

Working with Volunteers

Third Sector Workbook 7



Improving support
for a stronger third sector



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ACTion
with communities
in cumbria

The Third Sector Workbook Series

This publication is one of a series of workbooks that have been developed to help organisations to manage their activities and finances effectively.

The workbooks have been developed by a group of organisations working together. These are:

- Action with Communities in Cumbria
- AWAZ (Cumbria)
- Cumbria Disability Network
- Cumbria Youth Alliance
- Young Cumbria

Their joint work has been funded by Capacity Builders (Improving Reach) and the Big Lottery Fund (BASIS).

Throughout the workbooks we have tried to use some terms consistently. The glossary below should help when you use them.

When we say ...

We mean ...

Third Sector	Community groups, charities, social enterprises.
Organisation	Your group, club, society, village hall committee, trust, charity, etc.
Stakeholders	All the people with an interest in your organisation including clients, users, members, staff, volunteers, trustees, committee members and funders.
Governing Document	The rules that set out what your organisation can do, who its members are and how it will be run e.g. constitution, articles of association, deed of trust.
Infrastructure Group	Organisations, including those involved in developing this workbook, which provide advice and support to other Third Sector organisations.
Management Group	Your managing committee, Board of trustees, directors – those people legally responsible for your organisation and its work.
Activities	Your projects, services, village hall facilities etc.

Note: The contents of this workbook are accurate only at the time of writing. Groups are advised to check with the latest good practice guidance from their local Infrastructure Group or by visiting the Charity Commission Website.

A quick guide to working with volunteers



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Part 1 - Information

1. Introduction to the workbook

This workbook has been produced to help your organisation recruit and support a volunteer workforce.

Understanding how to attract, retain and manage volunteers will help your organisation:

- Increase the number of volunteers supporting your organisation.
- Increase the skills within your organisation.
- Allocate resources effectively.

This will help you to deliver your activities efficiently and effectively.

Appendix 1 provides detail of other organisations providing support to Third Sector organisations and useful websites.

2. What do we mean by volunteering?

Volunteers are people who give up some of their time to help individuals, organisations and causes out of choice, for no financial gain.

Volunteering is an expression of concern about something or somebody other than oneself. It involves putting in the time, effort and commitment to help fellow men, women or animals or to contribute towards a cause that the volunteer feels passionate about.

Volunteering is also about having the determination to put values and beliefs into action with a view to improving the quality of a person's life or the quality of a situation.

2.1. Why do you need volunteers?

Management Groups are made up of volunteers; if people are unwilling to take responsibility for the organisation, the organisation ceases to exist.

Many Third Sector organisations are run and managed by volunteers with no paid staff. Other organisations utilise volunteers alongside paid staff in a wide variety of roles from administration to the provision of services such as support for vulnerable adults, children, young people or practical conservation work.

Volunteers provide an unpaid, flexible workforce. Perhaps more importantly, they bring enthusiasm, a wide range of skills and passion.

Remember

Every charitable organisation in Cumbria relies on volunteers and without them we would be lost!

2.2. Who is involved with volunteers?

Volunteers are involved in many different areas of work within organisations. They will engage with:

- Other volunteers e.g. as part of the Management Group or supporting activities.
- Paid staff e.g. supporting activities, undertaking administrative tasks.
- The beneficiaries of the organisation e.g. supporting individuals or groups.
- Other organisations working with or in the same area as the organisation e.g. as representatives at meetings.

Many people will base their opinion of your organisation on their contact with the volunteer they meet, so it is vital that your volunteers:

- Are allocated roles which match their skills.
- Understand your aims and objectives.
- Understand your policies and procedures.
- Are well managed/supervised.
- Receive proper training.

3. Gathering information

Before you try to recruit new volunteers you need to gather together key information about your organisation, what you intend to do and who will manage the volunteers. This will help you decide how many and what kind of volunteers you need.

3.1. Your organisation

The Third Sector in Cumbria is extremely diverse. It ranges from small voluntary organisations with no paid staff, to larger service providers with many paid employees. It follows that the kinds of volunteers that each organisation requires to run its activities will vary enormously.

Organisations may need volunteers to:

- Fill positions in the Management Group.
- Support individuals.
- Support group activities.
- Co-ordinate community fundraising activities.

If you have already written a business plan, work from it to clarify the areas which depend on volunteer involvement. If you haven't, please refer to the workbook on *Business Planning*. If you don't want to write a full business plan for your organisation, look at your activities, the resources you need to operate and the environment you operate in, to give you an overview.

You need to be clear about what your organisation does i.e. its aims and objectives, so that you can recruit volunteers and place them in appropriate roles.

