



The Toolkit



**Your guide to recruiting, motivating
and retaining volunteers**

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Introduction

A motivated volunteer is an asset to an organisation. He or she will bring with them a variety of skills, talent and expertise. As with any other asset, they are more effective when they are properly maintained and supported. This tool kit is designed to help you get the best out of your volunteers.



Recruitment and retention are two important factors to consider when you decide to bring volunteers into your organisation. What do we want volunteers to do? Where should we look for them? How do we make sure that we get the right person? How do we motivate them and make sure that they stay with us? These are some of the questions that this toolkit will help to answer.

To begin with, we encourage you to think about your organisation. What exactly does it do? What is it good at? Who benefits? What makes it different from other organisations? This is a useful exercise. It will help you to sell your organisation to potential volunteers. It will help you to attract the right volunteers. It will help you decide what you want your volunteers to do.

Once you have decided on volunteer roles within your organisation, you need to advertise, recruit and select, as you would with paid staff. Matching the right volunteer to the right role is important for the organisation and the volunteer. This toolkit offers some suggestions on how to achieve this.

Recruiting your volunteer, however, is only the beginning. Having gone through the recruitment and selection process, you will want to do your best to keep him or her with your organisation. You will have to motivate them, keep them interested, and ensure that they are properly supported.

A clear volunteer strategy will help you to do this. This means having the right procedures and guidelines in place so that your volunteers feel a part of your organisation. We have included some suggestions on how to do this and some sample documents that you might like to use.

Finally, there are the legal and practical considerations. The toolkit concludes

with some advice on Health and Safety, Welfare Benefits and payment of expenses.

We hope that you will find this toolkit useful, that it will encourage you to use volunteers and that it will help you to make effective use of those volunteers you already have. We intend to keep the information up-to-date. We will do this by including your organisation's details on a dedicated database. This will enable us to send any amendments out to you as and when we make them. Eventually we hope to include the guide on our website so that you can download the latest version yourself.

If you have any questions or if you need further information or support, please call us at **Volunteer Centre Luton** on **01582 733418**.





Getting to Know Your Organisation

Surely I know my organisation already:

You probably do. But taking some time to clarify your activities will help you to get your message across. It will help to attract clients who will benefit from your services. It will attract the right staff and volunteers to your organisation too. They will understand what you are trying to achieve. It will help you to identify suitable volunteer roles within your organisation.

Here are two techniques that will help you to know your organisation better.



Asking the Right Questions:

Ask yourself the following questions and answer them as clearly and specifically as you can:

- **What does your organisation do?**
- **Who benefits from your services?**
- **Who are your competitors for volunteers/market share/funding?**
- **What are the internal & external factors that affect your services?**
- **What are your aims and objectives?**
- **What is your *unique selling point*?**
- **What makes your organisation different from any other organisation?**

Once you have answered these questions it will be a simple task to tell the community about your organisation. You will also have a better idea of what you want your volunteers to do.

SWOT Analysis:

This is a very good tool for getting to know your organisation.

SWOT stands for:

- **S** trengths
- **W** eaknesses
- **O** pportunities
- **T** hreats

Focus on one heading (**S**trength, **W**eakness, **O**ppportunity, **T**hreat) at a time. List everything that you can think of under each point. You will be surprised at how much you find out about your organisation.

It will also give you some ideas on where to focus your future energy and resources. It will also help you to identify any opportunities that you can offer volunteers.



Here is an example of a completed exercise:

Strengths

- Good at attracting funding**
- Recognised high profile in the community**
- Expertise producing information leaflets**
- Good recruitment records**

Weaknesses

- Dependant on one funding source**
- Lack of publicity**
- Few dynamic volunteering opportunities**

Opportunities

- Identifying a specific target group for volunteering**
- Implementation of a process to quickly identify further funding**
- Working in partnership with other agencies**
- Explore every opportunity to network**

Threats

- Failure of future funding**
- Fewer people volunteering**
- Drop in communication with supporting agencies**

Once you have completed these exercises, you might like to produce a paragraph outlining your mission, your aims and objectives and the people that you work with. You can use this paragraph in your promotional material. You can also use it to appeal to potential volunteers.





Finding Volunteers:

Now that you are clear about what your organisation hopes to achieve, you are in a better position to identify the tasks that volunteers could perform. Once you have identified how many volunteers you need and which roles you want them for, you can start to recruit.



