

If you would like more information on anything in this booklet or would like help in developing policies and procedures please contact the Volunteer Centre - Southend on 01702 356060 or Email [vb@savs-southend.co.uk](mailto:vb@savs-southend.co.uk)

Further training on managing volunteers is available from Voluntary Sector Training. For full details of their courses visit [www.voluntarysectortraining.org.uk](http://www.voluntarysectortraining.org.uk) or call 01371 876747



The Volunteer Centre - Southend is a service of:  
**Southend Association of Voluntary Services**

29-31 Alexandra Street  
Southend on Sea  
Essex

Tel: 01702 356060

Fax: 01702 356011

Email: [vb@savs-southend.co.uk](mailto:vb@savs-southend.co.uk)

Web: [www.savs-southend.co.uk/volunteering](http://www.savs-southend.co.uk/volunteering)

Registered charity: 1063655/0  
A company limited by guarantee  
Registered in England No. 03351855



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 know 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.

This booklet is designed to provide information on how to involve and support your volunteers.

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



# Checklist

**Volunteer Policy**

**Induction and Training**

**Role Description**

**Volunteer Agreement**

**Copies of Policies**

**Risk Assessments**

**Expenses**

**Supervision and support**

**Welcome Pack**

## Welcome Pack

All of the previously mentioned elements can be put together into a welcome pack or volunteer handbook.

This is a good way of giving volunteers all the information they need to take away and look at home as a back up to their induction.

This can include:

- An overview of the organisation and its aims
- Copies of flyers and leaflets about the organisation and its projects
- Copies or summaries of policies relevant to the volunteers role;
- A written role description
- The volunteer agreement
- Contact details for the volunteer manager/project manager
- Useful information - where to make tea/coffee, cloakroom, location of toilets, etc.
- Copies of expenses forms

## Supervision and Support

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

It is good practice for the volunteer to be provided with a named member of staff or a named trustee who they can approach with any concerns they have.

Consider also whether it is viable to have a supervision system in place where a member of staff can sit down to discuss a volunteers activities and any concerns they have on a regular basis. This could be quarterly, bi-annually or more frequently depending on the role.

This is especially important when a volunteer is new to a role to ensure they feel welcome and settled.

If you are involving a number of volunteers in your organisations you may also wish to organise volunteer meetings to enable them to share experiences and access peer support but also to feed back to the organisation any concerns they have.

## Volunteer Policy

Consider:

- What roles will volunteers take within your organisation?
- Are there written roles or a volunteer handbook available?
- How will you recruit volunteers? – will there be an interview, references, CRB check?
- What training and induction will the volunteer need to undertake?
- Will there be a trial period?
- What expenses will be paid and how will this be done?
- Who will support the volunteers – is there a named contact?
- Are volunteers included in your public or employee liability insurance?
- Should the volunteer sign a confidentiality declaration?
- Are volunteers covered by other policies such as Health and Safety, Equal Opportunities, Grievance etc?
- Are there any risk assessments that cover volunteer activities?

## Induction and Training

### Induction

An induction is very simply a welcome into the organisation and an overview of how the organisation runs on a day to day basis.

This will include things such as:

- A tour of the site
- Fire procedure
- First aid and accident reporting
- Meeting key members of staff and volunteers
- Outlining key policies e.g. health and safety, confidentiality, protection of children.

It is a good idea to have a schedule that you can use for your induction to ensure that you cover everything with a volunteer. This may be a simple list or can form the basis of a welcome pack or volunteer handbook.

### Training

For some volunteer roles more in depth training is required to ensure that volunteers are equipped with the right skills to carry out their tasks.

The most common way of training volunteers and probably the most economical is on the job training. This is effective if you are taking on volunteers one at a time for quite simple tasks.

Other methods include in-house training and external training which can be more expensive, are better suited to groups of volunteers and can provide a more in depth knowledge for complex roles.

## Expenses

It is good practice to reimburse volunteers for out of pocket expenses incurred while undertaking activities on behalf of your organisation.

