

Advice and information for organisations that have completed the FULL Volunteer Management Health Check



Volunteering Management resources can be found by clicking here or pasting this link into your browser: <http://greaterlondonvolunteering.org.uk/experts-in-volunteering/online-resources/>

1 Equality and Diversity		
	Any actions needed?	High/med/low priority
Do you have an Equal Opportunities/Equality and Diversity policy that includes volunteers?	Ensure that your policy specifically refers to volunteers; this may be a simple matter of adding in the phrase 'and volunteers' whenever staff are mentioned.	
> if yes, has your policy been reviewed in the last twelve months?	Ensure that your policy is reviewed regularly, ideally every 1 or 2 years. This should normally be the responsibility of the Management Committee. It's a good idea anyway to have a rolling timetable for reviewing all policies. If starting a policy from scratch, why not use the Charter points as a check list of areas that need to be covered?	
Do you collect and analyse equal opportunities data?		
Does the demographic profile of your volunteers reflect that of the local population?	Use the data you have collected to compare your volunteer profile to that of the local population. Is it reflective? Can you diversify to make it more reflective?	
> if not, does it reflect organisational target groups?	If you have a particular target group for your volunteering does your group of volunteers reflect this? You may need to take action eg where do you advertise; how do you select; what would attract your target group and how can you find them.	
Is Equality and Diversity training routinely delivered for:		
> volunteers?	Ensure training is delivered on equality and diversity for all volunteers, staff and trustees. If training is not possible, ensure individuals are briefed on equality and diversity as part of their induction. E & D training is often neglected in the sector - perhaps we assume we are up to speed!	
> staff?		
> trustees?		

Is Equality and Diversity training compulsory for:	Ensure either training or briefing on equality and diversity is at least a compulsory part of volunteers', staff and trustees' induction. If your organisation specialises in one area of diversity you should include a general awareness of other areas too - it's not just about relating to the client group.	
> volunteers?		
> staff?		
> trustees?		
<b>2 Expenses</b>		
	Any actions needed?	High/med/low priority
Do you reimburse volunteers' expenses?	Ensure that all out of pocket expenses are reimbursed for your volunteers. This is an equality issue; offering expenses may make the difference between being able to volunteer or not.	
If yes, please answer the following questions; if no, go to the next section, 'Induction.'		
Do you have a policy/procedure/guidelines on:		
> types of expenses that can be claimed eg travel, childcare, meals?	Create guidelines on volunteer expenses either in a volunteer policy, handbook, or on an expenses form, outlining what can be claimed (travel and lunch for over 4 hours of volunteering is good practice, plus child care is best practice), limits in place (e.g. maximum £5 for lunch), and how volunteers should claim (e.g. petty cash/BACS, who to claim from). It is good practice to reimburse volunteers on the day, or as frequently as possible.	
> any limits to the amount payable?		
> arrangements for paying expenses?		
Are the relevant staff briefed on expenses guidelines?	Ensure that all staff who may work with volunteers know how to reimburse expenses. In particular, expenses should be offered, before the volunteer has to ask for them. Or there could be a routine time eg as part of a de-brief at the end of a shift in a service delivery setting.	
Are all volunteers briefed on expenses guidelines?	Ensure all volunteers know how to claim expenses - cover this in induction. If volunteers don't want to claim expenses, you can encourage them to claim and then donate this money back. If they are a taxpayer it will include gift aid. This gives a true reflection of the cost of volunteering.	
Are volunteers' expenses included in budgets for funding bids?	The best way to ensure expenses are covered is by building them into budgets for funding bids. Funders do appreciate that volunteer expenses is a legitimate cost.	

