

MANAGING VOLUNTEERS TOOLKIT

LOVE
LIBRARIES

LOVE
VOLUNTEERING

Introduction

Welcome to the **Team London - Love Libraries, Love Volunteering: Managing Volunteers Toolkit**, which outlines the resources available to you and how you can use them.

In 2011 a consortium of partners: Association of London Chief Librarians (ALCL), Chief Culture and Leisure Officers Association (cCLOA), London Borough Merton, Merton Volunteer Centre and the Reading Agency, secured funding from The Mayor of London's Team London Volunteering Programme to develop a coordinated best practice approach to volunteering across London's public library services. The Team London programme itself is funded by philanthropic funding from the Reuben foundation.

The partners delivered a pilot project, case studies, tools and guidance specific to the sector, although much of it could also be applied to other services/sectors.

Ten library services involving 13 borough councils and Volunteer Centres, (Barnet; Bromley/Bexley shared service; Croydon; Ealing; Enfield; Hackney; Havering; the 'Triborough' of Westminster, Hammersmith & Fulham, Kensington & Chelsea; Redbridge and Waltham Forest), were involved in a pilot 'Love Libraries, Love Volunteering' project.

The project aimed to strengthen local communities' engagement with London's public library services by supporting and creating volunteering opportunities. It also explored some of the issues and obstacles to volunteering and aimed to find flexible solutions.

One of the aims of the project was to create a legacy of good practice in volunteer recruitment and involvement in libraries across the London region. A Toolkit was developed so that boroughs not involved in the pilot project could access support and guidance in order to implement their own successful volunteering programme in their local libraries.

This toolkit is packed full of information on best practice around how to recruit, involve and retain volunteers. It is intended to help library managers and staff through a number of key stages of setting up systems, recruiting, inducting and supporting volunteers. It highlights areas that you will need to consider with advice, helpful tips, good practice and template forms to support you in this process.

How to use this Toolkit

This Toolkit is divided into a number of sections, which are listed below. You can click on each one to jump to the relevant section:

1. Introduction
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22. Equality and Diversity
23. Confidentiality
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25. Quality Standards and Volunteer Training
26. Tools and Resources

Some of the content of this Toolkit is in boxes with hyper-links to sample documents, policies and templates that you may find useful. For example:



Sample - task description arts and crafts

This template policy can be adapted to suit the needs of your organisation.

You will find links to these documents and some additional resources repeated in **a section at the end of the toolkit.**

Background to Volunteering

Definitions

There are many definitions of what volunteering is, but for the purposes of this Toolkit we will use one of the simplest, as defined in “**The Compact Code of Good Practice on Volunteering**”, published in 2005, which states that volunteering is:

“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.”

You may hear people talking about formal and informal volunteering. Informal volunteering is usually considered to be individual unpaid help given to a non-family member where the volunteer is not attached or affiliated to a group or organisation.



The Compact Code of Good Practice
on Volunteering: Capacity for change:
A review

May 2008
Institute for Volunteering Research
Meta Zimmerack

This report represents the independent views of the authors and does not necessarily represent the views of the Commissioner for the Compact

Thus doing the shopping for an elderly neighbour or helping a person with disabilities work in their garden through an ad-hoc arrangement could be regarded as informal volunteering. Volunteering for an organisation, such as a library on a reasonably regular basis or via a volunteer centre is usually regarded as “formal” volunteering.

Four key principles of volunteering

There are four key features of volunteering which are generally regarded as fundamental to all volunteering activity:

Choice: Volunteering must be a choice freely made by each individual. It should not involve coercion or compulsion.

Diversity: Volunteering should be open to all, no matter what their background, race, colour, nationality, religion, ethnic or national origins, age, gender, marital or civil partnership status, sexual orientation, gender reassignment, pregnancy and maternity or disability. In some situations, however, certain types of organisations can justify seeking volunteers from a particular background (e.g. A women’s Refugee wanting only female volunteers.).

Mutual Benefit: Volunteers offer their contribution and skills unwaged, but should benefit in other ways in return for their contribution. Giving time to volunteering must be recognised as establishing a reciprocal relationship in which the volunteer also benefits and feels that his or her contribution is personally fulfilling.

Recognition: Organisations/agencies engaging volunteers should both formally and informally show appreciation to them and publicly acknowledge their contribution. This should include recognising volunteer's contribution to the individual organisation or agency, the wider community, as well as the social economic and wider social objectives. This acknowledgement is fundamental to a fair relationship between volunteers, volunteer involving organisations (including libraries), central and local government and the wider society.

Motivations

A focus of research into volunteering, and an important element of volunteer management, is to understand what motivates volunteers to come and give their time. If you understand a person's motivation, you can find ways of managing that volunteer effectively. There are many and various motivations for volunteering, which include:



- Commitment to a cause
- Commitment to a library
- Wanting to give something back
- Looking to use existing skills / share skills
- Looking to learn new skills/ receive training and experience
- Improve career prospects
- Seeking an up-to-date reference
- Wanting to make new friends
- Wanting to have some fun
- A way of using spare time
- Wanting to be part of something
- Wanting to feel part of the community

- Wanting to make a difference
- Wanting to change things
- Wanting to get out of the house
- Wanting to stop boredom and isolation
- Wanting to feel good
- Wanting to gain confidence
- Wanting to feel needed
- Wanting to feel important
- Wanting to gain recognition
- Wanting to help others
- Life cycle volunteering (e.g. helping at a playgroup their child attends)
- Filling a gap in the community

Usually behind these reasons is one of five motivating factors:

- The **Achievement-Motivated** person likes to strive for and reach high goals. They want to do the job better, figuring out ways to remove obstacles. They like excelling and seeing the difference that they are personally making.
- The **Power-Motivated** person wants to have impact, influencing others with their ideas. They like winning arguments and having things done their way.
- The **Affiliation-Motivated** volunteer likes being around other people. The social aspect of volunteering really appeals to them. They want to build friendships and to be respected and feel part of something. They want to help people and they care about others' feelings.
- The **Recognition-Motivated** volunteer wants just that – recognition. They will enjoy the prestige and status associated with volunteering and like being seen to help others. They enjoy public events and activities. They like being connected with popular projects and often tell others what they are doing.
- The **Altruistic-Motivated** volunteer wants to make the world a better place. They have high ideals and values and are concerned about helping others so as to improve society. They care about accountability and doing things right.

Volunteers and the Law

Several sections of this Toolkit consider elements of legislation and how they relate to volunteers. Although you will find many definitions of volunteering in official documents, there is no single definition of a volunteer in law.

Because of the increased professionalism required of volunteers, with the need, for example, for volunteers in certain areas of work to undertake extensive training, there can arise the thorny issue of “when is a volunteer not a volunteer?” It is not always just a question of a person being paid or unpaid.



There is a grey area within the law and judges and tribunals have interpreted the law on a case by case basis, as they see fit. Often they may debate whether it is a question of the “spirit” rather than the “letter” of the law.

Consider the following examples:

- A football coach of a boy's football team is paid £100 each month to cover his expenses, petrol, telephone, printing etc.
- A volunteer at a library provides IT support to library users, including facilitating a 'Basic IT' course every Tuesday afternoon. His volunteer agreement stipulates that he must attend the library every Tuesday.

In the first example it could be argued that because the football coach is paid a set amount, irrespective of the actual expenses incurred, that the £100 could be considered a wage and therefore turns the coach into a paid employee, who would be subject to pay tax and would be protected by the raft of employment legislation. In order to ensure that you do not unwittingly create a situation where payment for expenses could be deemed a wage, **ensure that you only reimburse actual expenses incurred** during the course of volunteering.

In the second example, by stipulating the hours of work, the library could be seen as treating the volunteer as an employee, even though they are not paid; in which case the volunteer would come under employment law. It is however perfectly acceptable to request a minimum number of hours or

shifts per week or month, providing that the actual hours are mutually agreed, but not set down in a contract.

It is not the intention to worry you and stop you taking on volunteers! Rather, it is to urge you to be careful and bear this grey area of the law in mind. It is why within this Toolkit we talk about volunteer “roles” or “tasks” rather than “job” descriptions, and “volunteer agreements” rather than “volunteer contracts”.

Setting up your Systems

When you are beginning to consider recruiting volunteers, it is important to think about whether your library service is currently ready to take them on. Some of the questions you should consider are:

- What are your unique selling points? What is it about your library that makes it special enough for people to devote their time and energy to it unpaid?
- Why do you need to recruit volunteers?
- What will their roles be?
- Are you looking for occasional or regular volunteers or both?
- Are there sufficient resources to manage volunteers? Do you (and colleagues) have time to manage them? Is there sufficient desk space, equipment for them to use, if appropriate?
- Can you offer volunteers a variety of roles / challenges? This could mean that you have a variety of roles that volunteers could take on or that there is variety within the specific roles that you can offer.
- How will you ensure that the public understand the roles you can offer? Sometimes the public only associates a library with its main sphere of activity, lending books/DVD etc. it will not necessarily consider that the library could offer volunteering roles related to publicity/marketing, foreign language classes or knitting circles etc.
- Will there be adequate support / supervision for volunteers?
- Can you cater for their social needs?



- Can you communicate effectively? How will you keep your volunteers up to speed with what is going on if they only volunteer for you once a week or once a month?

Important paperwork you will need

There are three forms that you will need – two are essential and one is advisable:

1. A Volunteer Policy
2. A Volunteer Role Description / Person Specification
3. A Volunteer Agreement.

Volunteer Policy

A volunteer policy is a framework for a volunteer programme. It enables an organisation, such as a library, to look at the benefits and challenges that come with working with volunteers.

Why should your library have a volunteer policy?

- **Commitment** - A volunteer policy demonstrates your library's commitment to its volunteer programme and its individual volunteers. It shows that care and thought has gone into the volunteer programme.
- **Consistency** - Volunteers are a diverse range of people. Being able to refer to a written policy ensures that decisions are consistent and not made on an ad-hoc basis and that all volunteers are treated equally and fairly.
- **Clarity** - A policy allows volunteers to know where they stand. It offers some security, in that they know how they can expect to be treated and where they can turn to if they feel that things are going wrong.
- **Unity** - It also helps ensure that your library's paid staff and wider management structures fully understand why volunteers are involved and what role they have within the library.

The process of writing a volunteer policy is as important as having the document itself.

- Consider exactly why your library wants to involve volunteers and how they fit into the day-to-day life and work of the library.
- Consult as widely as possible when drawing up the policy. The more input there is, the more relevant the policy is likely to be.

What should the Volunteer Policy focus on?

The needs of your library - there is no blueprint for volunteer policies. Every library has its own unique needs that should be reflected in its policy.

Keep it short - most organisations have a relatively short policy as a statement of intent, with the day-to-day issues covered in separate policies or a volunteer handbook.

What should the Volunteer Policy cover?

Start with an explanation of what your library does and why it wants to involve volunteers in its work. Explain in what way volunteers' input helps your library's aims.

