

# Management of Volunteers

This part of the workbook should be used in conjunction with Set 3 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 3**

### **Management of Volunteers: Induction Training (*InfoSheet 3.1*)**

Even if a volunteer is already highly skilled, induction is essential. It is the process of preparing volunteers for a clear relationship with the organisation. It should make volunteers feel comfortable and ensure they better understand the organisation's history, ethos, structure and procedures, so that they will contribute more productively to the organisation's work.

### LEVEL ONE

#### **1. Planning induction for your volunteers**

*1.1 Make a list of all of the tasks that your volunteers will undertake. If you have one, consult your volunteer 'description of tasks' and summarise each of the tasks below:*

# Set 3

## Part 3.1

*1.2 For each of the tasks you have outlined, state how you will prepare your volunteers with the necessary skills/experience to carry out the task before they begin to carry out tasks on their own (don't forget to include things like client confidentiality, professional boundaries, personal safety, etc.):*

# Set 3

## Part 3.1

*1.3 How will you make volunteers aware of all the procedures/policies of your organisation?  
(First list the procedures/policies that volunteers need to know about and then state how you  
will include these in the induction process):*

# Set 3

## Part 3.1

*1.4 How will you make volunteers aware of all the practicalities they need to know about before they begin volunteering (for example, sickness reporting procedures, toilets, breaks, etc.)?*

### **2. The induction process**

*2.1 How will you deliver your induction programme to your volunteers (i.e. work shadowing other volunteers or by giving training to a group of volunteers):*

*2.2 Who will provide training (or work shadowing opportunities) for your volunteers:*

*2.3 Who will provide the training, how often, and what practical arrangements do you need to make to ensure that training can take place (i.e. preparing materials, booking rooms, providing refreshments, etc.)*

# Set 3

## Part 3.1

### LEVEL TWO

#### **1. Planning an induction training programme**

If you plan to provide some form of formal induction training to groups of your volunteers, you will need to find ways of making your training as interesting as possible.

Think of ways in which you can involve volunteers in the learning process, for example, by asking them to work things out in a group or involving them in exercises that demonstrate, for example, the importance of equal opportunities.

The Volunteering Unit provides a six-hour induction training programme for its own volunteers and can offer advice to council (or council-funded) organisations that approach us for consultancy work. Please see Appendix V of the Good Practice Guidelines for details of how to contact us.

# Set 3

## Part 3.1

### LEVEL ONE - Implementation Plan - *InfoSheet 3.1*

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

### LEVEL ONE - Implementation Plan - *InfoSheet 3.1* (continued)

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

# Set 3

## Part 3.1

### LEVEL TWO - Implementation Plan - *InfoSheet 3.1*

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

# Set 3

## Part 3.2

### Area:

### **Set 3**

### **Management of Volunteers: Volunteer Tasks, Roles and Personal Development (*InfoSheet 3.2*)**

It is important to develop task outlines for the potential volunteer.

Both your organisation (paid staff, managers, service users) and its volunteers need to understand what it is they are expected to do and, equally important, what they are *not* expected to do.

Any volunteer task outline should be looked on as a means to understanding your volunteers' roles within your organisation's aims and objectives and its place in the community. Task descriptions are also a way to better understand what is needed for the volunteer opportunity.

#### **1. First steps – things to consider before writing your volunteer task outlines**

Before beginning to write your task outlines, you should try to answer the following questions, these will help you clarify roles for your volunteers:

*1.1 In as few words as possible, how do you feel your volunteers' roles will contribute to your aims, objectives and mission?*

*1.2 What is the paid staff's (if you have any) responsibility?*

# Set 3

## Part 3.2

*1.3 Volunteers should not be used to replace paid staff or carry out the same roles. Are the roles you plan for volunteers complimentary to those of paid staff and do they add something extra to your service? How?*

*1.4 What could you not do, or not do as well without the help of volunteers?*

*1.4 When do your activities that include volunteers really need to take place?*

*1.5 Where do these activities really need to take place?*

*1.6 What skills, personality traits and other qualifications do volunteers need to do the activities?*

# Set 3

## Part 3.2

### 2. Next consider what goes into a volunteer task outline.

You might approach the volunteer task outline by consider the following issues:

- Desired outcome of individual project
- What you need to achieve the outcome
- The volunteer's role in helping you achieve the outcome
- The skills a volunteer needs to help you achieve the outcome

*2.1 Desired outcome of individual project*

*2.2 What you need to achieve the outcome*

*2.3 The volunteer's role in helping you achieve the outcome*

*2.4 The skills a volunteer needs to help you achieve the outcome*

# Set 3

## Part 3.2

### 3. Writing your volunteer task outline

Once the above questions have been answered then you need to look at the essential elements of the volunteer task outline. Good volunteer task outlines will therefore contain the following elements:

**3.1 Title:** What the volunteer opportunity will be called, or what position is being offered

**3.2 Purpose:** The goals the voluntary activity will accomplish. This is the most important part of the volunteer task outline

**3.3 Suggested Activities:** Provide examples of what activities the volunteer might carry out to accomplish the purpose. The word 'suggested' indicates that the volunteer has some authority to think, to pursue other approved activities if their supervisor agrees.

