



Good Volunteer Management Practice Guidance Overview & Checklist

LIST OF USEFUL TEMPLATES *(this page is updated on an ongoing basis)*

If you would like a copy of a sample policy/form/procedure please have a look at www.enfieldva.org.uk/EVON or contact Helen Price at volunteering@enfieldva.org.uk

- Volunteer Policy
- Volunteer Involvement Statement
- Volunteer Risk Assessment
- Volunteer Expenses Policy
- Volunteer Role Description
- Volunteer Application Form
- Volunteer References request
- Volunteer Induction pack
- Volunteer Personal Development Plan
- Volunteer Supervision sheet
- Volunteer Feedback form
- Volunteer Exit Interview

Remember – FAILURE to PLAN is the same as PLANNING to FAIL

Happy, Well-Managed Volunteers help make your organisation's Mission & Vision a Reality!





Good Volunteer Management Practice

Guidance Overview & Checklist

ACTIONS FOR TRUSTEES, MANAGEMENT COMMITTEE, SENIOR MANAGEMENT

(please note that for all things in italics we can provide templates, guidance etc)

Agreement

- at Board level (and minuted) that volunteers will be involved in the organisation's activities

Recognition

- That involving volunteers will require resources, skills & competencies to support and manage volunteers (also minuted) that will need to be funded

Appointment

- of a Board member or senior manager to be the 'Volunteers' Champion' - responsible for considering volunteers, and issues from a volunteer's perspective

Statement

- draw up a '*Volunteer Involving Statement*' (at the very least) or a '*Volunteer Policy*' that is agreed by the Board and reviewed regularly

Policies

- your organisational policies that affect volunteers should be amended/adapted; includes *Equality/Diversity Policy; Confidentiality Policy, Complaints Policy, IT user policy, Data Protection Policy* etc

SOME THINGS TO CONSIDER:

VOLUNTEER RIGHTS: Volunteers do not have rights within law in the same way that persons employed do. Volunteers DO have rights with respect to Health & Safety and in this should be considered in the same way you would consider visitors to your organisation, service users, clients, customers.

HOWEVER, a recent inquiry (initiated originally by volunteers) into Volunteer Rights⁷ has published its report (July 2014)⁸ and you may want to consider its recommendation to embed the principles of the 3R promise in your Volunteer Involving Plans.

THE 3R PROMISE

We will endeavor to get it RIGHT from the beginning - Our organisation will:

- follow guidance on good practice and ensure it has up to date policies and evidence this in appropriate reports
- ensure that concerns of volunteers are listened to and given due consideration.

We will offer means to achieve RECONCILIATION if things go wrong - Our organisation:

- recognises that sometimes things go wrong and makes sure that everyone in the organisation knows how to deal with it
- will identify a trustee or equivalent to become a volunteering champion.
- will appoint an individual who will monitor volunteer complaints and encourage rapid resolution in emerging conflicts. Volunteer complaints will be reviewed by Directors / Trustees on a regular basis.
- will explore independent alternative conflict resolution when necessary.

We accept our RESPONSIBILITY - Our organisation:

- explains and accepts its responsibility for its volunteers and their well-being and respects their wish to always have a fair hearing if a conflict arises
- will work with the Call to Action Progress Group to share lessons and improve standards
- will report publicly on the implementation of its 3R promise.

⁷ https://www.ncvo.org.uk/images/documents/policy_and_research/volunteering-policy/volunteer_rights_inquiry_final_report1.pdf

⁸ <http://blogs.ncvo.org.uk/wp-content/uploads/mike-locke/call-to-action-progress-group-volunteer-rights-inquiry-report.pdf?>



Good Volunteer Management Practice

Guidance Overview & Checklist

ACTIONS FOR PERSONS WHO HAVE OPERATIONAL AND DAY-TO-DAY MANAGEMENT OF VOLUNTEERS

(please note that for all things in italics we can provide guidance, templates, sample documents etc)

Volunteers' Policy

- Is it fit for purpose?
- Is it simple to understand?
- Does it cross-reference to other policies that also involve volunteers?
- Is it reviewed regularly?