- A statement of intent e.g. why your library uses volunteers and to what aim
- Some information about your library's recruitment process
- Role descriptions, induction and training for volunteers, trial period, expenses such as travel, meals, child care etc., support and supervision processes
- How volunteers are insured
- Basic Health and Safety information - signposting volunteers to the main Health and Safety policy
- The complaints procedure - there should be clear procedures in place to deal with complaints by or about volunteers, separate from those for paid staff
- Information about how your library deals with any problems arising out of volunteer placements
- Information about confidentiality
- Whilst volunteers are generally not covered by equal opportunities legislation, it is clearly good practice to include them in your equal opportunities policy

Introducing the Volunteer Policy

- Once the policy is written, it is necessary to ensure that it is read, understood and implemented properly as part of the everyday work of your library
- All staff, volunteers and managers should receive a copy
- The library could use the policy as a framework for induction meetings with volunteers

- The policy can also be the basis of the information given to the people with which your library works, about why the library involves volunteers

Accessibility

- Clear English - any document given to the volunteers should be straightforward to read and understand
- Identifying needs - discussing the policy with volunteers at induction helps identify needs; volunteers with English as a second language or a learning disability may require some parts of the policy to be clarified
- Format - the policy should be clearly legible for people with sight problems

Revising the Policy

The flexible nature of volunteering means it makes sense to review the policy annually. You can download an example / template of a volunteer policy below. As with many resources within this Toolkit, it is important that you don't just download the tool, add your logos and, hey presto, you have your policy! You should read it through and make changes so that it is completely relevant and practical for your library/scheme.



Volunteer Policy.doc

This template can be adapted to suit the needs of your organisation

Role Descriptions

What are volunteer role descriptions?

A volunteer role description (also known as a task description) details the specific activities in which a particular volunteer is involved. It is like a job description, although using separate terminology is recommended to avoid implying a contract of employment for volunteers.



Elements of Volunteer Roles

- In order to cater for a range of potential volunteers and promote diversity, libraries should try to design a variety of volunteer roles, which suit people with varying motivations, skills and interests (there are links below for a number of description for roles already agreed)
- Planning is also needed for the different amounts of time people are able to offer
- Volunteers also have different motivations; a volunteer wanting work-related experience will look for a different experience from a volunteer hoping to meet new people or find an activity that gives them a change from their daily routine
- Having defined a volunteer role, be prepared to adapt and amend it to suit the skills, knowledge, interests and availability of potential volunteers

Writing a volunteer role description

When writing a volunteer role description, you should try to make it detailed but concise. Building the description around different headings is useful. Some suggested headings could be:

- Title of role - be specific
- Purpose of role - the difference it will make to the work of your library
- Main activities / tasks
- Qualities / experience / skills needed (where relevant)
- The time commitment and when this will be needed
- Training available
- Location
- Who will be the main point of contact?

While volunteers should not feel over-committed or overloaded in their role, it is also important that they are engaged in productive tasks and get a sense of achievement from their voluntary work. When creating volunteer roles, it is useful to think about whether a particular role offers the volunteer a chance to expand and develop.

These factors will not appeal to all, but some volunteers might be motivated by a greater sense of ownership. Volunteer roles should make best use of the unique talents, skills and personalities of the people contributing their time.

Writing a volunteer role description will also help you to focus on the practical elements of your library's volunteering programme. It is important to make sure that all the necessary resources and procedures are in place before the volunteer arrives.

Using volunteer role descriptions

- Volunteer role descriptions form an important part of a library's recruitment process. They help to give the volunteer an accurate idea of the work they will be doing and also ensure that the volunteer is attracted by the tasks as well as the library's wider aims. They also help a volunteer manager to focus on what kind of volunteer they actually need and avoid mismatching people and tasks.
- A detailed volunteer role description is particularly useful if you are recruiting volunteers through a Volunteer Centre. It saves time and disappointment on both sides if a potential volunteer knows as much as possible about the role before contacting the library.
- It is also important for volunteer managers to offer ongoing support to volunteers and a volunteer role description can help you to structure supervision sessions. Referring to role descriptions is also a good way of evaluating the volunteer programme of a library and demonstrating the breadth of what the volunteers do.

Developing a Volunteer Person Specification

A person specification exists to make it easier for both volunteers and volunteer-involving libraries to realise what skills and abilities volunteers have or need.

The person specification should come about as a result of the volunteer role description.

From the role description, pick out the duties, grouping those that are similar, then translate them into the abilities and skills needed for the role.

- Specify necessary skills as far as possible in precise role-related terms
- Identify any specific knowledge requirements for the role or requirement of some evidence of the ability to learn
- Where relevant, indicate qualifications and level of education required for the role - be as precise as possible
- If appropriate, identify the experience required to carry out the role and define the extent of that experience.

Once you have thought through these points, it is time to start preparing a person specification attributing the words “desirable” or “essential” to each of the skills and abilities needed to fulfill the role.

Some person specifications may be very short as there are many volunteer roles that may not require high skills or experience levels. Reliability, commitment and enthusiasm may be all that is required.

Do we need a role description for every role we offer?

For roles that require a regular or long term commitment, the answer is obviously YES! For occasional roles, e.g. helping out at an event, such as a Black History Month Celebration, a brief role description may be useful but not essential, unless there are duties involving supervising other people and/or health and safety considerations etc.



Sample – Role description activities coordinator

This template policy can be adapted to suit the needs of your organisation.

Sample- Role description Arts & Crafts

This template policy can be adapted to suit the needs of your organisation.

Sample –Role description Admin Support

This template policy can be adapted to suit the needs of your organisation.

Sample - blank task description.doc

This template policy can be adapted to suit the needs of your organisation.

Volunteer Agreements

Volunteer agreements are being used more widely nowadays in an effort to formalise the arrangement between volunteers and an organisation, particularly for roles that require a regular or long-standing commitment. As with the Volunteer Policy, its aim is to establish the seriousness of the commitment on both sides, as well as recognises that there are rights and responsibilities for both the volunteer and the library.



It differs from a contract of employment in that it is an aspirational document, not a legally binding obligation. Within the agreement you should cover:

- A brief introduction thanking them for becoming a volunteer and your commitment to them
- Their name, your library's name, start date etc.
- Your commitment to them, which could include providing them with adequate information, training and support so that they can carry out their volunteering role, respecting their needs, skills and views
- What you expect of them: i.e. to perform to the best of their ability, to adhere to the library's policies and ethos and to meet time and duty commitments as agreed
- Signature of both parties
- A final sentence emphasising that this is not a legal contract. The wording we use in the example below is:

"This agreement is not a legally binding contract between us and may be cancelled at any time at the discretion of either party. Neither of us intends any employment relationship to be created, either now or at any time in the future."

Benefits of having a Volunteer Agreement

As mentioned above, an agreement emphasises an element of commitment on the volunteer's behalf to take their volunteering role seriously. Whilst a volunteer can choose to participate or not to participate, an agreement makes it clear that they must abide by the policies of the library and perform to the best of their abilities.

It is no help to your library if a volunteer fails to turn up or produces very shoddy work. If, as occasionally happens, a library has to let a volunteer go, the manager can often point to the fact that the volunteer has failed to abide by the volunteer agreement that they signed.

Volunteer Rights and Responsibilities

Although, as mentioned previously, the place of volunteers within the law is a grey area, it is obviously good practice to ensure that volunteers are treated well within your library. The volunteer agreement should set out in simple terms the rights and responsibilities' of the volunteer (for example, the right to have out of pocket expenses reimbursed or the obligation to adhere to the library's policies and procedures).

There is an obvious correlation between the Rights of a volunteer and the Responsibilities placed on the library (and vice versa). You may feel that you wish to expand on these areas in a separate document. This could be placed in your Volunteer Induction Pack.



Sample –Volunteer Agreement

This template policy can be adapted to suit the needs of your organisation.

Volunteer management charter

Your library service may wish to sign up to the Greater London Volunteer Management Charter – this promotes 10 fundamental principle of volunteer management.

Attracting and Recruiting Volunteers

Attracting and Recruiting Volunteers is not the same! You first have to attract a person's attention before you can recruit them to become a volunteer for you.

Be proactive rather than reactive in recruiting volunteers, as people sometimes need to be asked! Think about the volunteer roles you have and the type of person you want to recruit to them; this might give you a clue as to the best way to attract them.

Information Overload

Many organisations can't understand why their past 'recruitment' techniques are no longer working. It is not because fewer people are volunteering – it is because we now receive our information differently, we are immersed in the 'information age' and are bombarded with information. Be clear about what you want from potential volunteers and why they should volunteer with you. What is your unique selling point?

Review your written advertising brochures, flyers, leaflets etc. so that they attract people's attention for the right reasons. As part of our partnership arrangements your local Volunteer Centre will help you advertise your opportunities on Do-it, the national volunteering database (www.Do-It.org.uk) and will also advise you with regards to other methods of attracting and recruiting volunteers, such as using social media; Facebook, Twitter etc.



Make it snappy

Your title needs to stand out from the crowd. An advert, leaflet, poster or web article that merely says "Volunteers Wanted" is not eye catching and unlikely to generate much interest from prospective volunteers. It is a phrase that is very over used and does not make your particular piece stand out from the crowd. The use of humour or unusual titles/descriptions; one charity shop advertised for retail guru, when it was looking for volunteers to serve behind the counter, they were inundated with enquiries.

What is your unique selling point?

In some way your advert needs to explain what's unique and what's special about your library and/or its activities. The basic work of libraries is generally well known and you will attract a certain volume of volunteers, especially in today's climate, who identify with the library movement and wish to support you by volunteering their times. Others will not be aware of what you do, especially the activities outside your main area of business, and may need to be informed of the variety of services/activities you provide and their importance to the community. Highlight what is special about your individual branch or borough; does it have a unique community it serves, is it well used and valued, how many visitors does it attract each day, week, month; do you put on a number of different activities; homework clubs, book clubs, foreign language clubs, film clubs etc. , highlight what makes your library unique and the benefits to potential volunteers, training, development, transferable skills and experience, reference.

Recruiting Volunteers

"I think with volunteer recruitment, it's about understanding that we're selling a product and that we need to learn how to sell products. You don't sell a particular product by saying 'if you want to volunteer, come here' - that's not how you sell it. You've got to target your customers with what you're offering, you've got to target them with what they want from it and convince them that we will meet their expectations."

(The 21st Century Volunteer - Elisha Evans and Joe Saxton)

Recruitment

Recruiting volunteers can be seen as a similar process to advertising (sell the benefits of the volunteering) and, as with any advertising, it is critical that you have a clear message. The nature of this message will depend on your library and the work that you want volunteers to do. However, in general, it will include:

- What the volunteer will do
- What the library as a whole does
- How a new volunteer can make a difference
- How to find out more

Most methods of recruitment elaborate on this basic information.

Motivation

It is always useful to remember the reasons why people volunteer e.g. commitment to the ethos of a public library service, it is therefore important to emphasise how their volunteering will make a difference

- Meeting people – emphasis the social aspect of the role, meeting members of the public, staff, other volunteers, the potential to develop new networks
- Gaining skills - stress the skills and experience (such as communication, research, cataloguing, customer service) that volunteers can gain
- Utilising existing skills – many people, especially the retired or underemployed, want to share their own skills and experiences
- Keeping active - more and more older people are volunteering
- Moving into paid employment - developing or enhancing their CV (when recruiting 80% of employers stated that they value volunteering experience - (<http://timebank.org.uk/>))

When one has in mind the motivations, you can ensure you match or market roles in a way that promotes the meeting of those needs. For example, “Feeling lonely or isolated, want to make new friends, then come and join our fun team of volunteers....”

Volunteer Centres

Most London boroughs have a Volunteer Centre. They are integral to this project in putting individuals in touch with library services seeking volunteers. Library services are encouraged to form meaningful relationships with their local Volunteer Centre. Your local volunteer centre will not only be able to assist you with the recruitment of volunteers, but also be in a position to provide practical and ongoing advice and support on working with volunteers.

In addition, the Volunteer Centre will be able to register and upload your opportunities on www.do-it.org, the national database of volunteering opportunities. You will find more details about Volunteer Centres at the end of the Toolkit or by clicking on the link below.



<http://greaterlondonvolunteering.org.uk/volunteer-centres-2/>

This template policy can be adapted to suit the needs of your organisation.

