

# Information Bank



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In this guide you will find advice on how to involve volunteers successfully in your group or organisation.

## Sections:

<b>Planning for Volunteers</b>	<b>Page 2</b>
<b>The Essentials</b>	<b>Page 10</b>
<b>Getting Recruitment Right</b>	<b>Page 15</b>
<b>Choosing the Right Volunteer</b>	<b>Page 20</b>
<b>Supporting Volunteers</b>	<b>Page 29</b>
<b>Challenging Situations</b>	<b>Page 34</b>

# Planning for Volunteers

**What is a volunteer?**

**Why do people volunteer?**

**What gets in the way of people volunteering?**

**What can be done?**

**Will it cost anything?**

**Are you clear why you need volunteers?**

**Roles and responsibilities – what do you want volunteers to do?**

**Who else needs to be involved?**

**What is a volunteer manager?**

**Check list - before you involve volunteers**

## What is a volunteer?



Volunteering is about people giving their time to take part in activities that benefit others. Many people are involved in activities where they don't even realise they are volunteering! For example, they may be the secretary of a club or group, or help run a local sports or arts group. They may be members of the local parent and teacher association or residents groups, or enjoy clearing litter from the local wildlife areas with a group of others.

Also, there are volunteers who take on more 'formal' roles in local charities or voluntary sector groups, doing anything from administration, to visiting older people in their homes, driving, campaigning..... volunteers can get involved in almost anything!

The Compact Code of Good Practice on Volunteering says that a volunteer is someone who takes on "...an activity that involves spending time, unpaid, doing something that aims to benefit the environment or individuals or groups other than (or in addition to) close relatives".

The Compact was published in 2005 and it is an agreement on relations between the Government and the Third Sector in England.

## Why do people volunteer?



Volunteers are all different and there are as many reasons for volunteering as volunteers!  
Here are just some of them:

- To gain experience
- To help in the local community
- To feel they are contributing i.e. self satisfaction
- To learn new skills
- To improve their CV
- To give back to society
- To meet new people
- To change lives
- To open doors for the future
- To dispel boredom
- To feel valued – a basic human need
- To build confidence and self esteem
- To prepare for going into “real” jobs via contacts/discipline
- To provide an insight into other people’s way of life and experiences
- To try something different
- To make new friends
- To have a challenge
- To lead on a project or to be part of a group
- To “Change the World”
- To have fun!



## What gets in the way of people volunteering?

There are a number of barriers that may stop people from volunteering. Some barriers are less obvious than others.

Common barriers:

- Time
- Age
- Disability
- Money
- Perception

## What can be done?



- Market the roles to the harder to reach groups such as BME groups and encourage diversity.
- Use images and language that promote and reflect diversity.
- Create a variety of different types of volunteering opportunities that can be undertaken by someone with various levels of skill and commitment
- Provide transport if necessary
- Reimburse expenses including childcare, travel, meals
- Adapt your premises to have disabled access
- Be ready to adapt a role to suit individual volunteer's needs
- Offer training and support
- Wherever possible minimise the bureaucracy and response time to potential volunteers

## Will it cost anything?



Yes, volunteers give their time, energy and skills free of charge. However, volunteers are not cost free.

You will need to consider out of pocket expenses, as volunteers give their time freely, but should not be out of pocket financially. Think also about whether the insurance you have is suitable to cover the needs of your volunteers, and also are any other expenses involved in supporting the volunteers.

## Are you clear why you need volunteers?

Volunteers should not replace paid staff, but provide an add-on benefit to the organisation. If you are unclear why you need volunteers, this website will provide necessary information. In this section there is plenty of information that will help you to understand the role of volunteers and issues that you might think about before engaging volunteers.

There are few points that will help you to clarify why you need volunteers.

- Are the roles that you want volunteers to do fair and fulfilling? Will they satisfy the needs of volunteers? (see the volunteers motivation section)
- Are you clear what a volunteer is and what motivates them?
- Think about the tasks you want your volunteers to do.
- Think about what volunteers will want from you and your group/organisation. Why would they want to volunteer for you?
- What other benefits will they gain from volunteering with your group/organisation?

## Roles and responsibilities – what do you want volunteers to do?

Both your group or organisation and the volunteers themselves will have expectations of what their role will be – it is up to you to plan what you want from the volunteer, and to clarify their responsibilities. The volunteer can then decide if that is what they want to be doing. It is also possible to design roles and responsibilities around the interests, skills and knowledge of the potential volunteer. Again, clarifying the role is essential for both the organisation and the volunteer before they start.

By giving their time, energy, skills and commitment, volunteers are contributing to your organisation. This contribution should be recognised and acknowledged.

## **Who will manage or support volunteers within your group or organisation?**

Volunteers will need to feel that they have a direct contact within your group or organisation – so you will need to consider who that person will be.

It could be a member of staff or committee, with experience in leading a team, or it could be an identified volunteer, or group of people, all of whom can support the volunteers.

## **How will everyone work together?**

It is important that when your group or organisation first involves volunteers or establishes new volunteer roles it makes sure that everyone in the group is aware of that, including your Committee or Board of Trustees - after all, they are volunteers as well!



Think about how everyone will work together – volunteers, paid staff, service users and external groups.

Work with your committee or colleagues to define what volunteers will do. Consider who else will be involved with volunteers, what will their relationship be? It is really useful to do this so that there is no confusion of roles later.

