hvos

Heritage Volunteer Organisers Scotland Toolkit

Photo 1:

Crafts volunteers at Culross

Photo 2:

Photographing in the Collections Management department at National Museums Scotland

Produced in partnership with

Museums Galleries Scotland

Supporting Scotland's Museums

Contents

Acknowledgements

This toolkit provides advice and guidance but is no substitute for checking the most up to date sources of information available. The additional help section is up to date at the time of writing.

Introduction

Welcome

Welcome to this toolkit! Heritage Volunteer Organisers Scotland (HVOS) hopes that you will find it useful in your work with volunteers. Museums Galleries Scotland has supported the production of the kit as part of its commitment to the maintenance and development of the paid and voluntary workforce in the sector.

Why have a toolkit?

In 2009 Museums Galleries Scotland carried out research into volunteering in the museums and galleries sector in Scotland. Amongst other things, this research identified a need for tools and resources to be widely available for people working with volunteers in the sector, whether paid or voluntary. This toolkit has been developed to meet that need.

Who is the toolkit for?

The toolkit has been developed for use by anyone organising, managing, co-ordinating and developing volunteers in the museums and galleries sector whether paid or voluntary.

The approach taken

The toolkit takes an action planning approach to involving volunteers.
- **Part 1** gives examples of planning and action methods that can be used to set up or enhance your volunteering programme.
- **Part 2** contains sample templates and forms for you to use in your role as an organiser of volunteers. These resources are intended to be guides and can be adapted to suit your specific needs. Some of them are simple, others are more complex, again designed to meet your needs.
- The whole of the toolkit is based on links to National Occupational Standards for the Creative and Cultural Skills Sector. **Part 3** contains some additional information about these. The toolkit is not intended to be a comprehensive guide to organising volunteers but a resource to dip into when required.

A word about language

This toolkit uses the word 'volunteer' throughout. For many of you working with Friends groups and associations the materials can be adapted to suit your purpose. The term 'volunteer management' is sometimes used as a short hand in the toolkit and is intended to cover anyone working with volunteers in the sector regardless of whether they are voluntary or paid.

Photo 3: Reception volunteer at Culloden Battlefield Visitors Centre

Part 1: Planning and Day to Day Organising

Photo 4: Visitor Services Volunteers from Clydebank

A Word about Action Plans

Why plan for volunteering?

Planning well from the start can ensure:

- you have assessed whether you need volunteers
- you have assessed your organisation's volunteering needs correctly
- you have a clear idea of where volunteering needs to go
- your organisation has enough volunteers, and matches people to the right positions
- there is people capacity, voluntary or paid, and sufficient resources to cope with the right number of volunteers
- the smooth integration of volunteers with any paid staff
- your volunteers are equipped with the knowledge and skills to carry out their role
- you review and adapt your volunteering programme with changing times.

Action plans can achieve all sorts of things including:

- working out the value of volunteers to your organisation
- identifying what roles volunteers can undertake and how support needs can be met
- setting out what your organisation expects of volunteers and what they can expect in return
- raising the profile of volunteers and their contribution throughout the organisation
- reinforcing the value and contribution of volunteers to paid staff, management groups and people using your service.

Action plans can be adapted to suit your organisation and can be as detailed or as minimal as you prefer as long as they reach a minimum standard for organising volunteering.

Key Point

Remember to take into account any other plans and strategies your organisation may have. Work out where volunteering should be integrated into these plans, if it is not already, and where it needs a separate approach. No initiative can be delivered in isolation and volunteering plans should underpin all other plans in your organisation.

Action Planning: A Way to Organise Volunteering

First things first

This toolkit adopts an action planning approach to organising volunteering and volunteers.

The approach is based on 4 simple questions:

- Where are you now?
- Where do you want to be?
- How are you going to get there?
- How will you know you've got there?

Each section on action planning follows a similar format by giving you checklists and tools to assess yourself and your organisation. (You will find all of these documents in this Toolkit.) These tools should provide you with a route map for what to do next. All of the tools can be adapted to suit your organisation's needs. You can start anywhere in the cycle depending on your requirements.

Where are you now?
(For new groups)

?

Questions to get you started:

1. Is there support in your group for involving volunteers? Describe it.

   _____

2. What sorts of tasks will volunteers undertake, e.g. guiding, administration etc?

   _____

3. How many volunteers do you think you will need to deliver new activities?

   _____

4. What resources are available to organise volunteers e.g. money to cover out of pocket expenses, people to organise and support volunteers?

   _____

5. Will volunteers be offered training and development opportunities? What kind?

   _____

Checklists, exercises and tools:
- **SWOT (Strengths, Weaknesses, Opportunities, Threats) Analysis (both on an organisational and individual level)**
- **Organising Volunteers Checklist (Small Organisations or Large Organisations)**
- **Organising Volunteering: Developing a Policy Checklist**

Where are you now?
(For established groups)

Questions to get you started:

1. How many people currently volunteer with you? Who are they?

   _____

2. What sort of tasks do they undertake e.g. guiding, administration etc?

   _____

3. What systems and processes, if any, do you have in place for e.g. recruiting new volunteers, training volunteers?

   _____

4. Do you have too few or too many volunteers?

   _____

5. How are volunteers supported, trained, and developed?

   _____

6. What opportunities can you see for development using volunteers?

   _____

Checklists, exercises and tools:
- **SWOT Analysis (organisational and individual)**
- **Organising Volunteers Checklist (Small Organisations or Large Organisations)**
- **Volunteer and / or Employee questionnaires**

Where do you want to be?

Questions to get you started:

1. What information do you need to collect to help you decide on future actions?

   _____

2. Who needs to be involved in deciding on the way forward?

   _____

3. How much time can you allow for this?

   _____

4. How will you get people to buy in to the vision for the future?

   _____

5. What are your timescales? Are there any other organisation plans or timescales you need to fit in with?

   _____

Checklists, exercises and tools:
- **Setting a vision for the future**
- **Setting SMART volunteering objectives**
- **Organising Volunteers Checklist (Small Organisations or Large Organisations)**
- **Volunteer and / or Employee questionnaires**

How are you going to get there?

?

Questions to get you started:

1. Which people can help you move forward?

   _____

2. What sort of tasks do they need to undertake?

   _____

3. What systems and processes, if any, will you need to move forward?

   _____

4. What additional resources, if any, do you need to move forward?

   _____

5. Are there new training, development and support needs to be met?

   _____

Checklists, exercises and tools:
- **Setting SMART volunteering objectives**
- **Organising Volunteers Checklist (Small Organisations or Large Organisations)**
- **Template Volunteer Role Description**

Photo 5: Putting the House to bed: Conservation volunteer at Newhailes

How will you know you've arrived?

Questions to get you started:

1. What kind of information do you need to collect to show progress?

   _____

2. What kind of things will you measure to show success e.g. visitor numbers, volunteers satisfaction?

   _____

3. What kind of tools will you use to measure success?

   _____

4. What will success look like?

   _____

5. Who can help?

   _____

Checklists, exercises and tools:
- **Monitoring and Evaluation Questionnaire for Volunteers**
- **Monitoring and Evaluation Questionnaire for Staff**
- **Volunteer Support and Supervision Record**

Organisational SWOT Analysis

This is a good way to assess your organisation's <u>Strengths, Weaknesses, Opportunities and Threats</u> in volunteering.

Ideally you should do this with several people in your organisation to get as full a picture as possible. Either way, encourage people to be as honest and constructive as possible. You may find some points appear in more than one section of the grid. Think as widely as possible.

STRENGTHS: What are your organisation's volunteering strengths?	WEAKNESSES: What are your organisation's volunteering weaknesses?
OPPORTUNITIES: What opportunities are coming up in your organisation?	THREATS: Are there any potential threats to volunteering in your organisation?

Individual SWOT Analysis
for Volunteer Organisers

STRENGTHS: Note down your own strengths in organising volunteering	WEAKNESSES: Note down any weaknesses in your own organising of volunteering
OPPORTUNITIES: Note down any upcoming opportunities for you in organising volunteering	THREATS: Note down any potential threats for you organising volunteering

Setting a Vision for the Future

Photo 6: A shop volunteer serving a customer at Falkland Palace

People often talk about organisations having long term visions.

This tool is best used in pairs or groups by a minimum of 8 people.

Step 1: Pick a date some way into the future e.g. 2, 3, 5 or even 10 or 15 years.

Step 2: Prepare flip chart sheets with one of the questions below on each.

Step 3: Split the total number of people into 4 pairs or groups.

Step 4: Give each group 5 – 10 minutes to come up with as many ideas as possible to answer their question.

Step 5: Ask the groups to pass their sheet clockwise to the next group who can then add their ideas.

Note:

Make sure every group has the chance to respond to each question. You should end up with lots of ideas and pointers on how to take things forward.

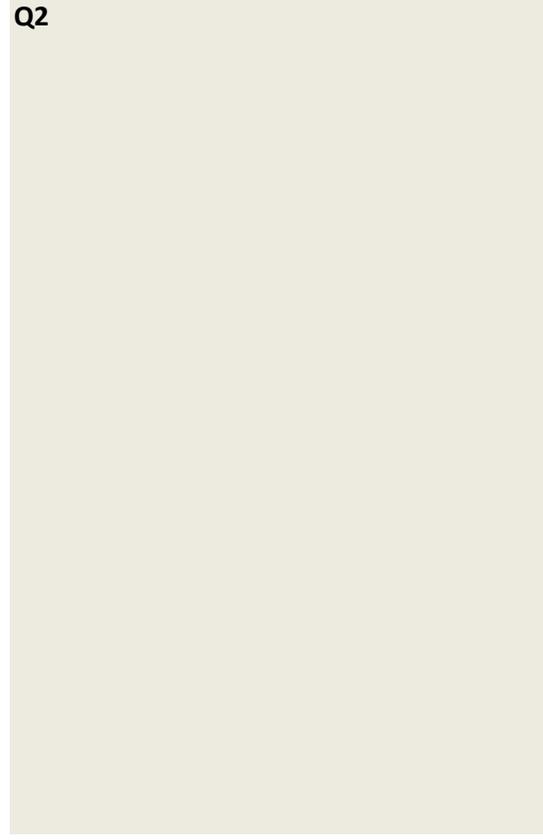**Use the questions below or some you have developed yourself**

    1) What would we like volunteering in our organisation to look like?

    2) What would we like volunteers to be saying about our organisation?

    3) How would we like visitors / customers to describe our organisation?

    4) What successes might we have had along the way?