Attracting a Diverse range of volunteers

It is beneficial to your library service to have a diverse range of volunteers who reflect the community that you serve and positively enrich your service provision by bringing in to it their various influences, cultures and life experiences. Diverse volunteering programmes are often the most exciting and dynamic. Using a diverse range of advertising/recruitment material and/or outlets often helps to increase the diversity of the volunteers you attract. For example, young people may be more receptive to information received via new social media, retired and older people may be more likely to respond to more traditional forms of advertising.

Did you know?

Research into volunteers and volunteering trends has found that:

- Volunteering helps people's promotion chances at work (The Career Benefits of Volunteering. Timebank 2009)
- Men who volunteer are more attractive to women- unfortunately it does not appear to make any difference the other way around! (Barclays 2010)

Using Social Media

The simplest form of volunteer recruitment is to ask someone – and this is the best way of using Social Media in your relationship with volunteers. The term Social Media is about using technology (the internet and mobile phones) to communicate and it usually implies a very informal style that encourages the volunteer to be as communicative as the organisation they volunteer for.



Facebook and Twitter are far and away the most popular forms. As a social network, Facebook offers you an opportunity to create pages, groups and profiles that enable you to converse regularly with volunteers – events, requests, rewards and opportunities can be circulated to a lot of people at a few strokes of the keyboard. Twitter – in 140 characters - usually takes you directly to a mobile phone with a short message or request that can be very immediate. If you are not familiar with these, go online and visit their sites and experiment.

It could also be worth your time visiting other sites – these can be very powerful tools: Flickr enables you to use and share photos; You Tube allows you to upload video clips. Other sites include: LinkedIn; MySpace; stumbleupon; reddit; del.icio.us; meetup; Friendster; dig; and many more. Using your search engine to search these words could open up a whole new world of opportunities for you and your volunteers.

Recruiting Using Social Media

All the principles discussed elsewhere in this Toolkit apply to all these forms of media. Using networking sites, encourage your existing volunteers to talk about their experiences, share photos and invite others to join in the fun.

Become pro-active: open a Facebook page for your group and experiment with various approaches – ask your members to download a recruitment poster and put it up in their place of work, ask them to invite their friends to join your group.

Communicating Using Social Media

Technology enables you to communicate with volunteers and supporters, in a cost effective and speedy manner. It is a very immediate way of letting them know what you are doing and how important they are to your organisation. It is a great way to say thank you and to celebrate success.

Young Volunteers

Young volunteers are an excellent resource and ensuring there are relevant opportunities for them could mean attracting a volunteer for life! Think carefully about how to recruit young volunteers and the types of roles they might be interested in. Often roles that provide variety and the opportunity to gain experience and learn new skills are more attractive to young volunteers, Summer Reading Challenges have traditionally been a good entry level for young volunteers to the library service. See the following link: <http://summerreadingchallenge.org.uk/>



If your library wants to involve young volunteers you will need to be aware of a range of legal and practical matters when deciding what roles are suitable or adaptable for a particular age group.

Legally any voluntary work undertaken by a young person still at school should not interfere or compromise his/her education.

When involving young volunteers, it is not only good practice, but a legal requirement to have relevant Safeguarding Policies and Procedures in place. Moreover, there is a need to identify and appoint, from amongst your staff a Designated Safeguarding Officer, who has overall responsibility for ensuring that the welfare of any young volunteers is considered and given the upmost prominence.

Parental Permission

Parental consent should be sought when involving young volunteers. Parental responsibility continues until the age of 18, unless the young person is 16 or older and married, or is living independently.

Both the young person and their parent or guardian should fully



understand what the voluntary work entails. Provide clear information about the organisation and the work the volunteer is expected to do, preferably a role description. Make sure that they are aware of time commitments, where the work will take place and how it will be supervised.

Health and Safety

The Children Act 1989 Section 3 (5) states that ‘an individual shall do what is reasonable for the purposes of safeguarding or promoting a child’s welfare while the child is in his or her care’.

There is also an enhanced duty of care towards young volunteers, reflecting their relative maturity. This means that risk assessments cannot take responsible behaviour for granted, and are likely to imply increased supervision, more explicit instructions and so on.

Think about the situations in which a young volunteer might be in and whether any adults supervising them will need to have a Disclosure and Barring Service (DBS) check. For example, any adult regularly training young volunteers would need a DBS check, but other adults who come into irregular contact with young volunteers may not.

In terms of best practice:

- Young people should not be left unattended
- It is safer if young volunteers are supervised by two or more adults
- Any potentially dangerous activity should have constant adult supervision.

FURTHER RESOURCES

Volunteering England has a section on youth volunteering.

Application Forms & Interviews

A logical first step when dealing with potential volunteers is to ask them to fill out an application form. This is a good way of recording basic information such as their name, address etc, but in most cases it is not the best way of assessing a volunteer's suitability for a role.

By asking someone to fill out a complex form you may unintentionally be putting barriers in the way for people, who have problems with their sight, for whom English is not their first language, or whose level of literacy is not high (all of whom may have lots of other skills and experience that you would not want to lose). Don't forget that there are a lot of people who do not like filling out forms!

Remember that the overall aim of any fair selection process is to allow all potential volunteers to give the best of themselves and application forms do not allow everybody to do this. If you are going to use a form to take details, be clear about what information you need and why. For example, many organisations ask for a volunteer's date of birth when all they actually need to know is if someone is above or below a minimum or maximum age.

Information you need for equal opportunities monitoring purposes should be asked for on a different form kept separately from other personal details and the reasons for asking should be clearly stated. There is no one template for an application form and organisations should design one that will suit their purposes. An example of a Volunteer Application Form can be downloaded [here](#).



Sample- Volunteer Application Form

This template can be adapted to suit the particular needs of your organisation.

FURTHER RESOURCES

For an overview of recruitment, plus templates and best practice examples of forms around recruitment, visit the **Volunteering England Best Practice Bank**.

The Institute for Volunteering Research has now provided a guide on collecting and using volunteer data.

Interviews

Volunteer interviews are a key tool in a recruitment and selection process. They should be informal and a two-way process. Part of the point of having them is to allow people to get the information they need to decide whether or not they would like to volunteer for you.



So, firstly, make the informal, mutual nature of the interview clear to the potential volunteer. Rather than use the term 'interview', some organisations prefer to simply say that they'll invite the person in for a chat. Find out if the person coming in has any support needs or accessibility requirements.

When the interviewee comes in, make sure that you're ready for them, and have arranged a quiet room where you will not be interrupted. Consider changing the seating arrangements to make them friendlier, if appropriate. Make sure you have any information, forms or policies you need.

How the interview itself unfolds will depend partly on the particular role. If a volunteer is going to be working with vulnerable clients, the information and feel for the volunteer that you get from the interview is much more important. In any case, although the interview is informal, it should have some structure. There will be some information you need to tell the volunteer and some you need from them.

It is good to start by explaining the purpose of the interview, to put the person at their ease. Let them know that anything they say will remain confidential. You can also start with any form filling that needs to be done, checking personal details and so on.

Have a list of the information you want to give the volunteer, and what you want from them, but don't let it stifle natural conversation. You might want to tell them about:

- The aims of the organisation and how volunteers fit into this
- The role description for the volunteer
- How they will be supported
- Your expectations regarding equal opportunities, health and safety and other volunteer conduct.

The information you would like from volunteers might include:

- What motivated them to want to volunteer with you
- What they know about your client group or your projects
- What support needs they have
- What skills or experience they have
- What their expectations are from volunteering.

Ask them what time they can offer the organisation, but don't expect them to be able to commit to you full time. Ask open questions; that is, ones that demand more than a yes or no answer, and give as much space as you can for volunteers to ask their own.

The interview allows you to see whether or not the role description can be adapted to better suit the individual. If you are making notes, let the volunteer know what you are doing and what sort of information you are recording. Make sure you keep this factual.

At the end of the interview you can discuss with the potential volunteer whether or not you're both happy for them to volunteer with you. If you really need time to decide whether or not the person is suitable or if, for example, there is scope to change the role to suit them, then give a clear deadline for your decision. It might help if you have a trial period for volunteers. Again, this is as much to allow volunteers to gain a taste of the role as to give you a chance to see how well they fit it.

If you are taking the volunteer on, make sure they leave knowing exactly what the next step will be - when you will contact them or when they are expected to start.



Sample interview record.doc

This template can be adapted to suit the particular needs of your organisation.

FURTHER RESOURCES

Volunteering England has a Good Practice Guide on volunteer interviews.

Trial / Probationary Period

Some organisations have introduced the concept of a three month trial period that allows both sides to get to know each other and find out whether they feel comfortable volunteering with you and whether you are happy with them.

Without some fixed point in the future, it can become more difficult for you to tell a volunteer: "Thank you, but no!" You, as a manager, may feel guilty about doing this. Similarly some volunteers begin to realise that the role does not suit them or they find it difficult to get on with the other volunteers.



They don't want to let you down, but they are not enjoying the volunteering experience. Rather than come clean, they will ring up to cancel their appointments or find excuses for not coming in. Finally you give up ringing them and the relationship comes to an unsatisfactory conclusion. The three month chat can provide the opportunity for a clean break.

Sadly, there are some "volunteers from hell" who drift from organisation to organisation spreading discord and strife and leaving a trail of destruction in their wake. Even they can remain pleasant for the duration of a half hour interview. Sometimes even the protection of collecting references may not help as a previous organisation could be economical with the truth in an effort to get rid of them! Within three months you should be able to discover the type of person they are and whether the volunteering role is working for them and for you.

It is important not to build the meeting up so that the volunteer is put under pressure and feels that they have to "prove themselves" to you. Some volunteers may be slow learners or require quite a lot of support initially. The Probationary Period should never feel like a test. In preparing for the meeting, one aspect you could consider is whether they are meeting the conditions they voluntarily signed up to in the Volunteer Agreement.

References & DBS Checks

What are References?

References are comments from people who know the person in either a work or social context. They can range from a basic check that the person is who they actually say they are, through to a detailed recommendation of their suitability for the role.

Are References Needed?

Obtaining references does give your organisation added security. References can also add to your picture of a volunteer, helping you to identify their strengths and weaknesses, and occasionally alerting you to serious problems. The need for references will depend on the type of task that the volunteer will be undertaking and the risks involved.

Who should you approach for References?

Most volunteer involving organisations ask for references from their volunteers. Without proper thought, however, references can act as another barrier to groups, who already find themselves excluded.

- You should bear in mind that a lot of potential volunteers may not have been employed for some time. Some people may have genuine difficulty in finding referees e.g. asylum seekers.
- Others such as young volunteers may not have past experience to draw on. In order to avoid creating barriers, you will need to be flexible about whom you will accept a reference from.
- You will need to make a balanced assessment of the risks involved and decide whether there is a safe way of involving people unable to provide references.
- Explain to volunteers why you take references, what you ask and what you do with them.



Remember the more flexible you can be, the more people will be able to volunteer for you.

Guidance from the Office of the Information Commissioner notes that there is more of a duty of confidentiality towards personal referees than towards a previous employer or similar corporate body.

An example of a Reference Request Letter downloaded below.



Sample reference request.doc

This template can be adapted to suit the particular needs of your organisation.

FURTHER RESOURCES

The Information Commissioner has produced a **leaflet** about protection of personal data.

Disclosure and Barring Service Checking

Checking if someone has a criminal record or is barred from working with children and/or adults by carrying out a Disclosure and Barring Service (DBS) check is one way of reducing the risk of recruiting volunteers who may be unsuitable to work with children and / or vulnerable adults.