## **What is a volunteer manager?**



Lots of people are involved in managing, supporting, coordinating and organising volunteers. This may be in paid employment or in a volunteering capacity. Many of them don't call themselves volunteer managers - but they just get on with the job!

## **What do 'volunteer managers' do?**

Not everyone who finds themselves supporting volunteers will have the official title of 'volunteer manager' - but if you find yourself organising, leading, co-coordinating and supporting the activities of the volunteers - then you are fulfilling that role.

In many local community groups this role may be taken by a member of the committee, or, where the group is self-managed, a member of the team who picks up the role to get things done.

In some organisations the role of volunteer manager is an “add on” to the main job of a paid member of staff.

## **A list of tasks that volunteer manager may do:**

Think of how you get things done in your group:

- A task needs doing, who co-ordinates the activity, makes sure people turn up, supports others and ensures that it happens?
- What skills were needed to get the task done?
- Identify what individuals would do
- Find and recruit extra people if necessary
- Explain to them how to accomplish the task
- Co-ordinate the activity of the task
- Support, encourage everyone to achieve the task
- Thank everyone at the end of the task

## **We asked a group of volunteer managers to come up with a list of skills and abilities needed for their role. They said:**

*Attitudes and personal qualities may include:*

- Enthusiasm
- Patience
- Tolerance
- Commitment
- Sense of humour
- Flexibility
- Adaptability
- Confidence
- Leadership
- Ability to relate to a wide range of people
- Self motivation

- Approachability
- Tact
- Willingness to learn

*Knowledge and understanding may include:*

- Background to the organisation
- Knowledge of local area
- Ethos of volunteering
- Diversity
- Good practice
- The law relating to volunteering

*Skills may include:*

- Interviewing
- Managing people
- Administration
- Mediating
- Motivating
- Monitoring and evaluation
- Communication
- Problem solving
- Organisation
- Teaching/training
- Ability to say “no”

## **How do we develop in these areas?**

*Attitudes and personal qualities:*

- Being open to influences around you
- Putting yourself in other peoples shoes
- Stepping back from day to day demands of job
- Training on self awareness and human relations
- Getting feedback (structured observation)
- Group discussions and role play

*Knowledge/understanding:*

- Reading
- Talking to experienced people/experts
- Training
- Asking questions
- Observing/shadowing

*Skills:*

- Training
- Practice
- Observation/shadowing

That is quite a list of skills and abilities!

## Check list - before you involve volunteers



- Is everyone in the organisation informed/consulted about plans to involve volunteers?
- What will change for those already involved with the organisation (staff, trustees, service users, other volunteers)?
- Is there a person/people who would supervise and support volunteers?
- Have you ensured that the people supporting volunteers are suitably skilled and trained?
- Is there a budget to cover cost of supervision staff, expenses, admin, training, CRB checks and any other expenses that are applicable to the role?
- Are there enough resources to involve volunteers such as space, computer, desk, etc?
- Have you analyzed any risk in relation to volunteers and to the organisation?
- Have you got an adequate insurance that cover volunteers?
- Have you prepared necessary processes and policies that cover volunteers and are different to the paid staff?
- Are you ready for the new ideas, changes and new skills that volunteers often contribute?
- Are you ready to apply and update good practice in volunteer management?

# The Essentials

## Policies and procedures

Why do you need them?

Developing a volunteer policy

How is volunteering different from staff?

What is essential?

What is useful to have as well?

## Policies and procedures

Policies define your organisation's values and ethos. They provide a sound base for structures and boundaries within the organisation. *They also clarify responsibilities and define lines of communication and accountability.*



## Why do you need them?

In short, policies and procedures are the building blocks for your group or organisation. They are the evidence of what you aim to achieve and how to do it.

Once policies are written it makes life easier. They make things clear for other people in the group or organisation, by establishing guidelines.

## Developing a volunteer policy



Developing a volunteer policy doesn't need to be daunting. The document can be short and simple as long as you cover the necessary areas.

To make it sound a bit more approachable, think about your volunteer policy as ideas on how your organisation is going to deal with volunteers. Writing it down will help you to make sure that you and the rest of your group are clear about what everyone needs to do and how it will be done.

It also proves that you are serious and value your future volunteers.

## **What are the elements of the policy?**

- **Introduction**

Why you need volunteers and why you involve them? Is involving volunteers in line with the values and aims of your organisation? If so, why?

- **Recruitment**

What are your recruitment procedures?

How will you advertise?

What are your recruitment methods?

How and when will you request references and/or CRB checks?

What are your selection processes?

- **Induction and training**

How are volunteers welcomed into the organisation? What information are they given?

What training if any is essential to the role? What opportunities to develop skills will volunteers have?

- **Expenses**

Are you going to cover expenses (what kind, are there limits)?

- **Support and supervision**

Who will provide support and supervision?

How and when will it be done?

- **Insurance**

What is the insurance cover? Are there any restrictions?

- **Equal Opportunities**

Have you got an equal opportunities policy that covers volunteers? What will it cover?

- **Health and Safety**

What have you in place to ensure a safe volunteering environment?

- **Problem Solving**

How, and to whom, can a volunteer raise concerns? How will you address problems that might occur with volunteers?

