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### 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.*

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.

What is essential?	What is useful to have as well?
<ul style="list-style-type: none"> <li>• Volunteer policy</li> <li>• Volunteer agreement</li> <li>• Expenses form</li> <li>• Support and supervision plan included in the volunteer policy.</li> <li>• Insurance that covers volunteers</li> </ul>	<ul style="list-style-type: none"> <li>• Role Profiles</li> <li>• Selection and recruitment</li> <li>• Supervision record form</li> <li>• Induction process</li> <li>• Vetting (if appropriate) and references</li> <li>• Discipline and grievance</li> <li>• Health &amp; Safety</li> <li>• Equal Opportunities</li> <li>• Ground rules / boundaries</li> <li>• Code of conduct</li> <li>• Consultation and feedback</li> <li>• Training</li> <li>• Support and supervision for volunteers and the staff who manage them.</li> <li>• Retention and recognition policies and framework</li> <li>• Volunteer review form</li> </ul>

# Involving Volunteers Toolkit

## Getting ready for Volunteers

### Developing a volunteer policy

Developing a volunteer policy does not need to be daunting. The document can be short and simple if 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.

### A volunteer policy should include:

<b>Introduction</b>	<ul style="list-style-type: none"> <li>• Why you need volunteers and why you involve them?</li> <li>• Are you involving volunteers in line with the values and aims of your organisation and if so, why?</li> </ul>
<b>Recruitment</b>	<ul style="list-style-type: none"> <li>• What are your recruitment procedures?</li> <li>• How will you advertise?</li> <li>• What are your recruitment methods?</li> <li>• How and when will you request references and/or DBS checks?</li> <li>• What are your selection processes?</li> </ul>
<b>Induction and training</b>	<ul style="list-style-type: none"> <li>• How are volunteers welcomed into the organisation?</li> <li>• What information are they given?</li> <li>• What training if any is essential to the role?</li> <li>• What opportunities to develop skills will volunteers have?</li> </ul>
<b>Expenses</b>	<ul style="list-style-type: none"> <li>• Are you going to cover expenses (what kind, are there limits)?</li> </ul>
<b>Support and supervision</b>	<ul style="list-style-type: none"> <li>• Who will provide support and supervision?</li> <li>• How and when will it be done?</li> </ul>
<b>Insurance</b>	<ul style="list-style-type: none"> <li>• What is the insurance cover?</li> <li>• Are there any restrictions?</li> </ul>
<b>Equal Opportunities</b>	<ul style="list-style-type: none"> <li>• Have you got an equal opportunities policy that covers volunteers?</li> </ul>
<b>Health and Safety</b>	<ul style="list-style-type: none"> <li>• What have you in place to ensure a safe volunteering environment?</li> </ul>
<b>Problem Solving</b>	<ul style="list-style-type: none"> <li>• How, and to whom, can a volunteer raise concern?</li> <li>• How will you address problems that might occur with volunteers?</li> </ul>
<b>Confidentiality</b>	<ul style="list-style-type: none"> <li>• What have you got in place to protect your clients', volunteers', and organisation's confidentiality?</li> </ul>

### How is volunteering different from employing 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 several policies already in place. It is important though to remember that, legally, volunteers are different from paid staff.

*'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 below.

There are certain words that relate to paid staff that should be avoided when drafting policies relating to volunteers. An Employment contract whether verbal or written has legal obligations. To avoid creating an employment contract with your volunteers, it is important not to use the word 'contract' and only reimburse out of pocket expenses.

Employment	Volunteering
Volunteer contract	Volunteer agreement
Volunteer job description	Volunteer role profile
Person specification	Personal qualities or skills
Grievance and disciplinary procedure	Problem solving procedure
Rights and responsibilities	Reasonable expectations
We are an equal opportunities employer	We are committed to volunteers from a diverse range of backgrounds
Interview	Informal chat or informal interview
Trial period or probationary period	Introductory period
Subsistence allowance and expenses will be paid	Out of pocket expenses will be reimbursed
Placement or vacancy	Volunteering Opportunity
Incentives	Motivations

### Volunteer Agreement

Volunteer agreements can be used to set out both an organisation's commitment to its volunteers and what it hopes for from its volunteers. They act as a reference point for volunteers and a reminder to the organisation that it should meet the standards of good practice that it has set. Commitments Might include:

#### From an Organisation:

- to provide a full induction and any training necessary for the volunteer role
- to provide regular support to the volunteer in their role and a named contact for the volunteer who will support them in the role.
- to treat volunteers in line with its equal opportunities policy
- to reimburse out-of-pocket expenses
- to provide insurance cover for the volunteers
- to implement good health and safety practice.

#### From a Volunteer:

- follow policies and procedures relevant to volunteers and the role the volunteer.
- is undertaking, e.g., equal opportunities, health and safety, and confidentiality.
- meet mutually agreed expectations around the role, such as the amount of time the role is expected to take.

Organisations should be aware that there is a risk of inadvertently creating an employment contract with volunteers. However, this risk can be minimised by following good practice as identified below:

- Care must be taken to set out what the organisation will provide, how it will treat the volunteer and what it expects from the volunteer in such a way as to avoid the creation of mutual obligations, which could be regarded in law as creating a contract.
- Set out the terms of the relationship based on reasonable expectations rather than obligations. You should also avoid the use of any language that sounds contractual.
- Reduce perks that could be seen as 'consideration' or payment. Even benefits necessary for the volunteer to carry out their work, such as training, can be problematic if they are couched in such a way that suggests an obligation on the part of the volunteer.
- Ensure that expenses cannot be seen as income by ensuring you only reimburse volunteers for out-of-pocket expenses.

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## Getting ready for Volunteers

### Role Profiles

You should provide written outlines, or profiles, of volunteer roles. The profiles should be consistent across your organisation and comply with your volunteer policies. This is crucial to staff and volunteers understanding their roles.

Written profiles:

- Give more information to the volunteer than is possible to convey at an interview.
- Allow you to show where the volunteer's work fits in with the work of the organisation.
- Offer a list of tasks so the volunteer can compare these with their skills and expectations.
- Provide a basis for measuring activity levels and performance.
- Describe the intended outcome of the work.
- Help others understand how the voluntary role applies to their own.

### What to include in volunteer role profiles

A role profile should include:	You could include:
<ul style="list-style-type: none"> <li>• Title of role.</li> <li>• Objective(s) of role.</li> <li>• A broad outline of tasks and activities to be undertaken.</li> <li>• Targets or measurements of performance (as appropriate).</li> </ul>	<ul style="list-style-type: none"> <li>• The name of the person who the volunteer reports to.</li> <li>• Location and volunteering hours.</li> <li>• How the role fits in with the work of the organisation.</li> <li>• Expectations of behaviour and dress (if appropriate).</li> <li>• Skills and qualifications – essential and desirable.</li> <li>• Required person specifications (if appropriate).</li> </ul>

### Defining the volunteer's position within the organisation

Try to give volunteers straightforward boundaries and structures with clear lines of reporting. Volunteers benefit from understanding the limits and expectations of their position in the organisation. Staff who supervise volunteers should be aware of any special requirements volunteers have.

### Legal issues with volunteer role profiles

Volunteer role profiles can look a lot like job descriptions. They are not. Instead, they describe unpaid roles and should only describe expectations of a role. You must be careful not to imply a volunteer is under contract to perform specific tasks.