Q1

Q2

Q3

Q4

Q1

Q2

18
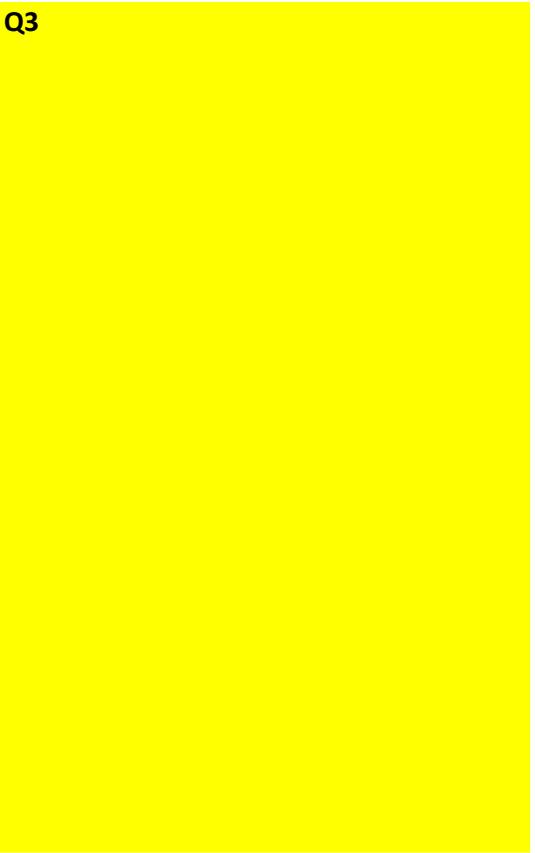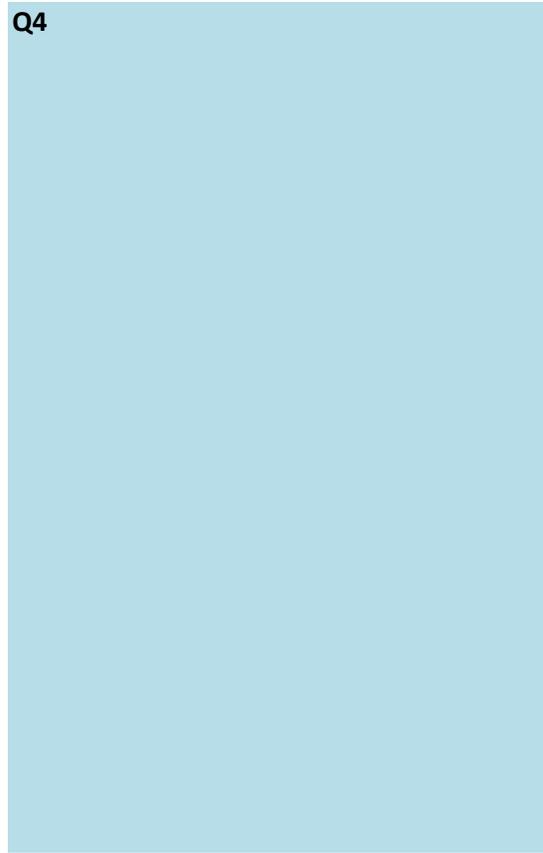
Planning For and Organising Your Volunteers

Planning for Volunteer Involvement

Before you begin recruiting volunteers, it is important that you consider what support that volunteer might require, and whether you have the resources to provide this.

Who do you need to talk to?

Do you already have volunteers working with you or in your organisation? Before starting to recruit, you should ensure that your existing volunteers are aware that you are looking for someone to cover this additional opportunity. If you would like to consider other applicants, then you could invite your existing volunteers to apply through the same process.

If you don't currently have volunteers, but have employees who have not worked with volunteers previously, then it is generally helpful to include them in the planning process. Employees who are not engaged may see volunteers as a threat to their role (replacing paid employees with unpaid volunteers), or may see volunteers as unskilled 'amateurs' who don't have the same skills as employees. It is important to make sure that any volunteer brought in will feel valued within your current team of people.

What practicalities do you need to consider?

In some organisations, finding a suitable place for your volunteer to work can be a major challenge. Before recruiting a volunteer, make sure that all the practicalities are in place to allow them to carry out their role – for example:
- Where will they sit?
- If someone else is currently using the space, what alternative arrangements will be put in place?
- Will the volunteer require a computer and an electronic login?
- If so, what would be the timescale for arranging this?
- A volunteer should have a named person who will be directing their work and providing support as required. Have you identified that person?
- If the volunteer will be attending when that person is not available – whether off site or on annual leave – who will the volunteer report to, and is that individual happy to support the volunteer?

The *Volunteer Policy and Practice Checklist* (in Part 2: Sample Forms and Templates) provides a good starting point for answering these questions.

Setting SMART Objectives: Quick Guide

SMART

SMART is a useful acronym which describes the different elements that are required in useful objectives.

SMART	A potted guide
Specific	The more specific you can be the more likely that you will find ways to meet the objectives e.g. if you want to increase your volunteering numbers: by how many and over what time period.
Measurable	Make sure the objective can be measured in some way. This could be by e.g. checking volunteer satisfaction with their volunteering, or counting the numbers of volunteers retained or recruited in an agreed period of time.
Achievable	Although having a vision is important when it comes to planning ahead it's important to keep objectives manageable. Large objectives can be broken down into smaller ones. Achieving objectives needs to take into account things like the capacity of people to work on a project and the time they have to allocate to it.
Relevant	Check that the objectives you come up with reflect what is needed by your organisation and that they match the expectations of the people who will be carrying them out.
Time framed	Is there a time frame in place? This should include, for example, the date by which work should have been done and when it will be reviewed.

Tools to Try:
- **Template: Setting volunteering objectives**
- **Action Plan: Removing Barriers to organising volunteering**

Template: Setting Your Volunteering Objectives

Objective	How? (ways to achieve this)	Who? (people to be involved)	Target (measure)	By Date	Resources needed	Progress / Notes / Evidence of Success

Template Action Plan: Removing Barriers to Organising Volunteering

	Barrier	Immediate Solutions?	Future Solutions	Can I make these changes on my own?	People who need to be involved
1.					
2.					
3.					
4.					
5.					

Organising Volunteers: Small Organisation Checklist

Minimum requirements you should have in place	In place	Under development	Required
Widespread support for volunteering in your organisation at all levels.	☐	☐	☐
A plan that covers how volunteers will be recruited, supported, trained, and developed in your organisation.	☐	☐	☐
Insurance that covers volunteers whilst carrying out their voluntary roles.	☐	☐	☐
Defined roles / tasks with likely time commitments.	☐	☐	☐
A commitment to / actions in place to ensure equality of opportunity and diversity in your volunteering programme.	☐	☐	☐
Reimbursement of out of pocket expenses for volunteers.	☐	☐	☐
A commitment to / actions in place to support data protection and confidentiality for volunteers and the organisation.	☐	☐	☐
A commitment to / actions in place to provide health and safety to volunteers in your organisation.	☐	☐	☐
A commitment to / actions in place to support the protection of children and vulnerable adults (where appropriate).	☐	☐	☐
A plan outlining how issues and problems will be resolved e.g. if a volunteer or a customer is dissatisfied with their treatment.	☐	☐	☐

Organising Volunteers: Large Organisation Checklist

Minimum requirements you should have in place	In place	Under development	Required
Organisation / Group Structure			
There is full support for volunteering in your organisation e.g. strategic and operational.	☐	☐	☐
Clear lines of communication about volunteers and volunteering exist.	☐	☐	☐
People at all levels are aware of the make-up of the organisation and where volunteers fit into it.	☐	☐	☐
Planning and Resources			
The organisation / volunteering plans cover recruitment, retention and recognition.	☐	☐	☐
There is forward planning for volunteering positions e.g. succession plans.	☐	☐	☐
Sufficient resources are allocated to volunteering e.g. equipment, money, people.	☐	☐	☐
Volunteers' roles, tasks and responsibilities are reviewed regularly.	☐	☐	☐
Volunteers are involved in planning and decision making where appropriate.	☐	☐	☐
Equality and Diversity			
There is a statement or policy for equal opportunities and diversity in volunteering that it is worked to by all.	☐	☐	☐

Minimum requirements you should have in place	In place	Under development	Required
Application forms and recruitment material profile your organisation's commitment to equality and diversity.	☐	☐	☐
Equal opportunities and diversity information is collected, analysed and acted upon.	☐	☐	☐

Safety and Risk

	In place	Under development	Required
Risk assessments for volunteer roles have been carried out and any actual or potential risks have been minimised or removed.	☐	☐	☐
Any need for PVG / Disclosure checks is identified and action taken.	☐	☐	☐

Recruiting of Volunteers

	In place	Under development	Required
There are role / task descriptions for volunteers.	☐	☐	☐
Role / task descriptions are reviewed and updated.	☐	☐	☐
There are records held within data protection guidelines on current, past and potential volunteers.	☐	☐	☐
A variety of volunteer recruitment methods are used.	☐	☐	☐
Equality and Diversity information on potential volunteers is monitored, evaluated and acted upon.	☐	☐	☐
Recruitment paperwork /information is clear, easy to read and available in alternative formats on request.	☐	☐	☐

Minimum requirements you should have in place	In place	Under development	Required
Communication with Volunteers			
Volunteers and staff can participate in making decisions that affect them.	☐	☐	☐
There are codes of conduct for volunteers and any staff supporting them.	☐	☐	☐
Team work and taking responsibility is encouraged where appropriate.	☐	☐	☐
Induction and Training			
Varied training, induction and support methods are used for volunteers e.g. onsite training and demonstration, buddying, mentoring, induction checklists.	☐	☐	☐
Support and Development			
Volunteers are supported e.g. through one to one or group meetings on a regular basis.	☐	☐	☐
Volunteers are clear about who to contact if they need help.	☐	☐	☐
Volunteer feedback is taken into account when planning new activities.	☐	☐	☐
There are development opportunities available for volunteers.	☐	☐	☐
Recognising Volunteers			
Out of pocket expenses are reimbursed.	☐	☐	☐
Volunteering successes are celebrated and promoted internally and externally.	☐	☐	☐
There are annual recognition events.	☐	☐	☐

Minimum requirements you should have in place	In place	Under development	Required
The impact of volunteering is measured and the results shared internally and externally.	☐	☐	☐
Volunteers are regularly thanked for their contribution.	☐	☐	☐
Volunteers moving on are offered references.	☐	☐	☐

Monitoring and Evaluation

	In place	Under development	Required
Volunteers are asked to feedback regularly on their experience.	☐	☐	☐
Any findings are used to plan future volunteering in the organisation.	☐	☐	☐

Organising Volunteering: Developing a Policy

Volunteering policies should be developed by involving as many key people as possible. They are a good way to document the aims and values of your organisation and to emphasise the role of volunteers. Policies can vary in length depending on your organisation's needs. You can use a policy to cover everything relating to volunteering or have a short introductory document and refer within it to any policies, procedures and guidelines your organisation has that affect volunteering.

Minimum Policy Requirements	In place	Under Development	Required
The role and benefits of volunteers to your organisation	☐	☐	☐
Recruitment and selection	☐	☐	☐
Induction, support , training & development	☐	☐	☐
Out-of-pocket expenses	☐	☐	☐
Insurance	☐	☐	☐
Records management / data protection	☐	☐	☐
Rights and responsibilities / codes of conduct for volunteers	☐	☐	☐
Responsibility to meet any time commitments or inform manager if not possible	☐	☐	☐
What your organisation expects of volunteers	☐	☐	☐
What volunteers can expect from your organisation	☐	☐	☐
Working relationships between volunteers, and with any paid staff	☐	☐	☐
How any decisions affecting volunteers are made	☐	☐	☐
How complaints and problems are solved	☐	☐	☐
Equality and diversity	☐	☐	☐

Minimum Policy Requirements	In place	Under Development	Required
Health and safety including the protection of children and vulnerable adults where appropriate	☐	☐	☐
Monitoring and evaluation / review of your programme	☐	☐	☐
Who has responsibility for volunteering policies, procedures and guidance and how often they will be reviewed.	☐	☐	☐

Recruitment and Selection of Volunteers

Recruitment

Effective recruitment is about attracting the right number of volunteers with the skills and qualities you need in ways that match up with volunteers' motivations and interests. This approach applies to bringing in volunteers for new roles as well as to succession planning in the event of current volunteers moving on.

Have a plan and promote your volunteering opportunities

People volunteer for all sorts of different reasons so it's important to think about the voluntary roles you are offering and who they are likely to appeal to. Having simple introductory information helps people work out whether they want to offer their services as a volunteer for you. All your information should be understandable, produced in plain language, a readable font, and easy to download if you place it on a website. It is good practice to have items available in accessible formats, for example, large print and audio.

