetings is likely to be the sort of thing they should be able to refer to later. Many organisations place their grievance procedures, health and safety policies and so on in the appendices of their handbooks.

Do remember to keep the language in handbooks clear and readable. Some organisations use graphics and cartoons to break up the text and make the document more user-friendly.

For examples of Volunteer Handbooks please go to [www.volunteeringengland.co.uk](http://www.volunteeringengland.co.uk)

# Volunteer Agreement

A range of resources for volunteer managers. Volunteer Agreements can be used to set out both an organisation's commitment to its volunteers, and what it hopes for from its volunteers. Such agreements act as a reference point for the volunteers, and a reminder to the organisation that it should meet the standards of good practice that it has set itself.

## Reasonable expectations

Care must be taken to set out what the organisation will provide and how it will treat the volunteer and what it asks from the volunteer in such a way as to avoid the creation of mutual obligations, which could be regarded in law as creating a contract.

Typically in an agreement an organisation might commit:

- To provide a full induction and training necessary for the volunteer role.
- To provide a named supervisor for the volunteer, with regular supervision.
- To treat volunteers in line with its equality and diversity policy.
- To reimburse out-of-pocket expenses where there are receipts or similar evidence of cost to the volunteer.
- To provide insurance cover for the volunteers.
- To implement good health and safety practice.

A volunteer agreement might ask volunteers to:

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

It can be a good idea to include your agreement as part of your welcome pack/ induction process or perhaps at the end of your handbook so that when you have been through the handbook with the volunteer, you are ensuring the volunteer has read and understood the contents.

## **The dangers of creating a contract**

Organisations are understandably aware of the dangers of creating a contract with their volunteers, and can be reluctant to have any form of written agreement with them. However, as long as the organisation avoids any form of obligation or contractual language, any risk is outweighed by the benefits of having a written agreement.

It is important that you avoid any 'perks' that could be seen as 'consideration'. ie make sure that volunteers are reimbursed for actual out-of-pocket expenses only, and that they submit receipts and transport tickets for their expenses claims. Also ensure that any training offered is relevant to their role only. For further information on this please contact your local Volunteer Centre.

Make it clear that you don't intend to create a contract.

Where it is not practical or reasonable to remove all benefits or obligations, it makes sense to state in volunteer documents such as agreements or policies that there is no intention to create a legally binding relationship, for example:

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

It should be noted that this is not an easy get-out clause but should form part of the overall picture.

# Welcome Pack

All of the elements mentioned in this booklet can be put together into a welcome pack.

This is an excellent way of making sure the volunteers receive all the information needed to take away with them and look at home as a back up to their induction. Alternatively it can be sent out with the volunteers' offer letter.

This might include:

- Offer letter/letter of introduction.
- Handbook.
- Copies of flyers leaflets about the organisation and its projects.
- Copies or summaries of policies relevant to the volunteers role.
- A written role description.
- The volunteer agreement form.
- Copies of expenses forms.
- Next of Kin information request.
- Referee request.

The above are suggestions as to what you may want to include in your welcome pack and is not exhaustive. The order can also be adapted to fit your organisations' requirements.

# Induction and Training

## Induction

An induction welcomes the volunteer into the organisation with an overview Of how the organisation runs on a day to day basis. It introduces them to their volunteer role.

The induction should include:

- A tour of the premises at which they will be based.
- Fire procedure.
- First aid and accident reporting.
- Meeting key members of staff and volunteers.
- Outlining the key policies relevant to their role e.g. health and safety, confidentiality and safeguarding.

A schedule which can be used as a “tick list” to make sure that you cover everything could be a good idea.

## Training

Some volunteer roles will require more in depth training than simply “on the job” training. This will ensure the volunteers are equipped with the skills necessary to carry out their tasks.

Specific roles such as involving vulnerable people including children, could require specialist training.

The most common way of training volunteers however is “on the job” which will prove most effective and economical for volunteers taking on a simple task, as will shadowing or buddying an existing member of staff or volunteer.

For more comprehensive or formal training, you may use in-house training or training from external sources such as a local CVS or Essex-based Voluntary Sector Training, There are also a wide range of online training resources available such as vision2learn (<http://www.vision2learn.com/>). These methods can provide in-depth knowledge for complex or specialist roles. The offer of accredited training for some volunteers will also appeal to many as a way of enhancing their CV's.

Training can be a way of meeting a volunteers' motivations and a way for them to acquire work-based skills. However all training must be relevant to the volunteer role to avoid being seen as a benefit.

# Supervision and Support

Once you have recruited your volunteer you will want them to stay. It is therefore important to have a good system of support in place.

It is good practice for your volunteer to be provided with a named supervisor, who will be responsible for their involvement and who they can approach with any concerns they have.

The volunteer's progress should be regularly reviewed by one designated person and a agreed supervision system put in place. Supervision is an ideal time to discuss relevant training options, the volunteers progress, and any problems they might have.

If you involve many volunteers within your organisation you may also wish to organise volunteer meetings in addition to 1:1 supervision. This will enable them to share experiences, access peer support and feed back to the organisation any concerns they have and any suggestions for developing their role.

You may have a newsletter that your volunteer could contribute towards, making them feel part of the organisation.

Supervision is a way to communicate regularly and openly with your volunteer to ensure they are happy in their role.

# Recognition and Farewells

It is essential when managing volunteers to remember that they are giving their time willingly and without payment, so it is entirely their choice to be with your organisation. There are many options open to volunteers so if a volunteer is feeling undervalued or taken for granted, they will look for an alternative role elsewhere.

Making a volunteer feel valued is simple and does not have to take up lots of time or resources but it could be the difference between keeping or losing a valued team member.

## Things to remember:

- Say good morning and goodbye, but most important of all say THANK YOU.
- Remember birthdays.
- Acknowledge special events, i.e. family occasions etc.
- Always show consideration.
- Be flexible around hours and availability.
- Be patient and understanding if volunteers are unsure of tasks.
- Hold events specifically for volunteers, such as coffee mornings or meetings.

When a volunteer leaves your organisation, for whatever reason, it is beneficial to make sure you acknowledge the work they have done for you and let them know how much you have appreciated them. If they chose to volunteer again it is hoped they will return to your organisation.

## Suggestions to ensure a friendly farewell:

- Always send a letter thanking the volunteer.
- Offer to give support with job applications, for example interview support or looking over application forms.
- Let volunteers know they can rely on you for references.
- Make sure you tell them they are always welcome to return.

A good volunteer is worth their weight in gold, so make sure they know it!

For more information contact your local Volunteer Centre or visit the Volunteer Essex Website: [www.volunteersex.org](http://www.volunteersex.org).

To find your local Volunteer Centre visit  
**[www.volunteeressex.org](http://www.volunteeressex.org)**

**Volunteer Centres  
to insert their  
addresses here**

**We make every effort to ensure that the information contained in this booklet is correct at the time of publication. It is intended as a brief summary of relevant good practice to help you plan or develop your work with volunteers. Legal advice should be sought where appropriate. Volunteer Centres Essex is unable to accept liability for any loss or damage or inconvenience arising as a consequence of the use of this information. The inclusion of other organisations in this booklet are listed solely for signposting purposes.**