



How to welcome and manage new volunteers

1. Induction

It is more important than ever to look after people when they first start volunteering for a charity. A good induction should include:

- An overview of the charity
 - Your charity's history, mission and culture
 - How the charity is structured
 - Policies and procedures – what and how. Volunteer policy (if applicable), health and safety, equal opportunities, expenses, etc. and relevant processes and forms
 - What to do if they have any concerns

- An overview of the volunteer's role
 - Their responsibilities – what you expect them to do
 - Your responsibilities – the ongoing support you intend to provide
 - How their work fits into the charity's overall activity and the difference their role will make
 - Provide any background resources they will need
 - Go through the Volunteer Agreement with them

- Things you can do to help the volunteer feel comfortable at your charity:
 - Introduce them to other volunteers and staff
 - Where there is no office or infrequent opportunities to meet, provide social opportunities for volunteers. This might include trustee meetings. Volunteers are likely to lose interest or get into difficulties if they are not welcomed, thanked, equipped and supported
 - Explain the culture around how meetings and events work in practice. E.g., do people report back from any sub-committees, if recommendations are made about grants how much are they discussed and how are decisions made during meetings.
 - If there is an office or even a venue where your committees meet regularly, show the volunteer round – include toilets and fire exits, even if they appear to be obvious
 - Explain the trust's culture. In an office this might be around tea breaks, meetings and lunch breaks. For meetings, where there is no office it might be whether lunch is part of the meeting or bringing in biscuits etc. It sounds minor but social aspects can have a very large impact!
 - If there is an office, show them their desk, computer, phone and any other equipment they will need



How to welcome and manage new volunteers

- If they will be volunteering from home you will need to discuss the equipment they are working on to ask them to keep standards of security and protection. E.g., if they are keeping lists of people's personal information you will have to ensure that you know what software is being used and that it is being kept securely and safely through a data protection policy that everyone understands and adheres to.

2. Volunteer Agreement

Agreements should describe what is expected of the volunteer and what the volunteer can expect from you in return. It should be specific for each role. It is not a contract and should describe expectations, not obligations.

What to include in a volunteer agreement:

- Role Title – this should reflect the nature of the role. Don't include the word "volunteer".
- Role Description – a brief description of the work to be undertaken and / or project goals.
- Expectation of time commitment with an understanding that the role is voluntary.
- Point of contact – the volunteer's line manager and that person's contact details.
- Specific training or support the volunteer will receive – without imposing mutual obligation which constitutes a contractual arrangement.
- The volunteer's role will almost certainly evolve over time. This is normal and there is no need to stick rigidly to the original agreement. Having an agreed, written description means there is a mutual reference point in case any confusion arises over what the volunteer should be doing.
- A statement about remuneration of expenses. This should never be a set amount paid regularly as this constitutes a contractual arrangement.

3. Volunteer Policy

Things to include in a volunteer policy:

- The relationship between your organisation and volunteers
- Recruitment – your normal method and commitment to equal opportunities, if applicable.
- Inductions and ongoing support – how you will support volunteers



How to welcome and manage new volunteers

- Expenses – under which circumstances and how much volunteers can claim
- The procedure for dealing with problems
- Health and safety, insurance, etc.

4. Volunteer Handbook

A volunteer handbook is a reference guide for the volunteer. It should cover the information one of your volunteers might need to know about being a volunteer in your organisation.

A volunteer policy lays out the principles guiding your volunteer programme, while a handbook includes the things a volunteer needs to know for their day-to-day activities. The policy is “what” while the handbook is “how”.

- What to include in a volunteer handbook:
- An introduction to your organisation – an overview of your work, your structure, etc
- Information on the Volunteer Co-ordinator or contact (if there is one)
- Details about volunteer support and training
- How to claim expenses
- How to make a complaint
- If there is an office or regular meeting place, where to get a cup of tea, find the toilets, what to do in case of fire, etc.

Q&A

1. **There are not many of us and we can only do so much as volunteers or staff ourselves. Do we really need all of these?**

Inductions and Volunteer Agreements are recommended as essential by charity sector advisers.

Recruiting at least one volunteer or Trustee to manage volunteers is a useful step to take if you do not already have a person doing this.

Small, informal charities may often be able to get along without a volunteer policy or handbook. They do not have to be weighty formal documents. At least an outline of practices and reasons for them for new volunteers may be useful to county trusts, however, because they depend entirely or almost entirely on volunteers. In a few cases there may be a central office, but most do not have one so ensuring a shared understanding is more important. Being able to offer a set of guidelines may also help to focus minds. A shared set of expectations, goals, standards and processes



How to welcome and manage new volunteers

shared by all trustees, staff and volunteers are vital even if they are framed in an informal way.

2. We have been working on the same basis for a long time or we have not needed formal policies and procedures in the past as we work informally. Are there other reasons for introducing or refreshing the way we work as and with volunteers?

The nature of volunteering is changing and different generations of people volunteer in different ways. Trusts often express concern over succession and attracting new volunteers which suggests that reviewing practices could be useful.

One example is the Ride+Stride for Churches which involves higher numbers of periodic volunteers who might easily be left on the periphery, lose sight of mission, go off and do their own thing or become discontented. Managing volunteers becomes more difficult in these circumstances. If your Ride+Stride is not attracting new organisers or if churches are reluctant to open, redefining what is involved and refreshing policies is likely to be a helpful first step.

3. What should we avoid in a Volunteer Role Description or Agreement?

Avoid anything that constitutes a contract by not basing the description on mutual obligation. For example, instead of asking volunteers to agree to volunteer for six months it is better to talk of hopes and reasonable expectations, with the understanding that volunteers are free to come and go as they wish, and that there are no obligations placed upon them. One possibility is suggesting that if the volunteers stay in the role for at least a specified time then both they and the charity will get the most out of the experience.