**Disclosure &
Barring Service**

Whilst it is a useful tool in helping to identify unsuitable volunteers, it is not enough just to rely on carrying out a DBS check and this should be used as part of a recruitment process which involves interviews, references and on-going training and supervision once the volunteer has started in their role.

Organisations that fall under the remit of the Care Standards Act 2000 or are 'childcare organisations' under the Protection of Children Act 1999 have a legal requirement to undertake DBS checks on their volunteers. In addition any organisation which carries out Regulated Activities will be breaking the law if they allow a volunteer who is barred from working with children and/or adults to carry out those Regulated Activities. A DBS barring list check for a volunteer will be carried out as part of an Enhanced DBS check, if this is requested at the time the application is sent to the DBS.

Where organisations work with children and / or vulnerable adults but are not covered by any of these requirements, the only legal obligation which those organisations have to carry out DBS checks is the duty of care which they have towards the people they work with.

The duty of care requires that an organisation does everything reasonable within its power to protect people from harm. It could be argued that if an organisation works with children and / or vulnerable adults, part of this duty of care is to undertake DBS checks on volunteers who are going to work with those people.

An organisation which works with children and / or vulnerable adults should carry out a risk assessment for their volunteers to see whether the children and / or vulnerable adults might be at risk and if the role is eligible for a DBS check. If a potential risk and / or eligibility for a DBS check was identified, then one way of reducing the risk would be to carry out DBS checks.

If a volunteer is going to work with children and / or vulnerable adults, an organisation can include a sentence on their application form which says that because of the nature of the work to be undertaken, the role is exempt from the Rehabilitation of Offenders Act 1974 and so all convictions including spent convictions should be declared and the role will be subject to a DBS check.

The statement should also include wording which says something like 'having a criminal conviction will not necessarily prevent you from becoming a volunteer'. The reason why you should include this statement is that a DBS check will include all convictions however minor or long ago they took place and you would not want to put off a potential volunteer who perhaps had a conviction 30 years ago for shoplifting whilst a teenager and had not been in trouble since.

An organisation which wants to carry out DBS checks will, unless they are going to do more than 100 checks a year, have to apply to the DBS via an 'umbrella body' which will help the organisation process the applications. An "umbrella body" will also be able to explain some of the technical definitions such as "regulated activities". A list of umbrella bodies can be found on the **DBS website**. The DBS do not make a charge for processing a DBS check but most umbrella bodies will make a small charge to cover their costs.

At present, the usual advice is that each organisation should obtain a DBS check for their organisations regardless of whether the individual has already been checked by another organisation. There are good reasons for

this, as an older CRB or DBS check may be out of date if the person has been to court since that check was carried out. In addition the person may not have been checked for a similar role, or may have been barred from working with children and / or adults since their last check.

As different information may be revealed, particularly about what is known as non-conviction information, as a result of checks on different roles, the full background about a person might not be known if a 'second hand' DBS check is used.

There are proposals for this situation to change, probably from 2013, when a system may be brought in which allows an individual to apply for a DBS check and then to present it to as many organisations as they wish.



DBS Decision Tree.doc

This template can be adapted to suit the particular needs of your organisation.

Induction and Training

Volunteers need to feel welcome. Most people want to do a good job within their voluntary role. They need to know from the outset what is expected and involved. As with paid staff, induction is an important stage in the recruitment process for volunteers.



It acts as an introduction and welcome to the organisation for the prospective volunteer and can give them a “taste of what’s on offer”. Induction gives organisations an opportunity to provide volunteers with further details and information needed to do the role.

This may also involve explaining to volunteers the policies and practices of the organisation, clarifying any queries or potential problems, setting ‘boundaries’ or ‘ground rules’ and encouraging them to work to a set of principles - the ethos of the organisation.

Induction takes place over a period of time. People are often very nervous when they start a new volunteering role and explaining exactly what they will be doing over the next few weeks can help to put them at their ease. Induction and training for volunteers form parts of the same process, the purpose of which is to ensure that volunteers are able to carry out their volunteering role as effectively as possible.

You need to remember that for the first few weeks, volunteers will still be making up their mind about whether they want to stay. The induction helps them work through this process - this way both you and the volunteer are much more likely to understand what motivates them and you will end up with a happy and committed volunteer.

To make this process easy, it can be a good idea to introduce the induction as a taster or trial period, at the end of which you and the volunteer can both discuss how the volunteer feels they are doing, what kind of support they feel they need, the areas of the work in which they would like training and which type of work interests them most.

On their first day you will probably want to keep things very basic. You may want to cover fairly informal things - practical things like knowing where the

toilet is and where they can make a cup of coffee can help to make the volunteer feel comfortable and relaxed. There will of course be some formal things that you need to cover quite early on. It is a good idea to go through any important policies and procedures with the volunteer; by going through them you can make sure that the volunteer understands them and is comfortable with them.

It is also good for anyone with limited literacy or English, who may otherwise be too embarrassed to ask for help. These areas may include health and safety, the volunteer agreement, equal opportunities, confidentiality, and problem solving procedures.

Many organisations find it useful to have a volunteer handbook or induction pack, which contains all the information the volunteer needs. Make sure this is updated regularly and ask current volunteers if anything could be added to make it even more comprehensive.

The induction pack would be a folder that contained key documents such as policies and procedures, important forms like expense claims and the volunteer agreement.

The induction checklist can be a simple form where the person being inducted and the person running the induction sign off the items as they are covered. Having a checklist means that you do not have to rely on your memory!

You can download a sample contents page for an induction pack and an induction checklist which you can then amend and develop for your group. Both downloads cover a wide number of areas.

If you are very a small group, you will not need to include all these items – you should choose those that are relevant at the moment. As your group develops and becomes more formal, you may wish to add more categories from the templates.



Sample volunteer information booklet.doc

This template can be adapted to suit the particular needs of your organisation.

Staff & volunteer induction checklist.doc

This template can be adapted to suit the particular needs of your organisation.

The rest of the induction period will probably be taken up with training and the volunteer trying out the type of work they will be doing.

Effective induction will give volunteers more confidence, especially in the early stages of their work, and demonstrates that the organisation values the involvement and work of a volunteer.

Training may be formal or informal but it can:

- Enable volunteers to do their tasks more efficiently and effectively
- Make volunteers feel their work is being taken seriously by the organisation, and is not just a marginal activity
- Provide job satisfaction for the volunteer, offering help with personal development and career progression
- Provide a benefit to volunteers - training may be used by the organisation as a means of rewarding their volunteers and thanking them.

Do I need to do all the induction myself?

Sometimes managers take on all the induction themselves despite the fact that they have a heavy workload above and beyond their volunteer manager role.

It is advisable to see if other members of staff or more senior or experienced volunteers can take on some of the induction for you. You, as manager, may assume overall control, but delegating some of the induction to others will allow you to get on with other work and also ensure that a wider group of staff are involved with your volunteers from the onset.



Having volunteers who can act as mentors to new recruits can be beneficial, as the mentors will have some experience of what the new volunteer may be going through in terms of worries, concerns and expectations. In a later section of this Toolkit we expand on the idea of developing some volunteers as volunteer supervisors.

It is important to realise that every volunteer is different – people take in and digest information at different speeds, some are practised in using IT, others have a phobia about computers and so on. Thus some inductions may be quite quick, others need longer.

Group Induction

Some organisations prefer to hold group induction sessions where a number of new volunteers attend and learn about the organisation together.

This has a number of advantages:

- The new recruits all receive the same information
- They can start making friends and receive peer support
- It saves time

It is important though to check that they understand the information given and that there is an opportunity for individual support, if required.

Support and Supervision

Once a volunteer has been recruited, selected and trained and is undertaking their role effectively, they have become a valuable resource to your library. This does not, however, mean volunteers can be just left 'to get on with it!'.

It is common and justifiable, for example, for volunteers to look to the organisation for continuing help and support. In turn, by valuing people, enabling their personal development, building skills and experience, making them feel motivated, needed and wanted; your library service will be demonstrating a commitment to its volunteers.

Support for volunteers should be integral to the volunteering experience. Support is essential to help ensure that volunteers can perform to the best of their abilities and also to ensure they are gaining satisfaction from their experience.

Support should be made easily accessible and volunteers need to know who they can go to when they require support. The support needs of volunteers will change over time, so the library should constantly review its procedures.

Support is primarily about meeting the needs of volunteers; supervision is likely to be more concerned with the needs of the organisation. Supervision ensures that, through regular review sessions, individual volunteers are

working to their role description and acting in accordance with the guidelines and policies of the organisation. Supervision often encompasses a far wider range of issues and concerns.

Supervision can, for example, provide an opportunity to assess the training needs of a volunteer, consider whether their role is too demanding (or not sufficiently demanding) and ascertain if they are receiving adequate support. Therefore, supervision can perform a supportive function and will often form part of a volunteer's support.

Other Definitions

The terms "supervision" and "support" mean different things to different people. For some, the words mean the same, for others supervision is what you provide for staff, support you provide to volunteers. Others may see the "formality" of the encounter as creating a difference.

The following definitions are generally agreed:

- **Supervision** – a planned meeting happening on a regular basis which may have an agenda, set in advance or at the start of the meeting, covering work plans, personal development, problems and opportunities. Some form of note-taking may occur to record what was discussed.
- **Support** – an unplanned meeting which may arise because the member of staff or volunteer (or manager) has a specific issue / problem that needs discussing.

As a volunteer manager it is important to discuss with volunteers how they like to be managed, what type of supervision and support they will receive and how often. If you both work in the same building then support is likely to happen all the time, either formally or informally, such as a chat in the corridor. Whether you decide that formal supervision sessions rather than informal support are necessary may be determined by a number of factors:

- The seniority of the volunteer role
- The difficulty of the work being undertaken by the volunteer e.g. volunteers who work with challenging clients where updates on progress or discussion of issues may need more than just a brief chat
- The motivation of the volunteer e.g. if a person volunteers to gain experience of a work environment, taking them through formal supervision sessions could be regarded as part of their development.

One should also recognise where volunteers are in terms of their development and confidence.

Levels of Supervision

A manager's job is not to do things directly but to make sure things are done. There are four levels of control, starting at the bottom of the ladder and working up. Different people will need different levels of supervision and support, depending on their abilities and experience and their volunteer role.

The following diagram illustrates the principles. As volunteers develop within their role, you, as the manager, should be aiming to move them up the ladder so that they become more responsible and require less “hands on” supervision and support over time.



Self-assignment - The person decides what to do and does it. Manager / supervisor sees them rarely. There is a danger the volunteer will feel uncared for / out of touch. Make sure you keep in regular contact.

Monitoring progress - The volunteer knows what to do, does it and feeds back on an agreed frequency basis either orally or in written form.

Control - The volunteer does what they are told. Authority is totally invested in the manager / supervisor. This level is usually for new volunteers.

If you need some guidance on what to discuss in a more formal supervision session, you can download some helpful templates below.



Sample supervision record.doc

This template can be adapted to suit the particular needs of your organisation.

Sample supervision form.doc

This template can be adapted to suit the particular needs of your organisation.

Sample questions to ask in support sessions.doc

This template can be adapted to suit the particular needs of your organisation.

Group Supervision and Support

In some cases it may not be practical to have individual support / supervision session. If you are part-time or if you have many volunteers (over 10) to supervise, then small group supervision may be the answer.

Support for a volunteer should begin at the first point of contact and remain continuous throughout their time spent with the organisation. Support is integral at all times and underpins the whole volunteering process. As we highlighted in the ladder analogy above, one must not forget that even the most experienced or competent volunteer needs support and contact, even if it is a 10 minute phone call once a month.