3.2. Your policies and procedures

You will probably already have a number of policies and procedures in place e.g. Safeguarding, Equality. Make sure that you understand and apply them when you recruit volunteers e.g. that you undertake CRB checks on people who are going to be involved in work with young people or vulnerable adults. Please refer to the workbook on *Policies and Procedures* for guidance.

You may decide to develop a volunteering policy to ensure a fair and consistent approach to dealing with all volunteers. This will also help volunteers to understand:

- Their role in your organisation.
- What they will be expected to do if they become a volunteer.
- How they will be treated.
- How they will be dealt with if things don't work out.

A volunteering policy should include details regarding:

- What your organisation does.
- Why it uses volunteers.
- The principles underpinning the way you will work with and support volunteers.
- How you recruit volunteers e.g. where you will advertise; whether you will ask for the volunteer to complete an application form; whether you will take up references.
- How you interview and select volunteers.
- Volunteer roles.
- The policies and procedures within your organisation that the volunteer will be expected to comply with.
- Line management e.g. who will be responsible for managing and supporting volunteers.
- The induction procedures volunteers can expect.
- The training and development opportunities available.

- The kind of expenses volunteers can claim.
- Any trial periods.
- Insurance; health and safety policies.
- Disciplinary and grievance procedures.
- Confidentiality – what type of information they may have access to and how will you ensure they treat confidential details appropriately.

At this point you might like to complete Action Sheet 1 *Your Policies* (page 16).

Remember

Your policies need to be consistent and your procedures followed. If you are working with vulnerable people make sure you apply your safeguarding policies.

3.3. Why people volunteer

It is useful to understand why people volunteer. This can help you bring people on board and help you keep them motivated so that they continue to enjoy volunteering for you.

People volunteer for a variety of reasons, sometimes altruism e.g. wanting to give something back and sometimes personal reasons e.g. having had a relative with a specific disability. People always volunteer for a purpose.

When 100 people were asked in volunteering polls “Why do you volunteer?” there were 100 different answers, but some clear common themes. The five most common reasons are listed below:

Reason number one - giving back

For many people it's a way of giving something back. Some say, “My mother was helped so much by this charity when she was dying I just wanted to show my appreciation and give something back”. Others say, “When I was growing up an organisation like this saved my life and gave me a reason to live. Now I am in a position to help others who are growing up and facing these same problems”. It will be important for this type of volunteer to be able to work on service delivery so that they are able to feel they are “giving back”.

Reason number two – meeting new people

People who are new to a neighbourhood or have been at home raising a family may not have had time to make new friends or integrate into the community. Volunteering is a great way of meeting new people and finding out about the community. Older people, when they retire, are often looking for new activities so may be a target audience for recruitment. If your volunteers tell you that this is why they have joined you, try to make sure that you offer them the chance to get out and about and meet people. Don't leave them in your back office alone just answering the phone!

Reason number three – gaining new skills

Someone may lose their job, be returning to work or simply find that their skill levels and experience don't match the jobs available. Volunteering offers a way of refreshing skills and gaining experience in a new area. Recently employers have been quoted as saying, “I look at the whole person and I am always interested to see what people do outside of their working life as it tells me a lot about them as a person”. If you offer training and development to your volunteers, you get something and so do they! Volunteers with these reasons in mind may only be “passing through” but you might be able to keep their support even when they move on to work or further education.

Reason number four – feeling useful

When people retire or lose their jobs they can find that time hangs heavy on their hands and they feel a lack purpose or direction. Volunteering helps them to feel useful again, as they can contribute to the community in which they live. We all like to be valued and feel we make a difference. It will be particularly important to these volunteers that you recognise and acknowledge their contribution.

Reason number five – try something different

Many people are stuck in the routine of a 9 to 5 office job. Volunteering in the evenings or at weekends, perhaps outdoors, gives them the opportunity to try new things and have fun. Talk to your volunteers and find out what they would like try. See if you can offer a variety of opportunities within your organisation that will enable people to try new things whilst still making a difference for your organisation and clients.

Remember

Understanding why people volunteer can help you with your recruitment procedures. It will also help you manage your volunteers so they stay with you.

4. Your existing resources

You need to look at the resources you already have within your organisation so that you can identify:

- What people and skills you have.
- What you need.
- What gaps need filling.

Consider:

- Your people. Look at who is already working in your organisation, either as paid staff or volunteer. Think about the amount of time people have available.
- Your skills. Look at the skills people already have.
- Your needs. Look at the skills you need. Look at the time associated with different tasks and activities.

Think about 'soft skills' and experience as well as qualifications.