You can advertise in lots of ways, including on posters and in leaflets in your own museum and gallery, as well as in other places where potential volunteers are likely to be. Spreading the word through your existing volunteers is a good way to attract new people too.

Selecting volunteers

Selection means ensuring you get the right people in the right voluntary roles. Any or all of the following are productive ways to achieve this:

- volunteer position / role / task descriptions
- application / registration forms
- providing simple introductory information on your organisation and volunteering
- initial meetings / interviews – having an informal or formal chat to provide information and to discuss potential volunteers' areas of interest, expectations, anxieties, and needs
- taking up references and checking criminal records if required.

Matching and placing volunteers

It's important to match new volunteers up with the opportunities that most appeal to them and for which they have the skills and qualities you are looking for. Assessing their motivations and abilities in the selection process will help with this.

Accepting or rejecting offers of voluntary help

Not everyone who comes forward to volunteer will be suitable for your organisation. It is good practice if a potential volunteer is unsuitable, or decides against volunteering, to thank them for their interest and to suggest other options such as the local Volunteer Centre. Some people may ask for feedback and it is good practice to offer some constructive advice where possible.

Helping Volunteers Make a Good Start

Induction

The sort of volunteer induction you offer depends on your organisation. As a general rule induction should include, for example, essential information about your organisation, how it operates, any key policies and procedures that volunteers should be aware of, and how volunteers will be trained, supported and developed. You could take a 'must know', 'could know' and 'nice to know' approach to this.

Risk Assessment

Every organisation has a responsibility to ensure that volunteers are kept safe whilst undertaking their voluntary role. Risk assessment means taking a systematic approach to looking at what could cause harm to people and minimising all possible risks.

The Health and Safety Executive Scotland recommends the following 5 steps:

Step 1: Look for the hazards (things that could be dangerous)

Step 2: Decide who might be harmed, and in what ways by these hazards

Step 3: For each hazard identified, assess the chance of harm actually being done and decide whether existing measures are adequate or whether more should be done.

Step 4: Record all risk assessment findings e.g. the main risks and the steps you have taken to deal with them.

Step 5: Remember to review your risk assessments from time to time, and revise them as necessary.

Training

Training can be formal or informal, on or off site and before and during the start of volunteering. Key areas for training are role specific – what do volunteers need to know and do to carry out their role well? In addition there may be some essential training that everyone involved in your organisation should undergo, for example, health and safety, child and vulnerable adult protection, and using equipment.

Retaining, Recognising and Supporting Volunteers

Once volunteers are settled in there are lots of ways to keep them motivated and involved. People have different reasons for volunteering and retention should be varied to suit people's motivations. It is good practice to offer ongoing support to volunteers and to encourage them to develop to their full potential. This also maximises the benefits of involving volunteers for your organisation as a whole. Ongoing training and regular support meetings are good ways of retaining volunteers. Some volunteers enjoy being given development responsibilities or being recognised for their impact on the organisation's work i.e. for their achievements.

Reviewing, Monitoring and Evaluating Volunteers

Using the action planning approach described on page 8 in this Toolkit, you can review your volunteering programme regularly. Monitoring by collecting essential information is an important part of this process. You can collect quantitative or qualitative data through e.g. training evaluations, volunteer review forms and volunteer and staff questionnaires. Bringing people together for group discussions and the chance to feedback informally also works well. Monitoring and evaluation on an ongoing basis can ensure that you check the quality of volunteers' experiences within your organisation. It can also help to assess the value volunteers bring to your organisation and to engender ideas for improvement.

Ending a Volunteer Placement

Sometimes there are situations where it becomes clear that a volunteer placement should not continue. This can be challenging for everyone involved and usually will be when all other options have been tried e.g. a change of role, the provision of additional support or training. Generally, volunteer roles are ended by the organisation when a volunteer is no longer capable of carrying out their role and in these cases it's important to take a planned and caring approach. Volunteer placements may also be ended when a volunteer has committed a serious breach of the organisation's code of conduct, and in these cases it is important to have a process in place (outwith the employee disciplinary policy) to handle such situations.

When deciding to end a placement it's important to be able to describe what the issues are clearly. Communicating clearly and being able to refer to specific examples is crucial. Refer back to written records, any existing guidelines and information, e.g. a code of conduct, to allow you to be clear and specific about what the problem is.

Volunteering, Best Practice and the Law

There are lots of situations where the law may be relevant to involving volunteers. As a minimum you should consider the areas below:

The sections below do not provide an exhaustive list of all the legal factors that should inform and could affect your organisation's relationship with volunteers. It is recommended that you seek further advice and information as required. There are lots of links in the additional help section of this of this Toolkit.

Who can volunteer with you?

The good news is that lots of people can volunteer for your organisation. In Scotland, any citizen of the European Union (EU) or European Economic Areas (EEAs) can volunteer. One exception is that

there are restrictions affecting people from Bulgaria and Romania with regards to working in the UK and these include voluntary work. The UK Visa and Immigration organisation can advise and provide information in these cases.

This does not mean that people from outwith the EU or EEAs cannot volunteer in Scotland – if the type of visa they have allows volunteering they can go ahead. There may be restrictions in some cases. Again check UK Visa and Immigration for the most up to date advice and information. Currently, if someone is an Asylum seeker, normally they may volunteer for a registered charity. Sometimes, an individual who does not have a visa specifying their right to work or volunteer can give a limited amount of time as a volunteer while they are here, for example on holiday. This is known as 'incidental volunteering' and usually has a limit of 30 days. Because of the nature of incidental volunteering, it is important that this is not offered as an option to someone enquiring about coming to Scotland to volunteer, but only to someone already in the country.

If you are considering involving a volunteer who is in this situation, we recommend that you do further research before they start volunteering with you to make sure you stay within the law.

With regards to age there is no upper age limit on who can volunteer. There is no lower age limit either. However involving volunteers under the age of 16 will require you to consider a range of issues including the following:

- checking that your insurance covers volunteers under 16
- assessing the type of support and supervision a younger volunteer might need e.g. should they always be accompanied by a responsible adult whilst volunteering
- creating opportunities that can be carried out at times that would suit younger volunteers
- gaining written consent for volunteering from Parents or Guardians
- having appropriate Child Protection measures in place

Avoiding Creating a 'Contract of Employment'

It is important for organisations to have clear distinctions between employees and volunteers particularly as there have been legal cases where volunteers have been able to show that they have been treated like employees. Following the guidance in this toolkit will assist you to be clear that you are involving volunteers. Some key steps to take to avoid creating a contract are to ensure:

- any documents describing 'commitments' and 'expectations' between your organisation and your volunteers are termed 'volunteer agreements' (not contracts) and that there is no obligation on the part of volunteers or the organisation
- language used does not mirror the kind of language used in employment contracts
- any expenses reimbursed to volunteers cover only out of pocket expenses incurred during their volunteering i.e. do not offer flat rate expenses, sessional fees, lump sums or anything more than out-of-pocket-expenses.

- if you offer anything that could be interpreted as payment for services given by volunteers e.g. gifts, goods, discounts of any kind / free memberships be clear that these things are tokens of appreciation and not 'payment for services'.
- If your organisation has employees and volunteers that there is clear guidance on which policies and procedures apply to volunteers.

For example there are lots of employment related policies and procedures that should not mention volunteers e.g. annual leave / time off in lieu and that should not be available to volunteers.

Under employment law someone could be deemed an 'employee' not a 'volunteer' if a contract of employment is found to exist. For a contract to be seen as existing there are two key areas in law which must be met: **consideration** and **intention.**

Consideration

To meet this condition an individual and an organisation need to exchange something of material value. Where employment tribunals have considered whether or not a contract exists between an organisation and a volunteer they have explored a range of aspects including:

- Payment of expenses
- Training offered
- Whether there are obligations placed on the volunteer
- Documents relating to volunteering – do they constitute a contract

Intention

This aspect of the law focuses on whether an individual and an organisation intended to enter into a legally binding contract, that they could each go to court for to enforce their rights. This is one of the reasons why the language used in documents relating to volunteering should avoid employment type language.

Expenses and the Benefits System

It is perfectly acceptable for people to be volunteering whilst receiving state benefits of any kind. Indeed it is recognised that volunteering can enhance people's skills, knowledge and all round health as well as improve job prospects and career pathways. How much time people can volunteer whilst on benefits depends on the type of benefits they are receiving. People must continue to meet any conditions that come with the particular benefits they receive. It is the individual person's responsibility to be aware of any rules affecting the amount or type of volunteering they can do. Job Centre Plus publishes the most up to date information on this. At the time of writing they have an excellent guide: Volunteering While Getting Benefits. Reimbursing volunteers for anything other than the actual expenses incurred whilst volunteering may also place a volunteer's benefits at risk.

Payment of expenses is discussed in several places in this toolkit. It is good practice to reimburse volunteers for expenses incurred as a result of their volunteering but important to ensure that you are not accidently creating a contract of employment in any way. This can happen if volunteers are, for example, give a flat rate for some regular activity that does not mirror the actual costs they incur as volunteers. This could be viewed as contravention of minimum wage legislation.

HM Revenue and Customs and the Department of Work and Pensions provide up to date guidance on what are considered legitimate expenses for volunteers. At the time of writing the guidance covers the following:

- travel to and from the place where the volunteering takes place
- travel undertaken during the course of volunteering
- meals taken during the course of volunteering
- postage and telephone costs
- care of children and other dependants during the period of voluntary work
- the cost of protective or special clothing

This means that any of the above would be viewed as legitimate expenses incurred by volunteers during their volunteering. Expenses paid to volunteers should reflect the actual costs incurred by volunteers and be supported by receipts wherever possible.

Insuring volunteers

Insurance is a way of covering various types of costs if things go wrong. There are two main types of insurance to be covered by plus others that may apply depending on the roles your volunteers have. The main ones are Employers Liability Insurance and Public Liability Insurance.

Although volunteers are not employees, Employers Liability Insurance (ELI) should cover volunteers. If you already have ELI you should check it to ensure that volunteers are covered, adding them on if not. ELI protects your organisation in a range of situations including where volunteers are injured or become ill during times when they are volunteering with you. Public Liability Insurance (PLI) covers organisations in situations where liability claims are made by members of the public or a third party other than employees. Although organisations are not legally required to have this, not having it could expose your organisation to risk. Volunteers could be described as a third party in this type of insurance and may be able to claim against you if they experience harm or loss in their volunteering interactions with your organisation. This type of insurance should also cover your organisation for any harm or loss caused by the actions of your volunteers in relation to other third parties.

If you involve volunteer drivers in your organisation and own or hire vehicles for volunteers to drive these volunteers should be covered by Motor Vehicle Insurance. Where volunteers are using their own cars in the course of their voluntary work you must inform these volunteers that they

need to ensure their own insurance company is aware that they are using their vehicle for volunteering. These are the two areas to cover as a minimum when involving volunteer drivers.

Equality and Diversity

Treating volunteers with equal respect and supporting equal access to volunteering opportunities demonstrates that your organisation recognises the value of all people and the contributions they can make. Involving volunteers from diverse backgrounds enhances your volunteering programme and your organisation. You should aim to treat all volunteers fairly regardless of race, gender, religion, sexual orientation, transgender status, responsibilities for dependants, age, physical/mental disability or offending background. It is important to ensure that your volunteers reflect all sections of society where possible as well as your local community. Although equality legislation does not always mention volunteers it is good practice to follow its principles and practice.