<b>Resources: Claiming Gift Aid on redirected Volunteer Expenses- HM Revenue &amp; Customs</b> <a href="http://www.hmrc.gov.uk/charities/guidance-notes/chapter3/sectionf.htm#ay">http://www.hmrc.gov.uk/charities/guidance-notes/chapter3/sectionf.htm#ay</a>		
<b>3 Induction</b>		
	Any actions needed?	High/med/low priority
Do you brief new volunteers on their tasks and responsibilities?	All volunteers should be briefed on their role, including tasks and responsibilities. Having an induction checklist in place ensures consistency, and makes it easier for colleagues inducting a new volunteer.	
Do you introduce new volunteers to relevant staff and volunteers, and the roles of those people?	Make volunteers feel welcome and a part of the organisation by introducing them to appropriate staff and volunteers. Some organisations create a short video that includes a welcome message for staff, such as the CEO, who would not be available to attend each induction but highlights their gratitude to volunteers.	
Are new volunteers familiarised with:		
> health and safety, and accident and emergency procedures?	All volunteers should be inducted on the basics in order for them to carry out their role, including health and safety, accident and emergency procedures (e.g. first aid), how to claim expenses, and where they will be carrying out their voluntary work.	
> the procedure for claiming expenses?		
> the physical environment where they will be volunteering?		
Do you provide any formal induction training sessions?	If you recruit several volunteers at one time it is a good idea to have a structured induction session/schedule, which may include training. If your recruitment is more as-and-when, induct volunteers in a one-to-one.	
Do new volunteers receive a handbook (paper or electronic)?	Create a handbook for your volunteers covering all the practical information they need to know to do their voluntary work, and signposting to essential policies and procedures eg H&S, Safeguarding, Volunteer Policy. It's good if this is electronic, so that you can update easily and cut down on paper and printing. New versions can easily be sent to volunteers who are online.	

Do volunteers have easy access to any information necessary to do their voluntary work, including any policies and/or procedures as appropriate?	Ensure volunteers are told where to access information (paper/electronic copies) and given relevant documentation e.g. handbook/volunteer agreement. A simple way of doing this is to have policies available on the intranet/website. If office or shop based have a file with extra copies that volunteers have access to.	
Do you use volunteer agreements?	Volunteer agreements are a good way of summarising the expectation of both volunteer and organisation, and current good practice advises not to have the agreements signed. But there is no rule that says you must have an agreement, and it has no legal force; clear role descriptions and inductions can be equally effective.	
<b>4 Organisational Involvement</b>		
	Any actions needed?	High/med/low priority
Do you ensure that volunteers know what is happening in the organisation as a whole?	Keep volunteers informed of things that are going on through regular communication (emails, face to face), notice boards, google groups etc	
Do you encourage volunteers to express their opinion on the work of the organisation eg satisfaction surveys, exit interview, feedback forms?	Involve volunteers in the work of the organisation as much as possible. Create ways of hearing the views of volunteers – surveys, exit interviews/questionnaires, and feedback forms are just a few examples.	
Are volunteers consulted on changes in the organisation that will affect them? eg operational or policy changes	Consult volunteers on changes that may affect them as appropriate. Often staff are consulted, but volunteers are an afterthought.	
Are volunteers invited to attend and to speak at any meetings? eg committee, team, working group meetings.	Invite volunteers to meetings as appropriate, being as inclusive as possible. Also consider having staff and volunteer away days - not all volunteers will come, but it's good practice to seek their feedback as much as possible.	
Do any of the following happen in your organisation:		
> consultation exercises include volunteers eg inviting views about changes, new initiatives, planning etc?	Ensure that consultation exercises are planned and include volunteers. Examples of how to do this could include: informal discussions, surveys, volunteer focus groups.	
> volunteers receive internal communications such as newsletters, e-bulletins etc?	Include volunteers in organisational communication e.g. newsletters, e-bulletins, volunteer case studies/achievements, volunteer profiles or blogs on the website. Your fundraising colleagues may want to send mailings to volunteers - ensure that everyone is happy with this, and that there's an easy way for volunteers to unsubscribe.	