Consider:

Enthusiasm - a positive attitude is vital, especially if when working, the volunteer is supporting people in difficult circumstances.

Impartiality - being able to take an objective view of a person's problems, even if they're of their own making. This is especially important when working with marginalised groups or groups with dependency issues or needs.

Awareness - being able to recognise other people's needs and able to look for ways to meet those needs.

Reliability - being willing to devote a set amount of time regularly. If an organisation is relying on volunteers and they don't turn up, it might mean somebody goes without a service.

Compassion - having an empathy with the plight of a particular person or situation.

Commitment - demonstrating passion for a cause.

Self-confidence - being able to work both independently and as part of a team.

Communication - being able to relate to both fellow workers and those your organisation is trying to help.

Willingness – being able to make suggestions for improvements.

At this point you might like to complete Action Sheet 2 *Your Resources* (page 16).

5. Volunteer roles

You need to make sure your existing volunteers have been matched effectively with their role. Make sure:

- Existing volunteers are happy carrying out the tasks allocated.
- Existing volunteers are using their skills appropriately.
- There are enough volunteers involved in activities. If one person is being overloaded they may simply 'burn out'.
- More than one person understands each volunteer role. If you rely on one volunteer and they suddenly drop out you need to know exactly what they do so that someone else can take over.
- The amount of time involved in each activity.

Once you have established the skills you have and the skills you need, you can identify the gaps and allocate volunteers accordingly.

Think carefully about how much time will be involved. Some people will be willing to volunteer for several hours each week; others will only have a few hours to spare over a month. Make sure you offer a variety of opportunities by breaking tasks down; you may be able to find several people to help out for short periods of time rather than overloading one person with a huge time commitment.

You should consider developing volunteer role descriptors which simply outline the tasks, duties and responsibilities that the volunteer will have to do.

Being clear about the tasks you expect volunteers to undertake and the time involved right from the start can help you:

- Recruit the right people – you can advertise for specific skills.
- Manage your volunteers – you both have a clear understanding of what is required.
- Manage your activities – it's easier to allocate your resources appropriately if you know how much time someone has to give.
- Induct your volunteers – you will know what information/support they need to carry out their tasks e.g. safeguarding training if working with young people/vulnerable adults. They will understand their role and your aims.
- Retain volunteers – if people know exactly what their role is, they will have realistic expectations and are less likely to feel disappointed.

Your organisation will probably be seeking some specific skills, and your volunteering opportunities will be unique to you, so it follows that each volunteer role description will be unique. At this point you might like to complete Action Sheet 3 *Volunteer Role Descriptions* (page 18).

6. Volunteer recruitment

6.1. Finding volunteers

Finding suitable volunteers can be difficult. Cumbria Council for Voluntary Services operate a matching service that can help to connect potential volunteers with suitable volunteering opportunities. Other support organisations are listed in Appendix 1.

A survey by the Institute for Philanthropy found that 49% of all Trustee appointments came through personal contact, so ask your current volunteers if they know of anybody who might be keen to come forward.

Contact local businesses to see if they have any staff members who may wish to volunteer. Many larger companies and banks encourage their employees to volunteer.

Approaching local businesses may be particularly relevant if you are trying to recruit a Company Secretary or Treasurer. In addition to recruiting someone with the right experience, you may be able to form links with the business. If you don't find the volunteer that you need, you might manage to get another kind of donation.

Think about the volunteers' motivation, make sure you point out the benefits for the volunteers e.g. access to training, If you can, break roles down into bite sized chunks so that potential volunteers don't feel overwhelmed or that you are asking too much of them.

Consider putting up notices in your premises; at local community centres; village shops; social clubs; and on church notice boards. Although there is a cost, it may be worth paying for an advertisement in your local paper.

Make sure you have a consistent approach to enquiries about volunteering opportunities e.g. if you have a shop front location, people might drop in off the street. Try to have a pre-prepared sheet that details any current volunteering opportunities, together with information about the organisation and a simple application form. Encourage people who enquire to take this away and read it carefully, to see if any of the opportunities you offer might match their skills. Invite them to phone or come in to discuss their interest further. Make sure that whoever is staffing the phone or the front desk has the information and the skills to deal with such enquiries. At this point you might like to complete Action Sheet 4 *Advertising for volunteers* (page 19).

Remember

People new to your organisation may be apprehensive, do all you can to put them at ease. Explain your volunteer procedures are for their benefit as well as yours.

6.2. The recruitment process

It is a falsehood to believe that if somebody comes forward to volunteer and are giving their time for nothing, that they will be worth their weight in gold.