The Equality Act 2010 came into force in October 2010. This Act builds on previous legislation by taking a proactive approach to tackling discrimination and to promoting equality and good relations positively. Amongst other things, The Equality Act covers employees and people receiving services from organisations. It is designed to protect people from discrimination if they have protected characteristics. Under this legislation volunteering can be viewed as a service. For this reason any organisation involving volunteers should be protecting volunteers from discrimination, harassment or victimisation where volunteers have what are referred to as 'protected characteristics'.

The key areas in which volunteers might be discriminated against as service users are:

- Age
- Disability
- Gender
- Pregnancy and Maternity
- Race
- Religion and belief
- Sexual orientation
- Transgender status

As a starting point, encouraging people from any of the following groups below can demonstrate good practice in your organisation:

- black and minority ethnic community groups
- young people
- retired people
- students

- Lesbian, Gay, Bisexual and Transgender people
- Refugees, asylum seekers and migrants
- People with Disabilities
- Ex offenders, offenders and prisoners
- people from a range of faith communities
- unemployed people, particularly long term unemployed.

One way to monitor diversity is to ask volunteers to complete an Equality and Diversity form noting e.g. their gender, race, ethnic origin, age and any disabilities/conditions that they have as part of the recruitment process.

There are two approaches you can use to monitor and record the information received, depending on your organisational policies:
- The information can be completely anonymised, with no way of connecting the data to any individual – this is the most secure way to hold the data. It does however restrict the statistical benefit of recording this data - for example, although the data can be analysed for recruitment in a specific year, it cannot be used to check the current volunteer diversity (as individuals who were recruited in that year may have since left).
- Each individual may be issued a randomised tracking number (available and known only to the volunteer manager and specific relevant staff) which can be used to identify which lines of data are relevant to the current volunteer population. If using this method, we recommend that you take guidance from your organisation's data protection expert to ensure that your recording system meets data protection requirements.

Safeguarding, including Child and Adult Protection

Your organisation has a responsibility to ensure that children and vulnerable adults are protected from harm and abuse while engaging with you. From February 2011, the Scottish Government introduced a new membership scheme to replace and improve upon existing disclosure arrangements for people who work with vulnerable groups (children and adults). As with previous legislation, this scheme applies to volunteers and paid staff. The Protection of Vulnerable Groups Scheme (PVG Scheme) is designed to ensure that those who have regular contact with children and protected adults through paid and unpaid work do not have a known history of harmful behaviour. Through the PVG Scheme, your organisation can carry out checks on prospective volunteers if they are going to be undertaking what the law regards as 'regulated work'.

There are strict definitions of regulated work and if your volunteer roles do not meet them, checks under the PVG Scheme are not possible. The PVG legislation identifies areas of activity that are classed as regulated work and common areas are as follows:

- Caring for Children / Adults
- Teaching, instructing, training or supervising children

- Being in sole charge of children
- Unsupervised contact with children
- Providing advice or guidance to children

If your organisation is considering criminal records checks, you should have a policy in place which defines when checks should be carried out and which roles in your organisation require what specific type of background check. This policy should also describe the process you will follow if a background check returns additional information regarding a volunteer applicant.

You should also include the requirement for a criminal records check on your volunteer role description, so that people are aware that a check will be required before they apply for your volunteer role. This gives them the option of self-selecting themselves out of consideration for that role.

Key aspects of the PVG Scheme:

- Two lists are maintained which contain the names of people who are barred from carrying out regulated work (including volunteering) with children and/or vulnerable adults
- When an individual's scheme record is updated with new information, organisations listed as interested parties are automatically notified of the change
- New applicants complete a 'Join PVG' form, while existing PVG members complete a separate form for a Scheme Record Updates – this details any changes in a person's criminal record status since the previous request

The Disclosure documents contain relevant information on a person's criminal history as held by police and government departments. This information is confidential and impartial, and an organisation requesting this information is responsible for ensuring that the data held is stored securely and only accessible to relevant individuals.

When your organisation receives information indicating that a person is barred you must under no circumstances involve them in carrying out regulated work as this is an offence as well as a risk to children and vulnerable adults. Disclosures may contain information about a person's criminal history that does not bar them from carrying out regulated work. In these circumstances it is important to make a decision on someone's suitability to volunteer with you based on the voluntary roles for which they have applied and linked to other selection methods you have in place.

PVG Scheme membership is provided free of charge for unpaid individuals in voluntary organisations. The organisation can register directly with Disclosure Scotland or for smaller organisations, the Volunteer Scotland Disclosure Service (VSDS) can act as an umbrella body for applications.

Involving ex-offenders as volunteers

It is good practice to involve ex-offenders in volunteering where possible. There are some things to take into account. This Toolkit does not provide a comprehensive guide so you should also check further guidance carefully.

Under the Rehabilitation of Offenders Act 1974, there are circumstances under which people are considered rehabilitated and where their convictions are spent. In these circumstances they do not need to declare convictions when putting themselves forward as a volunteer. There are also exceptions to these rules. For Scottish organisations, please see the Rehabilitation of Offenders Act 1974 (Exclusions and Exceptions) (Scotland) Order 2013, amended by the Rehabilitation of Offenders Act 1974 (Exclusions and Exceptions) (Scotland) Amendment Order 2013.

You may choose to ask individuals to self-declare any unspent convictions as part of the application or registration process. In this instance, you should have considered what process you will follow if someone declares an unspent conviction, ensuring that this information is handled confidentially and fairly. If the information provided suggests that they would be unsuitable in that specific role, you can also consider whether there are any alternative roles in the organisation which may be more applicable.

Health and Safety

Risk assessments are an important aspect of managing the health and safety of your volunteers. Organisations have a duty of care, which includes taking reasonable care to avoid harm coming to their volunteers. As well as assessing and addressing risks there are a number of areas you should consider. The Health and Safety Executive (HSE) has lots of information about prioritising health and safety, and ensuring that you have robust support structures in place. Things to cover include:

- Having a health and safety policy
- Having a nominated person responsible for health and safety
- Providing suitable training and support for volunteers
- Reviewing health and safety in relation to volunteers regularly

The Health and Safety Executive (HSE) have produced specific advice for voluntary organisations on their website: http://www.hse.gov.uk/voluntary/index.htm

Data Protection

The main law governing UK data protection is the Data Protection Act 1998, which came into force in March 2000 and with which all organisations in the UK must comply. The Act refers to the processing of personal data by data controllers, and outlines data protection principles which must be followed. Individuals are entitled to compensation for damage and distress caused by the failure of a data controller to comply with the Act. Your organisation has a legal obligation to

protect the personal data of its volunteers, and should have policies in place to reflect that duty.

The Data Protection Act principles state that data must be:

- Fairly and lawfully processed
- Processed for limited purposes
- Adequate, relevant and not excessive
- Accurate and where necessary kept up to date
- Not kept for longer than is necessary
- Processed in line with the individual's rights
- Secure
- Not transferred to countries without adequate protection

The General Data Protection Regulations will come into force for all European Union countries on 25th May 2018, when Britain will still be part of the EU. Because of Britain's requirement for data transfer with the EU and the need to therefore maintain high standards of data protection which meet EU legislation, it is expected that the GDPR regulations will also form the basis of data protection laws post-Brexit.

The principles of GDPR are to ensure that data is:

a) Processed lawfully, fairly and in a transparent manner
b) Collected for specified, explicit and legitimate purposes
c) Adequate, relevant and limited to what is necessary in relation to the purposes they are processed
d) Accurate and, where necessary, kept up to date
e) Kept for no longer than necessary for the purpose for which the personal data is processed
f) Processed in an appropriate manner that ensures security, including protection against unauthorised or unlawful processing and against accidental loss, destruction or damage, using appropriate technical or organisational measures

Overarching these principles is Article 5(2) **ACCOUNTABILITY.**

Your organisation should now be preparing for the implementation of GDPR, and as someone responsible for the personal information of your volunteers, it is important that you are kept notified about how your organisation's data processes will be changing. GDPR will affect how you store personal data, how you use that data (including communications) and whether you can share that data with any other department or organisation.
You can find more information about preparing for GDPR in the Information Commissioner's Office (ICO) guide: https://ico.org.uk/media/1624219/preparing-for-the-gdpr-12-steps.pdf

References for Volunteers

Taking Up References for Volunteers

The Investing in Volunteers standards require organisations to have a <u>consistent</u> approach to the taking up of references. This means that it is up to you and your organisation as to whether you choose to request references for your volunteers, but you should have a policy in place and include any requirements for references on your volunteer role description. If working with partner organisations, you should also be aware that they may have a specific policy to not take up references for their volunteers in order to be more inclusive.

Providing References for Volunteers

Volunteers, particularly younger volunteers, often give their time in order to gain experience and get into employment. Sometimes organisations may have quite specific guidance on what can be included in an employee reference and while volunteer references are not generally as stringent, it may be worth consulting with your HR representative before providing a reference. In general, it is best to keep references quite factual and provide details about what the volunteer achieved while helping you.

Representing Your Organisation (including Social Media)

Volunteers can be fantastic ambassadors for your organisation, enthusiastically promoting your work to their friends, the press and on social media. It's important therefore that your volunteers are aware of your expectations for their behaviour and how they represent your organisation, both while volunteering and while not 'on-duty'. It is also important that volunteers are aware that any behaviour which does not meet your expected standards will be followed up and discussed.

Social media can be a fantastic tool for engaging with lots of people, including your volunteers. If your organisation has a social media policy which covers employees, you should check to see if this mentions volunteers as well and make your volunteers aware of this if so. If your policy doesn't cover volunteers, or you don't have a social media policy, then it would be good practice to include some principles about volunteer use of social media in your induction materials. Although volunteers may not see how their personal use of social media is relevant to their volunteer role, you can highlight that if they mention their volunteer roles on their personal profile, any of their posts can then be directly tied to your organisation.

Volunteer Reward and Recognition

If you are setting up a new volunteer programme, you should carefully consider what type of reward and recognition you will include for your volunteers. It is important to ensure that volunteers feel their services are appreciated, and thank you events, outstanding work certificates or long service awards are a traditional method of recognising the volunteer contribution.

Providing benefits such as free gifts or a promise of future employment can however result in a volunteer being considered an employee or worker – more guidance is available at https://www.gov.uk/volunteering/pay-and-expenses.

