



Volunteer Management Strategy

**A practical guide
to support your organisation with the
development of a volunteering
programme**



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Section 1 – Introduction

Why involve volunteers?

It is important to consider why you want to involve volunteers in your organisation and to think carefully about what tasks are appropriate for them to do. Volunteers should not replace paid work but add value to what is already being accomplished. Involving volunteers in your organisation brings diversity by broadening knowledge and increasing and developing skills in addition to extending the range of work and services.

Why do people volunteer?

Volunteers are people who freely contribute their time, experience and enthusiasm to benefit the community. Volunteering should be a two-way process, volunteers give to an organisation and they get something in return for example, training, gaining new skills, meeting new people, work experience to increase their employment prospects and a sense of satisfaction from the work they have undertaken. Involving volunteers in the management of an organisation or development of a project is an excellent way of integrating volunteers and harnessing diversity. It is essential that volunteering opportunities are interesting, fulfilling and rewarding in order to attract and retain volunteers. Volunteers should be appropriately trained, supported and supervised in addition to getting out of pocket expenses, if appropriate.

Good Practice

Good practice should be an essential element of volunteer management. It should permeate through every aspect of volunteer involvement within an organisation to ensure volunteers are valued for their contribution. Good practice can be demonstrated by having an honest, transparent and open way of working, promoting inclusion, tolerance and acceptance, good communication and a clear sense of purpose. A framework or code of good practice recognises the rights of volunteers and clearly defines their responsibilities.

Section 2 - Organisational policies that impact on volunteering

It is the organisation's responsibility to provide a policy framework to ensure that the rights of staff, volunteers and service users are protected and that aims and objectives of the organisation are met. Volunteers should be included and covered by any policies under which the organisation governs its work.

Volunteering Policy (Appendix 1)

Organisations recruiting volunteers should draw up a volunteering policy to set out clear guidelines for volunteers within the organisation. It defines the role of both the volunteer and the organisation.

Health and Safety Policy (Appendix 2)

Organisations have a legal responsibility to ensure that paid staff, volunteers and service users are safe at work and that conditions meet the standards of Health and Safety Laws. A Health and Safety policy should be drawn up and distributed to everyone within the organisation to ensure that they play their part in keeping safe.

Public liability insurance covers accidents and damage claims by members of the public as well as claims from within the organisation.

The policy needs to cover staff and volunteers working in different locations, as they may not always be based at the main work place.

If volunteers use their own car as part of their volunteering activity, they should inform their insurance company in writing as this constitutes a change of use and failure to do so could invalidate their policy.

A full risk assessment should be undertaken that includes all elements of the role and work place – to include any tools or equipment This should include fire risk assessment and first aid provision. This will highlight whether enough precautions have been taken to prevent harm.

The Health and Safety at Work Act 1974 states that employers are liable for their actions and have a duty to provide information, instructions, training and supervision to protect staff and volunteers.

For more information and guidance, contact the Health and Safety Executive's helpline on: 0845 345 0055

www.hse.gov.uk

The Health and Safety Executive has examples of model health and safety policies which can be used as a template.

Data Protection Policy (Appendix 3)

Data protection is about protecting people's privacy. This is the purpose of data protection in any organisation, and is at the heart of data protection law, including the new General Data Protection Regulation (GDPR) that came into force in May 2018. The most important step towards protecting privacy and complying with the GDPR is understanding some basic principles. These are:

- Know what personal data is.
- Only collect, store or use personal data if your group needs to do so for a clear, specific purpose.
- Only collect, store and use the minimum amount of data you need for your purpose. Don't keep extra data if you don't know why you need it, and don't keep data that is no longer needed for a clear purpose.
- Make sure people know how to contact you if they want you to remove their data from your records.
- Tell people what data you have about them if they ask you to, and remove it if requested.
- Store data securely.
- Be clear whether data belongs to your group or to you personally. Just because you have access to contact details held by the group, doesn't mean they are your personal contacts.

Insurance Policies

Every organisation has a responsibility to insure its staff and volunteers. The types of insurances that are usually considered are below.

Employer's Liability Insurance

The Employer's Liability Act 1969 states that all employers have a duty to insure against any claims by workers for injury or disease. Employer's Liability Insurance is compulsory and a legal requirement. The insurance must be for at least £2 million to cover any one claim and the certificate must be displayed in the workplace. This insurance does not cover management committee members, consultants and trainees, self-employed people doing work for the organisation, volunteers, and service users. Public Liability Insurance is needed to extend this cover.

Public Liability Insurance

This covers injury, loss or damage caused to any person as a result of an organisation's negligence. It covers accidents and damage claims by members of the public as well as from the organisation. It includes injury suffered by someone using the organisation's premises and it may cover volunteers working in other people's homes in other premises or on an external activity. It includes young people and adults who are participating in the work of the organisation but not when in a motor vehicle. Cover should be in the region of £2 million.

Vehicle Insurance

Under the Road Traffic Acts all organisations with vehicles (mini-buses or pool cars) used on the road must insure the drivers against third party risks – injury or death caused to other road users. The certificate of insurance must be readily available.

Third party insurance does not cover theft or damage to the vehicle. Insurance companies must be informed of the purposes for which the vehicle will be used and who is likely to be driving it. Any young drivers need to be taken into account when negotiating insurance.

Volunteers or staff using their own vehicles in connection with their organisation must give notice to their own insurance companies otherwise any claim made as a result of their volunteering or work may be invalid. A photocopy of the insurance policy should be given to the volunteer manager as evidence of the cover. It is good practice for Organisations to consider paying the excess costs when a claim is being made by a volunteer in addition to their No Claims Bonus premiums. This ensures that volunteers are not out of pocket.

Equality and Diversity Policy (Appendix 4)

An equality and diversity policy is simply a written agreement for your group about how you will avoid discriminating against people, and how you will create a safe and inclusive atmosphere for your members and service users. It will also help you to know how to manage a situation in which someone has been treated unfairly or disrespectfully within your group.