Generally speaking, there are two routes open to you when seeking volunteers for your organisation. You can either target specific individuals or you can appeal to the community at large. No matter which route you choose to take, remember to include it in your volunteer strategy (see *Volunteer Recruitment*, p7).



Targeting Specific Individuals

The reason that most people give for not taking on voluntary work is that they have not been asked. So, if you know someone or have heard of someone who would be ideal for a voluntary role in your organisation, go ahead and ask them. The chances are that they will say yes.

If you cannot think of anyone suitable, ask around. Someone else might know the ideal person for your organisation

Appealing to the Community at Large

Using Other Organisations

You might like to consider placing an advertisement for volunteers with other organisations.

These are some of the organisations where you can advertise. The list is not exhaustive. You will probably be able to think of many other organisations in your area.

Community Centres

Libraries

Job Centres

Schools

Colleges

Doctors/Dental Surgeries

Churches, Mosques, Temples, Synagogues

Local Businesses

Training for Work Agencies

Clubs and Societies

Local shows and festivals

It can be a good idea to establish a named contact in these places; this will help to develop a good relationship with them. You may need to produce your material in languages other than English

Using the Media

You might be able to use the media to help you with your search for volunteers. Try sending a press release to local newspapers or your local TV station.

- Make sure that your press release focuses on developments in the community, an event you are running or the reason why you are appealing for volunteers.
- The media will not allow you to advertise your organisation through them.
- Keep your press release short and to the point.
- Identify the main point that you are trying to make and use it as your first sentence.
- Remember to include a contact name and telephone contact number.

Remember to target black community, religious and gay press too. This will help to increase the diversity of your organisation.

Alternatively you might like to use the press to advertise directly for volunteers. This can be expensive. The **Guardian** has a monthly volunteers section on a Wednesday, in which organisation can advertise for volunteers at greatly reduced rates.



Using your Local Volunteer Centre

Your local volunteer centre can help you find suitable volunteers for your organisation. They will have the names of people looking for volunteering opportunities in your area. They will have information on these people, including the roles that they are seeking and when they are free to help you.

Your Volunteer Centre:

Volunteer centres are there to help potential volunteers and organisations that use volunteers. They advise potential volunteers on what voluntary work is available locally and put them in touch with local organisations. They advise organisations on volunteer recruitment and management and provide support and training.

There is a volunteer centre in most areas.

The details of your local volunteer centre are:

Volunteer Centre Luton
Voluntary Action Luton
15 New Bedford Road
Luton LU1 1SA
Tel: 01582 733418
Fax: 01582 733013
E-mail volunteer@valuton.org.uk

Using Other Means

The choice is endless. You might like to consider holding an open day, giving talks, using your newsletter or organising a direct mail shot to get your message across.



Volunteer Recruitment

Now that you are clear about what you do and where you need to focus your energy and resources, you are in a position to identify suitable roles for volunteers in your organisation.



Before bringing volunteers into your organisation, however, you need to give some thought to how you are going to do this. A well-motivated volunteer will work hard and bring great benefit to your organisation.

A poorly motivated volunteer is likely to become dissatisfied and leave.

Dissatisfaction may arise when volunteers feel that they are taken advantage of, that they are not properly supported, that they do not know where to turn when they have a problem, that their roles do not match their expectations. A volunteer recruitment strategy and clear policies and procedures can help to prevent dissatisfaction.

Volunteer Recruitment Strategy:

A well thought out strategy will:

- Help you to match the right volunteer to the right role.
- Tell potential volunteers how to contact you.
- Ensure that a new volunteer will be properly introduced to your organisation.
- Ensure that your organisation reflects the diversity of the local community.

A volunteer recruitment strategy needs to be matched to the needs of your organisation. It must be practical and realistic so that you can implement it.

There is no hard and fast rule to developing a strategy but it is a good idea to try and think about the following

- **What are the roles for which you will recruit volunteers?** Analyse the jobs that need to be done and develop a series of written task roles for volunteers (see Appendix 1, p20).
- **How will you recruit volunteers?** What message do you want to project? Who do you want to see the message? Where are you going to display the message? (See, *Getting to Know Your Organisation* p 3 and *Finding Volunteers*, p 5)

The Skills Matrix:

Try using a skills matrix to help you identify the qualities that you are seeking in a volunteering role. **Essential** qualities are those that you decide.

Your volunteer must have to perform their role. **Desirable** qualities are those you would like them to have. An example of how you might draw up a matrix is given below.