Photo 7: Curatorial volunteer at the National Museum of Rural Life

Part 2: Sample Forms and Templates

Photo 8: Volunteer guide entertaining visitors on a 'highlights' tour at the National Museum of Scotland

Setting Up Your Volunteer Programme

Volunteering Policy and Practice Checklist

Minimum requirements you should have in place	In place	Required	Actions
Planning / Getting Ready			
Strategy / Action Plan for volunteering	☐	☐	
Volunteering Policy	☐	☐	
Volunteer Role Descriptions	☐	☐	
Risk Assessments for volunteering activities	☐	☐	
Resources to work with volunteers e.g. funding, time	☐	☐	
Guidelines / information for staff on working with volunteers	☐	☐	
Management / Board support	☐	☐	
Recruitment			
Volunteer recruitment plan	☐	☐	
Marketing materials	☐	☐	
Website / online advert and application form	☐	☐	
Advert(s)	☐	☐	
Information for potential volunteers	☐	☐	
Open days / events involving current volunteers sharing their experiences	☐	☐	
Selecting and Placing Volunteers			
Selection Process	☐	☐	

Minimum requirements you should have in place	In place	Required	Actions
Application / registration forms	☐	☐	
Task or role description	☐	☐	
Person specification / skills and qualities required	☐	☐	
Interview process / questions	☐	☐	
Reference requests	☐	☐	
Disclosure or PVG checks	☐	☐	
Volunteer agreements	☐	☐	

Settling Volunteers In: Induction

	In place	Required	Actions
Guidelines for any paid staff /existing volunteers	☐	☐	
Introductory period	☐	☐	
Start up training and resources	☐	☐	
Induction pack	☐	☐	
Codes of conduct	☐	☐	
Volunteer handbook / guidelines	☐	☐	
Checklists covering everything	☐	☐	
Out of pocket expenses	☐	☐	

**Retaining Volunteers:
Supporting, Motivating and Developing**

	In place	Required	Actions
Informal / formal support systems	☐	☐	
Up to date record keeping	☐	☐	

Minimum requirements you should have in place	In place	Required	Actions
Recognition systems /events	☐	☐	
Training Volunteers			
Planned bespoke programme	☐	☐	
Training material	☐	☐	
Guidance notes on how to carry out their role	☐	☐	
Communication			
A plan	☐	☐	
Diverse approaches to meet everyone's needs	☐	☐	
Reviewing and Improving your Programme: Monitoring and Evaluation			
Plan for collecting feedback	☐	☐	
Volunteer surveys	☐	☐	
Staff surveys	☐	☐	
Dealing with Problems			
Complaints or problem solving procedure	☐	☐	
Records of how things were resolved	☐	☐	
Other areas you have identified			
	☐	☐	
	☐	☐	
	☐	☐	

Sample Volunteer-Related Policies

Template Volunteer Policy

1. Introduction

We (Organisation Name) aim to (*include examples here, such as "provide opportunities for our community to enjoy artefacts and learn about the past"*). We recognise the additional value that volunteers bring to our *museum / gallery* and to our *customers / visitors*.

Within **(Organisation Name)** volunteers are involved in the following roles:

- _____
- _____
- _____

When involving volunteers we aim to work within the following principles of good practice:

- All voluntary roles will be well thought out and clearly described so that everyone is sure about their respective roles and responsibilities
- we will comply with current Data Protection legislation and guidance in the handling of all information we hold on all volunteers
- our volunteering opportunities will complement the work of paid staff and enhance the work of our organisation
- volunteers will have regular opportunities to share their thoughts/ideas/concerns with an allocated person in line with our policies and procedures
- All of our existing and future policies and procedures will take into account how they affect volunteers.

2. The Purpose of this Policy

By adhering to this policy we aim to:

- recognise the value of the contribution volunteers make to our organisation
- be true to the purpose, values, and intentions of the organisation in our approach to involving volunteers
- recognise the roles, rights and responsibilities of volunteers
- reiterate our commitment to involving volunteers in our organisation
- create and work to agreed principles for the involvement of volunteers, and
- ensure that we offer satisfying volunteering opportunities as well as support volunteers appropriately to carry out their role to the high standards possible.

This policy should be read and considered alongside any other relevant policies, procedures and guidance that we use to support volunteering in our organisation.

3. Recruitment and selection

We will work to our equalities and diversity policy when recruiting and selecting volunteers. In addition we will abide by any relevant legislation e.g. on Data Protection and the Protection of Children and Vulnerable Adults. All potential volunteers will be asked to complete an application/registration form. Written role descriptions will describe the time, commitment, skills and qualities required as well as the types of activities volunteers will carry out. All volunteers will be asked to provide 2 references where possible. Where individuals are not successful in gaining a voluntary role in our organisation we undertake to refer them to other suitable organisations and opportunities where possible. All volunteers will receive appropriate training and development opportunities to help them carry out their volunteering role.

4. Support

Once their volunteering has started we expect volunteers to adhere to our existing policies and procedures. All volunteers are covered under **(Organisation Name)** Public Liability Insurance. All volunteers will receive appropriate induction into their volunteering. This includes the provision of user friendly information on any policies and procedures connected to their role.

Following Induction, volunteers will have regular support meetings, either one to one or in groups, to discuss progress, identify areas for development, or to address any issues.
Written notes of these discussions may be held within the individual volunteer's records in accordance with data protection requirements. These records can be shared with volunteers at any time at their request. Ongoing training and development needs will be met as required. All volunteers will be able to claim out of pocket expenses for their volunteering in line with our systems and guidelines.

5. Problem solving

Where a problem is raised, for example, by a volunteer or about a volunteer, we will endeavour to resolve this using a range of options including our complaints process, codes of conduct and support mechanisms.

6. Responsibilities

Overall responsibility for the carrying out, monitoring and review of the effectiveness of this policy and associated procedures rests with the volunteer organiser (**named contact).**
Implementation and adherence to this policy is the shared responsibility of all staff and volunteers within the organisation.

(Date of document and review date)

Volunteer Recruitment and Induction Policy

(Organisation Name) would like all volunteers to enjoy volunteering with us and the first step in this process is recruitment. We aim to ensure that all potential volunteers are treated fairly during recruitment and that they receive an appropriate induction to their role and our organisation. Recruitment and induction should be mutually beneficial enabling potential volunteers to find out more about their chosen role as well as for the volunteer organiser to determine more about the volunteer. All volunteers whose role will involve contact with children and young people or vulnerable adults will be required to undertake a Disclosure check where appropriate in line with Protection of Vulnerable Groups legislation.

Applications

Once potential volunteers have completed an application form, they will be invited to an informal chat to discuss their skills, interests and time commitment as well as the voluntary roles that interested them. Following this informal chat, **(Organisation Name)** may decide not to offer a voluntary position at this time. In line with accepted best practice we will refer unselected volunteers to other interested organisations, for example a local volunteer centre, for assistance in finding a suitable volunteering opportunity.

Acceptance, appointment and timescales

Volunteers will not begin volunteering with us until all essential paperwork and relevant checks are complete. The volunteer organiser should give the new volunteer a Volunteer Agreement and a copy of their role description plus a letter confirming their appointment. Any minimum time commitment for the voluntary role will be confirmed during the recruitment process.

Volunteer agreements and role descriptions

All volunteers will be given a volunteer agreement which describes the expectations of the volunteer within **(Organisation Name)**. This agreement, together with the voluntary role description, gives both the volunteer and **(Organisation Name)** confirmation of what is acceptable for both parties. The agreement is not a legally binding contract, and the volunteer organiser should explain the agreement fully to the volunteer to underline that this is a positive commitment by **(Organisation Name)** to ensure fair and appropriate support and approaches to its volunteers.

Induction

Induction helps volunteers to understand the organisation and their role within in it and assists volunteer organisers get to know new volunteers and to note the type and level of support they will require, as well as what motivates them and what they are hoping to gain from volunteering. Volunteer organisers should ensure that all new volunteers are familiar with **(Organisation Name)**'s relevant policies and procedures. A thorough induction checklist should be provided for volunteers to fill in. The completed checklist should be stored with the volunteer's records in line with Data Protection requirements.

Health and Safety Policy

This policy has been written to support volunteer organisers and our volunteers to make sure that everyone stays as safe as practicably possible. All volunteers should be familiar with this policy.

The Health and Safety at Work etc Act 1974 is written to cover paid employees but as an organisation we have an ethical responsibility to ensure that, as far as possible, volunteers (as well as others) are protected from physical, financial and emotional harm arising from volunteering. The concept of duty of care is regarded as common law across the UK, and requires **(Organisation Name)** to take reasonable care to minimise the risk of harm to volunteers.

To maintain appropriate levels of health and safety, staff and volunteers should be an integral part of procedures for raising and addressing health and safety issues. Volunteers should flag up any health and safety issues and any possible solutions at the earliest opportunity with the volunteer organiser.

As an organisation we take the safety of our volunteers very seriously and volunteer organisers work to these guidelines to ensure all aspects of the safety of volunteers.

In the event of a health and safety issue being identified, volunteers should communicate this as soon as possible to the volunteer organiser to ensure that we address the issue and amend policies or procedures as necessary.

(Organisation Name) should:
- ensure that volunteers understand the health and safety policy and how it applies to their role
- review practices regularly to ensure that when new risks are identified appropriate steps are taken to address them
- ensure that volunteers are working in as safe an environment as possible
- consult with volunteers where necessary on health and safety issues that they raise
- ensure that all volunteers are aware of the procedures for reporting any incidents.

Volunteers should:
- ensure that they have read and understood any risk assessments undertaken that affect them in their role
- take reasonable steps to assure their own safety and that of others
- report any hazards as and when they identify them
- inform the volunteer organiser of any incidents or concerns
- report any incidents or concerns using the appropriate procedures / forms.

Risk Assessment Form

Date: **Activity:**

People possibly affected by the activity:

Task	Hazards	How likely is it to happen?	How serious could it be?	Level of risk	What action(s) will be taken?

Template Volunteer Agreement 1

Volunteers are an important and much appreciated part of **(organisation name)**. We hope that you will enjoy volunteering with us and contribute fully to our team and organisation.

This agreement sets out what kind of things you can expect from us, and what we expect from you. Flexible is important to us so please let us know if you would like to make any changes and we will do our best to reciprocate.

Our aims are:

- to welcome you and to introduce you to how our organisation works and your role in it

- to provide any training you need and to effect regular meetings with a key person so that you let us know whether you are satisfied in your role and so that you can get feedback from us

- to respect your skills, abilities and development ideas and to do our best to utilise and match them

- to reimburse your out of pocket expenses incurred whilst volunteering for us in line with our policy

- to consult with you and keep you informed of changes that may affect you

- to ensure your health and safety by providing a safe place for you to volunteer in (see the Health and Safety Policy)

- to uphold all policies and procedures affecting your voluntary role

- to adhere to our equal opportunities and diversity policy at all times

- to adhere to our complaints / problem solving procedure if there are any issues.

I, (Name of volunteer), agree to:

- volunteer to the best of my ability

- do my best to follow (organisation name)'s rules and procedures, including health and safety, equal opportunities and confidentiality.

Please note: this agreement does not constitute a legal employment contract of any kind.

Template Volunteer Agreement 2

This Volunteer Agreement describes the arrangement between **(name of organisation)** and you. We aim to do our best to ensure your volunteering with us is enjoyable and satisfying.
We appreciate the time, commitment and energy you bring to our organisation.

Part 1: The organisation

Your voluntary role is _____ and starts on **(date).** The role supports our work by **(state how the volunteering role benefits the organisation).**

What you can expect from our organisation:

1. Induction and training: we will

- provide an in depth induction about our organisation, your volunteering role and set up any induction and /or training you need to meet the responsibilities of this role.

2. Supervision and support: we will

- advise you of the standards / codes of conduct we expect for our organisation and encourage and support you to meet the requirements
- provide a regular opportunities for you to discuss your volunteering and any successes and challenges as well as development options.

3. Expenses: we will:

- reimburse expenses following the guidelines in our induction material. Generally receipts will be required.

4. Health and Safety: we will:

- provide suitable training and ongoing information on our health and safety policy as well as up to date risk assessments.

5. Insurance: we will:

- provide suitable insurance cover for all our volunteers whilst they are carrying out their agreed volunteering roles.

6. Equal opportunities: we will:

- ensure that all volunteers are treated fairly, in line with our equal opportunities and diversity policy and current best practice.

7. Problems: we will:

- try to resolve fairly any problems, complaints and issues during the time you volunteer with us.

Part 2: The volunteer

Our aim is that you:

- carry out your voluntary role to the best of your ability

- follow our organisation's policies, procedures and guidelines in relation to our organisation, staff, volunteers and customers / visitors

- meet any agreed time commitments and standards and inform us as soon as practicable if this is not possible

- identify referees who may be contacted, and agree to membership of the PVG / Disclosure scheme where necessary.