It is important to think about equality and diversity because some individuals, groups and communities are more likely to face discrimination, harassment and exclusion in society. Community groups can ignore or discriminate against particular disadvantaged groups unintentionally, without realising this is what is happening. Thinking about what you can do about this will help you create an environment which is as safe and inclusive as possible for anyone who would like to join and participate in your group.

Safeguarding Policy (Appendix 5)

Safeguarding refers to the processes of keeping people safe from abuse and promoting their wellbeing, where a child or vulnerable adult is unable to protect them from abuse. Safeguarding usually refers to all children (up to 18yrs old) and adults at risk. Staff and volunteers are responsible for safeguarding. For some, there are legal obligations or contractual obligations, and for the rest there is a moral and ethical obligation to act on safeguarding. Regardless of your organisation's legal status, you will have a 'duty of care' to people who are involved with your activities by ensuring they can undertake their tasks in a safe environment.

Volunteers with additional support needs – where organisations are more accessible to people with additional support needs, there is an increase in volunteers who may be considered 'at risk' and this needs to be considered when developing your volunteering programme.

Section 3 – Marketing

As volunteers are not paid, it is essential that volunteering opportunities are as appealing and attractive as possible to capture people's interest on a broad scale. To adhere to your organisations Equal Opportunities Policy it is important to reach the wider community to include people from all backgrounds.

It is a good idea to think about whether it is appropriate to reach a target audience before you begin to advertise. A volunteering role description helps to establish whether the volunteering opportunity is only suitable for people with specific skills. There is more about role descriptions in Section 4 (Recruitment)

Marketing Methods

There are many ways to advertise and market volunteering opportunities.

Here are a few suggestions:

- Volunteer Bureau
- Local Radio
- Local Press
- Television
- Presentations
- Organisational newsletters
- Internet
- Posters
- Leaflets
- Flyers
- Word of mouth
- Community Centres
- Training Providers
- Job and Careers Centres
- Mailings

Blaby District Council will publicise volunteering opportunities, for their registered organisations, free of charge on the volunteering page of their website.

Section 4 – Recruitment

It is important when recruiting volunteers to ensure they are clear about what their role will be.

Role Description

A role description is basically a document that outlines what a volunteer will do, what they need to do in the role and what the volunteer will get out of it.

Why is having one important?

- It helps volunteers, who are thinking about applying know what they're being asked to do. This will help them decide if it's right for them.
- It gives the volunteer more information on t all aspects of the role.
- It's a great way of thinking through if you've covered everything that a volunteer might want to know.
- It helps you to know that you have everything in place for the role
- Once the volunteer has started – it clear what they will be doing
- It will also help you support them as you can refer to the role description when catching up about how they're getting on. You could include:
 - the name of the person who the volunteer reports to
 - location and volunteering hours
 - how the role fits in with the work of the organisation
 - expectations of behaviour and dress (if appropriate)
 - skills and qualifications – essential and desirable

Applications (Appendix 6 and 6.1)

When a potential volunteer contacts an organisation to find out more about a volunteering opportunity, an information/application pack should be given containing:

- Information about the organisation giving aims and objectives
- Information about the volunteering programme and opportunities
- Volunteering role description and person specification
- Application form requesting references

It is important that a potential volunteer receives as much information as possible about the volunteering opportunity for them to make an informed decision about whether they feel they are suitable in the first instance. Information regarding references, police checks, out of pocket expenses, training and hours required should be provided in addition to a role description and person specification.

Besides requesting contact details, the application form should ask relevant questions such as why the person wants to volunteer on a specific programme and what volunteering experience if any, has been gained in the past. Volunteer's skills and interests should be carefully matched to increase the success and longevity of the volunteer placement.

Once the completed application form has been received by the volunteer manager and the references checked, an interview should be scheduled so that the suitability of the potential volunteer can be assessed.

References (Appendix 7 and 7.1)

References validate and reinforce information given on the application form and at the interview. Reference requests can either be in the form of a letter or a reference reply form with a stamped addressed envelope for the reply. A copy of the volunteer role description should also be included to give the referee an idea of the personal qualities and skills required for the volunteering opportunity to be carried out. Taking up references demonstrates that volunteer involvement is taken seriously. The process of taking up references should be confidential and this needs to be explained to both volunteer and referee.

Interviews

Once the application form has been returned and references have been taken up, an interview should be scheduled so that both the potential volunteer and the volunteer manager can assess one another and their suitability. An interview should be a two way process providing an opportunity to ask questions, exchange information regarding the volunteering programme with the option for saying 'no' if necessary. If adequate information was sent to the person via the application process then the interview should be more about both parties assessing and getting to know each other. This reduces the chances of mismatching potential volunteers to volunteering opportunities. The setting of the interview should be considered. A confidential, comfortable and non-threatening environment should be provided where the interview will be conducted without disturbance. An informal, relaxed and friendly interview approach will put potential volunteers at ease.

Successful interviews generally include effective listening skills and a good mix of open and closed questions. If the potential volunteer is unsuitable, you should explain clearly why you came to that decision. If successful, an acceptance letter should be sent to the potential volunteer following the interview giving information regarding dates and times for commencement, induction and training.

Disclosure Baring Service (DBS)

On December 1st 2012, the Criminal Records Bureau (CRB) and the Independent Safeguarding Authority (ISA) merged to form the Disclosure and Barring Service (DBS). As a result 'CRB checks' are now called 'DBS checks' and ISA barred lists are now known as DBS barred lists. Volunteers working with vulnerable adults and children may need to have a DBS check to ensure they are safe to work with these client groups.

There are 3 types of check:

- Standard DBS
- Enhanced DBS
- Enhanced DBS check with Barring list(s) check

The level of check depends on the role and can only be carried out via a registered body – an individual can not obtain a check on themselves. Blaby District Council acts as a DBS umbrella body for the third sector.

Volunteer Agreement (Appendix 8)

If both the organisation and the potential volunteer agree to commence with the volunteering placement, a volunteer agreement may then be signed to inform the volunteer exactly what they can expect and what is expected from them. This is not a legally binding document and is signed in good faith.

Volunteering and Welfare Benefits

Volunteering can sometimes affect people's entitlement to Jobseeker's Allowance (JSA) and Incapacity Benefit. But if a few basic rules are followed, volunteers can carry on with your voluntary work and still receive their benefit.