- **Confidentiality**

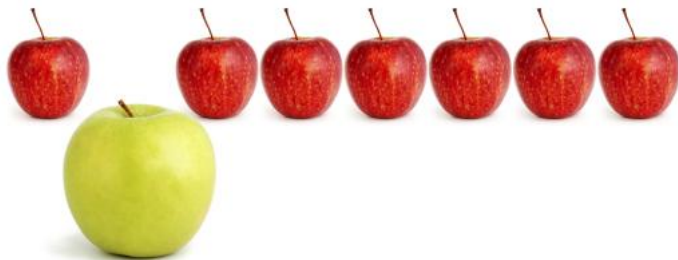
What have you got in place to protect your clients', volunteers' and organisation's confidentiality?

## How is volunteering different from staff?



It is important to remember that volunteers do not replace staff members – but ‘add value’ and support to your organisation. It is always a good idea to talk through with other staff members the roles of volunteers in your activities. Having all staff ‘on board’ with the plans will make it much easier to integrate volunteers into your team.

You may have a number of policies already in place. It is important though to remember that, legally, volunteers are different from paid staff. Volunteers, unlike paid staff, are not covered by the same employment legislation. This means that they should not be treated as an ‘unpaid staff’ but as a separate group.



According to Volunteering England Information Sheet Volunteering England 2009, Volunteer-Friendly Words, [www.volunteering.org.uk](http://www.volunteering.org.uk):

*There is no clear set of legal rights for volunteers in the UK. Volunteers have some rights as citizens, such as the right for others to take reasonable care of their safety or the right for their personal data to be used and stored appropriately.*

*But volunteers do not have any legal entitlement to the*

*types of rights enjoyed by paid employees. Therefore it is misleading to suggest that volunteers have formal rights to receive expenses or support and supervision.*

*It can also be unfair to suggest that volunteers have a formal 'right to complain' or a 'right to be treated fairly', when employment laws and anti-discrimination laws do not legally apply to them'.*

The good practice is to draft appropriate policies that relate to volunteers. You can find the list of essential policies and samples in the below section.

There are certain words that relate to paid staff that should be avoided when drafting policies relating to volunteers. We have prepared a list of words that are commonly confused. It is best to avoid the vocabulary associated with employment to clarify the boundaries between the volunteering role and formal employment.

Employment contract whether verbal or written has legal obligations. To avoid creating an employment contract with your volunteers, it's important not to use the word 'contract' and only reimburse out of pocket expenses.

What also helps to create a clear distinction between paid staff and volunteers is to use different vocabulary and tone when writing policies. Avoid words such as 'dismissal' or 'terminate'.

<b>Employment</b>	<b>Volunteering</b>
Volunteer contract	Volunteer agreement
Volunteer job description	Volunteer role or task description
Person specification	Personal qualities or skills
Grievance and Disciplinary procedure	Problem-solving procedure or Complaints procedure or Raising concerns policy
Rights and responsibilities	Reasonable expectations
We are an equal opportunities employer	We are committed to working with volunteers from a diverse range of backgrounds
Interview	Informal chat or Informal interview
Trial period or Probationary period	Introductory period
CRB check	Criminal Records Bureau Disclosure
Subsistence allowance	Out-of-pocket expenses

We will pay volunteer expenses	Volunteer expenses are reimbursed or We can cover volunteer expenses
Honoraria or Honorarium	Thank you gift (for example: for outstanding contribution or long service etc)
Placement or Vacancy	Volunteering opportunity
Voluntary worker	Volunteer
Incentives	Motivations

## What is essential?

- volunteer policy
- volunteer agreement
- expenses form
- support and supervision plan included in the volunteer policy
- insurance that cover volunteers

## What is useful to have as well?

If there is a good structure of policies and procedures within which to manage your volunteers, many problems can be prevented. It is impossible to pre-empt all difficulties, which is why we also are including policies for dealing with problems and resolving disputes.

The following list can be adjusted for your own organisation:

- Role descriptions
- Selection and recruitment
- Supervision record form
- Induction process
- Vetting (if appropriate) and references
- Discipline and grievance
- Health & Safety
- Equal Opportunities
- Ground rules / boundaries
- Code of conduct
- Consultation and feedback
- Training
- Support and supervision for volunteers and the staff who manage them
- Retention and recognition policies and framework
- Volunteer Review form
- In addition, the whole organisation needs to be well managed so that both staff and volunteers can concentrate on delivering the best service possible.

# Getting Recruitment Right

**How to plan your recruitment**

**Marketing your volunteer opportunities**

**What's so special about your group/organisation?**

**Attracting volunteers**

**Make recruitment effective**

**Removing barriers - recruitment tips**

If you plan ahead and prepare well you'll be rewarded with the right volunteers. Here are some tips on 'how to'.



## How to plan your recruitment

- Decide who is going to be responsible for recruiting volunteers and who will be part of the recruitment team. You could include members of your committee, or other people who volunteer with you to help.
- Decide what you want volunteers to be involved with. This is where the role description comes in.
- List the qualities, skills, attitudes and interests that you would want from potential volunteers. This is the personal qualities and skills – you can divide this into essential and wishlist.
- Outline what your organisation can offer to potential volunteers; what is in it for them? Volunteers are not motivated by money, but they are motivated – what is so special about your organisation?
- Agree how many volunteers you would like to recruit. Volunteers want to be busy.
- When should recruitment take place? One volunteer at a time - which would mean an ongoing recruitment; or in groups once, twice or four times a year – what is most useful to you as an organisation?
- Where and how could you advertise? Where would the sort of people you are looking for look to find a volunteering role?