This agreement is not intended to be a legally binding contract between us and may be ended at any time at the discretion of either party. Neither of us intends any employment relationship to be created at any point.

Volunteer Code of Conduct

All volunteers involved in the work of **(Organisation name)** should endeavour to follow this Code of Conduct.

If you become aware of or suspect a breach of the Code of Conduct, please inform your volunteer manager as soon as possible.

All volunteers should:

a. treat everyone with respect regardless of gender, ethnicity, disability, sexuality or beliefs: this includes co-volunteers, staff, and customers and visitors to our museum / gallery

b. remember that actions, words and gestures can sometimes be misinterpreted, regardless of their good intentions

c. not have any inappropriate physical or verbal contact with others

d. not exaggerate or trivialise harassment, victimisation or child and vulnerable adult abuse issues

e. not carry out their role under the influence of alcohol or illegal drugs

f. dress to the required standard when carrying out their voluntary role

g. endeavour to follow all (**Organisation name)** policies and procedures that apply to their role.

Recognition of Volunteers Policy

We **(Organisation name)** greatly appreciate and value the work of all of our volunteers and aim to recognise their contribution both formally and informally in as many ways as possible.

As a minimum **(Organisation name)** aims to offer the following formal and informal recognition of volunteers within our organisation.

Formal recognition of our volunteers - we may use any of the following methods:

   a. certificates outlining voluntary involvement, contribution to development, or length of service
   b. a volunteer celebration / thank you event or awards ceremony
   c. long service awards including service certificates and pins
   d. the provision of references for volunteers leaving us or changing voluntary position
   e. regular training and development opportunities
   f. involvement in our organisation's decision making and / or review process.

Informal recognition of volunteers – we may use any of the following methods:

   a. asking volunteers to represent us at events, for example recruitment fairs, conference and seminars
   b. featuring volunteers in a case study or press article to promote our work
   c. offering volunteers a new role, or additional responsibility, for example, supporting new volunteers
   d. informal celebratory and social events
   e. regular personal thank you.

Recruitment and Interviewing

Template Volunteer Role Description

Organisation:
Role Title:
Volunteering Location:

Purpose: key tasks

1. _____

2. _____

3. _____

Key knowledge / skills / qualities / experiences required

1. _____

2. _____

3. _____

Time and level of commitment required

_____

Key working relationships

_____

Support, Training and Responsibility

_____

Recognition

_____

Additional information

_____

Volunteer Interviews

Template Volunteer Interview Form 1

Volunteer Name		Date	

Interviewer Name(s)		

Interview topic	Covered	Notes
Introduction and welcome		
Information about your organisation e.g. • aims / values / objectives • structure e.g. Board, Friends, staff and volunteers • property • collections • visitor numbers • volunteer recruitment and selection process		
About the potential volunteer e.g. • why they want to volunteer • areas of interest / aspiration • experience, skills, knowledge • time commitment		
Your organisation's requirements e.g. • commitment to aims, values and objectives • time commitment including for the volunteer role and e.g. volunteer meetings		

• Disclosure check if applicable • effectiveness in volunteer role • willingness to undergo induction and training • adherence to essential policies and procedures e.g. Health and Safety, Equality and Diversity		

What your organisation provides for volunteers e.g.
 	
    • start up and ongoing support and training
 	
    • essential equipment / clothing
 	
    • out of pocket expenses
 	
    • references		

Application and selection process e.g.
 	
    • timescales / responsibility
 	
    • process if person is not selected		

Invite questions from volunteer e.g. • is there anything you would like to ask?		
Next steps • clear explanation of immediate and more long term timescales		

Template Volunteer Interview Form 2

Welcome and introductions: include warm up questions, i.e. how was your journey here? etc

General Questions

1)   Check initial application form if necessary

2)   What attracted you to volunteering with us?

_____

3)   What would you like to gain from volunteering with us? And / or what would successful volunteering look like for you?

_____

4)   Have you volunteered elsewhere and if yes what did you find most satisfying?

_____

5)   How would you like to be supported / supervised in a volunteering role?

_____

6)   Do you think you would prefer volunteering on your own or in a pair or group?

_____

7)   What kind of skills and / or qualities do you think you can bring to volunteering with us?

_____

8)   Is there anything you would particularly like to know about our organisation?

_____

Role Specific Questions

9)   What is it about this role / these roles that particularly interests you?

_____

10)   Is there anything else you would like to ask / know about?

_____

11)   Explain next steps

Sample Volunteer Application / Registration Form

Personal details

Name_____Phone_____Mobile_____

Address_____Email_____

Emergency Contact: Name_____Phone_____

Skills and Experience

Please give brief details of your skills and experience that might be useful in this role. This can include your employment background, previous volunteering, relevant training etc.

```


```

Background and interests

Please give brief details. This can include hobbies, interests:

```


```

Any previous voluntary experience you would like to tell us about (if not mentioned above):

_____

_____

_____

What kind of voluntary work are you interested in?

☐ Any	☐ Group	☐ Volunteering Alone
☐ Collections	☐ Fundraising	☐ Front of House / Reception
☐ Assisting Staff Members	☐ Administration	☐ Other (Please specify below)

_____

Time Availability

When are you available to volunteer? Please tick the best times for you below:

Time:	☐ Daytime		☐ Evenings		☐ Any Time
Days:	☐ Weekdays		☐ Weekends		☐ Other / Any Day

Is there any other information you'd like to give us about your availability?

_____

Additional Information

How did you find out about our volunteering opportunities?

☐ Print Advert: Poster / Flyer   ☐ From Current Volunteer   ☐ From Visitor

☐ Our Website   ☐ Another Website   ☐ Local Volunteer Centre

☐ Other (Please specify below)

_____

References:

Please give us details for two people we may contact for references:

Name: _____

Address: _____

Phone number: _____

Name: _____

Address: _____

Phone number: _____

Data Protection Statement

(Name of Organisation) is a registered data controller for the purposes of the Data Protection Act 1998 (registered number: **INSERT HERE**). **(Name of Organisation)** respects your privacy and will not disclose your personal data to any third party without your consent. By submitting this form, you consent to **(Name of Organisation)** processing any personal data (including sensitive personal data) that may be collected from you for the purposes of: (**Include your specific data uses – see following text for examples**) assessing your suitability to volunteer with us, your registration, maintaining our records, collecting references, collating statistical information, and to provide access to any required training. Our full Privacy Policy can be found on our website (**INSERT HERE**).

Thank you for completing this form

Equality and Diversity Monitoring Form

Our organisation aims to provide equal opportunities and fair treatment for all our volunteers and staff. Completing this form enables us to understand our volunteers better, check if we are attracting volunteers from diverse backgrounds, and to identify any changes we could make to involve more people from the local community in our work.

The information you provide will be held anonymously and securely, in line with the Data Protection Act 1998. Please complete the form and return it as per the instructions at the end. Please let us know if you would like the form in an alternative format.

Ethnicity

Please tick the box which most closely describes what you consider to be your ethnic origin.

Asian ☐ Indian ☐ Pakistani ☐ Bangladeshi ☐ Any other Asian background (Please specify below)	**Black** ☐ Caribbean ☐ African ☐ Any other Black background (Please specify below)	Chinese / Other Ethnicity ☐ Chinese ☐ Any other ethnic group (Please specify below)
Mixed ☐ White / Black Caribbean ☐ White / Black African ☐ White and Asian ☐ Any other mixed background (Please specify below)	**White** ☐ English ☐ Irish ☐ Scottish ☐ Welsh ☐ Any other White background (please specify below)	**Undisclosed** ☐ Prefer not to say

Other: _____

Age _____ years   ☐ Prefer Not to Say

Disability

Do you consider yourself to have a disability?

☐ Yes   ☐ No   ☐ Prefer not to say

Gender

☐ Male   ☐ Female   ☐Transgender: F to M   ☐Transgender: M to F
☐ Prefer not to say

Faith

Please tick the box which most closely describes the group you most identify with.

☐ No religious faith   ☐ Christian   ☐ Muslim

☐ Hindu   ☐ Baha'i   ☐ Buddhist

☐ Jewish   ☐ Jain   ☐ Sikh

☐ Other (please write in)   ☐ Prefer not to say

Other: _____

Sexual orientation

How would you describe your sexual orientation?

☐ Bisexual   ☐ Gay man   ☐ Heterosexual or 'straight'

☐ Lesbian   ☐ Transgender   ☐ Rather not say

Date of Completion: _____

Thank you for completing this form. Please send the completed form:

    by email: (**Add contact details**)   by post: (**Add contact details**)

Depending on your chosen method of recording this data, you may wish to add a space for recording the randomised reference number when detached from the volunteer application / registration form.
For further details, see Part One of the Toolkit: 'Volunteering, Best Practice and the Law'.

Volunteer References

Volunteer Reference Request Form

Please give us the name of two people who can provide us with references. If possible, one person should be someone who knows you from a formal role (for example, a current or previous employer / volunteer manager).

Name of Referee 1

Contact Address

Telephone No: _____

Email: _____

How this person is known to you

Name of Referee 2

Contact Address

Telephone No: _____

Email: _____

How this person is known to you

Template Volunteer Reference Request Letter

<div align="right">

Your Address

Date

</div>

Name and Address of Receiver

Dear _____ ,

Re: Reference Request for (Name of potential volunteer)

_____ has applied to volunteer with our organisation and has given your name as a referee.

Please find enclosed a copy of the role description for this voluntary position plus some additional information about our organisation and the value we place on volunteers. We provide a stamped addressed envelope for your reply. If you require any further information to assist you before replying to us please let me know.

Your comments on the skills and qualities of _____ for the voluntary position identified will help us to decide on his / her suitability. Anything you tell us will be kept in the strictest confidence but will help us towards making a decision.

Ideally please comment on e.g. how long you have known this person and in what capacity adding any other relevant information about their suitability for the post. Many thanks for your assistance in this matter.

Yours sincerely,

Name and Title

Template Reference Form for Referees

Name of Potential Volunteer: _____

Role Applied For: _____

Name of Referee: _____

Please tell us how long you have known this person: _____

In what capacity?

_____

Please give us some constructive comments on this person's suitability to volunteer for us.

_____

_____

_____

Please tell us if there are any reasons why this person should not volunteer in this role. Please phone to discuss this if you prefer. We treat information received in line with Data Protection guidelines and processes.

_____

_____

_____

Is there any other relevant information you would like to provide?