FURTHER RESOURCES

The Institute for Voluntary Research has produced a **report** on volunteers' views on involvement and support.

Volunteer Retention

Thinking about retention should start even before volunteers are recruited. A considerable amount of resources – from recruitment, induction, training, support and supervision are “spent” on each volunteer and so it makes sense to look at keeping volunteers for longer.



The nature of volunteering means that volunteers are free to come and go. This means thinking more creatively than you might if you were managing paid staff. There aren't any magic solutions, but there are some steps you can take to make volunteering with your library service a rewarding enough experience for them to continue to volunteer.

Creating Rewarding Volunteer Roles

You need to put a lot of thought into designing rewarding volunteer roles. Obviously not everything a volunteer will be doing is going to be fun, but when drawing up a volunteer role description look at the tasks you are pulling together. What is there in the role that would attract and keep volunteers? Is there a chance to learn new skills or meet new people? And what does the role have to offer a volunteer in the medium to long term?

Role descriptions need to be flexible enough to allow for some adaptation to suit individual volunteers. If a volunteer has some say over the role they are coming into, then there is more chance that they are going to be happy in it.

Role descriptions should also be open for negotiation further down the road. Once volunteers are within the role, they may be looking for new challenges, or find they really hate a task they thought they'd enjoy.

Clearly though there are limits to flexibility; your library has its own needs that have to be met.

Volunteer Supervisors

One possible area that could be rewarding for some volunteers is to create some volunteer supervisors. If you have to manage a large team of volunteers, creating a number of supervisors/team leaders will help to ease the burden and they can deal with some of the day-to-day problems.

This will only work if you are confident that they are competent experienced and “sensible” enough and that you make it clear where the boundaries of authority and delegated responsibility lie.

Volunteer supervisors could be particularly useful for organisations where the volunteers are spread over a wide geographical area. Having volunteer supervisors in the west, east, north and south of a borough or different branches could help you provide a more regular support mechanism.

If you are considering “promoting” some of your volunteers to the role of supervisors, you should consider whether this might cause disruption and discontent amongst your other volunteers. A particular volunteer may feel snubbed and ignored and may be unwilling to accept the “authority” of a supervisor who was once their equal. It is obviously sensible to find good reasons why the person has been promoted.

These could include:

- The person has longer experience of volunteering for the group
- The person may have or had extensive “management” experience currently or in the past
- The person may be giving a more regular commitment to the organisation than other volunteers.

Motivation

Looking at the reasons why people volunteer is extremely helpful when recruiting, but motivations are equally important when thinking about volunteer retention. Volunteering is a two-way relationship.

Volunteers may not be paid, but there is always something that they are seeking from the experience. This is the hook that gets them into volunteering in the first place.

As we emphasised earlier in this Toolkit, it helps a lot to be aware of a volunteer's particular motivation. It's one of the things to ask during an informal recruitment interview. If someone comes into the organisation because they want to feel ownership of a piece of work and end up doing bits and pieces of everything, they're not going to be too happy.

Motivations can change, which makes communication with volunteers very important. Someone may have started volunteering because they wanted to get out of the house for a couple of afternoons a week, but later on it might be the opportunity to develop within the role that really keeps them coming in. Talking to volunteers, both informally and as part of supervision meetings, allows you to keep an eye on their motivations, and if possible shape their role to continue meeting them.

Recognition

Volunteers should feel that they are an important part of the organisation. They should be involved in decision-making, and their achievements should be recognised. There are many ways of making volunteers feel involved, welcome or recognised.



Different people value different forms of recognition:

- You can involve them in decisions about the day-to-day running of the library
- Any event held to celebrate achievement is also an opportunity to acknowledge the work of volunteers
- Include volunteers in staff discussions and some staff training where appropriate

- Add their names to published lists of staff, though make sure that they are labelled volunteers
- Put them forward for volunteer awards - local, regional and national
- Perhaps think about volunteer recognition awards inside your organisation
- Volunteer events - a thank you event, as part of Volunteers Week, for example
- Certificates - a once a year thank you, or after a fixed term
- Accredited training opportunities
- Invite volunteers on to working groups - reviewing the volunteers' handbook as an example
- Send them a card for key celebrations or for their birthday.

But always

- Say thank you when they leave at the end of their volunteering day
- Make sure they have enough quality tasks to do during their volunteering.

Volunteer Get-togethers

Whilst you may already programme group supervision sessions or volunteer meetings, make sure there are opportunities for social occasions. As mentioned before, socialising, meeting new people and making friends are often important motivational factors for volunteers. Some groups programme specific social events for volunteers, others include "social time" within group supervisions and volunteer meetings.

Volunteer Newsletters

Sometimes organisations lose volunteers because the volunteer feels out of touch with the group. Some people may only volunteer three or four times a year, perhaps at events. Sending out a regular newsletter or e-bulletin can help people feel that they belong to the organisation.

Mixing organisational news, pieces of information as well as perhaps some "fun" elements (quizzes, light-hearted articles etc.) can help to keep people in touch with what you are doing. Highlighting the achievement of your volunteers will also help to boost morale.

Many volunteers have access to e-mails and the internet, so developing a newsletter should not prove costly, but always remember to post newsletters

to those who do not have internet access. Writing and editing the newsletter need not take up too much of your time – it could be a role for a volunteer!

Good Practice

The better and more efficiently volunteers are treated, the better they feel about the organisation they are donating their time to. Key things to bear in mind are clarity and consistency. Volunteers should know where they stand. This means:

- Fully inducting volunteers
- Keeping volunteers advised of their rights and responsibilities
- Having a volunteer policy in place
- Having a named supervisor to go to with problems
- Clear problem solving procedures
- Taking equal opportunities and diversity seriously.

Exit Interviews

If you are worried about a high turnover of volunteers, one of the best ways of finding out if there is a specific problem is to talk to volunteers who are leaving. This could be through a questionnaire or an informal chat (it is perhaps better if it isn't an immediate supervisor doing this!).

Even if you don't think there's a problem, exit interviews are a useful tool for monitoring your use of volunteers. People leaving the organisation are likely to be more candid than they would otherwise be. A simple Exit Interview Form can be downloaded below.



Sample exit questionnaire.doc

This template can be adapted to suit the particular needs of your organisation.

FURTHER RESOURCES

A Choice Blend: what volunteers want from organisations and management. Katherine Gaskin, 2003. It is available to **download** from Volunteering England.

www.morevolunteers.com is an American site filled with useful resources.

Legal Issues

Nearly a third of the population (eighteen million people) volunteer their time and skills each year. Post the 2012 Olympic, which promoted (through the Games Makers and Ambassador Volunteer Schemes) such a positive image of volunteering, the number of individuals registering to volunteer has grown substantially. The benefits of volunteering, both to the individual and the wider society continue to be heralded by many, including central and local government. It is therefore vital that organisations understand both the good practice and the legal implications of volunteer involvement, in order to ensure that volunteering remains a valuable experience for all.



Volunteers and Employment rights

People new to volunteering are often shocked to discover that volunteers are not covered by the same protections as paid staff. This means that, in theory, volunteers can be discriminated against or unfairly dismissed with impunity.

This is, however, a grey area and in some cases 'volunteers' have claimed their status is that of a worker or employee and this has been upheld in court. Other rulings, however, such as under the Equality Act 2010, have not seen volunteers as employees, so they do not have the same rights.

The central issue here is whether or not there is a contract between the organisation and its volunteers; and if so, what the consequences are of this. It is important, therefore, to know how to reduce risk by avoiding some common pitfalls; by being informed about such matters as reducing obligations and perks and the language of contracts, the importance of creating a distinction between paid workers and volunteers and of treating volunteers fairly. Good practice would advocate the use of volunteer agreements, a form that was discussed earlier in the Toolkit.

FURTHER RESOURCES

"Volunteers and the Law" Restall M. Volunteering England, 2005. Available to download.

"The Voluntary Sector Legal Handbook" Adirondack, S and Sinclair Tavor. J. DSC www.sandv-a.co.uk

Data Protection

If information kept on volunteers falls into the Data Protection Act 1998's definition of 'personal data', the library has legal duties concerning the collection, storage, use of and disclosure of such information.

Data Protection Principles

Under the law, personal data must be:

- Fairly and lawfully processed
- Obtained only for specified and lawful purposes
- Adequate, relevant and not excessive for the purposes for which it is processed
- Accurate and up-to-date
- Not kept longer than necessary
- Processed in accordance with the rights of individuals
- Kept secure
- Not transferred to countries where data protection legislation is inadequate.

In practical terms you should check whether you have a duty to register with the Information Commissioner's Office. On the website (address below) you can find a simple questionnaire which will help you determine the answer.

FURTHER RESOURCES

The Information Commissioner's Office has a wealth of information on data protection www.ico.gov.uk.

Volunteer Records

No clear guidelines exist for the retention of volunteer records, but organisations should follow the data protection principle that data should not be kept longer than for the purpose for which it was taken. The Disclosure and Barring Service states that disclosures should only be kept for as long as absolutely necessary.



The sort of personal information about volunteers that you may need to keep could include:

- Contact details
- Details of experience, skills and preferences used to assess suitability for a role (recorded on an application form or gained through interview)
- Monitoring information including gender, ethnicity and disability
- Information relating to CRB or DBS checks
- References
- Supervision notes.

Volunteers have the right to make a request to access all of the data you hold about them. Requests should be made in writing and you will need to decide on a process for this, e.g. will access be by appointment?

Copyright

Copyright normally belongs to the person who created the work. The law says that material produced by employees belongs to their employer, but makes no mention of volunteers. Therefore organisations should ask volunteers to transfer copyright to them or agree a licence whereby the organisation can use the work within agreed limits.

While this may seem a trivial issue, Volunteering England has heard of cases where volunteers have been producing work for important publications such as annual reviews, but following disputes with their organisations have refused to allow them to use their work.

FURTHER RESOURCES

Volunteering England's Information Team has drafted a form of words which you can adapt for use with your volunteers when dealing with copyright issues. To request a copy, you can email good.practice@volunteering.org.uk or call 0800 028 3304.

Expenses, State Benefits and Tax

Expenses are extremely important to many volunteers and are also important to your organisation in helping to attract a diverse volunteer 'workforce'. Any library serious about involving a diverse range of volunteers should reimburse expenses.



Reimbursing volunteers' expenses is an equal opportunities issue and means that volunteering is accessible to all, regardless of income. It also makes it clear that your organisation values its volunteers and is actively making sure that barriers do not exist to volunteer involvement.

Guidance on mileage and subsistence rates can be found on the HM Revenue and Customs website. Currently HM Revenue allows a car mileage payment of up to 45p a mile without incurring tax charges.

It is important that volunteers are only paid out-of-pocket expenses i.e. costs that they have actually paid out. Beware of paying a flat rate amount or your library could fall foul of national minimum wage legislation or of creating a contract of employment. Advise volunteers that reasonable previously agreed expenses can be claimed via the organisation's claim form, backed up by appropriate receipts.

Pay expenses as soon as possible after they have been incurred - Ask volunteers what suits them best - remember what is a small amount of money to some may not be small to others.

A weekly or monthly reimbursement system may be easier for your organisation, but it may be that you have to develop different systems for different people. It is also permissible (under the Social Security Amendment (Volunteers) Regulations 2001) to pay expenses in advance - with unspent money being returned with evidence of money spent.

NOTE: Some volunteers may feel that they do not need or should not even be offered expenses. Explain the equal opportunities issue - not everyone can afford to write off costs incurred through volunteering. It's important that there is no stigma attached to claiming expenses, so it would be better if everyone put in a claim, even if they return the sum as a donation, which can be gift aided if they are also a UK tax payer.