Are volunteers formally represented at committee level? eg a trustee who represents volunteers; a volunteer representative sitting on the committee.	Encourage your trustees to take volunteering seriously by having someone to represent volunteering on the Management Committee, or at Senior Management level. This should involve briefing and support, at least initially. Also, it's a good idea to identify a volunteering 'champion' among the trustees - someone with a particular interest who will pick up on and be an ally in volunteering issues at strategic level.	
Is 'Volunteering' a routine agenda item in:		
> staff meetings?	Ensure that volunteering is covered in team meetings. Having it as a routine agenda point can help. All colleagues should know if there's a new volunteer starting, or if a volunteer will be trying out different work, for example.	
> trustees' meetings?	Try to get volunteering onto the trustees' agenda as a routine item; offer to report routinely, if you are not already. Remember that trustees appreciate brevity - they have quite a bit of paperwork to read already.	
<b>5 Personal Development</b>		
	Any actions needed?	High/med/low priority
Is volunteer training included in budget setting and funding bids?	Build realistic volunteer training costs into budgets for funding applications. It's also good to look out for free training opportunities, training in kind, or skills shares.	
Is there an opportunity to identify the volunteer's motivations during the selection process?	Ensure that the volunteers' reasons for volunteering and expectations are discussed at the beginning (during selection), and consider where this information can be recorded so that it can be easily reviewed. Understanding motivation can be key to developing volunteers and retaining them.	
Do the following happen in supervision sessions and meetings:		
> volunteers' motivations and expectations are reviewed?	Review volunteers' motivations and expectations regularly, because circumstances can change.	
> learning and development needs are identified?	Ensure you discuss volunteers' learning and development needs (specific to the role) during each supervision.	

Do you provide ongoing training and/or learning opportunities that equip the volunteer with the skills and knowledge required to perform their role?	Based on the needs discussed during supervision, find appropriate training or development opportunities to help volunteers fulfil their role, or ensure volunteers attend the required training for that role (if this is the case). Try to provide appropriate development opportunities - an additional responsibility, for example, or a change of role.	
Do volunteers have the opportunity to move into different roles/try out other roles?	Encourage volunteers to develop their skills - trying out different roles or taking on new tasks could be one way. If you devise a new role consider highlighting this role internally first.	
Are there opportunities for volunteers to take on increasing responsibility as they develop?	Give volunteers the option to take on more responsibility. You should always discuss with them and their supervisor that everyone is happy with this.	
<b>6 Recruitment Process</b>		
	Any actions needed?	High/med/low priority
Is there clarity in your organisation about why you involve volunteers?	Your Volunteer Policy should state clearly why you involve volunteers and the value that they bring. This can be replicated on your website and on promotional material. All colleagues and trustees should be able to state why you involve volunteers - you, as volunteer manager, may have some internal promotional work to do to remind them!	
Do you have a policy/procedure covering volunteer recruitment and selection?	Either in your volunteer policy, or in a separate policy and procedure, provide detailed information on how you recruit and select your volunteers, covering the different areas outlined below.	
If yes, does it deal with:		
> identifying opportunities that are meaningful and rewarding?	Include information on identifying opportunities, pointing out the importance of volunteers feeling fulfilled in their role. Remember, this is a two way process, you want to get the most out of your volunteers and you want them to get the most out of the role. <del>A note you may have to include colleagues who may be</del>	
> creating accurate role descriptions and person specifications?	Ensure you have role descriptions and/or person specifications that are appropriate for the opportunity. You may need to review them if a role develops. Include a sentence to say the role has a level of flexibility depending on the skills and ability of a prospective volunteer	