- Be clear about the kinds of volunteers you want.
- Be clear about the types of opportunities you have to offer.
- Be clear about the need for references and CRB checks (if appropriate) prior to the volunteering commencing.

Think carefully about the volunteer's role and the skills they will need when you plan your recruitment. Try to reflect your priorities in the information that you produce.

Having an application form and interview process in place will help to select volunteers, so you can match their skills with the work you want them to do. Many organisations take volunteers just because they walk through the door. However, asking volunteers to complete

an application and interviewing them will help you to assess whether they have the skills you need. It will also give you a chance to tell them something about your expectations.

Interviewing volunteers also helps you decide:

- Whether the person will fit in with the rest of the staff and volunteers.
- Whether they will be able to relate to your client group.
- What skills they have.
- What support/training they might need.
- Why they are volunteering - understanding why a person volunteers is key to ensuring you retain and develop your volunteers.

It is useful to involve others in the interview process rather than doing this alone. A second opinion is always a good idea. You might want to ask clients to be involved, because it is very important that service users can relate to the volunteers that work with them.

Always take up references and undertake any checks that may be necessary to comply with your policies and procedures e.g. CRB checks before the volunteer starts undertaking activities.

Agree when your volunteers will be starting, what they will be doing, who will supervise and support them and what arrangements will be made for their induction into your organisation.

Remember

Only recruit the volunteers you need and can support. Always take up CRB checks for volunteers working with young people and/or vulnerable adults.

7. Managing volunteers

7.1. Induction

Once you have recruited your volunteers you need to help them fit into your organisation. You need to induct volunteers into your organisation in the same way you would induct a paid member of staff. Starting someone as a volunteer without completing all the necessary checks can lead to unsatisfactory consequences for both you and your clients.

Their induction provides a formal opportunity to:

- Meet existing staff/volunteers.
- Meet the people who use your activities.
- Learn about the tasks they are being asked to complete.
- Understand your policies and procedures.
- Ask questions.

A good induction should help the volunteer feel part of the organisation and begin to develop a sense of commitment to it, so it is worth having induction procedures which explain:

- Who will manage the volunteer (their point of contact).
- Who will explain the tasks to the volunteer.
- Who will explain what the organisation does and how it is managed.
- Who will explain the organisation's policies and procedures.
- What level of behaviour is/isn't acceptable.
- How expenses can be claimed.

- Who will introduce the volunteer to existing staff/volunteers and beneficiaries.
- What social activities are available.

Remember

If you are inducting members of your Management Committee make sure they understand their legal duties.

7.2. Supervision and training

Volunteers should be supervised and have access to the training they need to carry out their role.

It is important to provide regular support and supervision to identify any problems the volunteer is having. The format and regularity will depend on the type of voluntary work people are involved in, but it is useful to meet regularly to discuss:

- Day to day activities – tasks the volunteer is undertaking.
- Workloads – too much work can put the volunteer under unacceptable levels of stress, too little work can mean the volunteer loses interest.
- Areas where the volunteer excels – it is important to recognise achievements and celebrate success.
- Areas where the volunteer is experiencing problems – this can highlight training needs or problems with other members of staff, volunteers or beneficiaries which may need to be addressed.
- The organisation's policies and procedures – it is important that all volunteers understand and follow the organisation's rules.

It may be useful to keep brief records so that you can see how problems have been solved and to identify any areas where further training is needed. Remember to tell the volunteer that you are keeping records and give them the opportunity to read and comment in writing, on what you have said.

It may be appropriate to provide a training programme to develop the skills and qualities that are needed to carry out the work. You should provide training opportunities for all your volunteers in line with your equality policy. Make sure that all your volunteers undertake any compulsory training.

Further advice on managing volunteers is available from www.volunteering.org.uk and/or the Cumbria Council for Voluntary Service website www.cumbriacvs.org.uk

8. Monitoring and evaluation

Recruiting and managing volunteers can be costly and time consuming, so it's important that you know whether:

- You are recruiting the right volunteers for the right role.
- Your volunteers are doing what you need them to do.
- Your volunteers are happy to stay with your organisation.

8.1. Recruitment procedures

Advertising can cost a lot of money so you may need to make sure any recruitment campaigns are cost effective. Keep a record of where volunteer applicants heard about you. If they are recruited through personal recommendation, there is no point in paying for an advert in the local paper.

Ask your volunteers:

- How they felt about completing the application form.
- Whether their role description was accurate.
- Whether the induction process helped them feel part of the organisation.
- Whether the induction process included all the information they needed.

Ask yourselves:

- Whether you got the skills you needed.
- Whether the volunteer has been matched with the right role.
- Whether the recruitment process went smoothly.
- How much time and effort went into the recruitment.