	Skills	Qualities	Other, e.g. Car Owner
Essential			
Desirable			



How would you like potential volunteers to contact you?

You might like to think about a named person that they should contact. You should also try to produce application forms and develop written interview and selection procedures. It is a good idea to seek references. If the volunteer will be working with vulnerable people, you should consider conducting a background check on them via the Criminal Records Bureau. You can get further details from their website, www.crb.gov.uk/index

For an example of an application for you might like to use for volunteers, see Appendix 7, p 29

How will you introduce new volunteers to your organisation? Think about developing a written induction procedure. What do volunteers need to know about the organisation? What do they need to know about their role? Who do they need to be introduced to?

These are some areas you might like to cover in your induction programme:

- The volunteer's role
- Support, supervision and grievance procedure
- Aims, policies and ways of working with the organisation
- Roles of paid staff
- Opportunities for training
- Confidentiality
- Health and Safety
- Location and use of equipment
- Insurance – volunteers should be informed if they are not covered
- Volunteer expenses
- How to deal with difficult situations
- Building, i.e. toilets, where to get refreshments
- Introductions to other staff members
- Emergency telephone numbers

How will you know if your policy is successful?

Think about any objectives and goals that you would like to meet so that you can monitor and review your policy on a regular basis. Think about what has worked and what has not worked. Make any changes that are necessary.

Interview

It is a good idea to interview potential volunteers face to face before taking them on. An interview will give you the opportunity to find out about them and their expectations. It gives them the opportunity to ask questions about your organisation.

The interview can be as informal as you wish.

You could use it to:

- Tell the potential volunteer about your organisation and how volunteers fit in
- Find out more about why they want to volunteer with you
- Find out about their availability
- Find out about their training needs
- Explain that you will be taking up references and where appropriate that you will need to conduct a criminal record check.
- Confirm volunteers are subject to the same treatment in recruitment, training and support as paid employees

Questions a volunteer may ask - BE PREPARED!

- What job do you want me to do?
- What does it involve?
- How many hours/days do you need me?
- When and where will I be volunteering?
- With whom will I be working?
- To whom will I be responsible?
- What training and support will I receive?
- What equipment and facilities are there?
- What about expenses?

Appointment

Once references have successfully be taken up and any necessary Criminal Records checks have been carried out, it is a good idea to send a letter confirming a start date, their hours, the location where they will be based and the nature of the role they will be performing.

Turning Down Potential Volunteers

Occasionally you may have to say “thanks” but “no thanks” to a volunteer. For some people this can be quite hurtful. So do be tactful and phrase your rejection sensitively. Be constructive. Give positive feedback. But do be honest about why you cannot use them.

Having a role description and skills checklist will prove to be very helpful – if the volunteer does not match your needs, it will be much easier to explain why.

If possible, try to suggest another organisation that might be able to use their services.

Communications

Remember to keep volunteers informed about what is happening during the recruitment process. This is especially important if there are likely to be lengthy delays, e.g. when it is necessary to carry out a Criminal Records Bureau checks are being made.

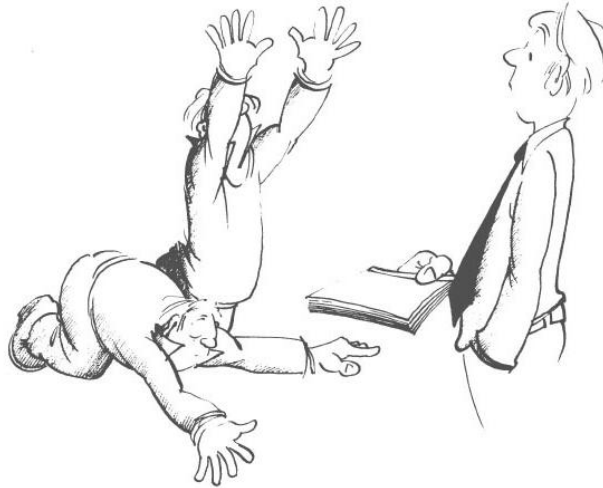
If you do not keep potential volunteers informed of such delays, they will think you have forgotten about them, lose interest and go elsewhere.





Managing & Retaining Volunteers

People volunteer for a variety of reasons: they may want to support an organisation or a cause; they may want to gain experience or training; they may want to keep themselves busy and meet new people; they might want to put something back into the community.