> creating effective and appropriate advertising materials?	Include information on advertisement, ensuring it is accessible and appropriate for your target audience (e.g. language, colour, images). Focus on the benefits to them - and, please, no 'Volunteers desperately needed' ads	
Do you have a specified time frame for responding to enquiries about volunteering?	Include time frames for responding to enquiries, meeting expectations of enquiries or applications.	
Do you update your local Volunteer Centre about new or filled volunteering opportunities?	Utilise your local Volunteer Centre as best as you can. You should keep them informed of any new opportunities, but also when roles are no longer available. Find your local Volunteer Centre: <a href="http://www.do-it.org.uk/wanttovolunteer/aboutvolunteering/vcfinder">http://www.do-it.org.uk/wanttovolunteer/aboutvolunteering/vcfinder</a>	
Do you interview volunteers?	You should have a 1:1 interview with all volunteers - there's no such thing as an informal interview, but make it as friendly and affirming as possible, and a genuine chance for both sides to find out about each other. It's a good idea to have some set questions you always ask, and then you may add additional ones depending on the role. If possible, involve a second interviewer to get a second view of the applicant - advisable in terms of equal opportunities.	
If yes, does the interview;		
>respect good practice in Equal Opportunities?	Follow equal opportunities principles when interviewing applicants, embedding whatever is outlined in your equality and diversity policy. Discrimination law does not generally apply to volunteers as it does to staff, but this is good practice and a fair way to treat people.	
>explore the volunteer's motivations and expectations?	As part of the interview discuss the reasons why the person wants to volunteer, and what they expect to get out of it. This will inform how you later place and support them.	
If an applicant is unsuitable for your needs, do you:		
> offer them feedback?	Keep written notes so that you can offer genuine pointers rather than fobbing an applicant off with general but not very useful feedback. If someone requests feedback, 'rehearse' what you will say to them, if verbally feeding back. Always try to find something positive, and thank them for their time and	

> refer them elsewhere?	If a volunteer is unsuitable, you could try to find them a more appropriate role within your organisation, refer them to the Volunteer Centre, or to another organisation that you have contact with who could benefit from their skills.	
Do you vet volunteers eg CRB, membership of professional bodies, as applicable?	Ensure CRB checks are done as appropriate (for volunteers working unsupervised with children or vulnerable adults) and volunteers are registered with appropriate bodies e.g. for volunteer counsellors. Your safeguarding policy should include a procedure for a CRB check that raises concerns. This should be kept strictly confidential, and decisions are best signed off by a senior member of staff, where there is one.	
Do you ask for references?	It's good practice to request 2 references, preferably not from family members, although you may be more flexible than for staff references. You may need to be even more flexible about this depending on the volunteer e.g. asylum seekers may find it difficult to provide references, or young people with little track record of volunteering or working..	
Do you have a policy and/or guidelines on references and vetting?	Ensure you have some guidelines written down (possible within your volunteer policy) on why/how you reference and vet so it is clear to the applicants. Always remember that vetting is no substitute for good supervision and support - it only tells you about the past if it tells you anything at all.	
<b>7 Resolving Difficulties</b>		
	Any actions needed?	High/med/low priority
Do you have a policy and/or procedure for resolving volunteers' concerns and complaints?	Create a resolving difficulties (or problem solving) procedure specifically for dealing with volunteers. It should be separate from staff grievance or disciplinary procedure and use softer language. There should be a section that deals with volunteers' concerns or complaints. Typically, there will be fewer stages than for paid staff.	
If yes, does it include:		
> a clear explanation of how a complaint will be handled?	The procedure should explain how the complaint is handled e.g. who the volunteer should speak to, informally first when hopefully issues can be resolved, but if not then in writing.	