This section provides general guidance but does not cover all situations. For more detailed guidance contact your local JobCentre Plus.

Jobseeker's Allowance (Appendix 9)

To get JSA, people have to be available for and actively seeking work. To be available for work, a volunteer must be willing and able to attend a job interview, or start a job, at one week's notice. Volunteers should inform the organisation for whom they are volunteering that this may be the case. There is no limit to the number of hours someone on JSA can volunteer, provided they meet the above conditions. The 16 hour a week rule has now changed. It is important that a person informs the Job Centre that they are commencing voluntary work before their start date. Blaby District Council can provide volunteers with a standard letter template (see page 32) answering all the relevant questions that the Job Centre needs to know about a volunteer placement in order to safeguard benefit payments. The definition of volunteering at the Job Centre is work that is not replacing paid work for a not-for-profit organisation, where only incurred out of pocket expenses are paid.

Incapacity benefit

There is no limit to the number of hours someone on Incapacity Benefit can volunteer. Volunteering does not call into question the entitlement to Incapacity Benefit, except in 'exceptional circumstances'. People should inform their local Job Centre before they start volunteering to receive confirmation that they will be allowed to do the work. Only incurred out of pocket expenses should be paid.

Volunteer Expenses (Appendix 10 and 10.1)

Problems can arise if volunteers are paid more than their actual out of pocket expenses. If volunteers are given sessional payments, pocket money or lump sums that exceed their expenses, they will be classed as 'paid' volunteers and benefits may be affected.

Section 5 – Induction

The purpose of induction is to enable volunteers to get to know the organisation and to inform them of the policies and procedures. Clarity of the role of a volunteer and their relationship within an organisation in the context of its aims and objectives encourages motivation and retention and increases volunteer's engagement and feeling of value.

Induction Training

A comprehensive induction training programme should include:

Information about the organisation

- mission statement
- aims
- objectives

Organisational policies that impact on volunteers

- Volunteering Policy
- Volunteer Agreement
- Health and Safety Policy
- Data Protection Policy
- Insurance Policies
- Equality and Diversity Policy
- Safeguarding Policies

Practical information

- Lunch and tea and coffee arrangements
- Dress code
- Building security e.g. keys, codes, opening hours etc
- Use of equipment e.g. photocopier, fax, telephone systems, etc
- Guidelines on claiming expenses and timesheets if appropriate
- Support and Supervision and who to go to for help and advice
- Training Programme
- Volunteering and Welfare Benefits

Induction Information Pack (Appendix 11 and 11.1)

An Induction Information Pack is an ideal way of providing hard copies of all the relevant documentation, organisational policies and procedures which impact on volunteers and could be used as a tool when delivering the Induction training session.

Section 6 – Training

Volunteers are often attracted to a volunteering opportunity if training is provided, especially if it is accredited. However, it could also have the opposite effect making people shy away from volunteering opportunities because training is mandatory. It may be appropriate for training to be part of the selection process with candidates being offered the volunteering role once they have successfully completed their training course.

Identifying Training Needs

Before recruitment starts it is important to consider what training is needed for the volunteering role to be carried out effectively and whether the organisation has sufficient budget to meet training costs. Some training may be specific to the person and the role and some training may be relevant across the whole organisation for both staff and volunteers e.g. Health and Safety, Equal Opportunities etc.

Training Programme

A training programme should be developed and included in the Induction Information Pack so that volunteers know what they can expect in the course of their volunteer involvement with an organisation. If training is mandatory, this should be stated in the role description.

Personal Development and Progression

Training should be part of the agenda at one to one supervision sessions with volunteers and their supervisors.

Training needs for volunteers should be identified on an ongoing basis looking at their development in their volunteering role and their personal development and progression to reach future goals. It may be necessary to prioritise the training needs of volunteers in relation to the organisation with regard to what resources are available.

Section 7 - Support and Supervision (Appendix 12)

Support and supervision for volunteers should be adapted to the volunteer's needs and level of involvement. A named person should be responsible for volunteers so that they know who to approach if there is a query or a problem. The level of supervision will vary from volunteer to volunteer depending on their role but it is essential that everyone receives support even if they appear to be working well by themselves.

Methods of support

Methods of supervision for volunteers could be:

- regular group meetings
- social gatherings
- regular telephone conversations
- one to one sessions

Details of how support is given should be included in the Induction Information Pack. Supervision acts as a sounding board for new ideas and provides an opportunity for voicing concerns. It also provides an opportunity for identifying training needs and personal development.

It is important also to remember that volunteers value being thanked and appreciated for the time and commitment they give.

Section 8 – Evaluation and Review (Appendix 13 and 14)

Why monitor and evaluate a volunteer programme?

- To measure the quality of the volunteers' experience within your organisation
- To identify the impact that volunteers have on your organisation, both in terms of their contribution and their economic value
- To identify areas in your volunteer programme that may need improvement
- Funders may require you to monitor and evaluate your volunteer programme

Identifying outcomes and outputs to be measured

The first step in monitoring and evaluating a volunteer programme is to identify your aims and objectives, so that you can measure the outputs and outcomes of your volunteering programme.

Outputs can include information such as:

- How diverse are our volunteers?
- How successful are our recruitment methods?
- How well do we retain volunteers?
- How did our volunteers find out about our volunteering opportunities?

Outcomes may include:

- Are volunteers properly supported?
- Are policies and procedures relevant?
- How does the training we provide enhance the volunteer experience?
- In what ways have volunteers benefited the organisation?

Gathering information to measure outputs and outcomes

To measure your outputs you will need to collect facts and figures. This may involve keeping records and producing statistics.

Outcomes rely on feedback from the volunteers, staff and service users within your organisation. Ensure that they know why you are collecting information and the purpose it will be used for.

Questionnaires are an obvious choice for gathering information but also an informal group discussion is a useful way of finding out people's opinions, and it enables everyone to contribute. Having a list of open questions will give the review a structure, and will also give your volunteer time to prepare their comments and answer openly and honestly.