Volunteers will leave an organisation for a variety of reasons too. This might be because they find a job or their circumstances change in some other way. It might be because they are unhappy in their volunteering role because they do not feel properly involved or because they do not feel supported in that role. It might be because their expectations are not being met.

Motivated volunteers...

...will help to generate a good atmosphere; they will work hard to high standards and promote a positive image of your organisation; they will enjoy what they are doing

De motivated volunteers...

... might be persistently late and frequently sick; perform poorly; be irritable and un-cooperative; de-motivate others; leave.

You can minimise the risk of de-motivation by creating an infrastructure that helps to make them feel valued, involved and supported

This might sound like a lot of work but it will pay dividends. Once you have developed all your policies, procedures and forms that you need, it is easy to use them for any other volunteers that come along. A solid foundation that clarifies roles and builds in support means that you will keep more of the volunteers you recruit. This will save you time in the long run.

We have already mentioned the advantages of a written recruitment strategy (p7). If you have done this you will already have produced written application forms, interview, selection and induction procedures. Let's take a look at some of the other things you might need.



Volunteer Policy

Small, informal groups might be able to get by without a written volunteer policy. For larger groups, however, a policy is a good idea. A policy helps to ensure consistency and demonstrates a commitment to good practice. It will clarify the role of volunteers in a organisation and will show how they will work alongside paid staff. It will tell volunteers how that can expect to be treated by an organisation. It demonstrates that the organisation takes its volunteers seriously.

Policies should be written to take into account the needs of individual organisations. Some organisations will choose to write a single, all-inclusive policy; other will write a shorter policy that refers to other relevant, existing policies. It is a good idea to consult with existing staff and volunteers before writing it.

What should be included in a volunteer policy?

There is no hard and fast rule about what should be in a policy. These are some of the areas you should consider:

An Introduction: Use this to explain your aims and objectives and how volunteers fit in with these. Who uses your organisation? You could also use it to make a statement outlining how volunteers will be treated by your organisation. You might even include the paragraph that you developed in ***Getting to Know your Organisation (p4)***

Recruitment: How do you recruit? How do you interview and select? What do you tell people if they are not selected?

Induction and Training: What do volunteers need to know about the organisation and the way it works? What do they need to know to start in their role? How do they access further training? Confidentiality.

Expenses: What expenses can volunteers claim? How do they claim them?
See ***Expenses (p20)***

Support for volunteers: How do you support your volunteers? What type of supervision can they expect?

Equal opportunities: How does your equal opportunities policy relate to volunteers?

Problem solving: How does a volunteer tell you about any problems they might have. How do you deal with problems relating to volunteers? Does your disciplinary and grievance policy apply to volunteers? Do they need a separate one?

You can of course include other areas if you think them relevant to your organisation. These might include your commitment to involve volunteers in the day-to-day life of the organisation and volunteers' attendance at staff meetings. It is also appropriate to mention how volunteers are covered by your insurance policies.

Volunteers Agreements:

A signed agreement that clarifies the relationship between the organisation and volunteers is a good way to demonstrate commitment to volunteers. It makes clear the expectations of both sides and helps to keep misunderstandings to a minimum.

However, care needs to be taken to word an agreement so that it does not become a contract. Take care to avoid any hint of obligation. Talk about hopes and expectations. Make it clear that volunteers are free to come and go. You might like to include a disclaimer saying that the agreement is not legally binding but this will be disregarded if the wording of the agreement itself is contractual.

In Appendix 6, p 26 you will find two sample agreements that you can adapt and use for your own organisation.



Volunteer Charter:

Some organisations like to produce a volunteers' charter. This is a good way of making a public commitment to volunteers. A charter is a statement outlining what an organisation expects from volunteers and what volunteers can expect from an organisation in return.

These are some of the commitments you might like to include in your volunteers charter.

Responsibilities of Volunteers:

To do the job reliably

To do the job in a way which corresponds to the aims and values of the organisation

To be honest if there are problems

To attend training and support sessions if these are an agreed part of the job

To respect confidentiality

To do the work that they have agreed with the organisation.

Rights of Volunteers:

To have someone to talk to about the work

To be appreciated

To know what is expected of them

To know to whom to go with a problem

To get something from the work themselves

To make mistakes and to learn from them

To be able to say "no."

To know they are being selected

To know what their rights are if something goes wrong

Not to be out of pocket

To receive appropriate training

To develop and change in the job

To take part in the organisation

To have safe working conditions

To be insured

To be free from discrimination on grounds of race, gender, sexuality, disability, age, etc.