**3.4 Measures:** How will you tell if the result has been achieved?

# Set 3

## Part 3.2

**3.5 Requirements of Volunteer:** What skills, attitudes, and knowledge are needed, as well as any requirements regarding conduct?

**3.6 Time:** Estimated number of hours, length of commitment, and flexibility in scheduling:

**3.7 Site:** Location of where activity is to be carried out:

**3.8 Supervision:** Relationships with staff and other volunteers, reporting requirements and supervisory relationships, as well as procedures for monitoring and dealing with problems.



# Set 3

## Part 3.2

**3.9 Benefits:** Training, insurance, parking, reimbursement of expenses, child care or carer provision, events to thank volunteers, and so on.

**3.10 Health and Safety** considerations and procedures following from risk assessment (see InfoSheet 3.5 and Sample Risk Assessment form at Appendix IV)

# Set 3

## Part 3.2

**LEVEL ONE** - Implementation Plan - *InfoSheet 3.2*

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

**LEVEL ONE** - Implementation Plan - *InfoSheet 3.1* (continued)

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

### Area:

### **Set 3**

### **Management of Volunteers: Volunteers who Work with Children and Vulnerable Adults (*infoSheet 3.3*)**

Most volunteers enhance the lives of the clients they work with, but some may not be suited to work with children, young people and vulnerable adults, and a tiny minority may pose a threat. It is important, then, that organisations working with vulnerable clients give consideration to ways in which they can minimise risks and provide a safe environment for clients and volunteers.

#### **1. Vetting Procedures**

**You should have worked through InfoSheet 2.6; Vetting Procedures and Section 2.6 of this workbook before moving on to this section.**

You should have decided on your procedures for interviewing and selection of volunteers, and also your procedures for taking up references.

You should also have decided whether or not you will carry out CRB checks on your volunteers. InfoSheet 2.6 of the Good Practice Guidelines can help you with this, but you may need to seek further advice and support from any of the organisations listed in Appendix V of the Guidelines.

#### **2. Written policies and practices**

##### **2.1 Treat clients with dignity and respect**

Do you have a written policy and rules outlining the types of behaviour that are or are not acceptable?

How do you ensure that your volunteers understand these principles? What training do you provide and how do you check that your volunteers have understood your policy?

# Set 3

## Part 3.3

### **2.2 Understand the nature of abuse**

How do you ensure that your volunteers understand what abuse means and the procedures for reporting abuse if they witness it? For example, do you provide training in child protection procedures or procedures for reporting the abuse of vulnerable adults?

### **2.3 Adopt work practices and codes of behaviour that minimise risks and protect both clients and workers**

Everyone in the organisation should be clear about their role, about your organisation's aims and values and about the accepted codes of behaviour. They should also know to whom they should report any concerns about clients or other members of staff or volunteers.

**How do you ensure that your volunteers are aware of their roles and the importance of working within their task descriptions? Do you provide training to help volunteers understand which tasks they should not carry out?**

# Set 3

## Part 3.3

### 2.3 (Continued)

**Define the role:** Are you clear about what volunteers will be expected to do? Have you drawn up a volunteer task description and a list of the qualities, skills and experience you are looking for? (See InfoSheet 3.2 and Set 3.2 of this workbook for further guidance).

Do you feel that your volunteers have clearly defined roles that minimise risks to your service users/clients and to volunteers themselves? How do you ensure that the roles your volunteers undertake effectively minimise risk?

Do you have policies which protect your volunteers as well as your clients, for example, that no volunteer should be left alone with a child? How do you ensure that your volunteers are aware of and understand these policies?

### 3. The importance of good training and support

Help your volunteers to carry out their duties by providing support and training. Having an effective system for support and supervision of volunteers will help you to assess their general competence, the development of relationships with co-workers and clients and to identify any training needs.

Sets 3 and 4 of this workbook can help you develop quality volunteer management, support and supervision systems.