Ensure that the volunteer is aware that this is not an appraisal of them, but an opportunity for them to provide feedback on the organisation and its activities. This will help them to feel they are contributing to the organisation's development, which will demonstrate the value your organisation places on volunteers.

Even if you don't have many other monitoring procedures in place, you could hold exit interviews. Exit interviews are useful because they can indicate how things are going, and you may be able to identify trends in why volunteers leave. Volunteers are more likely to be open about their reasons for leaving, especially if someone other than the volunteer's supervisor is conducting the exit interview.

How to use the information to improve your volunteer programme

Once you have gathered the information, you will need to analyse it and interpret it. This might include:

- Did you meet the targets you set for volunteer recruitment?
- Are your volunteers from a wide and diverse range of backgrounds?
- What about your outcomes? Did you achieve what you set out to do, or were there some unexpected outcomes e.g. did some volunteers leave to take up paid employment using the skills and experience they learned and developed as volunteers?

Once you have identified gaps, you need to focus on how to make improvements. These need to be realistic, specific and achievable.

Appendix 1 - Example Volunteering Policy

Introduction

The aim of NAME OF ORGANISATION is to: (The mission statement or aim of the organisation is written here)

In NAME OF ORGANISATION, volunteers are a major resource and make a vital contribution to our aim outlined above. We intend to encourage, develop and support volunteer involvement in our work in which volunteers are already important stakeholders. In doing so we recognise that the roles of volunteers will complement and not replace the roles of paid staff.

The time, energy and skills offered by our volunteers benefit our work and help us to achieve our aims. Experience has shown that volunteering also brings benefits to volunteers themselves and their client group.

In NAME OF ORGANISATION, a volunteer is understood to be a person who undertakes voluntary activity on our behalf or on behalf of member organisations. It is undertaken by choice and it is unpaid. In the case of volunteers involved with NAME OF ORGANISATION, we undertake to organise activities effectively. NAME OF ORGANISATION believes that our relationship with our volunteers is one of mutual responsibility and commitment and our volunteers have both rights and responsibilities. We hope that volunteers will enjoy their involvement and gain from it in terms of their own personal objectives.

Purpose and Advantages of Policy and Procedures on Volunteers

NAME OF ORGANISATION purpose in adopting this policy is to:

- Highlight and acknowledge the value of the contribution made by volunteers
- Reflect the purpose, values, standards and strategies of NAME OF ORGANISATION in its involvement of volunteers
- Recognise the respective roles, rights and responsibilities of volunteers and NAME OF ORGANISATION
- Confirm NAME OF ORGANISATION commitment to involving volunteers in its work
- Establish clear principles for the involvement of volunteers
- Clarify the roles of volunteers and address the relation between volunteers, those who engage them and those who receive their services
- Help to ensure the ongoing quality of both the volunteering opportunities on offer and the work carried out by our volunteers
- Acknowledge the current areas of volunteer involvement

The advantages of this policy are:

- It provides a basis for the expansion, if required, of volunteer involvement
- it sees volunteer involvement not as a cheap alternative to paid staff, but as a valuable way of extending and adding choice to our members and the broader voluntary sector. It is a resource which we value highly

- It gives a framework for recruiting and supporting volunteers including people from under-represented groups such as youth, people with a disability, older people and people from black and minority ethnic communities
- It commits NAME OF ORGANISATION to identify and adequately meet the financial and personnel costs of the volunteer programme and to support volunteering through funding and other forms of support.

Statement of Principles of Good Practice

General

In involving volunteers we will be guided by the Volunteering Agreement.

Recruitment and Selection

NAME OF ORGANISATION Equality and Diversity Policy will be adhered to when recruiting and selecting volunteers.

To ensure that all volunteering opportunities are widely accessible they will be promoted appropriately. Such promotion will specify the task to be undertaken and will draw attention to the benefits and experience to be gained from participation in volunteering.

Volunteers will be required to complete a volunteers' application/registration form.

Written task descriptions will define time commitment, necessary skills and actual duties.

We will request references for volunteers where this is seen to be appropriate
People who offer to volunteer will be dealt with as quickly as possible

We will regularly review the way in which potential volunteers make contact with us.

Placements will match the volunteers' skills, talents and interests with the voluntary work to be carried out.

Once placed, we will expect volunteers to comply with existing policies and procedures.

Support for Volunteers

NAME OF ORGANISATION will invest financial and personnel resources for the management of volunteers

We will provide an induction period and a review session for volunteers to assess the progress of their placements and to resolve any problems at an early stage

We will provide funding for the payment of volunteers' expenses. Volunteers will be given clear information about what expenses can be claimed and how to make a claim

NAME OF ORGANISATION has included volunteers within its insurance arrangements including employment and public liability

Volunteers will be given information on other legislation or policies, which may affect them e.g. Health and Safety and Equal Opportunities. In these respects volunteers will be treated in the same way as paid staff for liability purposes.

All volunteers will be offered access to support and supervision on a regular basis, with a named support worker where appropriate

All volunteers will be offered access to appropriate training to enable them to develop their capabilities and personal competence appropriate to their volunteering role

Volunteers will be encouraged to provide each other with mutual support

Volunteers will be made aware of the organisation's complaints, grievances and disciplinary procedures, and of who to contact if they have a grievance about any aspect of their work

A designated person will be assigned responsibility for dealing with complaints about a volunteers' conduct in accordance with the general procedures of NAME OF ORGANISATION

Management Committee Volunteers (sometimes known as Trustees)

To support its Committee, NAME OF ORGANISATION will provide:

- An induction on the role and responsibilities of the Committee and the work of the organisation
- Training where required
- Opportunities to meet with staff members of their choice
- Written information and reports in good time on matters related to the governance to the organisation, the organisation's constitution/Memorandum and Articles of Association, and other relevant areas of legislation

Rights and Responsibilities of Volunteers

In engaging volunteers, we recognise the rights of volunteers to:

- Know what is expected of them and to be given clear information and induction
- Have clearly specified lines of support and supervision
- Be shown appreciation
- Have safe working conditions
- Be insured
- Know what their rights and responsibilities are if something goes wrong
- Be paid out of pocket expenses
- Be trained and receive ongoing opportunities for learning and development
- Be free from discrimination
- Experience personal development through their participation as volunteers
- Ask for a reference for future employment further volunteering opportunities

- Be consulted on decisions that will affect what they do
- Withdraw from voluntary work

We expect that volunteers will:

- Carry out their tasks in a way which corresponds to the aims and values of NAME OF ORGANISATION
- Work within agreed guidelines and remits
- Be reliable
- Respect confidentiality
- Attend training and support sessions where agreed

Relationship with Paid Staff

Steps will be taken to ensure that paid staff at all levels are clear about the role of our volunteers, and that good working relationships are fostered between paid staff and volunteers.