To get satisfaction and enjoyment from volunteering

Support and supervision

Effective support and supervision help volunteers to stay focused and motivated. Support and supervision are both part of the same process and cannot always be separated. Support tends to focus on the person whilst supervision tends to focus on the tasks they perform. By making time to support and supervise your volunteers; by ensuring that your volunteers know to whom to turn for support and who is responsible for supervising their work, you will be taking a big step towards building a productive relationship between the organisation and its volunteers. You will also be tackling any problems that do arise at an early stage.

Effective support:

- Takes place in an environment where volunteers feel safe to express themselves
- Helps to resolve problems
- Makes volunteers feel valued and motivated
- Takes into account that outside situations may affect work

Effective supervision:

- Monitors and evaluates work and performance
- Recognises and deals with problems
- Provides a framework for discussion and agreed change
- Clarifies priorities

Showing your appreciation

Volunteer policies, charters, agreements; effective support and supervision provide the infrastructure for a rewarding volunteering experience. They establish a volunteering framework that is supporting and appreciative.

There are countless other, everyday, ways, however, in which you can recognise the achievements of your volunteers.

Remember, the more you show your appreciation, the more likely it is that volunteers will stay with your organisation.

Here are some ways you can show appreciation. You can probably think of many more.

- Keep records of all your volunteers achievements
- Include your volunteer in social events
- Remember the day they started volunteering with you
- A birthday card.
- Include them in your Annual Report
- Identifying ways for your volunteer to progress but keep in line with their aspirations
- In house promotion
- Increased responsibilities
- Could your volunteer act as a mentor for other new volunteers?
- Make paid staff aware of your volunteers contribution to the organisation
- Saying thank you
- Telling them they did a good job
- Consulting them
- Involving them in decisions
- Providing them with references

Remember: Good organisation does not mean rigidity. Policies, procedures and guidelines should recognise that flexibility is important to many volunteers. Recent research has shown that the acronym, **FLEXIVOL**, outlines the aspirations many younger volunteers. For them, flexibility is the most important consideration of all.

- F** lexibility
- L** egitimacy
- E** ase of access
- X** perience
- I** ncentives
- V** ariety
- O** rganisation
- L** aughs

A Volunteer Handbook?

You might like to produce a handbook for volunteers. This would contain background information on your organisation, your aims and objectives and all the policies and procedures that relate to volunteers, including health and safety and confidentiality. A handbook helps with induction and is always available for easy reference.



Keeping Volunteers Safe

Health and Safety

It is important for your organisation to be aware of your Health and Safety obligations. This is a complex area. It is not possible to go in detail into this toolkit. Further information can be obtained from the Volunteering England website, www.volunteering.org.uk



Your organisation has a legal **duty of care** to avoid carelessly causing injury to persons. This includes volunteers. If your organisation asks a volunteer to do a task that results in them injuring himself or herself or anyone else, the members of the governing body may be liable. Liability depends on establishing that the organisation failed to take reasonable care. The notion of duty of care needs to be considered in all aspects of an organisation's work and activities.

You may need to:

Carry out a risk assessment to identify and control any hazards presented by your organisation's activities.

Write a Health and Safety Policy.

Consult with your local Fire Brigade to assess the risk of fire on your premises.

Register your organisation's activities with the local authority.

Conduct a first aid assessment.

Health and Safety regulations are less clear for organisations that use only volunteers as opposed to those who have paid staff. Nevertheless, it is good practice, to offer your volunteers the same level of protection as you would paid staff.

Insurance

An agency can protect itself and its volunteers against some of the consequences of risk by taking out appropriate insurance. The insurance required depends on the tasks undertaken by the agency and its volunteers. Insurance cover should reflect the liability of the agency in the following areas.

- **The risk of a claim by a volunteer against the agency**
- **The risk of a claim by a service user (or member of the public) against a volunteer and/or the agency.**
- **Different policies will be required for each area of risk.**

Public Liability Insurance

This covers legal liability to third parties for personal injury or illness or damage to third party property caused by accidents associated with activities of the organisation.

It indemnifies the agency against claims arising from accidents that cause injury or damage to property other than employees, in this instance volunteers.

It is important to ensure that the policy carries an endorsement declaring that volunteers are covered when working in other peoples' homes, or in other premises or on external activities such as play schemes or environmental projects. The agency must also tell the insurers exactly what sort of activities they are involved in (it is common practice for policies to have exclusion clauses referring to, for example, certain sporting activities).

