

**Volunteering Good Practice Guidelines**  
To Support Bradford's Policy Statement of Good Practice in Working with Volunteers

# **Good Practice Workbook**

# Good Practice Workbook

## **How to use this Workbook**

### **Introduction**

This Workbook has been designed for use with the Volunteering Good Practice Guidelines which support Bradford's Policy Statement of Good Practice in Working with Volunteers.

It is a practical tool which is aimed at helping organisations identify 'where they are at' with regard to involving volunteers, and what they need to do in order to implement good practice.

### **Working at different levels**

The workbook can be completed on two levels, depending on the needs of your organisation and how developed volunteering is within it.

If your organisation has no history or experience of involving volunteers you should aim first to work through level one in all of the areas. You can then revisit the Workbook at a later stage with the aim of completing Level two once you have tackled the basics.

You should ensure that you have first read the Policy Statement as a whole, and then the Guidelines before attempting any of the exercises in this Workbook, i.e. read Set 1 of the Guidelines before completing Set 1 of the Workbook.

### **Consultation and support**

You can complete this workbook within your organisation without outside support if this seems appropriate. If you are a Council Department (or your service is funded by the council) you can choose to work through these exercises with the support of the Volunteering Unit which is based at Bradford Council's Department of Community Development and Lifelong Learning (see Appendix V of the Guidelines for contact details).

### **Completing the implementation plans**

An implementation plan is provided for you to complete at the end of each set of this workbook.

This is basically a summary of all of the areas in which you identified you needed to take further action (from completing the questions for each of the 'Sets' in the workbook).

The implementation plans are there to help you identify people, resources and timescales for taking the work forward. They are a flexible resource that you should revisit on a regular basis in order to assess whether you are meeting your objectives. If you find that you are not meeting your objectives, you may need to revise your implementation plans.

# Introduction to Volunteering

This part of the workbook should be used in conjunction with Set 1 of the Good Practice Guidelines that support Bradford's Policy Statement of Good Practice in Working with Volunteers. Please ensure you have read and understood this Set before using the workbook.

**Area:**

**Set 1**

**Introduction to Volunteering: Making the Decision and Getting it Right (InfoSheet 1.1)**

**LEVEL ONE**

*Level one refers to the minimum you will need to have considered in order to start planning volunteer involvement. You should complete this section before progressing to other areas of the Workbook.*

This part of the workbook looks at the initial stages of the planning process required when it comes to involving volunteers. You are not expected to have thought through each of the areas referred to in great detail. ***The aim at this stage is merely to show that you have considered the minimum requirements and identified people and resources to undertake the necessary development work.***

**Checklist for InfoSheet 1.1**

**1. Our organisation understands the basic principles of volunteer involvement: Tick box if you feel you have a basic understanding at this stage.**

*We understand that:*

1a) that we have a 'duty of care' towards volunteers which means planning, staff time, resources, providing training, varied roles, support and supervision

1b) that our main reasons for wishing to involve volunteers should not be about any notion of a 'cheap alternative' to paid staff.

*Our reasons for wishing to involve volunteers are:*

# Set 1

## Part 1.1

We have:

1c) checked that our reasons for wanting to involve volunteers do not appear to be in conflict with the needs of our service users/clients

1d) checked that we are not seeking to replace paid staff or save money on jobs that should be done (or were previously done) by paid staff

### 2. Initial ideas about potential roles for volunteers

Note: In this section you will write down your initial ideas about potential roles for volunteers. As you progress through this Workbook, your ideas about these roles may change. ***At this stage, you are merely identifying tasks for volunteers that seem to be of benefit to your organisation, your service users and to volunteers themselves.***

2a) The potential roles we envisage for our volunteers (that we think are appropriate) are:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

2b) Do any of these roles appear to be in conflict with the roles of paid staff?

Yes

No

If 'yes', which roles appear to be in conflict and why?

# Set 1

## Part 1.1

Can you amend your volunteer roles so that they no longer appear to conflict with those of paid staff? What amendments can you make?