*For example:*

- Volunteer Centre
- Website – [www.do-it](http://www.do-it)
- Local newspaper
- National newspaper
- Library
- Community centre
- Particular interest groups
- Job Centre
- Local newsletters

Know who you're looking for and how to attract them.

## Marketing your Volunteer Opportunities



Marketing your recruitment is about getting your recruitment message across to individuals who might volunteer.

There are several marketing techniques that can be applied to volunteer recruitment. Your organisation wants to grab the Attention of people, to get their Interest, to bring out a Desire to be involved and to motivate people into Action to join you. This can be viewed as AIDA - Attention, Interest, Desire, and Action.

### **How will you market your opportunities?**

There are lots of ways to market your recruitment of volunteers. You may be able to identify a budget for recruitment, but probably you will be looking for low cost or free

ideas.

- Register your volunteer opportunities with Volunteer Centre Merton
- Register on the do-it website
- Printing posters, leaflets and other display materials
- Contact the local press, radio etc
- Develop a website
- Give presentations to local groups
- Take part in Volunteers Week – and any other Days or Weeks relevant to your group
- Investigate local Employee Volunteering programmes
- Look at national advertisements and pick up ideas from those
- Where is the best place for your promotional material?

## What's so special about your group/organisation?

Answering this question will help to design an effective recruitment campaign. Often volunteers are not attracted by the role, but by the ethos of your organisation. For example there might be many people who want to volunteer with homeless people, environmental causes or helping animals. They could volunteer in variety of different roles as long as they feel they contribute to the cause.

Finding something unique about your organisation could attract volunteers that will be committed to the cause and ethos. Don't forget to emphasise how their commitment will make a difference.

## Attracting volunteers



Interesting roles are a magnet to volunteers. Be open to adapt the role to suit volunteers' needs. Perhaps you can think of a role for a volunteer with a unique set of skills?

Are you offering roles that volunteers will actually want to do?

Before an organisation begins the process of recruiting volunteers, it needs to identify the tasks that are appropriate, and those that are inappropriate, for volunteers to do. A basic principle governing this process is that is that volunteers should complement, not cover, the work of any paid staff.

It may be tempting to identify tasks for volunteers that are easy to pick up and which involve little training (e.g. collating a mailing). The danger in doing this is that volunteers may be bored with the work, and that they feel that they have a low status within the organisation. Conversely, giving volunteers tasks which they find too challenging may also discourage them from getting, or staying, involved in volunteering. People will

differ in what they find too routine or over-challenging. It is important to be as flexible as possible and identify a range of tasks that volunteers could undertake.

*Attractive role check list:*

- Do you have work that would satisfy a range of motivations in volunteers, e.g. challenge, friendship etc
- Are there immediate short term tasks for volunteers to do if they, or you, are unsure of their involvement?
- Are there more complex long term tasks for people who are looking for development and commitment?
- Do you have work for people with varying amounts of time?

## **Make recruitment effective**

Effective recruitment is when you are getting the number or type of people volunteering that you want to involve in your organisation.

You may have regular sessions or training courses which you recruit to, or you may be able to recruit volunteers at any time.

If you find that you are not attracting the volunteers you would like, think about your recruitment process – what works well and what is not so effective? Might your current volunteer recruitment process be putting up barriers which discourage people from getting involved?

### **Your recruitment message**

The essential core of any recruitment message must be an emphasis on the benefits of volunteering to the potential volunteer.

Overcome the negative perceptions of volunteering by illustrating the range of activities; the benefits in terms of social contact, fun, development of skills, responsibility and new experiences; the achievements of existing volunteers.

Reduce anxiety over some of the practical difficulties – the payment of expenses should be made explicit and training and support given should be emphasised.

### **Defining your message**

What tasks might volunteers do?

Why is the project or their role in it worthwhile?

- What are the aims of the project?
- What is important/exciting/worthwhile about the project?
- What is special about the role of volunteers in the project?
- What will volunteers gain from being involved?

Who do you want to have as volunteers?

- What sort of skills are you looking for?
- What sort of experience are you looking for?
- What sort of attitudes, qualities are important?

What should people do if they are interested?

## **Removing barriers - recruitment tips**

If you are not getting the right or enough volunteers to apply for your roles, think what are the possible barriers. Below is a list that might help you to establish potential problems:

- An unintentional bias to particular groups of people
- A lack of sensitivity to age, race, culture, religion, gender or extra support needs
- The need for references and disclosures
- Lengthy application forms
- Publicity i.e. posters or leaflets – that don't stand out
- Using too formal language or terminology – simple English is always best
- Too general recruitment messages – that don't appeal to anyone in particular

If these, or any others, apply – think about what you can do to lessen or remove their impact.

# Choosing the Right Volunteers

## Selection methods

Saying “No” to a volunteer

Tools for selection

Screening volunteers

Good questioning techniques

What do volunteers need to know before they start?



Always bear in mind that it might take some time to find the right volunteers for your organisation – not everyone will be right – but when you find them they are a valuable resource.

## Selection methods

Having met and/or interviewed the potential volunteer, you can now decide if they have the qualities, skills, experience etc. that you are looking for.



If they have – let them know as soon as possible and tell them what happens next – when they start, who they will meet, and what their first sessions might involve.