A Public Liability policy will provide cover up to a stated maximum amount for any one accident. This is normally chosen by the policyholder.

It is important to ensure that cover is adequate. Volunteer England recommend a Public Liability Insurance limit of £5,000,000.

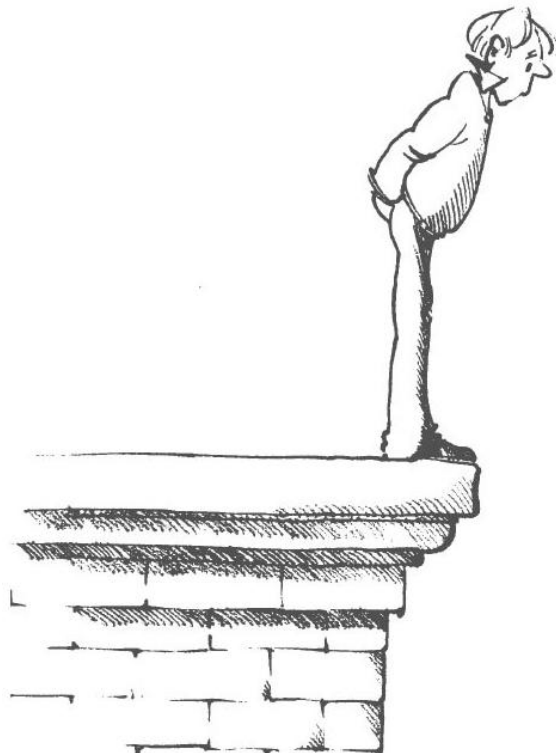
🌀 Personal Accident Insurance

This is a voluntary benefit provided by an agency if they choose to compensate volunteers in the event of an injury, sickness or death.

🌀 Professional Indemnity Insurance

If the agency offers an advice service to the public, then it would be worth considering this type of policy.

It provides cover arising from loss or harm to a service user who reasonably places reliance on and acts on advice, that subsequently turns out to be incorrect. The agency's liability may extend to someone to whom the agency could reasonably expect the service user to pass on such advice





Welfare Benefits and Volunteering

Jobseekers Allowance (JSA)

This benefit is paid to people who are unemployed and able to work. To receive JSA a person has to be available for work and actively seeking work.

There is no restriction on the number of hours a person receiving benefit can volunteer! **However, they must continue to be actively seeking work and available for work within 48 hours.**

Your volunteer should tell the Job Centre that they are volunteering.

Incapacity Benefit (IB)

This will not be affected by voluntary work. A person claiming IB will not have their entitlement to benefit questioned, except in “exceptional circumstances”. It is a good idea for them to tell the Benefits Agency before they start voluntary work and receive confirmation that they will be allowed to do the work. This will ensure that there is no room for misunderstanding.

For more information see the Job Centre website - www.jobcentreplus.gov.uk



Expenses

Care should be taken to reimburse volunteers only the actual costs that they incur. Additional payments may cause problems, resulting in them being treated as “paid volunteers”. In these circumstances they might find that their entitlement to benefit is affected.

These are the expenses that volunteers can claim without it affecting their entitlement:

- Travel to and from the place they volunteer
- Travel while volunteering
- Meals taken while volunteering
- Post and phone costs
- Care of dependants (children, elderly parents) while volunteering
- Cost of protective clothing

Reimbursement for the cost of driving their own car:

The Inland Revenue has laid down how much volunteers can claim in expenses per mile without becoming liable to tax. Rates vary according to the size of car and number of miles travelled

For more detailed information visit the Inland Revenue’s website

www.inlandrevenue.gov.uk





Appendices

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Appendix 1: **Volunteer Role Description**

Title: Volunteer Admin Assistant

Major Objective:

To help provide administrative support to a busy charity with 25 staff that provides services to homeless people.

Volunteer Responsibilities:

- To assist with general reception duties
- To order stationery and other supplies
- To assist with the preparation of management accounts
- To provide basic information to callers inquiring about the organisation's services

Hours:

Two half-days per week. The actual times worked are negotiable

Minimum Commitment.

Because of the training provided, we are looking for someone who can make a minimum six-month commitment.

Location:

St Bede's
321 Boundary Road
Casterbridge
Wessex WE12 8NQ

Training Available:

Computer skills – Word and Excel
Customer care skills
Telephone skills

Supervision:

This will be provided by the Head of Admin.