Paying expenses is an Equal Opportunities issue and ensures that individuals on low income or benefits can take part in your volunteering activities.

---

There are a number of laws relating to employment, charity, tax and benefits that organisations need to be mindful of when paying expenses.

### **KEY CONSIDERATIONS**

- All expenses paid should be genuine reimbursement for money actually spent as part of the volunteering role. They should be necessary for the role, wholly for the role and adequately documented.
- Volunteers in receipt of state benefits should ensure that their benefits advisor is informed of their volunteering activities and the expenses they receive.
- Low value perks, discounts or regular gifts of tokens or vouchers could be seen by an employment tribunal as “consideration” (something of material value given in return for work) which could give rise to claims for minimum wage, paid holidays, unfair dismissal and/or other employment rights.

To find out more about the different laws that affect the involvement of volunteers contact the Volunteer Centre, who can provide you with further information, resources and signpost you to relevant training.

## Risk Assessments

Some activities that need to be undertaken in your organisation may have an element of risk attached. For these activities, risk assessments should be carried out to identify

- The potential risk of an activity
- Who is at risk
- How likely the risk is to occur
- How severe the outcome is likely to be
- How to eliminate or reduce the risk

If a volunteer role will include activities that are risk assessed then the volunteer should be made aware any safety precautions or procedures that are in place.

This could include

- Undertaking training before attempting an activity
- Using protective equipment
- Working in pairs
- CRB checking staff and volunteers

It may be necessary to write risk assessments specific to people, for example pregnant mothers, young people, people with criminal convictions, people with extra support needs or people with a disability.

## Role Descriptions

Creating role descriptions for volunteers has a number of benefits.

Firstly, by spending time thinking about the roles that volunteers can fill, you will be able to identify the skills and attributes to look for when recruiting. It will enable you to see where volunteers can be used, what training might be needed, and to identify key tasks that might make up a separate smaller role.

Secondly, being able to provide specific information about a role will help with recruitment. Potential volunteers are more likely to come forward if they can see themselves doing a role. If there is a vague or very general outline then you might lose out to other organisations who can provide more information.

Thirdly, a volunteer role description helps a potential or new volunteer to know what is expected of them and exactly what their role in the organisation will entail. It will help them to know where they fit and help them decide whether the role is appropriate for them.

### What to include

- Role title
- Main activities/task
- Desirable/ Essential skills
- Training offered
- Where, when and how often they are needed

nb: when writing volunteer role descriptions avoid terminology associated with paid roles such as “staff”, “work”, or “job”. Instead consider words such as “volunteer”, “tasks” and “role”.

## Volunteer Agreement

A Volunteer Agreement is a document which helps to outline the rights and responsibilities of the organisation and the volunteer.

This will include things such as:

Volunteers are expected to

- Arrive when arranged or telephone in advance to rearrange or cancel.
- Respect equal opportunities
- To respect confidentiality
- To follow health and safety guidelines and risk assessments
- To attend training courses as required

The Volunteer can expect

- To have a named contact to speak to about problems
- To have support and relevant training
- To be valued and respected
- To have out of pocket expenses reimbursed

This is not a contract between the organisation and the volunteer and this should be made clear. It is however a opportunity to outline your expectations and responsibilities from the start to avoid confusion later.

## Copies of policies

Part of the volunteer's induction to the organisation should include overviews of relevant policies such as the Volunteer Policy, Equal opportunities and Safeguarding.

This is important to ensure that volunteers are aware of the policies relevant to their role, such as:

- What to do to ensure that vulnerable people or children are not at risk.
- How to maintain a safe environment for staff and volunteers
- The importance of confidentiality
- What to expect from the organisation in terms of support, payment of expenses, etc.
- The importance of equality and respect in the work environment.

This will help demonstrate to potential volunteers that they are a valued member of the team.

If your policies are in depth and contain legal jargon, you may wish to produce a set of summarised versions for inclusion in a handbook.