It may be good to plan an introductory period – for both the organisation and the volunteer to decide if this is the right role for them. If this is the case, give them the date that the period ends, and keep to it. In some cases, it might be necessary to extend the introductory period – but still review it on the previously agreed date and plan a further date.

## Saying “No” to a volunteer



Your organisation might have decided that the potential volunteer is not suitable for the role they have applied for. In this case let them know and tell them how and why this was decided. It is best to do this face to face if possible, enabling them to ask questions. Honesty is the best policy in these situations, and, if your selection process has been clear, the reasons why they are not suitable will be very easy to explain and demonstrate.

You should always offer alternative options to a volunteer that you reject. You may have other opportunities within your organisation, you may know of other organisations that would be more suitable or you can refer them to, or back to, the Volunteer Centre. You may, in some cases, particularly if the individual is feeling vulnerable, offer to make the first contact with the Volunteer Centre for them.

If you use a personal qualities and skills and role description or list of roles when you are interviewing, you will have clear evidence to back up your decision if you decide not to take on a volunteer.

- Explaining that the person does not fit the necessary criteria will enable the volunteer to see why the placement is not suitable.
- It may be that you do not have the resources to give the volunteer the extra support that they would need to fulfill the role. If this is the case, it is worth saying as well.

By referring to the requirements of the role, you can assure the volunteer that the decision not to accept them was not the result of a subjective judgement.

If you are not quite sure about a volunteer, but they meet the criteria, or if they do not quite fit the criteria but you decide you can give some extra support, you may decide to accept them but to carefully monitor and supervise their role. Having an introductory period for all volunteers helps you and the volunteer to review their progress after a fixed period. If you do decide to have an introductory period this should apply to all the volunteers that you recruit and it should be made clear to people at the interview.

Do not offer to write and then send a letter along the lines of “I’m sorry there is nothing suitable at the moment, but we will let you know.” Being honest at the interview gives volunteers the chance to correct anything that you may have misunderstood, enables you to tell them what was good about the interview and gives you scope to discuss alternative options for them.

Be assertive. Accepting someone who is not suitable will probably be more difficult in the long run than clearly saying “no” to begin with.

## Tools for selection



Groups and organisations vary in their approach to the selection of volunteers. Small groups may have the approach of meeting with possible volunteers for an informal chat, whilst larger organisations may want a more formal structure for their interview process.

### Informal interviews

Think beforehand about what you need to know from the possible volunteer, and what they need to know from you.

Where is the best place to meet with them? This might be at the group session itself, before or after, so that they have time to see what you do, or somewhere completely separate. Whichever it is, make sure that you can completely concentrate on them for the interview without interruption.

You have already thought about the role you are looking for someone to fill - so having that with you will focus you on the skills etc that you are looking for.

Why are they particularly interested in helping this group?

When are they available?

What are they interested in doing with the group?

Any particular skills, abilities that they can bring to the group?

What support will they need to enable them to contribute?

How long do they think they might be involved for i.e. is it a time limited commitment or longer term?

What other questions would be relevant to your group?

Consider suggesting an initial trial period of a few weeks, so you can both decide if it is the right thing for the group and the individual.

It would also be useful to look at the notes on the "formal selection interview" as many of the points e.g. getting in touch with the person as soon as possible, are really important.

### **A formal selection interview**

- *Before the interview*

- You should respond quickly to a volunteer's request for an interview
- Be as flexible as possible about date, time, venue
- Give clear directions to the interview venue
- The volunteer should have received some information about the organisation before the interview
- Give the volunteer the name(s) of those who will be interviewing and what their roles are in the organisation

- *Your preparation on the day*

- If you have a receptionist let them know that a volunteer is expected and let them know their name
- Have a suitable venue away from other staff
- Set out the venue so you will be sitting facing the volunteer, without a desk or table between you
- If possible, make sure that your chairs are the same height
- Make sure that you will not be interrupted
- Make sure that you have allowed enough time for the interview
- Prepare mentally – switch off from any other work, do not appear harassed
- Have all the necessary information to hand

- *Introductory phase*

- Welcome the volunteer - 'thank you for coming, did you find us alright...'
- Introduce yourself again
- Explain the purpose and structure of the interview

- *Explain more about the organisation*

- The work that the organisation does
- The role that volunteers have within the organisation
- What you can offer to volunteers, e.g. expenses, support, training

- What your expectations of volunteers are
- What time commitment is needed
- *Ask information from the volunteer*

The information that you require will depend very much on the nature of the volunteer roles within your organisation and the person specification criteria you have identified.

- What is their motivation for volunteering?
- What do they want to do?
- Why are they particularly interested in your organisation?
- What time do they have available?
- What relevant experience, skills and interests do they have?
- What is their understanding of relevant issues – e.g. disability awareness?
- Any other factual information that you need to know

- *Ask questions from the volunteer*

- Do they have any questions at this stage?

- *Ending the interview*

You should aim to reach, with the volunteer, a decision about their suitability for volunteering with your organisation, based on the criteria laid down in the role description and person specification.

If you feel that the volunteer is not suitable you should explain this and show that it is because they do not meet the necessary criteria. If there is no other suitable role for them in your organisation, refer them back to the local Volunteer Centre or suggest other organisations that it may be more appropriate for them to contact.

Agree a next course of action. Taking up references, arranging a time for the volunteer to start with your organisation, letting them know when the training will begin.

Agree times when these next steps will happen – “I will take up your references and contact you when I have received them both”

Thank the volunteer for coming.