> suggested sources of support for the volunteer?	It should indicate who the volunteer can get support from whilst the complaint is being dealt with.	
> time frames?	Include a reasonable time frame for responding to and dealing with complaints.	
> the opportunity to appeal decisions?	Volunteers should have the right to appeal the decision, which should be then considered by the Management Committee and final decision made in writing.	
If yes, is the policy readily available to volunteers in paper or online?	Make sure that volunteers have access to and can refer to the resolving difficulties procedure.	
Do you make volunteers aware during induction of how to raise concerns?	Cover 'resolving difficulties' during induction, and make volunteers aware that there is a specific policy in place and that you're happy for it to be used.	
Do you have a policy and/or procedure for dealing with issues arising from a problematic volunteer?	The procedure should include a second section which deals with issues arising from a problematic volunteer (or if someone has a complaint about a volunteer), this could also include gross misconduct.	
If yes does it include:		
> a clear explanation about how the issue(s) will be handled, for the volunteer?	Similar to above, it should outline how the issue is handled e.g. who deals with the issue, aim to resolve all issues informally first, and if it cannot be resolved this way then in writing, any suggested time frames and opportunity to appeal depending on the issue. Some issues that need to be resolved may be in line with your safeguarding policy.	
> a clear explanation about how the issue(s) will be handled, for any other person/people it may be affecting?		
> possible sources of support?	Those involved should be provided with sources of support whilst the issue is being resolved.	
<b>8 Reward and Recognition</b>		
	Any actions needed?	High/med/low priority
Does your organisation express appreciation and/or recognise the contribution of volunteers?	There are many ways of showing recognition for your volunteers' efforts - be creative, and remember to speak to your volunteers to find out what they would like.	
Do any of the following happen in your organisation:		
> certificates are awarded for achievement and/or training?		

> awards for volunteers?	Have a structure in place of things that you do to show recognition of your volunteers' efforts. Examples of showing recognition include: certificates (which can be downloaded and personalised including organisational logo etc), awards, thank you letters, volunteer profiles/electronic materials, celebrations, exit interviews and everyday thanks. This list is not prescriptive, know your volunteers and be creative with your approach! Volunteers' Week is 1-7 June every year, and free resources can be found at <a href="http://www.volunteering.org.uk/policy-and-campaigns/volunteers-week/">http://www.volunteering.org.uk/policy-and-campaigns/volunteers-week/</a> Exit interviews for volunteers tend to have poor response once the volunteer has gone, so ask them to complete one before they leave. This can be quite short, asking why they left, their views on their experience generally, and how it might be improved. Depending on the structure of your organisation, you could ask whether they would like to receive a supporters' newsletter.	
> volunteers receive a letter of thanks when they leave?		
> volunteers appear in electronic and written materials for external and internal audiences?		
> Volunteers' Week is celebrated?		
> volunteers are encouraged to complete an exit interview when they leave?		
Do you provide references for volunteers as a routine procedure?	References can be an important element of volunteering for some people (ideally after sufficient time to get to know them); make volunteers aware at the outset that they can request one. If their volunteering was very brief, you can at the very least confirm the dates, and the role they had, and that there were no problems in the short time they were with you.	
Do you make volunteers aware that they can receive a reference (and aware of any qualifying length of service as a volunteer)?		
<b>9 Safe Volunteering Environment</b>		
	Any actions needed?	High/med/low priority
Do you have a Health and Safety policy that includes volunteers?	Make sure that your Health and Safety policy refers to volunteers, as well as staff.	
If applicable, do you have policies relating to Safeguarding (protection of children and/or vulnerable adults)?	Ensure that you have relevant safeguarding policies in place if you work with children or vulnerable adults, and make sure volunteers are referred to.	
Are volunteering activities fully covered by insurance?	Have relevant insurance in place e.g. Public Liability Insurance, Professional Liability Insurance. If you are introducing new activities for volunteers, let your	
Do you carry out and record risk assessments on:		