The roles of volunteers and paid staff will be complementary and mutually supportive.

If appropriate, consultation arrangements with Trade Unions will be clearly established.

Appropriate training, support and resources will be provided for all those who work alongside volunteers and for those who have a managerial role in relation to volunteers.

Volunteers will also be given clear information about the roles undertaken by paid staff and their value to NAME OF ORGANISATION.

Volunteers will not be engaged in times of industrial action to do the work of paid staff. They may continue with their regular work, but will not be asked to undertake additional duties.

Reviewing the Policy and Procedures

NAME OF ORGANISATION will monitor and review this policy and procedures on volunteers on an annual basis and will nominate a member of the Management Committee and a senior paid staff member to undertake this monitoring and review role.

Responsibility

Overall responsibility for the implementation, monitoring and review of the policy and procedures lies with the Management Committee and, on the day to day basis, with the senior paid staff.

Appendix 2 - Health and Safety Policy

Introduction

The NAME OF ORGANISATION Management Committee has overall responsibility for health and safety in the organisation, and for ensuring that it fulfils all its legal responsibilities. It recognises that it is the duty of Committee members and volunteers to uphold this policy and to provide the necessary funds and resources to put it into practice.

The NAME OF ORGANISATION Management Committee is committed to ensuring that all its activities are safe and it will do whatever it can to provide for the health, safety and welfare of all volunteers, members and visitors ensuring that risks to volunteers, members and visitors are minimised at all times.

It will observe the Health and Safety at Work Act 1974 ("HASAWA") and all relevant regulations and codes of practice made under it.

This policy will be reviewed annually by the management committee.

Responsibilities of NAME OF ORGANISATION

The Committee member responsible for the implementation and monitoring of health and safety policies and recommending changes where necessary is _____.

All accidents or unsafe incidents will be investigated by _____ on behalf of the Committee as soon as possible and then to be reported to the committee at the next available committee meeting.

- Assessing the risk to the health and safety of volunteers, members and visitors and identifying what measures are needed to comply with its health and safety obligations;
- Ensuring that venues or vehicles used for trips are safe and without risk to health including safe ways of entering and leaving;
- Ensuring that equipment is safe and well maintained;
- Providing information, instruction, training and supervision to volunteers in safe working methods and procedures as required;
- Encouraging volunteers and members to co-operate in ensuring safe and healthy conditions and systems by effective joint consultation
- Establishing emergency procedures as required;

Volunteer Responsibilities

All NAME OF ORGANISATION Volunteers will ensure that:

- They are aware of the contents of this safety policy
- They comply with this policy
- They take care of themselves and others who may be affected by their actions or omissions

- They will report all accidents, or unsafe situations, and any near misses (things which could have led to an accident), to _____ or another Committee member at once.
- They record accidents or near misses at work in the accident book kept in _____.
- They are aware of all fire procedures for the area in which they are working
- If they identify anything which they think could be in any way unsafe, they will report it.

Risk Assessments

The responsible committee member _____ will ensure that all premises and tasks are assessed in line with the current relevant legislation. Assessments will be repeated when there is a

- trip or event to organise
- change in legislation
- change of premises
- significant change in work carried out
- transfer to new technology
- or any other reason which makes original assessment not valid

Training

To comply with legislation and to promote the health, safety and welfare of volunteers, health and safety training will be provided as follows:

- at inductions
- on the introduction of new technology
- when changes are made to venues
- when training needs are identified during risk assessments

Resolving health and safety problems

Any volunteer with a health and safety concern must first tell the responsible Committee member.

If, after investigation, the problem is not corrected in a reasonable time, or the responsible committee member decides that no action is required but the volunteer is not satisfied with this, the volunteer may then refer the matter to the management committee chairperson. This must be in writing.

If the volunteer is still dissatisfied, the matter will be entered on the agenda for the next meeting of the Management Committee.

Signature of chair:

Date of signature/ratification of policy (or what date was this policy adopted by the committee)

Date that next review is due:

Date policy reviewed:

Appendix 3 - Model Volunteer Risk Assessment

Risk assessment table

The table below presents information on risks, probabilities (how likely it is), impacts (the effect it will have) and mitigating actions (what can be done to reduce the risk).

Risk Area	Risk Description	Probability HIGH/ MEDIUM/ LOW	Impact HIGH/ MEDIUM /LOW	Mitigating action	Responsibility

Appendix 3 - Model Data Protection Policy

Definitions

Personal data is information about a person which is identifiable as being about them. It can be stored electronically or on paper, and includes images and audio recordings as well as written information.

Data protection is about how we, as an organisation, ensure we protect the rights and privacy of individuals, and comply with the law, when collecting, storing, using, amending, sharing, destroying or deleting personal data.

Responsibility

Overall and final responsibility for data protection lies with the management committee, who are responsible for overseeing activities and ensuring this policy is upheld.

All volunteers are responsible for observing this policy, and related procedures, in all areas of their work for the group.

Overall policy statement

NAME OF ORGANISATION needs to keep personal data about its committee, members, volunteers and supporters in order to carry out group activities.

We will collect, store, use, amend, share, destroy or delete personal data only in ways which protect people's privacy and comply with the General Data Protection Regulation (GDPR) and other relevant legislation.

We will only collect, store and use the minimum amount of data that we need for clear purposes, and will not collect, store or use data we do not need.