8.2. Volunteer performance and retention

You also need to review the work the volunteer undertakes. Does each volunteer:

- Stick to your policies and procedures.
- Perform the agreed role efficiently and effectively.
- Undertake additional tasks.
- Require additional supervision.

In short you need to be certain the volunteer is reliable and adds value to your organisation. If there are any problems you need to address these.

Regularly appraising your volunteers helps you identify the above mentioned items, it also shows the volunteer that you take their role seriously and that you value their input. It provides them with the opportunity to raise any concerns they have. This means they are less likely to simply stop coming.

Make sure your volunteers understand you disciplinary and grievance procedures.

Keep a record of how many active volunteers you have, to establish if this number is increasing or decreasing. If you are managing to recruit volunteers but none of them stay with you, you may need to look at how you are operating and ask yourself if there are any underlying reasons e.g. are you asking too much from your volunteers?

Remember

To say thank you and to recognise and publicise the impact volunteers have on your organisation.

Appendix 1 – Useful Contact Details

If you need advice to set up your group or support for your trustees there are a number of infrastructure bodies in Cumbria that are there to help.

This workbook has been developed by a partnership made up by:

- Action with Communities in Cumbria (www.cumbriaaction.org.uk)
- AWAZ (CIC) Cumbria (www.equalitycumbria.org)
- Cumbria Disability Network (www.equalitycumbria.org)
- Cumbria Youth Alliance (www.cya.org.uk)
- Young Cumbria (www.youngcumbria.org.uk)

Each is a potential source of help to your organisation.

You may also access advice and guidance from Cumbria CVS which provides trustee training through their Trustee Network. Cumbria CVS has a network of offices in the County and can be contacted via its website www.cumbriacvs.org.uk or by telephone on 01768 800350.

Other useful websites for advice and guidance:

Charity Commission provides up to date information on legal responsibilities and compliance and it's a great place to keep up to date with changes in the law governing charities and their responsibilities for reporting, accounting, risk management, etc. www.charity-commission.gov.uk

Governance Works provides support to the boards of voluntary and community organisations to ensure they have the necessary understanding of governance and the skills to fulfill their roles www.governance-works.org.

Independent Safeguarding Authority holds information on individuals working with children or vulnerable adults where they consider them to have caused harm or pose a risk of harm. Provide information on safeguarding issues www.isa-gov.org.uk

NCVO offers information on every aspect of governance www.ncvo-vol.org.uk

RNIB (Royal National Institute for the Blind) provide information on making written material accessible for people with sight problems www.rnib.org.uk

Sahara Consulting provides CD roms on Volunteering and the Law www.mytrainingresources.com or www.saharaconsultancyuk.com

Volunteering England supports volunteering and provides research, good practice and programme management in the involvement of volunteers www.volunteering.org.uk

Part 2 – Action Sheets

1. Your policies

See page 7



Action - Make a note of

The policies you have in place, that might impact on your recruitment procedures:

The policies you have in place, that volunteers will have to comply with:

2. Your resources

See page 9



Action - Make a note of

Your organisation's aims:

Your organisation's activities:

Your people. List the management committee; paid staff; volunteers:

Their skills. List the skills you have within your team e.g. financial management; administration; communication; empathy:

The time people have available:

Your needs. List the skills you need to run your organisation and your activities:

The difference between the skills you have and the skills you need taking into account the amount of time people have available:

3. Volunteer role descriptions

See page 10



Action - Make a note of

The tasks you want your volunteer to undertake e.g. making tea/coffee; driving a minibus:

The amount of time involved e.g. one morning each week; a couple of hours a month:

Where you expect the volunteer to be e.g. at your premises; travelling to different venues throughout the county:

Who the volunteer will report to/be managed by:

Any compulsory training the volunteer will be expected to attend e.g. safeguarding training:

Any skills or requirements essential to the volunteer's role e.g. over 18 for a Trustee of a Registered Charity.

4. Advertising for volunteers

See page 11



Action - Make a note of

People you know who may be willing to volunteer:

Local advertising opportunities e.g. parish magazine, village hall notice board:

Local media e.g. newspapers and radio stations:

Please note that the following workbooks are also available:

Third Sector Workbook 1 – Getting Going.

Third Sector Workbook 2 – Policies and Procedures.

Third Sector Workbook 3 – Sustainable Funding.

Third Sector Workbook 4 – Robust Business Planning.

Third Sector Workbook 5 – Developing Your Budget.

Third Sector Workbook 6 – Marketing.

If you require this information in another format, please contact 01768 840827 and we will do our best to meet your requirements.

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