# Set 3

## Part 3.3

### 4. Develop a written policy on the protection of children, young people and vulnerable adults

#### 4.1 Do you have a policy on the protection of children and/or vulnerable adults?

If not, what is your plan for developing this (see InfoSheet 3.3 for more information about how to develop such a policy)? You may also need to contact other organisations (e.g. the NSPCC for further advice).

How do you ensure that your volunteers are aware of and understand this policy (or are allowed to contribute/comment on your draft policy if you have not yet written it)?

# Set 3

## Part 3.3

### 5. Specific recruitment procedures for volunteers who will be working with children, young people or vulnerable adults

#### **5.1 Adopt consistent and effective recruitment and selection procedures**

The key to good recruitment is to apply your policy and procedures consistently with all potential volunteers. Explain to anyone who questions a procedure that it is the routine practice of your organisation and an important way of managing risk.

Do you have a consistent recruitment and selection process that everyone uses and understands?

How does your recruitment and selection process help minimise the risks to your clients or service users?

### 5. Establishing links with other organisations

6. It is a good idea to make contact with and establish links with voluntary organisations such as the NSPCC or Age Concern. Such organisations often involve volunteers and have specific procedures in place for minimising risk.

Which organisations do you feel you could share ideas about good practice with?

Who will be responsible for making the initial contact with these organisations and maintaining links in the future?

# Set 3

## Part 3.3

**LEVEL ONE - Implementation Plan - InfoSheet 3.3**

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

**LEVEL ONE - Implementation Plan - *InfoSheet 3.3* (continued)**

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

# Set 3

## Part 3.4

### Area:

### **Set 3**

### **Management of Volunteers: Personal Boundaries & Confidentiality (InfoSheet 3.4)**

You may have already thought about this in Parts 3.2 and 3.3 of this Workbook, particularly if your volunteers will be involved with children, young people and/or vulnerable adults.

It is a good idea to have a written policies setting out how far volunteers should become personally involved with your service users or clients. This is to protect your volunteers as well as your service users. Risk can be minimised if both volunteers and service users understand your policies and the reasons for them.

Volunteers should also understand what confidentiality means and also your confidentiality policy. They should understand the processes for sharing information for others and also be clear about the circumstances where they should maintain confidentiality.

#### **1.1 Confidentiality Policy**

##### **1.1 Your Confidentiality Policy**

Do you have a confidentiality policy?

If not, do you feel that you need a policy in order to protect your service users or clients (think about whether your volunteers have access to personal information about clients which is held by professional staff)?

If you feel you need to develop a confidentiality policy, think about how you can go about writing one for your organisation. What will you need to include and how will you consult with your volunteers, service users and staff?

### 1.1 Your Confidentiality Policy (continued)

How will you ensure that your volunteers know about and understand your confidentiality policy (e.g. training, induction, etc.)?

## 2. Personal Boundaries

Think about the dos and don't's of your volunteers roles (see InfoSheet 3.6 for a full list of the things you may want to include). Circulate this list to your volunteers and your service users and make sure that everyone understands it.

### 2.1 Volunteer dos and don't's:

***Challenging others' behaviour (e.g. staff and service users):***

***Respecting and supporting other people:***

# Set 3

## Part 3.4

***Socialising (including sexual contact and relationships):***

***Personal Information:***

***Drink/drugs:***

***Participating in Illegal Behaviour:***

***Gifts:***

***Lending/Borrowing:***

***Buying/Selling:***

***Visiting clients/service users at home:***

# Set 3

## Part 3.4

### LEVEL ONE - Implementation Plan - *InfoSheet 3.4*

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

**LEVEL ONE - Implementation Plan - *InfoSheet 3.4* (continued)**

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

# Set 3

## Part 3.5

### Area:

### **Set 3**

### **Management of Volunteers: Risk Assessment and Risk Management (*infoSheet 3.5*)**

#### LEVEL ONE

The Good Practice Guidelines explain the importance of carrying out a full risk assessment for each volunteer role.

It is a good idea to carry out a risk assessment every time you involve a new volunteer, in case he or she has a medical condition or extra support needs which may mean that the role subjects your volunteer to extra risks.

**By completing risk assessment forms for each volunteer you can identify and manage risk by eliminating or reducing risk to an acceptable level (see Appendix IV of the Good Practice Guidelines for a sample form).**

#### **1. Procedures for carrying out risk assessment**

*1.1 Which staff member will carry out a risk assessment for each new (and existing) volunteer?*

*1.2 Does this person need extra training to allow them to carry out this role? (See Appendix V of the Guidelines for information on organisations who provide such training).*

*1.3 What is the procedure for ensuring that risk assessments are carried out for each volunteer and at what stage will the form be completed?*

# Set 3

## Part 3.5

### LEVEL ONE Implementation Plan - *InfoSheet 3.5*

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

# Set 3

## Part 3.6

### Area:

### **Set 3**

### **Management of Volunteers: Volunteer Records and Data Protection (InfoSheet 3.6)**

Organisations who employ staff and/or involve volunteers will almost certainly be subject to the 1998 Data Protection Act and as such must adopt principles of good practice in relation to personal information kept on volunteers.