We will only collect, store and use data for:

- purposes for which the individual has given explicit consent, or
- purposes that are in our group's legitimate interests, or
- contracts with the individual whose data it is, or
- to comply with legal obligations, or
- to protect someone's life, or
- to perform public tasks.

We will provide individuals with details of the data we have about them when requested by the relevant individual.

We will delete data if requested by the relevant individual, unless we need to keep it for legal reasons.

We will endeavor to keep personal data up-to-date and accurate.
We will store personal data securely.

We will keep clear records of the purposes of collecting and holding specific data, to ensure it is only used for these purposes.

We will not share personal data with third parties without the explicit consent of the relevant individual, unless legally required to do so.

We will endeavour not to have data breaches. In the event of a data breach, we will endeavour to rectify the breach by getting any lost or shared data back. We will evaluate our processes and understand how to avoid it happening again.

Serious data breaches which may risk someone's personal rights or freedoms will

be reported to the Information Commissioner's Office within 72 hours, and to the individual concerned.

To uphold this policy, we will maintain a set of data protection procedures for our committee and volunteers to follow.

Review

This policy will be reviewed every two years

Date.....

Signature (Chair).....

Signature (Secretary).....

Appendix 4 - Model Equality and Diversity Policy

Organisations have a responsibility to promote equal opportunities and to oppose discrimination in line with the law. Developing and implementing an equal opportunities policy is an on-going process and should include staff, volunteers and service users. Equal opportunities should be at the heart of the organisation and should cut across every aspect work.

Statement of intent

NAME OF ORGANISATION aims to promote equal opportunities at all levels within the organisation and in all its activities to ensure that no individual is discriminated against on any of the following grounds:

- Language
- Gender
- Ethnic Origin
- Marital Status
- Nationality
- Religious or Political Belief
- Physical or Mental Disabilities
- HIV or AIDS
- Sensory Impairment
- Sexual Orientation
- Colour
- Domestic Care Responsibilities
- Social or Economic Background
- Age
- Health status
- Unrelated criminal convictions

NAME OF ORGANISATION conforms with the legislation relevant to anti-discrimination and specifically:

- Disability Discrimination Act 1995
- Equal Pay Act 1970
- Race Relations Act 1976
- Rehabilitation of Offenders Act 1974
- Sex Discrimination Act 1975
- Criminal Records Code of Practice

Objectives

NAME OF ORGANISATION has specific objectives in its intention to promote and implement equal opportunities

Employment

No existing or potential member of staff should face discrimination, either directly or indirectly, in the advertising and recruitment procedures, or through lack of necessary facilities for people with disabilities or those with sensory impairments. Existing staff who may become disabled will be provided with support and assistance to enable them to continue in post where appropriate.

Volunteering

NAME OF ORGANISATION is committed to good practice in volunteering in line with staff recruitment and employment procedures.

Practice

NAME OF ORGANISATION will ensure that all its services are equally available and accessible to everyone in society

Monitoring and Review

The Equal Opportunities policy will be regularly reviewed and monitored so as to remain effective.

A named person has overall responsibility for Equal Opportunities and for monitoring and review

Strategy

Equal opportunities training and advice will be given to ensure implantation of the strategy

All published materials including recruitment advertisements will be non-discriminatory

The equal opportunities strategy will be publicly displayed within the organisation

Complaints

Complaints from any individual or group may refer to (a named body of member of staff) any matter which they feel may be grounds for discrimination

Practice

All members of NAME OF ORGANISATION will practice adherence and compliance with the stated commitment to equal opportunities

Appendix 5 – Model Child Protection Policy

Statement of Purpose

NAME OF ORGANISATION is determined to ensure that all necessary steps are taken to protect children and young people from harm.

The organisation will ensure that:

- The welfare of the child remains paramount.
- All children whatever their age, culture, disability, gender, language, racial origin, religious beliefs and/ or sexual identity have the right to be protected from harm.
- All suspicions and allegations of abuse will be taken seriously and responded to swiftly and appropriately.
- All staff (paid/ unpaid) working for the organisation have a responsibility to report concerns

Abuse

Abuse is a broad term in the context of safeguarding children. There are many degrees of abuse and it can take many forms. Abuse can be classified under the following:

- Neglect
- Physical Abuse
- Sexual Abuse
- Emotional Abuse

What should you do if a young person reports abuse or you suspect abuse?

Upon receiving the information you should:

- React calmly.
- Reassure the child that they were right to tell and that they are not to blame and take what the child says seriously.
- Be careful not to be deemed as putting words into the child's mouth, the easiest way of doing this is by asking questions.
- Do not promise confidentiality.
- Inform the child/ young person what you will do next.
- Make a full and written record of what has been said as soon as possible and don't delay in passing on the information.

The report should include:

- The child's known details including name, date of birth, address and contact numbers.
- Whether or not the person making the report is expressing their own concerns or those of someone else.
- The nature of the allegation, including dates, times, specific factors and any other relevant information.
- Make a clear distinction between what is fact, opinion or hearsay.

Referral

It is not the organisation's responsibility to decide whether abuse has taken place or not. Staff/volunteers do not need to know everything about the child or what is happening before making a referral.

The referral should be made to Leicestershire Children's Services:
0116 305 0005 (24 hour phone line)

If it is an emergency, you should call the Police on 999.

Policy adopted on DATE

Review on DATE

Appendix 5.1 – Model Vulnerable Adults Policy

All volunteers and members of () have a duty to **SAFEGUARD** vulnerable people with whom they may come into contact through their service and other activities.

The welfare of a vulnerable adult is paramount and is the responsibility of everyone. We all have the right to live our lives free from abuse. It is recognised that certain groups of people may be more likely to experience abuse and less able to access services or support to keep themselves safe. This group may include adults with:

- Learning / physical / sensory disability
- Mental Health / ill Health /or dementia
- Frailty due to age
- Acquired brain injury
- Certain types of physical illness

Abuse can be physical, sexual, financial, neglect, discriminatory, emotional, psychological or institutional. Abuse can be perpetrated by anyone - relatives, partners, friends, care workers, or strangers - and can happen anywhere.