_____

Your signature_____**Date** _____

Many thanks for completing this form

Please return this form to:

Induction and Support

Inducting a New Volunteer: Set Up Checklist

Before a new volunteer starts:

Induction action	Additional Information	Date
Volunteer welcome prior to start		
Request references for volunteer		
Contact volunteer informally to say hello / welcome prior to their first day confirming e.g. what time they should come, directions etc		
Welcome to team		
Inform all key people of the induction day timetable and their role		
Prepare essential information e.g. policies, procedures, guidelines etc.		
Access to museum / gallery		
Arrange for any entry passes / ID / IT access as required		

Volunteer's first day

Induction Item	Additional Information	Date
Health and Safety information		
Fire exits and drill / procedures		
First Aid facilities / First Aiders		
Accident and emergency procedures		
Domestic / orientation information		
Toilets		
Refreshments		
Opening hours of museum / gallery		

Parking/travel details		
Dress code		
Place of volunteering		
Introduction to any colleagues		
Overview of organisation / section		
Introduction to role		
Any essential office procedures e.g. filing		
Agree induction timetable		

First 6 weeks of volunteering:

Induction item	Additional Information	Date
Support and supervision		
Have regular support meetings scheduled		
Induction completed – use a checklist		
Organise and deliver essential start up training		
Plan future training and development activities		
Identify any additional support needs and potential solutions		
Record volunteer's successes, progress and any problems, actions		

Any other comments / additions:

_____

_____

_____

_____

Volunteer Induction Checklist

Name of Volunteer:	
Volunteer Organiser:	
Start date of volunteering:	

RESPONSIBLE	ACTION	SIGN/DATE AS COMPLETED
Volunteer Organiser	Welcome to the organisation and the team	
	Tour of museum / gallery and location of: toilets kitchen / reception / communal areas tea and coffee making facilities	
	Introduce person to other volunteers / staff	
	Explain the structure of the organisation	
	Discuss organisation /section / personal objectives and the museum / gallery vision/mission	
	Explain dress code	
	Confirm hours of volunteering, breaks and other details requested by volunteer	
	Demonstrate phone system	
	Demonstrate ICT e.g. computer log on / usage	
	Explain expenses procedures and claim process	
	Demonstrate any role specific equipment	
	Issue keys, ID and car park passes as required	
	Explain building evacuation procedures and fire alarm / safety tests / muster points	
	Explain accident book, first aid boxes, first aiders and fire wardens, risk assessments and associated reporting	
	Explain health and safety responsibilities and commitments.	

Volunteer Support and Supervision Policy

(Organisation Name) aims to provide support and essential training, education, learning, and development opportunities for all our volunteers. **(Organisation Name)** will ensure that volunteers can discuss their progress and successes, and raise issues and ideas including their development requirements with the volunteer organiser.

Volunteer organisers are responsible for supporting volunteers, but can involve others as part of the support process. We encourage, for example, experienced volunteers mentoring new volunteers in their role, and all members of staff contributing to the ongoing support, training and development of our volunteers

The level and type of support we provide for volunteers is underpinned by, for example, our code of conduct, complaints and problem solving processes. Volunteer organisers and volunteers are encouraged to use support meetings to discuss any issues arising informally prior to any formal action being taken. If there is a concern/issue from either party which cannot be resolved in an informal way, the volunteer organiser may choose to approach the situation using more formal approaches. For this reason it is important that any issues or concerns are raised and discussed as soon as possible to allow suitable support to be put in place to assist volunteers or to make changes to the way our organisation works.

Our support and supervision approach includes providing a named contact, access to relevant information and access to training, education, learning, and development opportunities to ensure volunteers and the organisation get the most from their respective contributions.

Volunteer Support and Supervision Questions

Name of volunteer: **Date:**

What has been going well in your volunteering?

What, if anything, hasn't been going so well?

What, if anything, would improve your volunteering experience?

What training, support or practical things do you need / want?

Are there any other areas of volunteering that you'd like to try?

Any other comments?

Summing up

Volunteer Support and Supervision Record

Volunteer Name: _____

Volunteer Organiser Name: _____

Date: _____

Note of discussion / issues / suggestions	Feedback and Actions

Volunteer Training Record

Volunteer Name: _____75_____

Volunteer Organiser Name: _____

Start Date: _____

Date of training	Training Activity (brief description)	Course Duration	Evidence of attendance e.g. certificate / award

Any other comments:

_____

_____

_____

Volunteer Review Form

Volunteer Name: _____

Volunteer Organiser Name: _____

Start Date: _____

It would help us enhance your voluntary experience and our organisation's approach to volunteers if you could answer the questions below.

Thinking about your voluntary work over the last 6 months / 1 year, please answer the following questions:

1. What has gone well? _____

2. What have you enjoyed the most? _____

3. What, if anything, has not gone so well? _____

4. What would have improved this situation? _____

5. What do you think you would you like to achieve in you volunteering over the next period?

_____

6. Would you like to continue with your current time commitment? Or make a change?

_____

7. Are there any changes you would like to make to your voluntary role? If yes please note

_____

8. Are there any new training and development opportunities that would help you carry out your role?

_____

9. Are you happy with the level of support / information / training that you receive from us? If your answer is no, what would improve this experience?

_____

10. Do you have any other comments you would like to make?

_____

Thank you for completing this form.

Monitoring and Evaluation Questionnaire for Volunteers

(for reviewing programmes)

1. **Name** (optional) _____

2. **What is / are your volunteer role(s)?**

   _____

3. **Gender (please circle)**   Female   Male   Non-Binary   Undisclosed

4. **Do you carry out your voluntary work with us? (please circle)**

   a) as a member of our Management Committee / Board?   Yes   No
   b) in a Museum / Gallery?   Yes   No
   c) in each of the above roles   Yes   No

5. **How long have you been volunteering with us? (please tick)**

   Under 1 year ☐   1-2 years ☐   2-5 years ☐   5-10 years ☐   More than 10 years ☐

6. **Do you find your voluntary work: (please circle)**

   a) Interesting   **b)** Challenging   **c)** Enjoyable   **d)** Other – please describe

   _____

7. **On average, how many hours per month do you volunteer with us? Please tick**

   0-2 ☐   3-4 ☐   5-6 ☐   7-8 ☐   9-10 ☐   Above 10 ☐

8. **What kind of activities / tasks do you carry out as a volunteer? Please list below:**

   _____

   _____

   _____

9. **Did you / do you receive training in how to carry out your voluntary role? (please circle)**

   Yes   No   Don't know

10. **Do you receive regular support to help you carry out your voluntary work? (please circle)**

   Yes   No   Don't know

11. Does the current type and level of support meet your needs?

Yes ☐ No ☐ Somewhere in between ☐

If No, please suggest improvements:

_____

12. Are out-of-pocket expenses on offer to you? (please circle) Yes No

If No, do you think this may deter people from becoming volunteers? Yes No

If yes, do you claim these expenses? Yes No

13. From your own experience, do you think that volunteers are valued by paid staff?

Yes ☐ No ☐ Somewhere in between ☐

If you answered anything other than yes, can you suggest ways to improve the situation?

_____

14. From your own experience, do you think volunteers are accepted by visitors and / or customers in the museum / gallery?

Yes ☐ No ☐ Somewhere in between ☐

If you answered anything other than yes can you suggest ways of changing this?

_____

15. Overall, how would you rate your experience of volunteering with us?
(Please circle: 1=very bad, 4=very good)

1 2 3 4

16. Can you think of any new areas in which volunteers might contribute to our work?

_____

_____

17. Please use the space below to make any other comments regarding our involvement of volunteers.

_____

_____

Thank you for taking the time to complete this form. Please return to: (**INSERT ADDRESS**)

Monitoring and Evaluation Questionnaire for Staff

(for reviewing programmes)

1. **Name** (optional) _____

2. **What is your job?** _____

3. **Are there volunteers working alongside you? (please tick)**

    Yes ☐   No ☐   Don't know ☐

4. **How many volunteers volunteer alongside you?** _____

5. **a) Would you like to see more volunteers involved in your area? Please circle**

    Yes ☐   No ☐   Don't know ☐

    b) If Yes, what additional roles / activities would you like to see?

    _____

    _____

6. **If you can see any problems/challenges in implementing 5(b) what are they?**

    _____

    _____

7. **a) Do you think that the specific tasks currently carried out by our volunteers are suitable?**

    Yes ☐   No ☐   Don't know ☐

    b) If no, please give example of the tasks, which in your view are unsuitable

    _____

    _____

8. **a) Do you know how many hours on average volunteers with whom you work are involved each week?**

    Yes ☐   No ☐   Don't know ☐

    b) If Yes, how many hours on average do most volunteers carry out their role each week?

    0-2 ☐   3-4 ☐   5-6 ☐   7-8 ☐   9-10 ☐   Above 10 ☐

9. **How have the volunteers in your area of work have been recruited and selected?**
(Please tick all the boxes that apply)

By our Volunteer Organisers ☐   By you / another member of staff ☐

Through a local Volunteer Centre ☐   By another voluntary group ☐

Don't Know ☐   Other (Please specify):

_____

10. **a) In your experience, do most volunteers carry out the work that they are asked to do appropriately and to a high standard?**

Yes ☐   No ☐   Don't Know ☐

(b) Please comment on your answer

_____

11. **Do you think most volunteers have been suitably trained to carry out their roles?**

Yes ☐   No ☐   Don't Know ☐

12. **Do volunteers receive travel and other out of pocket expenses?**

Yes ☐   No ☐   Don't Know ☐

13. **Do you think that volunteers are currently valued by:**

a. **Paid Staff?**   Yes ☐   No ☐   Don't Know ☐

b. **Customers / Vistors?**   Yes ☐   No ☐   Don't Know ☐

14. **Do you know if volunteers you work alongside are given regular support and / or supervision?**

Yes ☐   No ☐   Don't Know ☐

15. **Are volunteers covered by any of the following :**

(a) Public Liability Insurance?   Yes ☐   No ☐   Don't know ☐

(b) Professional Indemnity Insurance   Yes ☐   No ☐   Don't know ☐

(c) Personal Accident Insurance   Yes ☐   No ☐   Don't know ☐

16. Who currently has responsibility for the following areas?

(a) Recruiting and selecting volunteers?

Volunteer Organiser ☐   Other paid staff ☐   Don't know ☐   Other (please state):

_____

(b) Training volunteers?

Volunteer Organiser ☐   Other paid staff ☐   Don't know ☐   Other (please state):

_____

(c) Paying volunteers' out-of-pocket expenses?

Volunteer Organiser ☐   Other paid staff ☐   Don't know ☐   Other (please state):

_____

(d) Insuring volunteers?

Volunteer Organiser ☐   Other paid staff ☐   Don't know ☐   Other (please state):

_____

(e) Supporting / supervising volunteers?

Volunteer Organiser ☐   Other paid staff ☐   Don't know ☐   Other (please state):

_____

(f) Monitoring, evaluating and reviewing work carried out by volunteers

Volunteer Organiser ☐   Other paid staff ☐   Don't know ☐   Other (please state):

_____

17. Do you think that paid staff are adequately trained / supported in how to work with volunteers?

Yes ☐   No ☐   Don't know ☐

18. What, if anything, could be done to help paid staff work better with volunteers?

_____

_____

19. How would you describe the response to volunteers by:

   (a) Museum / Gallery visitors /customers?

     Positive ☐   Mixed ☐   Negative ☐   Don't know ☐

   (b) Paid staff?

     Positive ☐   Mixed ☐   Negative ☐   Don't know ☐

20. What do you think volunteers gain from volunteering?

_____

21. What benefits are gained by our deployment of volunteers by:

Customers / Visitors? _____

Paid staff?_____

Our organisation? _____

Our local community? _____

22. (a) In your area of work, has volunteer involvement resulted in any problems?

     Yes ☐   No ☐   Don't know ☐

   (b) If Yes, please give examples and indicate how you think these problems can be solved?

_____

23. How has your own workload altered as a result of involving volunteers?

   Lowered ☐   Remained the same ☐   Increased ☐

24. Do you have suggestions as to how we might improve our systems for support and development of volunteering in our organisation?

_____

_____

25. Please use the space below to make any further comments related to our organisation's involvement of volunteers.

_____

Thank you for completing this form – it's much appreciated. Please return to: (INSERT ADDRESS)

Equality and Diversity Statement

We (**Organisation name**) are committed to the fair treatment of our volunteers, regardless of race, gender, religion, sexual orientation, responsibilities for dependants, age, physical/mental disability or offending background (as long as this does not pose risk to children, young people, or vulnerable adults). We aim to encourage diversity amongst our volunteers to ensure that they are representative of all sections of society and our surrounding community. We endeavour to ensure that each volunteer feels respected and valued.