Another key reason for encouraging everyone to take their expenses is so that organisations have an accurate picture of volunteer costs for both funders and for themselves in setting realistic budgets for the future. You can download a simple template expenses claim sheet below.



Sample expenses claim form.doc

This template can be adapted to suit the particular needs of your organisation.

Volunteering and State Benefits

In theory, genuine voluntary work should not affect entitlement to any benefit; but in practice this is not always the case. It is useful, therefore, to be aware of the rules and regulations.



Benefits are handled by Jobcentre Plus. Where benefits legislation defines voluntary work, it is always described as unpaid and where 'volunteers' receive more than out-of-pocket expenses, they will be treated as if they are in paid work. Volunteers can receive money to cover expenses connected with volunteering.

This may include the cost of:

- Travel to and from the place of volunteering
- Any special equipment such as waterproof clothing
- Any meals taken away from home during the voluntary activity
- Childcare costs while volunteering.

Current rules concerning some of the most common benefits are:

- **Jobseeker's Allowance** (soon to come under the name of Universal Credit) - claimants are fully entitled to volunteer as long as they remain available for and actively seeking work. Currently there is no limit on the number of hours. In the past there has been a misconception amongst some Job Centre employees that volunteers on Jobseeker's Allowance can only volunteer for a maximum of 16 hours a week. This was not true! It should be noted, however, that the Coalition Government intends to bring in rules to cap the number of volunteering hours to 17.5 hours a week.

- **Income Support** - claimants can volunteer for as many hours as they like but must not receive any income from volunteering (apart from legitimate expenses)

- **Incapacity Benefit and Employment and Support Allowance** - claimants are fully entitled to volunteer and this should not call into question a person's capacity to work. There is no limit to the number of hours.

Individuals in receipt of benefits should be asked to inform their advisers if they take up a volunteering role. It is good practice to let them know, but in fact it is entirely up to the volunteer whether they tell their adviser or not.

As an organisation you have no duty to inform the benefits office of who is volunteering for you - leave it up to the individual volunteer to decide. Do bear in mind that if someone has not informed the benefits office that they are volunteering, they may be wary of their name or photograph appearing in any publicity, so always check first before 'outing' someone as a volunteer.

As noted above, the Coalition Government are making changes to the names and conditions of certain benefits, and these changes will be phased in over a couple of years. The Universal Credit, for example, will come into effect in 2013 and this will become a new single payment for job seekers and low income earners.

If you wish to get up-to-date information about benefits, visit the www.gov.uk website (Benefits section).

Tax and National Insurance

If volunteers receive nothing more than out-of-pocket expenses, then this reimbursement will not have tax implications. If they receive some form of payment, then this will be taxable. Simply referring to a payment as 'expenses' does not make it exempt, nor does describing it as an honorarium, pocket money or sessional payment. Describing expenses in these terms may be seen as creating a contract of employment.

FURTHER RESOURCES

For up to date mileage rates visit: www.hmrc.gov.uk/rates/travel.htm.

There is a useful document on volunteering while getting benefits, at www.dwp.gov.uk/docs/dwp1023.pdf.

Job Centre Plus has a range of information at www.direct.gov.uk.

Insurance & Liabilities

Insurance is a very important issue in relation to volunteers. Make it clear to prospective volunteers as to how they are covered by your Library services' insurance.

Volunteers should be covered either under employer's liability insurance or public liability insurance or, depending on the type of work involved; your library service may need professional indemnity insurance as well.



It may well be that the insurance cover for your library is encompassed in a policy or policies held centrally by your borough council, however, you should check and ensure that any policy explicitly mention volunteers because they may not automatically be covered. Insurance companies should also be aware of the types of work that volunteers are doing, because if the tasks are high risk, then the insurance policies may have to be changed to accommodate these risks.

The more common insurance policies are listed below. Please note, this list is not exhaustive. There are several types of insurance, which might be needed by a volunteer-involving organisation. These should be determined by an assessment of the types of exposure and losses that may occur.

The main types of liability insurance for the voluntary and community sector in the UK are as follows:

- **Employers' Liability (EL)** insurance is compulsory by law for employers and covers all staff, permanent and temporary. Trustees are advised to regard volunteers as being employees for insurance purposes and to ensure that they are appropriately covered (Charity Commission, 2003 and see also Health and Safety Executive, 1999).
- **Public Liability (PL)** insurance provides cover for injuries to the public or damage to or loss of their property caused by the negligence of the organisation, which includes the actions of employees and volunteers. The term public means anyone other than an employee and includes volunteers, participants, spectators, visitors and clients.

The following policies are also taken out by some organisations:

- Contents and Building insurance (covering premises)
- Professional Indemnity insurance (particularly important if volunteers will be giving out advice to clients e.g. CAB advisers, debt advisers etc)
- Product Liability insurance
- Trustee Indemnity insurance
- Directors and Officers (D & O) insurance
- Business Continuity insurance
- Fidelity Insurance.

Other policies such as motor insurance, equipment insurance and medical malpractice are held by some organisations, depending on the nature of their work. In some Home Visits Library services, for example, the groups take out insurance to protect their volunteer drivers' personal no claims bonus if they were to have an accident whilst driving their car as part of their volunteering duties.

It is important to point out to your volunteers exactly what activities are covered by your organisation's insurance policies. Many volunteers like to be helpful and accommodating and sometimes, unwittingly, they cross the boundary and undertake duties they should not.

The Unions- volunteers should not be used for job replacement

Prior to commencement of any volunteer programme it is essential to obtain support and agreement from the unions. Volunteers can be viewed suspiciously, as undermining paid staff security, "taking people's jobs". Gaining early support and agreement with the staffs' representative union(s) can help allay these fears.



TUC volunteering Charter.docx

This template can be adapted to suit the particular needs of your organisation.

Care of your Volunteers

Health and Safety

Despite the increasing importance of volunteering, the legal obligations of organisations towards their volunteers with regard to health and safety are less clear than they are for employees.

Nevertheless, organisations do have legal obligations towards their volunteers and it is clearly good practice to treat volunteers with equal consideration when it comes to health and safety.

This means that reasonable steps should be taken to reduce the probability and seriousness of injury to volunteers. This could mean giving them proper information, training, and use of safety clothing, closer supervision and so on.

There are also duties on employers under Section 3 of the Health and Safety at Work etc Act 1974 to take account of the health and safety of those people (other than their employees) who may be affected by their activities, and to give them relevant health and safety information.

Duty of Care

The duty of care is a general legal duty on all individuals and organisations to avoid carelessly causing injury to persons. The duty is regardless of the size of the organisation, its income or whether the organisation has paid staff.

If your library asks a volunteer to do a task, which results in them injuring themselves or anyone else, you will be liable. No matter what activities your organisation is involved in, you will have to consider the duty of care owed to your volunteers.

Liability depends on establishing that your library failed to take reasonable care. The notion of duty of care needs to be considered in all aspects of an organisation's work and activities.



Health and Safety Law for Organisations with paid staff and volunteers

The main piece of health and safety legislation is The Health and Safety at Work Act 1974. It also gives employees the general duty to ensure the health and safety of themselves and others, who may be affected by what they do.

Health and safety law lays down your duties to your employees. The law also imposes further responsibilities on you as an employer with regard to people not in your employment, such as volunteers and other members of the public, who may be affected by your work activities.

Organisations with responsibility for buildings and premises and anyone controlling non-domestic premises must take reasonable steps to provide employees and volunteers with equipment and premises that are safe, including safe routes of exit.

Health and Safety Policy

A health and safety policy is the foundation on which to develop health and safety procedures and practices. The policy announces the services commitment towards good health and safety standards. The policy can help to clarify procedures and areas of responsibility.

Volunteers should be made aware of the policy and practical safety issues as part of their induction. This is a good way of reminding people about it and signposting them to the health and safety policy proper.

Fire Assessment

All public and community buildings are obliged under various pieces of legislation to specify minimum levels of standards so that the risk of fire is reduced.

Health, Safety and Welfare

All employers must provide a safe place to work, which is clean and free from risks, to reduce the risk of ill health or injury.

Employees and volunteers must be given training and information to give them sufficient skills and knowledge to carry out their work/role safely. They should also be provided with adequate and appropriate supervision.

First Aid

All employers have a duty under law to make a first aid assessment. The need for first aid will depend on the organisation's activities. Again, an assessment of the workplace is the key to deciding what first aid to provide. There are, however, minimum standards for organisations with employees.

For example, if you hold a public exhibition without first aid facilities and someone is injured, you may have broken your duty of care. If you have any doubts whatsoever, you should always contact the local Health and Safety Executive office for advice.

FURTHER RESOURCES

The Health and Safety Executive has examples of model health and safety policies.

Risk Management

Risk management is not a one-off event, but a process that should cover the whole organisation. Risk management involves integrating precautionary measures into day-to-day operations and should include policy development, programme and service planning, partnership and service agreements, financial management, governance, and personnel and facility management.



The approach to risk management planning depends on the size, activities and management structure of your library.

Risk Management has three central aims:

1. **Prevention:** the first priority; it is clearly preferable to keep things from going wrong in the first place
2. **Minimisation of harm:** minimise the magnitude of harm that could occur in the event that a risk materialises
3. **Liability reduction:** a well-documented risk management system constitutes tangible proof of due diligence and can substantially reduce the likelihood of successful legal action.

There are several models that can be used to identify and manage risk. Risk management systems are unique to their organisations and the particular issues and risks they have to deal with in their area of work. However, there is a basic six step model for volunteering that includes:

- Screening
- Induction and training
- Risk assessment
- Insurance
- Recordkeeping
- Review

Risk management is a process which never ends. It is therefore essential to keep it under review. Monitoring involves establishing systems of data collection and analysis and encompasses not only how well procedures are working, but also takes account of changed conditions or newly emerging risks. This enables organisations to introduce improvements and refinements to their practice so that small gaps are plugged and systems streamlined.

Successful Risk Management

The successful practice of risk management has a number of elements which contributes to its effectiveness:

- **Getting expert help** - There are a large number of resources on risk management, which organisations can consult in developing their own systems.
- **Devising plans and systems** - Guides on risk management stress the value of having a team or a collective, participative process for devising plans and systems. This has the advantage of sharing the load, bringing in as many perspectives on risk as possible and ensuring a sense of ownership across the organisation.
- **Taking a positive and realistic view** - Taking a positive and realistic view of risk management helps organisations embrace and implement it effectively.

This includes emphasising the benefits and opportunities, and promoting the view that it makes the organisation safer and more accountable and improves practice overall. Organisations that promote risk management as an enhancement of their volunteer programme generally get a positive response.

- **Strong motivation and context** - Organisations that have had a bad experience related to risk have a particular motivation to implement it effectively. An experience of insurance difficulties, allegations, claims or threats of loss of funding is a strong stimulus to get things in order to prevent future risks to the organisation.

- **Implementation** - The approach taken in implementing risk management can influence how successful it is. This includes developing systems and procedures that are as efficient and easy to use as possible and the way in which they are implemented with staff and, particularly, volunteers.

The Impact on Volunteering

The focus on risk has had significant effects on volunteers, both directly and indirectly through impacts on organisations. Greater caution in programme planning and volunteer role development, and the increased burden of bureaucracy can limit an organisation's capacity to engage and retain volunteers.

Volunteers themselves worry about risk and being sued, and some are put off by paper-work and the level of responsibility.