Appendix 2 **Volunteer Application Form**

Name of Organisation

Address

Telephone Number

Charity Number

Personal Details

Mr/Mrs/Miss/Ms/Other

First name:

Second Name

Address:

Postcode:

Telephone:

(H)

(W)

Date of Birth:

Availability

Please tick the times that you are available for volunteering.

	Mon	Tues	Weds	Thurs	Fri	Sat	Sun
Morning							
Afternoon							
Evening							

Your Experience

Please give brief details of your current and past employment and any voluntary work that you have done previously.

Your Skills

Please tell us about any qualifications, special skill and interests that you have.

Do you have a driving license?

Yes/No

Do you have the use of a car?

Yes/No

Your Voluntary Work

Please tell us about the type of voluntary work that you are looking for.

How Did You Hear About Us?

Please tell us about how you heard about this organisation.

Referees

Please give the contact details of two referees. They must not be related to you.

If possible, please use your current or most recent employer as one of the referees.

Name

Organisation

Address

Telephone

E-mail

Signature

Name

Organisation

Address

Telephone

E-mail

Date

Appendix 3: **Volunteer Reference Request**

Use the Organisation's headed paper

Date

Dear

Re: Volunteer Post

Confidential

The above named person has offered to become a volunteer with us and supplied your name as a referee. A copy of the role description is enclosed.

Your co-operation in completing and returning this confidential reference as soon as possible would be much appreciated. A stamped addressed envelope is enclosed.

How long have you known this person and in what capacity?

Using the role description, what is your opinion of this person's suitability for the post? Please give reasons where appropriate.

What special qualities do you consider this person to have to make him/her suitable for this volunteer work?

If you need any further information, please feel free to contact me on [telephone number, e-mail address].

Yours sincerely

Appendix 4: Confidentiality

Confidentiality is important to all organisations.

Anyone using your services needs to feel confident that personal information will be used appropriately and that it will not be passed on to a third party without their permission.

You might want to have a written agreement with the prospective volunteer with reference to confidentiality. If so, an example of possible wording of such an agreement is given below.

I agree to hold in confidence all matters that come to my attention while volunteering at [name of organisation] including information about any person or organisation using the services of our organisation. I have read and understood the confidentiality policy.

I will respect the privacy of clients, other volunteers and staff and confer appropriately with those designated as my supervisors.

Volunteer Name:

Signed:

Date:

Appendix 5: **Volunteer Charter**

The organisation will:

- Listen to you
- Value what you do
- Provide initial training & give you the opportunity of further training as appropriate
- Keep you informed of developments
- Provide you with a named support
- Give you helpful feedback about your performance
- Try to ensure your safety at all times
- Cover you by insurance while engaged on approved business

As a volunteer, we expect you to:

- Uphold the good name of the organisation at all times
- Abide by the organisations Code of Practice
- Carry out what you agree to do or contact us speedily if you cannot
- Observe our Confidentiality, Health & Safety Equal Opportunities Policies
- Try to give as much notice as possible if you decide to stop work for us
- Make new friends
- Enjoy yourself

Appendix 6: **Volunteer Agreements**

These sample volunteer agreements are a starting point to help you draft an agreement that suits your organisation. We hope you will discuss and consult on the sample agreements and feel free to adapt them to suit your needs.

The first agreement is more formal and detailed than the second one.

A volunteer agreement helps both the organisation and its volunteers by making expectations clear. Both agreements incorporate current thinking on what is good practice in managing volunteers. They also address the unlikely possibility of volunteers being considered employees in the eyes of the law.

A volunteer agreement is usually part of a set of documents, which includes a volunteer policy and voluntary work outlines (like a job description).

Advice on drawing up such documents is available from the information service at the National Centre for Volunteering,

See website: www.volunteering.org.uk

Sample volunteer agreement - Example 1

This Volunteer Agreement describes the arrangement between [name of organisation] and you. We wish to assure you of our appreciation of your volunteering with us and will do the best we can to make your volunteer experience with us enjoyable and rewarding.

Part 1: the organisation

Your role as a volunteer is [state nature and components of the work] and starts on [date]. This work is designed to [state how the work benefits the organisation]. [Name of organisation] commits to the following:

1. Induction and training

To provide thorough induction on the work of [voluntary organisation], its staff, your volunteering role and the induction and/or training you need to meet the responsibilities of this role. The Volunteer Handbook provides full details of the organisation.