Safe Recruitment and Practice

It is the policy of () to carry out enhanced DBS checks on all volunteers that join the organisation. All volunteers will be made aware of this policy and the issues of vulnerability as part of their introduction to the organisation.

Reporting Concerns:

All suspicions or allegations of abuse will be taken seriously and dealt with in line with the following guidance provided by the Leicestershire and Rutland Safeguarding Board. You do not need to know everything about the situation or what is happening. You may just be worried, or feel that something is not right. It is not up to you to investigate or decide if abuse has taken place but it is your duty to report any concerns to the appropriate authority. If you have any safeguarding concerns about an individual you should in the first instance contact one of the **members of the committee** who will in turn contact:

Leicestershire Adult Social Care – 0116 3050004 or

Leicestershire Police – 999 if the person is in immediate danger or a crime has been committed, 101 if the person is not in immediate danger.

IF A VOLUNTEER IS UNABLE TO CONTACT A MEMBER OF THE COMMITTEE AND THE SITUATION IS URGENT, DO NOT DELAY AND CONTACT EITHER LEICESTERSHIRE ADULT SOCIAL CARE OR LEICESTERSHIRE POLICE TO REPORT YOUR CONCERNS.

More information and guidance can be obtained at <http://lrsb.org.uk>

Wherever possible, consent will be obtained from the adult before sharing personal information with third parties. However, in some circumstances, obtaining consent may be neither possible nor desirable, as the safety and welfare of the vulnerable adult is the priority.

Policy Adopted:

Committee Signature:

Appendix 6 Volunteering Role Description

Organisation Name:	
Organisation Address:	
Contact Name:	
Contact Position:	
Contact Number/Email:	
Role Title:	
Responsible to:	
Location of Placement:	
Role description:	
Volunteering commitment:	
Main tasks:	
Required skills, qualities and experience	
How the role fits into the work of the organisation	
Training and support available:	
Any other Requirements:	
Recruitment process:	
Date role created:	

Appendix 6.1 – Example Volunteer Application Form

This form is confidential and will only be seen by people taking part in the selection process

Name _____

Address _____

_____ Post Code _____

Tel _____ Email _____

Which volunteering opportunity are you interested in?

Why do you want to volunteer for this organisation?

How much time are you able to commit?

Do you own a car? Yes / No

Do you hold a clean driving licence? Yes / No

Are you insured for voluntary driving? Yes / No

Times available (please tick)

	Mon	Tues	Wed	Thurs	Fri
Am					
Pm					

What skills and experience do you have that may be relevant to this kind of voluntary work? You could include life experiences, other voluntary work or paid work, qualifications etc.

Do you have a disability? Yes/No

If yes, please give details _____

Do you have any health problems? Yes/ No

If yes, please give details _____

Please give the name of two referees. These should be people who have known you in a professional capacity such as a teacher, support worker, employee (paid or unpaid) but not a family member.

Name _____

Name _____

Address _____

Address _____

Tel _____

Tel _____

Position _____

Position _____

Appendix 7 - Example Reference Request Letter

Dear

Re: Volunteering Reference for

The above mentioned person has offered to become a volunteer with us and the process of application has supplied your name as a referee. The position applied for is _____ and involves _____

Please find enclosed a role description and person specification for your reference.

I would be very grateful if you could complete and return the enclosed Volunteer Reference Request as soon as possible.

May I take this opportunity to thank you for your assistance in this matter; a SAE is enclosed for your convenience.

Yours sincerely

Volunteer Organiser

Appendix 7.1 - Example Volunteer Reference Request

Name _____

Referee _____

Vacancy _____

How long have you known the above mentioned person and in what capacity?

What special qualities do you consider this person to have to make them suitable for this position? (Please use the role description and person specification enclosed for reference)

Please use the space below for any additional comments.

Signed _____ Date _____

Appendix 8 – Model Volunteer Agreement

It is important that volunteers can participate in activities in a safe and secure environment. This Code of Contact has been developed for the protection of both members of *organisation* and volunteers.

(Name of Organisation) will: -	Volunteers will:
Have a volunteering policy in place, which defines the roles and limits of volunteering within the organisation	Act within the governing document of (name of organisation) and abide by the policies and procedures
Ensure that volunteers know of, and understand, the organisation's standards and procedures, including health and safety policy, equal opportunities policy, confidentiality policy (where applicable) and grievance and disciplinary procedure	Support the objects and mission of (name of organisation), using any skills or knowledge to further that mission, seeking expert advice where appropriate
Ensure that volunteers are made aware of the organisation's aims and objectives	Act within the law and inform (name of organisation) of any relevant police record or other factor, or any change in circumstances which may make them unsuitable as a volunteer
Ensure that volunteers have clearly defined tasks, and limitation on tasks within the organisation	Respect organisational and individual confidentiality, while never using confidentiality as an excuse not to disclose matters that should be transparent and open
Have a designated person responsible for volunteers to whom the volunteer has reasonable access, and who will provide them with supervision and support	Accept responsibility to support (name of organisation) to be well run and raise issues and questions in an appropriate and sensitive way to ensure that this is the case.
Ensure volunteers are properly prepared for their volunteering through an induction programme which includes any training necessary to enable them to carry out their volunteering tasks	Not gain materially or financially from any involvement with (name of organisation) unless specifically authorised to do so.
Ensure that recruitment and selection of volunteers adheres to equal opportunities practices	Act in the best interests of (name of organisation) as a whole
Ensure that volunteers are adequately insured	Endeavour to work considerately and respectfully with all those they come into contact with at (name of organisation) respecting diversity, different roles and boundaries
Ensure that volunteering tasks complement work carried out by paid staff in the organisation, and will not be a substitute for it	Seek to support and encourage all those they come into contact with at (name of organisation)
Recognise that volunteering is a matter of choice and volunteers will have the time and opportunity to consider whether to undertake the tasks offered to them	Not make public comments about (name of organisation) unless authorised to do so

Signed _____

On Behalf of _____

Name _____

Date _____

Signed _____

Name _____

Date _____

Appendix 9 – Example Jobcentre Plus Letter

Date as Postmark

Dear Sir/madam

Re: Notification of commencement of volunteering

N.I Number: _____
Name _____
Address _____

I am writing to inform you that I wish to start volunteering on _____ with _____ which is a charitable/not for profit organisation.