2c) The roles we envisage for our volunteers are not roles that were previously carried out by paid staff (*note: you should not be using volunteers to replace staff. If this seems to be the case then perhaps you should be looking at ways of obtaining funding for more paid staff rather than at volunteer involvement*).

2d) We feel at this stage that the roles we have in mind do not expose our volunteers to undue levels of risk/danger

If we have identified areas of risk or danger, we have revised our volunteer roles in the following way:

### 3) Staffing and resources

3a) Who will have general responsibility for developing volunteering within the organisation? *Identify lead person who will have the task of completing this Workbook.*

# Set 1

## Part 1.1

Name of lead person \_\_\_\_\_

Who else will be involved in the development process (paid staff)?

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3b) Who, from this list, will:

- Carry out consultation re volunteer involvement with clients/service users, management committee and other stakeholders?

Name of person/people \_\_\_\_\_

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Training needs \_\_\_\_\_

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3c) Who, from this list, will:

- Be responsible for co-ordinating, supervising and supporting volunteers?

Name of person/people \_\_\_\_\_

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3d) Who, from this list, will:

- Design application forms, expenses forms, and other forms of paper/computerised records for keeping information about volunteers?

Name of person/people \_\_\_\_\_

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Training needs \_\_\_\_\_

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# Set 1

## Part 1.1

3e) Who, from this list, will:

- Put in place administrative procedures for dealing with volunteers (i.e. sending out application forms, processing volunteer expenses, etc.)

Name of person/people \_\_\_\_\_

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Training needs \_\_\_\_\_

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3f) Who, from this list, will:

- Work towards writing and implementing volunteer policies which will reflect your organisation's commitment towards good practice? (*Note – this person should generally be your 'lead person', i.e. the person who will be completing this Workbook*).

Name of person/people \_\_\_\_\_

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Training needs \_\_\_\_\_

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***If other members of your paid staff are to be involved in developing volunteering within your organisation, you will need to ensure that they are in agreement with their new roles, that they are committed to volunteers and have the time and training to work with volunteers. These areas are covered later in this workbook.***

#### 4) Recruiting Volunteers

4a) Will your volunteers need any existing skills experience? What basics will they need (that you can think of at this stage)? (note: this can then form the basis of your person specification)

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# Set 1

## Part 1.1

4b) Do you have a budget available for recruitment? If not, how much do you think you could spend and where will you find the cash?

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4c) Who will process applications?

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4e) Who will be involved in interviewing volunteers and do they have the time?

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### 5. Training and induction for your volunteers

5a) Do you have induction materials or training for your staff that can be adapted for use with volunteers?

Yes

No

5b) If yes, who will adapt your materials and provide induction training for volunteers

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5c) If no, who will write a induction materials or develop induction training for your volunteers

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5d) Will this person need training themselves (i.e. in health and safety issues, volunteer expenses, insurance, etc.)?

Yes

No

5e) If yes, how will you access training for this person?

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# Set 1

## Part 1.1

5f) Will your volunteers need any ongoing training?

Yes

No

5g) If yes, who will provide it?

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### 6. Volunteer expenses

6a) Have you identified a budget for volunteer expenses?

Yes

No

6b) If no, you will need to think carefully about whether you can afford to involve volunteers and about whether you can identify other ways of finding the funding.

Who will find out about obtaining funding?

### LEVEL TWO

***Level two refers to additional exercises you can do to help you ensure you implement good practice when putting together your initial plans for involving volunteers. You can fill out this section now, if you feel you are ready. If not, you can revisit these at a later stage.***

#### 1. Risk Assessment

1a) Who will carry out risk assessments for all of the roles you are planning for your volunteers? *(Note: this person should work with you on InfoSheet 3.5 and the accompanying section of this workbook. He or she should also fill in a risk assessment form, provided at Appendix IV of the Good Practice Guidelines).*

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# Set 1

## Part 1.1

### **2. Ensuring that volunteer involvement does not conflict with the needs of your organisation and your service users, and that you have something to offer your volunteers.**

2a) Group exercise – carry out the group exercise referred to on page 2 of InfoSheet 1.1 to ensure that needs and interests are not in conflict.