Part of the problem may be the name itself. Risk management implies problems that need to be overcome. But if we see managing risk as maximising opportunities for doing well, it puts a different face on it. So we'd rather call it 'safe keeping'. This suggests that managing risk is about keeping things safe and that everyone and everything that organisations are dedicated to helping can flourish in the safe keeping of volunteers. Whenever you encounter the term risk management, think 'safe keeping'.

Practical Considerations

Whilst many volunteers help to enhance an organisation's services and reputation, there are some potential risks you face. These include:

- Accidents, injuries if volunteers do not take on board potential health and safety risks
- Damage to the organisation's reputation because of poor quality or sub-standard work or a well-meaning but inefficient service
- Breaches of confidentiality – volunteers do not fully understand the rules regarding confidentiality of information or they leave confidential files lying around
- Services cannot be delivered – because volunteers do not turn up.

There are a number of areas that may demand special attention:

Volunteers who may need special Risk Assessments

Some volunteers may require risk assessments being done, over and above the standard day-to-day or role assessments. These include:

- Young volunteers (under the age of 18)
- Pregnant volunteers
- Volunteers with learning disabilities
- Volunteers with physical disabilities or mental health issues
- Elderly volunteers who may be experiencing diminishing physical or mental faculties.

One issue, that may be particularly relevant to some groups, is helping the older volunteer to continue in meaningful and rewarding roles. Some libraries have a number of active volunteers aged over 85. It is always distressing to have to tell elderly volunteers that they can no longer contribute to your service, particularly if they will not acknowledge the fact that their physical or mental capacities are diminishing. One has to balance, however, the organisation's health and safety and risk issues along-side the volunteer's determination to carry on. Being flexible and imaginative with tasks can help to prolong volunteers' active participation.



Sample risk assessment form 1.doc

This template can be adapted to suit the particular needs of your organisation.

Sample risk assessment matrix.docx

This template can be adapted to suit the particular needs of your organisation.

FURTHER RESOURCES

Risk toolkit - how to take care of risk in volunteering - a guide for organisations, Volunteering England www.volunteering.org.uk (available as a PDF download).

Equality and Diversity

While the Equality Act 2010 does not apply to volunteers, an organisation committed to equality and diversity should believe that everyone, who chooses to, has a right to volunteer and that everyone has the potential to be a valuable, respected and active member of his or her community.

A diverse organisation is one that recognises and values difference. If you draw your volunteers from as many backgrounds as possible, you will benefit from the fresh ideas and perceptions offered by people with different skills, attitudes and experiences.



- Organisations can always benefit from fresh approaches, so motivating people with a broader range of backgrounds, knowledge and experiences can help you plan new projects and invigorate long running ones
- Incorporating a wider range of ideas might help your library to improve its service and work more efficiently to fulfil its aims
- Reflecting the local community can boost an organisation's credibility and improve its ability to focus on local needs. This could help you to develop new ideas or to meet specific criteria
- Volunteering should offer everyone a fair chance to contribute and avoid excluding people by stereotyping or labelling them
- An organisation becomes more welcoming as it becomes more representative of the community in which it works. You can benefit from a snowball effect as your organisation diversifies and is accessible to new clients, customers, staff and a greater pool of potential volunteers
- Also bear in mind that the population is changing, in terms of age, ethnic diversity, technology, family and lifestyle choices. Services need to reflect this to be relevant and effective. By recognising and accommodating difference, libraries can ensure they meet individual needs.

Volunteering opportunities that promote diversity have these ingredients:

Relevant and Meaningful

If you are going to make a real impact, then your focus needs to be less on how potential volunteers think of you and more on how you think about them.

The act of giving time for no material gain has different meanings depending on your class, social and ethnic background and whether your general life experience has been primarily as a giver or receiver of services. If you are going to provide volunteering opportunities that will be relevant and meaningful to others, you need to step outside your habitual world view. People will want to volunteer for something with which they have a sense of ownership.

Bear in mind that formal management structures may turn some people off. Young people, in particular, tend to be at a transitional point in their lives. They may be between school and work or college, so they may not have the time to engage in projects with a long lead-in time.

Easy to find out about

When people are asked why they don't volunteer, they typically say that they weren't asked. The invitation to volunteer works best when it is targeted at specific groups or, better still, made face-to-face.

You need to include information that will encourage people e.g. mention that expenses are reimbursed and that transport is provided if you know that lack of money or transport are likely barriers to volunteering for your target group. Consult with individuals in your target group to find out what style or language will make sense to their peers.



Convenient time and duration

When and how much time people have to donate depends very much on their lifestyle. The parents of young children may want to volunteer while their children are at school. Teenagers may want to volunteer in the evenings and at weekends.

Employed people may be relatively time poor and only want to volunteer for a couple of hours each week, whereas time may weigh heavily for new

migrants, the retired or under employed, who might welcome the chance to volunteer for several hours at a time.

Involve social contact

Most people like company. The opportunity to chat can make boring tasks fun. Create situations where boring tasks can be done by people in groups.

Enjoyable

If you want to recruit more volunteers from a wider range of backgrounds, then you need to develop volunteering opportunities which take account of your potential volunteers' priorities. Taking account of volunteer concerns may lead you to question the whole basis upon how you do what you do. That's the real challenge in diversity.



Sample Equal Opportunities statement.doc

This template can be adapted to suit the particular needs of your organisation.

Sample Equality & diversity Policy.doc

This template can be adapted to suit the particular needs of your organisation.

Talking to your Volunteers about Equality and Diversity

One issue that occasionally arises is that some volunteers may not always accept the principles of equality and diversity. What if your volunteer makes racist and/or sexist comments. Volunteer managers would need, initially, to take the person to one side and make him aware that expressing such views whilst volunteering was unacceptable.

If the volunteer did not heed the warning and persisted with making such remarks, he would have to be told to leave. If your organisation had introduced a volunteer agreement, you could use the fact that he was not abiding by the organisation's policies and procedures as grounds for asking him to leave.

FURTHER RESOURCES

The Equality Commission for Northern Ireland has produced a **guide** for promoting Equality & Diversity in Volunteering.

Confidentiality

Volunteers should be bound by the same requirements for confidentiality as paid staff. Everybody can be affected by confidentiality issues and it is important that volunteers realise that it is not only clients and client information that this applies to, but also to volunteer issues and individuals and the day-to-day work of your library service.



You need clear guidelines on the handling of information so that everyone knows what is expected of them. Volunteers need to be clear which information can be discussed outside the organisation and which cannot.

Confidentiality is a very complex subject; but both staff and volunteers must understand and respect the need for confidentiality in relation to their roles.

- Confidentiality is about trust – trust will not exist if service users feel that anything they say in confidence will not be treated with respect
- Volunteers should be advised not to encourage service users to disclose irrelevant confidential information
- Volunteers should be asked to use their common sense in matters of confidentiality and to be sensitive and have a professional approach
- Volunteers should also be made aware that breaches of confidentiality are treated very seriously.
- Amongst organisations, there is a range of practices in relation to disclosure of confidential information about service users:
- Organisations that operate a “confidentiality within the agency” rule i.e. information concerning any service user can be discussed within the agency but is not disclosed to anyone else without permission
- Organisations that always seek and obtain the permission of the service user before disclosing any information
- Organisations that will always operate on the principle that they have a duty to report confidential information if other people may be put at risk unless they disclose.

Information about Confidentiality

There are different implications for volunteers working with different client groups. For example the issues around children are quite involved, specifying that the child must be protected from harm. While an adult has the right to expect confidentiality on information told in confidence to a volunteer, the volunteer has a legal duty to report any concerns around safeguarding where abuse is suspected.



There are also issues for volunteers and groups or organisations around the handling of volunteer and client information. There are a number of ways of doing this:

- Formal policy
- Code of Practice
- Accessible information for volunteers
- Training
- Setting out procedures for a confidentiality policy, which covers the disclosure of information about volunteers / clients / staff, when to share and whether it varies for different groups.

A Confidentiality Policy sets out guidelines for volunteers and should include:

- How to deal with one-to-one situations
- Why confidentiality is important
- Keeping records
- Report forms
- Who to report to

On the subject of records, the policy should describe:

- The purpose of keeping records
- Any monitoring system in place to ensure complete anonymity
- How records will be kept accurate and accessible
- How records will be kept in a secure lockable filing cabinet. Only relevant staff shall have access to the cabinet

- How all records will be reviewed annually and how the destruction by a confidential shredding process will be applied where relevant.

This policy should be displayed in the offices and venues, and all efforts should be made to ensure that individuals accessing the library are aware of this policy.

All libraries that hold lists of personal details on computer or on paper must register under the Data Protection Act. If in doubt, always check with the Information Commissioner. There is a self-assessment guide online.

FURTHER RESOURCES

The Office of the Information Commissioner has data protection guides at [**www.ico.gov.uk**](http://www.ico.gov.uk).

A template for a declaration regarding confidentiality, available in English and eight other languages, is available from:

[**www.sheffieldvolunteercentre.org.uk/translated_resources_organisations**](http://www.sheffieldvolunteercentre.org.uk/translated_resources_organisations)

Dealing with Difficult Situations

Sometimes difficulties arise with individual volunteers or groups/teams of volunteers. You may find that a volunteer is unable/ or unwilling to undertake the tasks agreed or abide by other policies/procedures. Often volunteers may be unaware that they are doing anything wrong. This is why it is so vital to have adequate supervision and regular support meetings. After all, a volunteer can't be expected to improve or change the way they work if an issue hasn't been brought to their attention.

If you are going to meet up with a volunteer to discuss an issue involving behaviour, poor performance or attitude, it is often worth stepping back for a moment to take stock of the volunteer's performance. Sometimes we can find ourselves overwhelmed by what the volunteer is doing wrong. The following downloadable worksheet can help you to:

- Get things in perspective – there may be things that they are doing well
- Think more constructively i.e. not what they are doing badly, but what they need to improve
- Collect your evidence – sometimes you need to come up with specific examples of poor behaviour, attitude or performance
- Focus on what they can do to improve.



Sample- Volunteer Performance Analysis.doc

This template can be adapted to suit the particular needs of your organisation.

A change is as good as a rest

Perhaps the volunteer needs a change of role. They may be bored in their current one, or feel underused. It may help to look at volunteering in terms of a series of tasks rather than roles. This means that people aren't necessarily locked into a rigid off-the-peg role, and could have more say over their voluntary work. Again, this is a problem that can be spotted earlier through adequate supervision. Communication is a vital part of volunteer management.

If a volunteer is not suited to the role they are assigned to or any others at your library remember that they may have much to offer to a different organisation. Make sure that they are aware of this, and refer them to back

to the local Volunteer Centre. Having a trial period for your volunteer allows you to see whether or not they are suitable, as well as giving the volunteer a chance to get a taste of the role.

Point of no return

But with the best will in the world, there may be some situations, which can only end with asking a volunteer to leave. This could be because the volunteer has committed some form of gross misconduct.

It is when things get to this stage that you need a volunteer disciplinary procedure in place. As with paid workers some situations such as theft, abuse, gross misconduct, persistent breaches of confidentiality can lead to instant dismissal. In some extreme cases the police or other authorities may need to be involved.

There have been a few but highly publicised cases where volunteers have been sent to prison; one example of this has been fraud cases where volunteers have been caught misusing or stealing charitable funds. Disciplinary procedures are important, not only because they give volunteer managers clear guidelines on how to proceed, but also because they allow volunteers to see that decisions are not being taken on an arbitrary basis.

Where it is a case of volunteers overstepping boundaries or blatantly ignoring instructions that could put others at risk, one would hope that the volunteer has received prior warning (informally to start with and then in more formal supervision sessions) so that the final disciplinary meeting leading to them being asked to leave does not come totally out of the blue.

It is obviously very bad practice to dismiss someone without adequate reasons.