## Screening volunteers



Sometimes it is necessary to check on the suitability of an individual for your volunteer role.

Checks should only be made with good reason, and also with the prior consent of the potential volunteer. They are for the safety of the people who use your service, your organisation and for the volunteer themselves.

They are particularly relevant if the volunteer will be involved with:

- One to one contact with children or vulnerable adults
- Regular contact with children or vulnerable adults – in a group setting
- Home visiting/befriending
- Driving children or vulnerable adults
- Dealing with finances or being responsible for resources

So, in planning your volunteer roles, consider whether screening is necessary or not. If you are not sure, ask the Volunteer Centre for help.

This could take the form of:

- References – personal and/or from an employer or other professional
- Health check or reference
- Evidence of a particular qualification – if required
- Driving licence and insurance – if a driving role
- Disclosure of a criminal record – currently CRB but soon to be ISA

It will be necessary for you to record personal information on individuals in order to obtain any screening required. This is confidential information and will need to be kept securely, with access limited only to those who need to see it, and have received permission from the individual, to use it in any way.

You must only request information that is relevant to the volunteer role and your selection process. All information which has any personal details (including application forms) must be kept securely, within the guidance of the Data Protection Act.

## Good questioning techniques



### Empathising

By empathising you are appreciating the volunteer's position

- Acknowledge the volunteer's position and how they are feeling – they could be anxious, depressed, stressed, feeling foolish, feeling that they are wasting your time, worried about being rejected, feeling inadequate, nervous aggressive.
- Listen and look at the tone of voice, facial expression, body language – how is the volunteer feeling?
- During the interview reflect back by repetition, a phrase or sentence that has seemed significant. In this way the importance and intensity of the feeling is acknowledged.

### Rephrasing and summarising

These skills allow you as an interviewer to check your understanding of what has been said and to demonstrate that you are listening.

- If you are not sure what the other person means, repeat it in different words and ask if this is what is meant.
- Do not repeat back exactly what has been said. This indicates that you have heard the words, but not understood the meaning.
- When you are summarising focus on the main points or ideas.
- If you are unsure what to say next summarise. It may prompt the prospective volunteer to say more or develop another line of thought.
- Do not constantly rephrase and summarise as it can be very irritating for the person being interviewed.

### Listening

Listening is active not passive. Active listening is about making sure that you really are listening and that you show you are listening.

- Remember to listen
- Be seen to be listening – make eye contact, nod.

- Show that you are listening by summarising what the volunteer has said but in different words
- Don't be afraid to get someone to clarify what they have said if you are unsure what they mean.
- Avoid making judgements; be aware of your own prejudices.
- Distinguish between facts, opinions and preferences.
- Concentrate on both the words and the body language of the person.

## **Questioning**

Questions allow areas to be explored more deeply and to open up a new line of thought. There are two basic types of questions – open and closed.

- Open questions are useful for eliciting facts, feelings, opinions and preferences. How? What? Why?
- Closed questions produce precise, normally one word answers. Who? Where? When? Did you?
- Prompting – help someone by encouraging them to say something they find difficult, e.g. “are you saying that you would rather not work in the afternoon?”

## **Making sure you put the right impression across**

The person you are interviewing will notice and respond to your behaviour.

You need to be reassuring

You need to be interested and sympathetic

You need to be relaxed, calm and unhurried.

Speak quietly and slowly and make sure you are using language that the volunteer will understand – avoid jargon and abbreviations, keep your vocabulary simple.

Keep bureaucracy to a minimum; don't write anything down unless you must do so.

## **What do volunteers need to know before they start?**

### **Induction for New Volunteers**

A good induction for new volunteers is really important to ensure that they are supported through their first few sessions.

- Decide what and who it is important that they know. Listen to them – are there things you have missed in your induction plan?
- They need to know about the group or organisation – who is involved and who do they need to be introduced to?
- Who will the contact person be to answer any questions?
- They will need to know how they are covered by insurance, health and safety etc and how to claim any out-of-pocket expenses. Much of this information will be available to them through your Volunteer Policy.

Some organisations have a wide range of policies and procedures – which they will need to be aware of. Initially, it might help to give them a checklist of what is available and ask them to read through them a few at a time over the coming weeks/months. Fix a time, perhaps at a support session, to check with them whether they have any further questions about them.

Think about other ways of providing the information if reading is not possible.

### **Training**

Some roles may require training before the volunteer starts, which may be provided either by the organisation or by another agency. As part of your recruitment plan, make sure that potential volunteers are aware of essential training and that they are committed to attending.

Other training and learning opportunities may be identified later, through your support and review system which might help the volunteer's development.

### **Communications**

Volunteers provide a valuable contribution to groups and organisations. Encourage them to share their views and ideas for the group/organisation, give feedback and take part in the decision-making. A Support Group is one way of providing this opportunity.

# Supporting Volunteers

**Why is support needed?**

**Identifying methods of support for volunteers**

**Providing and recording support**

**Developing your volunteers**

**Celebrating your volunteers**

## Why is support needed?



Support and supervision is needed for all volunteers to:

- allow to view their concerns and ideas
- give and receive feedback
- make sure that the roles fulfill their motivations and that they are happy
- allow volunteers to progress
- assure that they are doing the right thing
- solve any problems that may have arise
- help you to manage volunteers
- help you to avoid any problems and resolve them if they arise
- help you to make sure that all your policies and procedures are being followed

The method that you choose will depend on the role and the individual volunteer. For example a long term volunteer will need a different type of support than a volunteer who provides help to your organisation on one occasion.