Other Organisational Policies

- These may include: *Equality/Diversity Policy; Confidentiality Policy, Complaints Policy, IT user policy, Data Protection Policy, Health & Safety Policy* and so on
- Are you satisfied that they have been developed to include volunteers?
- Are they reviewed regularly?

Insurance

- Has your insurer been informed that you intend to or are involving volunteers?
- Does your insurance policy and certificate cover volunteers?

Volunteer Expenses Policy

- Have you got one?
- Do you have a *clear process for volunteers to claim expenses* easily and to be paid promptly?

Risk Assessment

- Have you considered your volunteers when carrying out *risk assessments*?
- Have you thought about a *risk assessment for involving volunteers* (remember volunteers are not bound by Employment Contractual obligations)?

Safeguarding

- Are you aware of your organisation's obligations in law towards children, young people and/or vulnerable persons?
- Do you know if you are *required by law to carry out Criminal Record Bureau* (now DBS) checks?
- Are you sure if you *are entitled by law to carry out DBS checks*? There is a fine and a prison sentence if you don't follow procedure!

Volunteer Role Description

- Do you have a *role description* (like a job description but for volunteers) for each of the roles you want to involve volunteers in?
- Do you regularly review the *role description* (at least once a year) to ensure your volunteer involvement is relevant and current?

Volunteer Recruitment Process?

- Do you have a stated *Volunteer Recruitment Process* (this may only need to be a simple *flowchart*)?
- Is your *process* open and equitable? Do you have an appropriate *Application Form/Process*?
- Do you take up *references*?

Volunteer Induction

- Do you have a *process* by which you introduce and welcome your volunteers to your organisation and project and introduce your colleagues and your organisation to your volunteers?



Good Volunteer Management Practice

Guidance Overview & Checklist

ACTIONS FOR PERSONS WHO HAVE OPERATIONAL AND DAY-TO-DAY MANAGEMENT OF VOLUNTEERS (cont'd)

(please note that for all things in italics we can provide guidance, templates, sample documents etc)

Volunteer Agreement

- Why have a *Volunteer Agreement*?
- How do you stop a *Volunteer Agreement* becoming a 'contract'?
- What format should a *Volunteer Agreement* take?

Volunteer Training

- Do you provide *training* appropriate to the role for your volunteers?
- Are you aware of *training available* for your volunteers through local agencies such as EVA?
- Do you need to provide informal ('on-the-job') training?

Supervision Arrangements

- Do you have a *supervision process* in place to support your volunteers and to *monitor progress*?
- Do you know how to use the *supervision process* to *manage performance, expectations, boundaries* etc?

Problem Solving Procedure

- Do you know what the difference is between a *Problem Solving Procedure* and a *Grievance Procedure*?
- Why do you need one or the other?

Retain & Motivate

- Do you have problems with keeping volunteers for a longer time?
- Are you thinking about volunteer motivation?
- Do you know why your volunteers are volunteering for you?

Recognise & Reward

- When is 'reward' appropriate?
- Will you fall foul of HMRC rules and be subject to penalties?
- What are tried and tested forms of *volunteer 'recognition'*?

Exits and Departures

- What happens when you need to 'let someone go'?
- How do you deal with 'troublesome' volunteers?
- Do you know why you have a high turnover of volunteers?

Measure Impact

- What contribution to your *organisational objectives* do your volunteers make?
- Do you know what couldn't be achieved if you didn't have them working with you?
- How do you *present this information to stakeholders, funders, etc*?
- How effective are you at letting your trustees know the invaluable contribution your volunteers make?

Evaluate Volunteer Involvement

- Is involving volunteers worth it for you and your organisation?
- How does involving volunteers help your organisation develop?
- Are your *processes and policies* working for you and your volunteers?
- Do you know how your volunteers feel about their experience?