Apart from the moral case, volunteers who have been treated poorly tell their friends and family about their experience. These people then tell their friends and family. Word of mouth can affect not only the volunteer programme, but the credibility of the organisation itself.

A hard decision to take

Whilst it sits uncomfortably with the spirit of volunteering, but sometimes you do have to let a volunteer go. Some situations are that serious. A volunteer who is disruptive can have a negative impact on the organisation, the client group and their fellow volunteers. Some behaviour simply cannot be tolerated.

While volunteering is concerned with values far removed from the profit motive and narrow economic views of efficiency, if it is to be valued then it does need to have some level of quality, however this is judged.



Summary

To sum up, the first thought should be ‘what is the cause of the problem?’ Much of this depends on communication with the volunteer. Follow disciplinary procedures to ensure everything is open and accountable. If a decision to dismiss/let a volunteer go is taken, be clear and direct.

Concerns have been raised that having a complaints procedure in place may contribute to the creation of a contract with volunteers, giving them access to some or all employment rights. This is a theoretical risk, but a low one. It certainly makes sense to distinguish between the grievance and disciplinary procedures provided for paid staff and procedures for volunteers. Not having clear procedures in place could lead to greater problems.

Your organisation should develop effective and consistent procedures for responding to complaints, concerns and alleged or suspected incidents of abuse. Everyone in your organisation should know how to respond if it is alleged that one of your service users, paid staff, volunteers or the organisation has been harmed or is at risk in any way.

It is unacceptable to do nothing.

FURTHER RESOURCES

Volunteering England has a range of problem-solving procedures available from www.volunteering.org.uk.

Quality Standards & Volunteer Training

If you want to become more formally recognised for the way you work with volunteers (and staff), there are a number of commonly used organisational standards and quality systems you can use.

Relevant standards include Investing in Volunteers, Investors in People, PQASSO as well as standards used in particular sectors (such as the National Minimum Standards for Care Homes and the Guidance Quality Standards for Learning and Careers Advice Work).

Most, if not all of these have a cost attached and will take time and effort to achieve. However, in terms of attracting and retaining volunteers, achieving such a standard will be appealing, as it will show that you have the relevant policies and procedures in place and your organisation 'invests' in the value of volunteering. The process usually involves registering for a standard and then working towards a particular level of achievement, which will depend on your size, income and the type of organisation you are (usually through building a portfolio of evidence).

You may have an external assessor come to audit your organisation and interview staff, volunteers and your service users as appropriate; whereas other Standards require self-assessment only.

There are also a range of training courses your staff and volunteers can attend on an individual basis on the theme of volunteering and volunteer management.

Measuring the Impact of your Volunteers

One aspect allied to quality, which is increasingly becoming important particularly to funders, is that of measuring the impact of your work. What difference does your work make to your service provision.

Part of this impact research could be to look at the difference that your volunteers make. A number of different areas could be measured. These could include:



- Time given by volunteers (either in time given or notional money value)
- Number of users helped or number of user interactions
- Qualitative effects on clients from volunteer interaction
- Amount of money raised by volunteer fundraisers
- Effects on the organisation of volunteer involvement
 - Ability to do more or see more clients
 - Increase in range of services
- Number of volunteers moving into paid employment.

In funding bids and in your organisation's annual reports including such information can help to demonstrate the effectiveness of your work.

You could collect this information through a variety of means:

- Monthly timesheets of volunteer hours
- Questionnaires sent to volunteers or users
- Your normal day-to-day organisational records
- Making short films where clients and volunteers are interviewed and talk about particular projects and what the benefits have been.

The financial impact of volunteers

If you want to calculate your volunteers' contributions in terms of notional money value, there are a number of formulas you can use. In the past the European Social Fund and various governments have published notional values.

For example, you could calculate a volunteer undertaking basic or routine tasks around the value of the minimum or living wage i.e. approximately £7.00 or £7.50 an hour. More senior or responsible posts could use a rate of between £12.00 and £15.00 an hour. For trustees and management committee members a rate of £25 - £30 an hour could be used, depending on the size of your organisation.

Thus a typical trustee meeting lasting two hours with nine trustees could have a notional value of as much as £540; to this you could add on further costs for travel time to the meeting, time spent reading agenda papers, time for the secretary to write up the minutes etc.

Advertising the fact that volunteers contribute over £75,000 a year in time, for example, is a very powerful argument that your organisation provides value for money!

FURTHER RESOURCES

To find out more about Investing in Volunteers, follow [**http://iiv.investinginvolunteers.org.uk/**](http://iiv.investinginvolunteers.org.uk/).

Read more about the CVQ suite of qualifications at [**www.asdan.org.uk/Qualifications/CVQ**](http://www.asdan.org.uk/Qualifications/CVQ)

Tools & Resources

Below are all of the Team London Love Libraries, Love Volunteering resources and sample documents that have been intersperse throughout this toolkit. They are not numbered, but each is titled for ease of reference to help you when you are searching for a particular document/example.

Example of Problem Solving Process.doc

General Training Evaluation Form.doc

Sample application form.doc

Sample emergency contact details form.doc

Sample Equal Opportunities statement.doc

Sample Equality & diversity Policy.doc

Sample exit questionnaire.doc

Sample expenses claim form.doc

Sample interview record.doc

Sample Personal information consent form.doc

Sample positive feedback.doc

Sample questions to ask in support sessions.doc

Sample reference request.doc

Sample Rehabilitation of Offenders Statement.doc

Sample risk assessment form.doc

Sample risk assessment matrix.docx

CRB decision tree.doc

Sample self-declarationform.do

Sample supervision form.doc

Sample supervision record.doc

Sample task description activities co-ordinator.doc

Sample task description art and craft volunteer.doc

Sample task description - admin volunteer.doc

Sample training needs analysis.doc

Sample volunteer evaluation form.doc

Sample volunteer review form.doc

Sample volunteer satisfaction survey.doc

Sample induction checklist.doc

Sample Volunteer Handbook Contents.doc

Sample Volunteer policy.doc

Support

There are a number of agencies across London who can advise you on best practice around involving volunteers in your library and that can provide you with a wealth of resources, support and training.

Greater London Volunteering: 020 7864 1472, info@glv.org.uk,
www.greaterlondonvolunteering.org.uk

Volunteer Centres

Barking & Dagenham Volunteer Bureau:

Phone: 020 8532 7343

Email: bardagvb@hotmail.co.uk

Volunteer Centre Barnet:

Phone: 020 8364 8400

Email: vcmanag-er@communitybarnet.org.uk

Web: <http://bvsc.onlyit.co.uk/>

Volunteer Centre Brent:

Phone: 020 8902 1822

Email: bacp@hfvc.org.uk

Volunteer Centre Bromley:

Phone: 020 8315 1930

Email: dianed@communitylinksbromley.org.uk

Web: www.communitylinksbromley.org.uk

Volunteer Centre Camden:

Phone: 020 7424 9990

Email: info@volunteercentrecamden.org.uk

Web: www.volunteercentrecamden.org.uk

Volunteer Centre Croydon:

Phone: 020 8253 7070

Email: volunteer@cvalive.org.uk

Web: www.cvalive.org.uk

Volunteer Centre Ealing:

Phone: 0800 652 3183

Email: volunteering@ealingcvs.org.uk

Web: www.ealingcvs.org.uk/volunteering

Enfield Voluntary Action:

Phone: 020 8373 6348

Email: volunteering@enfieldva.org.uk

Web: www.enfieldva.org.uk

Volunteer Centre Greenwich:

Phone: 020 8853 1331

Email: info@volunteersgreenwich.co.uk

Web: www.volunteerscentregreenwich.org.uk

Volunteer Centre Hackney:

Phone: 020 7241 4443

Email: info@vchackney.org

Web: <http://www.vchackney.org/>

Hammersmith & Fulham Volunteer Centre:

Phone: 020 8741 9876

Email: enquires@hfvc.org.uk

Web: www.hfvc.org.uk

Volunteer Centre Haringey (HAVCO):

Phone: 020 8880 4047
Email: am@havcoharingey.org.uk
Web: www.havcoharingey.org.uk

Volunteer Centre Harrow:

Phone: 020 8863 5426
Email: Sarah.kersy@harrowcvs.org.uk
Web: www.harrowcvs.org.uk/volunteer-centre-asp

Volunteer Centre Havering:

Phone: 01708 742 881
Email: volunteering@hvco.org.uk
Web: www.havco.org.uk

Volunteer Centre Hillingdon:

Phone: 01895 442 730
Email: volunteering@havs.org.uk
Web: www.havs.org.uk/volunteering

Volunteer Centre Hounslow:

Phone: 020 8570 5083
Email: info@volunteerhounslow.org.uk
Web: www.volunteerhounslow.org.uk

Volunteer Centre Islington

Phone: 020 7832 5800
Email: info@islingtonvolunteer.org.uk
Web: www.vai.org.uk

Volunteer Centre Kensington & Chelsea:

Phone: 020 8960 3722
Email: enquiries@voluntarywork.org.uk
Web: www.voluntarywork.org.uk

Go Kingston Volunteering:

Phone: 020 8255 8685
Email: volunteering@kva.org.uk
Web: www.kva.org.uk

Volunteer Centre Lambeth:

Phone: 020 7737 9471
Email: Volunteering@lambethvac.org.uk
Web: www.lambethvac.org.uk

Volunteer Centre Lewisham

Phone: 020 8613 7113
Email: info@volunteercentrelewisham.org.uk
Web: www.volunteercentrelewisham.org.uk

Volunteer Centre Merton:

Phone: 020 8640 7355
Email: info@volunteercentremerton.org.uk
Web: www.volunteercentremerton.org.uk

Volunteer Network Centre Newham:

Phone: 020 8536 1937
Email: info@vncnewham.co.uk
Web: www.vncnewham.co.uk

Volunteer Centre Redbridge:

Phone: 020 8514 9624
Email: volunteering-broker@redbridgecvcs.net
Web: www.redbridgecvcs.net

Volunteer Centre Southwark:

Phone: 020 7703 4205
Email: info@volunteercentres.org.uk
Web: www.volunteercentres.org.uk

Volunteer Centre Sutton:

Phone: 020 8661 5900
Email: vcsutton@vcsutton.org.uk
Web: www.vcsutton.org.uk

Volunteer Centre Tower Hamlets:

Phone: 020 7377 0956
Email: info@vcth.org.uk
Web: www.vcth.org.uk

Volunteer Centre Westminster:

Phone: 020 7266 1992

Email: info@volunteerwestminster.org.uk

Web: www.volunteer.co.uk

Voluntary Action Waltham Forest:

Phone: 020 8521 0377

Email: info@voluntaryaction-wf.org.uk

Web: www.voluntaryaction.net

Resource Bank

ASDAN Community Volunteering Awards:

www.asdan.org.uk/Qualifications/CVQ

Disclosure and Barring Service: www.homeoffice.gov.uk/db

Do-It – the online database of volunteering opportunities: www.do-it.org

Health and Safety Executive: www.hse.gov.uk

Investing in Volunteers – quality standard:

<http://iiv.investinginvolunteers.org.uk/>

The Information Commissioner: www.ico.gov.uk

The Institute for Volunteering Research: www.ivr.org.uk

The UK Government – resources for expenses, benefits and tax:

www.gov.uk

Volunteering England Good Practice Bank: www.volunteering.org.uk

Volunteers and the Law:

http://www.volunteering.org.uk/NR/rdonlyres/8448CBDA-582E-4A91-8975-6165D6ABE3E7/0/Volunteers_and_the_Law_rev.pdf

Youtube – broadcast yourself: www.youtube.com