The address of the volunteering placement where I will be based is _____ and the volunteer organiser who will be supervising me is _____

The volunteering opportunity that I will be carrying out is _____ and the duties undertaken will be _____

The volunteering hours per week will be _____ and I will/will not be paid receipted actual out of pocket expenses incurred whilst volunteering.

The volunteering duties that I undertake would not be carried out by a paid member of staff at this organisation if I was unable and I am not volunteering in preference to paid work.

Signed _____ Date _____

Appendix 10 – Example Volunteer Expenses

Volunteering should not cost anything but time and enthusiasm. Reimbursable expenses should include:

- Travel
- Meal costs during volunteering activity
- Child care costs/replacement care costs
- Costs of equipment fees and materials needed to carry out volunteering

It is advisable to develop a policy which sets out clear guidelines of eligible volunteer expenses so that volunteers are aware of what can be claimed before they start volunteering. This document should include mileage rates, food allowances and child care guidelines of your organisation.

Example Volunteer Expenses Guidelines

NAME OF THE ORGANISATION is committed to the implementation of a policy for the reimbursement of actual expenses incurred by volunteers in the course of voluntary activity provided that the expenditure was:

- genuinely incurred (ie the money was actually spent)
- authorised by the name of organisation
- wholly for the name of organisations' purpose
- necessary for the particular task being undertaken

Expenses will be reimbursed to meet the following costs:

- Travel expenses between home and place of volunteering. The mileage rate payable will be in line with local government and receipts for public transport will be required for audit purposes. Volunteer expense claim forms showing accurate expenses will need to be submitted for payment. Volunteers have a responsibility to inform the Inland Revenue of expenses received as this income may have tax implications. They also need to inform their car insurance company of the change of use of their vehicle.
- Actual expenditure incurred in the purchase of materials or services required to fulfil the tasks being undertaken
- Actual costs of meals taken because of volunteering for more than 4 hours in 1 day. This is limited to £5 per meal.
- Actual costs of crèche, childminding fees or other dependant care incurred in order to be available for voluntary work. If children under 8 are receiving care at crèches or playgroups, they must be registered with the local authority.

Appendix 10.1 - Example Expenses Claim Form

Name _____ Role _____

Date	Activities	Travel	Childcare	Meals	Equipment	Total

Total Claim _____

Signature of person named above _____

Authorised by _____

Date _____

Please attach any receipts or public transport tickets

For Office use only

Project Name _____

Total Mileage _____ Accumulative Expenses _____

Appendix 11 - Example Volunteer Induction Checklist

Volunteer's Name: _____

Welcome to [ORGANISATION:]

	Completed (Y/N/n/a)
The mission statement, values, the history and future plans	
Details of our client/user group	
Roles of volunteers within [ORGANISATION]	
Roles of staff within [ORGANISATION]	
How decisions are made within [ORGANISATION]	
Introduction to other volunteers	

Welcome to your volunteer role:

	Completed (Y/N/n/a)
Introduction to the volunteer role and what you will be doing	
Talk through the volunteer role description	
Discuss what [ORGANISATION] expects of you and what you should expect in return	
Discuss any concerns about the role	
Give details of training to be undertaken and the timescale for this, what commitment is involved and the reasons for this, especially if there is any compulsory training	
Agree the support available to you, who this is from, in what form, and how often	
Discuss the boundaries of your role, including to whom you are accountable and whether you will be working alone or in a team.	
Provide a copy of your role risk assessment and discuss what you will need to do to be safe and comply with the insurance	
Information on volunteer meetings, communications and social events	
Discuss the purpose of the volunteer agreement	
Identify the named person for you to contact	
Provide ID badge or any required equipment or uniform	
Set a review date to talk about how your volunteering experience is going	

Welcome to the policies and procedures:

	Completed (Y/N/n/a)
Provide information on policies and procedures within [ORGANISATION] and how to access them	
Promote the importance of equality, diversity and inclusion and refer to [ORGANISATION]'s own policy	

Provide information on who to contact in an emergency and ensure that [ORGANISATION]has obtained emergency contacts for you	
Talk through the Health and Safety Policy and Procedures	
Fire exits; location of break glass points and extinguishers; emergency evacuation procedures and weekly alarm test; fire marshals	
First Aiders and location of First Aid kits	
Accident procedures explained	
Building entry and security outlined	
Your own responsibilities for health and safety	

Welcome to the facilities and any practicalities

	Completed (Y/N/n/a)
Talk through accessibility of the facilities such as disabled toilets, kitchen, opening hours, parking, and relaxation areas	
Provide a tour of the facilities and maybe the local community if relevant	
Provide information about the other organisations who share the building or area	
Discuss any dress code	
Give helpful tips about the local community such as car parking, bus route and nearest sandwich shop	
Discuss how to claim expenses, what can be claimed and issues relating to benefits	
Introduction to the telephone system	
IT log on; computer username and password	
Give details of where things are kept and how to get any keys that may be required	

Appendix 12 - Example Volunteer Timesheet

Name _____ Role _____

Date	Venue	Description of Duties	Hours

Signature of person named above _____ Date _____

Authorised by _____ Date _____

Appendix 13 - Example Volunteer Supervision Form

Name _____

Volunteering Role _____

Date _____

Work Content
Ongoing Work / Targets
Personal Development / Training
Other Issues

Date of Next Session _____

Signed (Volunteer) _____

Signed (Supervisor) _____

Appendix 14 - Example Volunteer Exit Interview Form

Name:

Interviewer:

Role:

Date:

Reason for leaving?	
Is there anything that we could have done differently that may have affected your decision to leave?	
Was your volunteer position what you expected it to be? If not, how did it differ?	
Do you feel you were placed in a position compatible with your skills? If not, please explain	
Were the training and development opportunities provided effective in meeting your needs? Was the amount of training appropriate?	
What was the greatest challenge you faced?	
What was the thing you enjoyed the most?	