2. Supervision, support and flexibility

To explain the standards we expect for our services and to encourage and support you to achieve and maintain them;

To provide a named person who will meet with you regularly to discuss your volunteering and any successes and problems;

To do our best to help you develop your volunteering role with us.

3. Expenses

To repay these expenses following procedures in the Volunteer Handbook:

Travel to and from home to [the place of work] and during your work: see the Volunteer Handbook for rules on methods of travel and car mileage allowances

Meal allowance to a maximum of £[] with a receipt and £[] per day without. [To be eligible you must work around meal times or for at least [4] hours a day].

Specialist clothing where this is required and provided by you.

Actual cost of crèche, childminding fees or other dependant costs incurred in order to be available for voluntary work.

4. Health and safety

To provide adequate training and feedback in support of our health and safety policy, a copy of which is in the Volunteer Handbook.

5. Insurance

To provide adequate insurance cover for volunteers whilst undertaking voluntary work approved and authorised by us

6. Equal opportunities

To ensure that all volunteers are dealt with in accordance with our equal opportunities policy, a copy of which is set out in the Volunteer Handbook.

7. Problems

To try to resolve fairly any problems, grievances and difficulties you may have while you volunteer with us;

In the event of an unresolved problem, to offer an opportunity to discuss the issues in accordance with the procedures set out in the Volunteer Handbook.

Part 2: the volunteer

I agree:

- To help [name of organisation] fulfil its [services];
- To perform my volunteering role to the best of my ability;
- To follow the organisation's procedures and standards, including health and safety and equal opportunities, in relation to its staff, volunteers and clients;
- To maintain the confidential information of the organisation and of its clients;
- To meet time commitments and standards agreed to except in exceptional circumstances, and to give reasonable notice so other arrangements can be made;
- To provide referees as agreed who may be contacted, and to agree to a police check being carried out where necessary.

This agreement is binding in honour only, 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 intends any employment relationship to be created either now or at any time in the future.

Sample volunteer agreement - Example 2

Volunteers are an important and valued part of Global Campaigns. We hope that you enjoy volunteering with us and feel a full part of our team.

This agreement tells you what you can expect from us, and what we hope from you. We aim to be flexible, so please let us know if you would like to make any changes and we will do our best.

We, Global Campaigns, will do our best:

- to introduce you to how the organisation works and your role in it and to provide any training you need. The initial training agreed is [].
- to provide regular meetings with your manager so that you can tell us if you are happy with how your work is organised and get feedback from us. Your manager's name is [].
- to respect your skills, dignity and individual wishes and to do our best to meet them.
- to pay your travel and meal costs up to our current maximum.
- to consult with you and keep you informed of possible changes.
- to insure you against injury you suffer or cause due to negligence.
- to provide a safe workplace
- to apply our equal opportunities policy
- to apply our complaints procedure if there is any problem

I, [name of volunteer], agree to do my best

- to work reliably to the best of my ability, and to give as much warning as possible whenever I cannot work when expected
- to follow Global Concern's rules and procedures, including health and safety, equal opportunities and confidentiality.

More details on these issues is provided in the volunteer handbook.

Note: this agreement is in honour only and is not intended to be a legally binding contract

Appendix 7: Checklist

Before you begin:

- Are you clear about what your organisation does?
- Are you clear about what you would like volunteers to do?
- Are you clear about the type of volunteers you need?

Your staff:

- Are they happy to work with volunteers?
- Are they aware what volunteers will be doing in the organisation?
- Are they willing and able to manage volunteers?

Paperwork:

- Do you have a volunteer recruitment strategy?
- Do you have a volunteer policy?
- Do you have an equal opportunities policy?
- Do you have a volunteer agreement?
- Do you have an application form for volunteers?
- Do you have a Health and Safety Policy?

Support & Training:

- Do you have an induction programme?
- Is there a named person to support your volunteer?
- Have you agreed how you will support and supervise your volunteer?
- Have you thought about the training that your volunteer will need?
- Have you thought how you will show appreciation to your volunteers?
- Have you explained your confidentiality policy to the volunteer?

Check:

- Have you applied for references?
- Have you conducted a criminal record check, if necessary?
- Does your insurance cover volunteers?

Expenses:

- Do you have a budget for volunteers' expenses?
- Do you have an expenses policy?
- Do you have expenses claim forms?