InfoSheet 3.6 contains an explanation of Data Protection principles and a sample data protection policy that your organisation may be able to adopt.

If you decide to adopt this sample policy for your group or organisation, you will need to put together an implementation plan to help you implement your new policy.

You will need to consider whether the information you collect about volunteers is strictly relevant – think about whether you are holding unnecessarily detailed information about your volunteers and whether what you record in writing is relevant to your volunteers' roles. You may need to change your procedures around destroying data and keeping data up-to-date and you may need to arrange for better security when it comes to personal files (for example, keeping volunteers' files under lock and key).

Look at the Policy in InfoSheet 3.6 and then fill in the implementation plan below.

# Set 3

## Part 3.6

### LEVEL ONE Implementation Plan - *InfoSheet 3.6*

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

**Set 3**  
**Part 3.6**

**LEVEL ONE Implementation Plan - InfoSheet 3.6**

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

# Set 3

## Part 3.7

**Area:**

**Set 3**

**Management of Volunteers: Volunteer Rights, Expectations & Agreements (*infoSheet 3.7*)**

**LEVEL ONE**

InfoSheet 3.7 of the Good Practice Guidelines sets out the rights that volunteers can expect to enjoy whilst they are involved with any organisation.

You may wish to set these rights (and responsibilities – covered later) out in a form that you and the volunteer both sign.

However, you first need to ensure that you actually do offer these benefits to your volunteers.

***Don't worry if you are unable to complete any of the boxes – go back to them once you have completed this Workbook as at that point you will probably have met all of the requirements.***

**1. Ensuring that your organisation respects volunteer rights**

***Fill in each of the boxes in this section, stating what you do to ensure that your volunteers enjoy each of the rights listed:***

*1.1 To work in a healthy and safe environment*

*1.2 To be interviewed and offered a volunteering placement in accordance with equal opportunity and anti-discrimination legislation*

*1.3 To be adequately covered by insurance*

# Set 3

## Part 3.7

*1.4 To be given accurate and truthful information about the organisation for which you are working*

*1.5 To be given a copy of the organisation's volunteer policy and any other policy that affects your work*

*1.6 Not to fill a position previously held by a paid worker*

*1.7 Not to do the work of paid staff during industrial disputes*

*1.8 To have a task description and agreed volunteering hours*

*1.9 To have access to a grievance procedure*

# Set 3

## Part 3.7

1.9 To be provided with an induction to the organisation

1.10 To be provided with adequate supervision and support

1.11 To have confidential and personal information dealt with in accordance with the principles of the Data Protection Act 1998

1.12 To be provided with sufficient training to do the job

Once you have met all of the above points, they can be included in your Rights and Responsibilities Statement which should be signed by both organisation and volunteer. They can also be included in your Volunteering Policy.

### **1. Ensuring that your organisation informs volunteers about their responsibilities**

Volunteers also have responsibilities. The list given in *infosheet* 3.7 might form the basis of your list of volunteers' responsibilities.

You may wish to set out these responsibilities (and rights – see above) in a form that you and the volunteer both sign.

However, you first need to ensure that you actually do have these expectations of your volunteers and that you ensure that volunteers are aware of them and are offered training where necessary.

**Fill in each of the boxes in this section, stating what you do to ensure that your volunteers are aware of each of the responsibilities listed:**

# Set 3

## Part 3.7

*1.1 Not to take on more responsibility than you can handle or deviate from your task description*

*1.2 To meet time commitments or to provide notice so alternative arrangements can be made*

*1.3 To perform the tasks assigned to you to the best of your ability*

*1.4 To attend induction training*

*1.5 To report any problems to your supervisor*

*1.6 To follow Child Protection Guidelines (if applicable)*

## Set 3

### Part 3.7

*1.7 To follow organisational policies and procedures, including equal opportunities*

*1.8 To respect those confidences entrusted to you*

*1.9 To be open-minded and respectful towards opinions shared with you*

*1.10 To notify the organisation in advance of absences or schedule changes*

Once you have ensured volunteers are aware of all of the above points, they can be included in your Rights and Responsibilities Statement which should be signed by both organisation and volunteer. They can also be included in your Volunteering Policy.