Different types of people need different type of support. Don't assume the level needed - ask. You can always try one method and review if it's working after some time. It is also a good idea to ask your volunteers if they need a certain kind of support (peer support, group, etc.) They may have brilliant ideas!

Think of a way to provide training or coaching that may help volunteer to adjust to their role.

## Identifying methods of support for volunteers

### Induction

Induction is the first step in supporting volunteers. The basic elements of induction are:

- Information about the organisation
- Where will they be based
- Staff and other volunteers
- The role they will be fulfilling
- What they will actually be doing
- Who will be the person who gives them regular support (possibly a named supervisor)

### **Informal Support**

This is important support for volunteers in small groups as well as larger organisations.

The "on the job" informal chats, get-togethers, social events, etc are a vital form of regular support.

For larger organisations, a more formal method of support would be valuable, see below.

It is also worth smaller groups to consider having a one to one session with each volunteer from time to time to ensure that there is an opportunity for issues to be raised, away from other people.

### **One-to-one with a named supervisor**

It is important that the volunteer knows exactly who they need to turn to should they have any questions. The person should be named at the induction and ideally be introduced at that stage.

### **Peer to peer support**

This enables an existing volunteer to support a new one. This is not only positive for the new volunteer but also to the existing one who gains a more responsible role.

### **Volunteer Meetings**

You can encourage your volunteers to meet regularly as a group to discuss projects, their involvement and to share ideas on development.

### **Group Meetings**

Volunteers would be able to chat to a supervisor or a member of staff in a group setting.

## **Providing and recording support**

### **Questions to ask in support sessions**



Any or all of these general questions can be adapted for use in your organisation with your volunteers.

- How accurately does your role description describe what you are doing? (Are there tasks you are doing that are not mentioned, or anything that you are not doing that is included)
- How well do you feel you are fulfilling your role description?
- Which aspects of your role have you found most rewarding and why?
- Which aspects of your role could be made more rewarding and how?
- Have you had any problems? Can we look at how they happened? Is there something that could be done to stop them happening again?
- Have you had any training? If so, what and how useful was it for you?
- Are there any areas of training that would help you to fulfill your role more effectively? If so, what?
- Are there any extra resources which could help you in your role?
- How adequate is your volunteering environment/ are the facilities for what you are doing?
- Do you find your role fulfilling? What could make it more so?
- To what extent do you get a sense of achievement from the volunteering you are doing?
- To what extent do you feel part of the team / part of the organisation?
- Are you getting the support and feedback you need from the rest of the team?
- To what extent are you getting what you want from volunteering with us?
- What areas of work would you like to do more / less of?
- Do you feel you are given sufficient opportunities to develop in your role as a volunteer?

## Developing your volunteers

Volunteers can develop formally and informally in your organisation.

Informal development can be achieved when a volunteer fulfils his or her motivation/s. They may gain confidence, friends, and fulfillment; acquire new skills and much more. To make sure their development is ongoing it is good to review their motivations and needs at the regular support sessions (see above).

Another aspect of the informal development is 'on the job' learning and getting new experience.

A formal development - training, could be provided to volunteers based on individual needs.

To establish the right kind of training think of what information, skills and attitudes volunteers need to successfully perform their tasks?

## Celebrating your volunteers



### Ground rules for making recognition effective

It must be:

- given at the right time
- given frequently
- varied – for role as an individual, as part of a team, from a supervisor, from the organisation
- honest
- given to the person, not to the role
- appropriate to the achievement
- consistent – with past praise, with praise to others
- individualised as much as possible
- paying attention to what you want more of

## Everyday ways of recognising volunteers



- greeting them
- saying "thank you" or writing thank you notes
- including them in socialising
- taking time to listen and talk to them
- involving them in decision making
- smiling
- enabling them to grow "on the job"
- showing interest in their personal life
- telling others about their achievements
- having a volunteer suggestion box
- reimbursing expenses promptly
- maintaining a folder of accomplishments
- bringing food to a volunteer meeting
- having social events
- mentioning their contribution at meetings, in a newsletter, the annual report, newspapers, local radio
- ask them to present their ideas at a meeting
- celebrate their birthday
- invite them to join an important project
- celebrate major achievements
- organise a visit to head office, other organisations

## Special ways of recognising volunteers

- invite them to major conferences, training events etc
- nominate them for local and national volunteer awards
- providing them where possible with good equipment
- honouring them for years of service
- inviting them to train or manage or support others
- giving them a new role

# Challenging Situations

## Ground rules - prevention

What could possibly go wrong?

Managing difficult interviews

How to let a volunteer go

## Ground rules - prevention



Providing regular support for volunteers is a way of ensuring that they are doing what you need them to do. You may be offering them opportunities to learn and develop their skills to enable them to be more effective, but sometimes a volunteer may not recognize the support that you offer and a challenging situation can arise.

Always try and resolve any problems by providing support, talking through the issues with the volunteer, in an honest and clear way. Involve others, e.g. members of your Committee or Board, to help you. What could be done differently to meet both the needs of the volunteer and the group/organisation?

Difficult situations are usually resolved with support, but, sometimes, on rare occasions, the situation may become irresolvable. This is when using your disciplinary process may be necessary – and it would be useful to involve members of your committee or Board of Trustees to help you in this.