Consider how you will revise your volunteer roles in light of the results, or whether you should be involving volunteers at all (you can write this into your 'action plan' for Set 1 at the end of this section of the Workbook).

### **3. Writing volunteer policies that reflect good practice**

3a) Who will take ongoing responsibility for developing good practice in relation to volunteers within your organisation?

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*(Note – at this stage you are simply identifying a lead person. Further work on this area comes at a later stage in this Workbook).*

# Set 1

## Part 1.1

### IMPLEMENTATION PLAN 1.1

You should now fill in the following implementation plan for any areas in which you decided that you need to take action. You should identify what the issue is, what you need to do, the person or team responsible and your timescale. Try to be realistic about what you can achieve and in what time.

You will need to revisit your plan on a regular basis to ensure you are meeting your objectives. If you are not meeting your objectives you may need to revise them or lengthen your timescales to make them more realistic. Aim to be flexible.

#### LEVEL ONE - Implementation Plan

<b>Item No (i.e. 2a, identifying volunteer roles)</b>	<b>How we plan to achieve this</b>	<b>Person/Team Responsible</b>	<b>Timescale</b>

# Set 1

## Part 1.1

### LEVEL ONE - Implementation Plan (continued)

Item No (i.e. 2a, identifying volunteer roles)	How we plan to achieve this	Person/Team Responsible	Timescale

# Set 1

## Part 1.1

### LEVEL TWO - Implementation Plan

Item No	How we plan to achieve this	Person/Team Responsible	Timescale

**Area:**

**Set 1**

**Introduction to Volunteering: Consultation and Participation  
(InfoSheet 1.2)**

**LEVEL ONE**

This part of the workbook looks at the initial stages of the process required when consulting others about involving volunteers.

**Checklist for InfoSheet 1.2**

**1. Our organisation understands the basic principles of consultation with service users, paid staff and other stakeholders and the reasons why we need to carry it out.**

***Tick box***

*1a) We understand why consultation about involving volunteers is important*

Our reasons for consulting others are:

*1c) We have identified the people and groups we need to consult with*

The people we need to consult with are:

*1d) We understand the meaning of the 'ladder of participation' and the different levels of involvement that we can offer*

We have chosen level:

Our reasons for this are:

# Set 1

## Part 1.2

### 2. Planning your consultation

2a) *We have decided who we need to consult (see 1c above)*

2b) *Our objectives are (what we want to achieve from consultation):*

2c) *Our method will be:*

# Set 1

## Part 1.2

2d) Before we consult, we will provide information about:

Volunteering and why we wish to consider volunteer involvement

Why we are consulting

What we want to get out of it (our objectives)

Our timescales (see below for planning these)

Our method

What we will do with the information we get from consultation

2e) *Our process (in stages) will be (list people involved at each stage and the actions they need to take, e.g. putting together an information pack, sending out publicity materials, etc.):*

# Set 1

## Part 1.2

2f) *We have considered accessibility issues if we are carrying out our consultation exercise at a venue (i.e. disabled access, interpreters, signers, and 'family friendly' times).*

### 3. Resources

3a) *We have identified the resources we will need for consultation and we have a set a realistic budget*

*List resources:*

### 4. Results and Feedback

*4a) Our plan for dealing with the information we receive from consultation is:*

# Set 1

## Part 1.2

*4b) Our decision making process will be:*

*4c) We will share our decisions (and information about how we reached them) with the people/groups we consulted by (state process and people involved in taking action):*

*4d) If there is disagreement about the decisions we have made, we will deal with it in the following way:*

# Set 1

## Part 1.2

### 5. Evaluation

*5a) Our evaluation process will be (list methods, people involved and actions they need to carry out):*

*5b) We will act upon the results of our evaluation by (state process):*

# Set 1

## Part 1.2

### IMPLEMENTATION PLAN – 1.2

You should now fill in the following implementation plan for any areas in which you decided that you need to take action. You should identify what the issue is, what you need to do, the person or team responsible and your timescale. Try to be realistic about what you can achieve and in what time.