# Set 3

## Part 3.7

### LEVEL ONE Implementation Plan - *InfoSheet 3.7*

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

# Set 3

## Part 3.7

### LEVEL ONE Implementation Plan - *InfoSheet 3.7*

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

# Set 3

## Part 3.8

### Area:

### **Set 3**

### **Management of Volunteers: Supervision, Review and Grievance Procedures (*infoSheet 3.8*)**

#### LEVEL ONE

Regular supervision gives you the chance to check that the volunteer is enjoying their role, whether they need extra support, whether they would like to expand or change what they are doing, whether they would like more training, and how they are getting on with staff, clients and other volunteers. It also shows the volunteer that their work and development is important to the organisation.

#### **1. Deciding the level, method and content of supervision**

The method of supervision you use (and the time you allot) will depend on the volunteer and the task they are doing. More complex roles, e.g. supporting vulnerable adults or children, may require more intensive supervision, perhaps a one-to-one session with a supervisor on a regular basis, perhaps fortnightly or monthly. Some roles may require less supervision and in some cases, supervision can be provided in groups, where everyone attends to discuss issues (Note – this method may not be suitable if there is a need to protect client confidentiality).

*1.1 Method of supervision, time allotted and reasons why this is appropriate for the volunteer (and their role):*

*1.2 Person/s responsible for providing supervision to volunteers (this person should always be a member of your paid staff):*

# Set 3

## Part 3.8

*1.3 Issues to be covered in supervision (for example, what the volunteer likes/dislikes about the work, what is going well and what not so well, any problems/issues/barriers, what the volunteer is pleased with and where he or she needs extra training and/or support. You should also give the volunteer the opportunity for general discussion about themselves and how things are going.*

*Make a list of things you need to cover and decide whether you need to design a standard form for your staff to use when carrying out supervision sessions with volunteers.*

# Set 3

## Part 3.8

*1.4 How will you ensure that you show your appreciation and thank the volunteer for their work during supervision sessions?*

*1.5 How will you make volunteers aware of:*

*The importance of supervision?*

*The availability of supervision and when to attend (and with whom)? (Note – this may be a more informal process, but your supervisors should always offer supervision rather than your volunteers having to ask for it).*

*1.6 How will you ensure that any issues or problems that arise during supervision are dealt with/resolved by the appropriate person (i.e. the manager of the service)?*

# Set 3

## Part 3.8

### LEVEL ONE Implementation Plan - *InfoSheet 3.8*

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

# Set 3

## Part 3.8

### LEVEL ONE Implementation Plan - *InfoSheet 3.8*

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

# Set 3

## Part 3.9

### Area:

### Set 3

### Management of Volunteers: Involving and Consulting Volunteers (InfoSheet 3.9)

#### LEVEL ONE

InfoSheet 3.9 explains the importance of consulting with volunteers about your service, policies and procedures, etc. Volunteers who feel involved in the life of your organisation are more likely to feel valued and thus more likely to continue volunteering with you.

#### 1. Areas in which you consult volunteers (please tick):

Changes to service delivery or other organisational changes

Changes in any aspect of your volunteering policies

Development of your organisations policies (e.g. equal opportunities, etc.)

Changes in ways of doing things/procedures

Changes in volunteer roles

Changes in any aspect of your volunteering policies (e.g. expenses, supervision procedures etc.)

Generation of new ideas, projects and ways of tackling problems

*1.1 List any of the above items you have ticked and state how you already consult your volunteers.*

*For each item, consider whether you are consulting broadly enough and whether you can improve your methods.*

*Also, for each item you list, think about how the results of your consultation contribute to your final decision making process – do volunteers' comments really matter within your organisation?*

# Set 3

## Part 3.9

1.1 (continued)

# Set 3

## Part 3.9

### 2. Plans for consulting with volunteers more broadly

*2.1 List any of the above items you have not ticked and state your ideas for how you could consult your volunteers on the issues you have not covered.*

*Think about methods of consultation – will you invite a volunteer to your team meetings (or perhaps ask them to elect a volunteer representative to attend if you have lots of volunteers).*

*Also, for each item you list, think about how the results of your planned consultation can contribute to your final decision making process – will volunteers' comments really matter within your organisation?*

# Set 3

## Part 3.9

2.1 (continued)

# Set 3

## Part 3.9

### LEVEL ONE Implementation Plan - *InfoSheet 3.9*

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

# Set 3

## Part 3.9

### LEVEL ONE Implementation Plan - *InfoSheet 3.9*

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