## What could possibly go wrong?

### A volunteer is unhappy with the organisation

Unfortunately it sometimes happens that the volunteer is unhappy with the organisation. Most of the problems can be recognised and resolved if the organisation has clear structures and processes in place especially support and supervision.

Common problems:

- Organisation does not contact potential volunteers in time.  
**Solution:** Prepare and implement a strategy to answer potential volunteers as quickly as possible at least within 24 hours. If you get too many enquiries, review your roles and recruitment strategy. Have templates of emails that you could adapt

quickly to send to each individual enquiry.

- Volunteer is not happy with their role.  
**Solution:** Talk with a volunteer through their role, referring back to the role description, and why they volunteer. If necessary, try to find an alternative role or adapt an existing role. Remember - having clear recruitment practices and role descriptions will help you to choose the right volunteers from the start!
- Volunteer feels that they are not treated the right way.  
**Solution:** Again this solution comes down to regular support and supervision sessions. It is helpful to have a clear problem solving policy, so if the problem can not be resolved by the immediate supervisor, you and your volunteer know who, how and when they can address their problem further.

### **Organisation is unhappy with the volunteer**

We understand that it is a sensitive subject to deal with volunteers that seem problematic for the organisation. This is because they are not paid and not bound by a formal contract. However one of the principles of volunteering is 'mutual benefit for the organisation and the volunteer' so you need to be sure that your volunteers are right for the organisation and the tasks that they do. You also have (or if not yet, want to develop) a volunteer policy and volunteer agreement. This will help you to clearly show to volunteer what are the requirements, code of conduct, policies and procedures that the organisation is governed by. You can always refer to this document at the support session and review it with your volunteer.

### **Common problems:**

- Volunteer does not come at appointed times and doesn't let organisation know about it.  
**Solution:** At the support session you can review the agreement that you have with volunteers about the times that they have agreed to volunteer. Explain why it is important that they come on time. Remind them that they have been requested to ring if they cannot attend the session. Perhaps there are other reasons that prevent them from coming such as feeling unskilled, unsupervised, inadequate, lacking in confidence? Can you find solution such as training or support? Perhaps there are other reasons that you cannot help with but it will help the volunteer depart with a mutual understanding.
- Volunteer does not perform the tasks that they agreed to do.  
**Solution:** Take similar approach as to the above point. The reasons might be different but the technique for resolving it is the same.
- Volunteer does not behave in the appropriate manner.  
**Solution:** Refer to your policies and procedures and the code of conduct. Don't just hand it to the volunteer. Spend some time going through them with the volunteer and explain why they are important.

## Managing difficult interviews



Sometimes a formal approach needs to be taken - to resolve an issue. It is worth considering that this does not necessarily lead to parting ways with the volunteer, and needs very careful handling.

If all other possible approaches have been tried, a formal interview may be necessary.

### **Do your homework**

- Make sure you are fully up to date with all relevant facts
- Collect any documentation together
- Consider possible outcomes and decide on the most beneficial (this may be done with colleagues, if appropriate)
- If a “plan B” would be acceptable, bear it in mind
- Rehearsing how you will make your points and answer any predictable questions can help you feel more confident
- Write a plan for the interview that you can stick to.

### **Make sure all the practical issues are sorted**

- Make sure the person knows who they will be seeing and what their role is, when the appointment is made.
- If you have a receptionist let them know the person is expected and let them know their name.
- Have a suitable venue away from other staff.
- Set out the venue so you will be sitting facing the person, without a desk or table between you.
- Try to ensure that your chairs are the same height.
- Make sure that you will not be interrupted.
- Make sure that you have allowed enough time for the interview.
- Prepare mentally – switch off from any other work, do not appear harassed.
- Have all the necessary information to hand
- If safety might be an issue, schedule the meeting for when a colleague is around and easily accessible. Always sit between the person and the door.
- Dress appropriately – you must be comfortable, but remember you cannot complain about someone’s lack of professionalism, if you look scruffy.

## During the interview

- Remain cool, calm and collected at all times
- Take a breather by referring to your notes
- Keep focused on what is really most important – ensuring the best service to clients – not necessarily the volunteer’s needs
- Try to get agreement to your desired outcome if at all possible
- Do not allow yourself to be talked out of the outcome you want
- Make sure the volunteer is left in no doubt about the outcome, be absolutely clear and check they have understood
- Always thank the volunteer for their contribution to the organisation, no matter what the outcome.
- Make sure all relevant people know the new situation afterwards (they do not need to know the reasons why).

## How to let a volunteer go

Dismissing a volunteer is not the only option. It is an admission that the organisation’s systems have failed. One of the alternatives below may resolve the situation satisfactorily. Do not use them when dismissal is the only solution. The short term easy way out will only build more problems for the future.

- Re-supervise: the volunteer may not fully understand the rules or in the case of many young people automatically challenge boundaries. An alternative supervisor might make all the difference.
- Re-assign: a different role, location or group of people to work with may help
- Re-train: some people take longer to learn than others, we all learn in different ways, so try an alternative style of training
- Re-vitalise: burn out is not unusual in stressful volunteering situations. A break or change to a less demanding role should help.
- Refer: another organisation could have a more appropriate role, or the VC could find a new placement.
- Retire: Let them leave with dignity and major acknowledgement of their contribution. Awards and parties are good “send offs”.