You will need to revisit your plan on a regular basis to ensure you are meeting your objectives. If you are not meeting your objectives you may need to revise them or lengthen your timescales to make them more realistic. Aim to be flexible.

#### LEVEL ONE - Implementation Plan

Item No	How we plan to achieve this	Person/Team Responsible	Timescale

# Set 1

## Part 1.2

### LEVEL ONE - Implementation Plan (continued)

Item No (i.e. 2a, identifying volunteer roles)	How we plan to achieve this	Person/Team Responsible	Timescale

# Set 1

## Part 1.3

### Area:

### **Set 1**

## **Introduction to Volunteering: Developing your Volunteering Policies (InfoSheet 1.3)**

### LEVEL ONE

This part of the workbook looks at the initial stages of the process required when thinking about how you will write your volunteer policies and what you will include.

***This section does not cover the process of writing your policies – you will do this as you progress through the different subject areas covered later on in the workbook.***

#### **1. Starting points for volunteer policies**

1a) *We understand the need to develop our own volunteering policies and will plan this work as part of our objectives*

1b) *We will dedicate staff time to this work*

1c) *The people who will be involved in developing our policies are:*

*Note –the ‘lead person’ for this should be the person who has primary responsibility for using this workbook*

#### **2. Research**

2a) *We will research the volunteering policies of organisations similar to ours. We will allocate staff time to this.*

*List members of staff who will be involved in researching volunteer policies and state timescale for this process:*

# Set 1

## Part 1.3

### 3. Consultation about volunteer involvement

This is covered in *InfoSheet 1.2* (see previous pages)

The information you gained from your initial consultation exercises can give you a starting point for writing your volunteer policies, for example, the reasons why you involve volunteers, what you can offer volunteers and what volunteers can give to your organisation and its service users.

*3a) We will ensure that any relevant information obtained from consultation is written into our volunteering policies when we write them.*

*3b) The person who will take responsibility for ensuring this happens is:*

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You will also need to consult widely with your staff, service users and others before implementing your policy. It might be a good idea for you to first write your policy, incorporating any information you received from consultation, and then circulate your policy for comment, allowing enough time for everyone to read, have their say and return their comments to you. You will need to show that you have taken other people's views into account – one way of doing this is to re-circulate your final draft together with some notes about how you reached your decisions regarding any amendments you made.

*3c) When we write our volunteering policies, the person with responsibility for consultation, circulating drafts and writing in amendments will be:*

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*(Note: this should usually be the person with responsibility for consultation – as in 3b above).*

**Remember to include the above information in your implementation plan for this section, even if you are not yet sure of timescales. This is because when the time comes to review your implementation plans, you will be reminded that you need to do this work at the stage when you write your policies.**

### 4. Distribution

*4a) List all of the groups/people who should receive a copy of your volunteer policies:*

# Set 1

## Part 1.3

### LEVEL TWO

**Area:**

**Set 1**

**Introduction to Volunteering: Developing your Volunteering Policies (InfoSheet 1.3)**

*Level two refers to additional exercises you can do to help you ensure you implement good practice when putting together your initial plans for involving volunteers. You can fill out this section now, if you feel you are ready. If not, you can revisit these at a later stage.*

#### **1. Evaluating your volunteering policies**

*1.1 Who will evaluate your volunteering policies on a periodic basis?*

*2.1 How will you evaluate each area of your policy, i.e. recruitment, selection, management, support, health and safety and insurance:*

# Set 1

## Part 1.3

*2.1 (continued) How will you evaluate each area of your policy, i.e. recruitment, selection, management, support, health and safety and insurance:*