> volunteering roles?	Ensure risk assessments are carried out for volunteer roles and/or activities that involve volunteers. Depending on the role, you should also cover emotional risk e.g. befriending/counselling role. Risk assessments are not necessarily complicated, but it's worth a few minutes to have something on file. You do not want to expose yourself or the organisation to allegations of negligence should anything happen. Find guidance at: <a href="http://www.volunteering.org.uk/resources/publications/freeguides">http://www.volunteering.org.uk/resources/publications/freeguides</a>		
> activities involving volunteers e.g. one off events, outings?			
Do risk assessments deal with emotional risk to volunteers?			
Do all your volunteering environments ensure that staff and Volunteers health and safety needs are priority?		Ensure the health and safety at work poster is visible and that both staff and volunteering environments conform to this.	
Do you encourage volunteers to suggest improvements to their volunteering environment?		Encourage volunteers to make suggestions on the environment where they are based e.g. through feedback forms, surveys, exit interviews.	
<b>10 Support</b>			
	Any actions needed?	High/med/low priority	
Do staff job descriptions include volunteer management responsibility:	It is best practice to have volunteer management responsibility on all job descriptions of staff who may work along side and supervise volunteers as part of their role. In a busy working environment a volunteer who may only spend a few hours a week there, may feel lost, and lack the confidence to ask for help. Having a named supervisor will mitigate this.		
>only for staff who are Volunteer Coordinators or Managers?			
>for staff who are named supervisors of volunteers?			
>for Volunteer Coordinators/Managers and named supervisors?			
>for all staff who work alongside volunteers, whether they are named supervisors or not?			
Is supervision and support of volunteers included in your policies?	Create a section on volunteer supervision and support in your volunteer policy, outlining how volunteers are supported (both formally and informally). Depending on the volunteer role, how frequently volunteers do their voluntary work, and how many volunteers you have to manage, support methods may vary.		

Do you use any of the following support methods:		
> 1:1 supervision?	e.g. 1:1s or catch ups every month or 2 months (this will vary depending on how often they volunteer)	
> group supervision?	e.g. for large numbers of volunteers, you have to be realistic about time. Group supervisions are a good way of getting round this, as long as volunteers know they can also speak to someone confidentially.	
> telephone follow-up?	e.g. for befrienders, or remote volunteers.	
Do you use any of the following support methods:		
> drop-in sessions with staff at specified times?	Less formal ways of providing ongoing support for your volunteers could include drop-in sessions (good to manage large numbers of volunteers), open door access (better for smaller numbers), and peer support between volunteers. Peer support is a good way of introducing new volunteers, or supporting volunteers with particular needs.	
> open-door access to supervising staff?		
> peer support?		
Do you have regular volunteer meetings?	Ensure volunteers are invited to volunteer meetings, keeping them up to date and in contact with others.	
Are volunteers invited to staff meetings?	Invite volunteers to meetings as appropriate, being as inclusive as possible.	
Do volunteers have opportunities to give and receive feedback?	Ensure support and supervision sessions provide the space for volunteers to give feedback, and receive feedback from you.	
Do you have policies/procedures on:		
> applicants with additional support needs?	Include guidelines in your volunteer policy on including and supporting volunteer applicants with additional needs.	
> users of your own services?	If you involve service users as volunteers, ensure you have a procedure to cover this making sure they are ready to volunteer e.g. if a service user has to have stopped using the service for a certain amount of time.	
Do you provide extra support for volunteers:		
> with physical disabilities?	Ensure your volunteering is as inclusive as possible - adapt environments and roles as appropriate, and provide extra support if necessary.	
> with learning disabilities?		
> with mental health difficulties?		
> who are ex-offenders?		

> who are refugees or asylum seekers?		
Do all staff working with volunteers receive training or briefings on supporting volunteers?	Ensure that all staff who may be working with volunteers are briefed on supervising and supporting them, and have access to the volunteer policy.	
Do you tell volunteers that they have the right to join a trade union?	Volunteers have the right to join a trade union - the benefits are quite minimal, but volunteers should be informed anyway as it is a useful way to keep up to date and feel involved in the organisation.	
Do you support flexible volunteering eg time off for holidays, emergencies, illness, job interviews and compassionate reasons?	Ensure you have a flexible approach to your volunteer management, which will help towards volunteer happiness :-)	
<b>Any other notes or comments?</b>		
We have lots of information and resources on our website:	<a href="http://greaterlondonvolunteering.org.uk/experts-in-volunteering/online-resources/">http://greaterlondonvolunteering.org.uk/experts-in-volunteering/online-resources/</a>	
You can also see examples of good practice resources on the Volunteering England website:	<a href="http://www.volunteering.org.uk/resources/goodpracticebank/Core+Themes/">www.volunteering.org.uk/resources/goodpracticebank/Core+Themes/</a>	

