Data Protection Statement

(**Name of Organisation**) is a registered data controller for the purposes of the Data Protection Act 1998 (ICO registered number: **INSERT HERE**).

(**Name of Organisation**) respects your privacy and will not disclose your personal data to any third party without your consent. We take our responsibility very seriously to hold and maintain your personal data in an appropriate and secure manner, and restrict access to the personal data we hold as appropriate. We will not pass on your details to any third party without your specific consent unless legally obliged to do so.

(**Name of Organisation**) requires specific information in order for you to get involved as a volunteer, in particular to ensure that you are covered by our liability insurance. We consider your health and safety while volunteering with us to be of utmost importance.

By submitting this form, you consent to (**Name of Organisation**) processing any personal data (including sensitive personal data) that may be collected from you for the purposes of: (Include your specific data uses – see following text for examples) assessing your suitability to volunteer with us, your registration, maintaining our records, collecting references, collating statistical information, and to provide access to any required training.

Our full Privacy Policy can be found on our website (**INSERT HERE**).

Sample Volunteer Travel and Subsistence Expenses Claim

Name: _____ **Role:** _____

From: **To:**

Travel and Subsistence			Mileage or travel costs			For Organisation Use
Date	Description	Amount	Mileage / travel costs	Mileage Rate	Amount	
			Total		Total	Total

Claim year to date brought forward ☐

Add above claim ☐

Total claim to date this year ☐

Signature: _____ **Date:** _____

Authorised: _____ **Date:** _____

Photograph 11
Volunteer guide at Brodick Castle, Arran

Part 3: Additional Information

Photograph 9
Documentation volunteer working in
West Dunbartonshire Council's
Singer Sewing Machine Archive

Photograph 10
Documentation volunteer working on
West Dunbartonshire Council's stores
as part of the IndustryUS West project

Case Studies

The case studies below focus on the kind of situations likely to face volunteer organisers in museums and galleries. You can use them for your own individual learning or for use in team planning or training events. The suggested approaches in the following section are not definitive and you may wish to add to them.

Case Study 1 Too few volunteers in a newly opened museum / gallery

The museum / gallery has been open for just under a year. Currently members of the public can visit on three weekdays. Potential visitors have been turning up at weekends. Feedback from existing and prospective visitors is that they would like the museum / gallery to be open every day. There are currently 6 volunteers helping to run the museum / gallery on opening days. Current volunteers do not want to do any extra hours. To open every day you estimate that another 8 people are required. You are situated in a small town with a lot of different community organisations competing for volunteers. There is a historical society.
Current volunteers carry out lots of different roles including: reception duties, guiding, setting up exhibitions, and handling money.

Case Study 2 Too many volunteers in a well-established museum / gallery

This museum / gallery has been running for forty years. Located in a university town means lots of students apply through the website to volunteer. Currently there are 65 volunteers. Following some re-organisation and the closure of two departments there are fewer roles for existing volunteers to carry out. For the last 3 years there has been a rolling volunteer recruitment programme every year with an intake of 10 new volunteers each time regardless of need. One person is tasked with organising the whole of the volunteer workforce.

Case Study 3 Introducing new policies and procedures into a museum / gallery with insufficient policies and procedures

Following a review in your museum / gallery you have been tasked with introducing some new policies and procedures for volunteers as well as for paid staff working alongside them. You have an established volunteer team many of whom are used to working in an informal way. The new policies and procedures include a volunteering policy, risk assessment forms and a recruitment, selection and formal support process for all volunteers. You have six months in which to introduce the new systems.

Case Study 4 Working relationships between staff and volunteers – new curator introduces change

People have been volunteering in your organisation for 10 years. Up until a year ago there were three paid staff. There are now 10 including a new curator. Recently appointed staff are keen to introduce new ways of working and have begun devising strategic and operational plans. These plans include changes in the organisation's direction and working practices. Existing volunteers have been allocated roles and responsibilities under these new plans. The new curator has not previously worked with volunteers. He assumes that they can be told what to do and that they will get on and do it. If they do not perform effectively he has suggested that they should be disciplined or asked to leave. You are the volunteer organiser, a role you carry out on a voluntary basis.

Case Study 5 Working with volunteers with additional support needs - people from a local day centre have expressed an interest in volunteering

Your museum / gallery takes prides in providing an inclusive, accessible environment for visitors. Adult with mental health issues from a nearby day centre have expressed an interest in volunteering with you. Currently you have 20 volunteers but could do with another 5 or 6. You have let existing volunteers know that there may be some new volunteers coming and explained where they may come from. Some volunteers are a bit unsure about working alongside people with mental health issues. Others would like to encourage the potential new volunteers. You have heard from a colleague in another museum / gallery that bringing in volunteers who may require additional support to undertake volunteering can be time consuming and challenging.

Case Study 6 Being taken seriously as a volunteer organiser - newly appointed

You are newly appointed to the role of volunteer co-ordinator in a flourishing museum / gallery. This is a new position and until now the organisation has not paid anyone to organise volunteering. This is your first full time job on leaving college where you studied community development. Your museum / gallery has a well established team of volunteers all of whom have retired from paid employment. Prior to retirement, most of the team worked as high powered executives and professionals. They have strong views on how things should be run and to date have been consulted on every aspect of the work of the museum / gallery. You have been tasked with supporting and organising this group to maximise the effectiveness of the museum / gallery.

Case Study 7 Involving young volunteers

You run a small museum with an ageing volunteering population. Several volunteers have said they will resign within the next year as the role has become onerous for them. Some of your other volunteers are cynical about whether young people will be fully committed to volunteering. Others are keen to volunteer alongside younger people. The museum exhibits are of interest to families and young people in particular. You would like to involve younger volunteers to offer peer learning and hands on try outs of the exhibits. There is a college and schools nearby plus lots of local community groups.

Case Study 8 Ending a volunteering placement

Several volunteers have expressed concern about a particular volunteer. The volunteer in question has become confused when dealing with customers when the museum is busy. In addition they have made a lot of mistakes when cashing up at the end of the day. To date one customer has complained. When you speak informally to the volunteer concerned it becomes clear that they don't think there is a problem. In fact they say that everyone else doesn't know how to carry out their role properly. With regret you decide that you must end this persons volunteering with your organisation. There is a code of conduct which all volunteers and staff are expected to work to.

Possible solutions to case studies

Case Study 1: Too few volunteers in a newly opened museum / gallery

Possible solutions:

- plan and run regular recruitment drives
- revisit the tasks / roles to be carried out, identifying the skills, knowledge and approach required
- use this information to identify what kind of people may be interested and target recruitment
- ask existing volunteers for their suggestions
- target school pupils and students identifying the CV / job prospect benefits of volunteering
- advertise widely including on websites, posters, radio
- approach other organisations for assistance
- if current volunteers say the time commitment is too onerous, split roles into smaller less time consuming tasks
- enlist the help of the local volunteer centre – it can provide advice and advertising opportunities

Case Study 2: Too many volunteers in a well established museum / gallery

Possible solutions:

- assess the reasons for there being too many volunteers e.g. constant or rolling recruitment drives or is the volunteer role a very popular one?
- review and alter the recruitment programme
- stop recruitment for the time being and / or run a waiting list – there is nothing worse than being recruited then being given nothing to do
- distribute the workload more evenly amongst volunteers if some are busier than others
- time limit the volunteer opportunities to accommodate turnover
- review the needs of volunteers – target specific volunteers who might gain most benefit
- move from one person organising volunteering to sharing this role across a team of volunteers – this will give some volunteers a development opportunity
- refer volunteers to other organisations which are looking to increase their volunteer numbers.

Case Study 3: Introducing new policies and procedures into a museum /gallery with insufficient policies and procedures

Possible solutions:

- identify the benefits of the new policies and procedures prior to communicating with volunteers and staff
- use 'what if' scenarios and discussions to draw out the need for new policies and procedures
- develop and implement a communication plan
- keep paperwork to an absolute minimum
- bring the volunteer group together, explain need for changes, and ask for their feedback on existing systems and for their input on best ways to implement new ways of working them as well as user friendly versions of the paperwork
- offer training and support to all on using the new policies and procedures
- review the impact of the new policies and procedures to demonstrate they have been effective.

Case Study 4: Working relationships between staff and volunteers – new curator introduces change

Possible solutions:

- educate the curator and other new staff on some of the key points of working with volunteers using, if available, the organisation's current policy and procedures for involving volunteers
- stress to the curator that imposed changes are unlikely to work and propose alternative approaches
- highlight that you too are a volunteer and as such should be consulted on and supported to carry out your role
- explain that it is customary to involve volunteers in any decision-making about their roles and responsibilities, and highlight that volunteers may leave if told rather than asked to work to new guidelines
- hold volunteer meetings to discuss proposed changes with volunteers including asking whether they are happy to remain involved with the organisation or if they would remain involved if the proposed changes are amended
- you may wish to argue that additional responsibilities for the volunteer organiser should receive payment going forward i.e. this should alter to be a paid position.

Case Study 5: Working with volunteers with additional support needs - people from a local day centre have expressed an interest in volunteering

Possible solutions:

- gain as full a picture as possible about what might be involved when including volunteers with mental health issues
- your organisation – take expert advice e.g. from your local volunteer centre
- offer support and training to existing volunteers in working with the new volunteers
- pilot the involvement of a couple of the new volunteers with buddies from the existing volunteer group
- recruit 'support volunteers' to work alongside the new volunteers
- consider whether safeguarding checks are required for any of your existing volunteers or staff (such as PVG for vulnerable adults)

Case Study 6: Being taken seriously as a volunteer organiser - newly appointed

Possible solutions:

- ensure that you have a thorough induction into the organisation
- introduce yourself as quickly as possible to all the existing volunteers
- find key influencers in the volunteer group and enlist their support
- promote your role as one that aims to build on an already successful history of volunteering to maximise the work of the museum / gallery
- ask for volunteers' input on areas for improvement in the museum
- in addition, ask current volunteers how they see your role working in practice
- identify some areas for development and invite volunteers to participate i.e. aim for some 'quick wins'.

Case Study 7: Involving young volunteers

Possible solutions:

- do some preparatory work with the existing volunteers to identify the benefits of involving younger volunteers
- carry out risk assessments
- create volunteer roles that will appeal to young people, for example building in variety, flexibility and fun
- carry out processes to ensure that any child protection issues are addressed
- enlist interested volunteers in a pilot project involving young volunteers
- work with specialist youth volunteering organisations such as ProjectScotland
- Consider the principles required for Investing in Young People accreditation

Case Study 8: Ending a volunteering placement

Possible solutions:

- gather as much information as possible on the situation – have examples of unacceptable behaviour ready to discuss with the volunteer
- arrange a meeting with the volunteer, giving the option for them to bring a friend / supporter along and communicate that the meeting is about how volunteering is going and that you wish to discuss their performance
- highlight the code of conduct at the start of the meeting and raise all the concerns to give the opportunity for the volunteer to respond fully
- if no new information emerges in this meeting that changes the decision to end the placement, thank the volunteer for their involvement and say that their input is no longer required – give the reasons clearly and again refer to the code of conduct.

Investing in Volunteers (IiV)

Investing in Volunteers (IiV) is the UK quality standard for good practice in volunteer management. If you want to assess the quality of your volunteer management and involvement, prove and improve the effectiveness of your work with volunteers, and enhance your organisation's reputation, Investing in Volunteers provides the ideal framework.

Investing in Volunteers is managed by the lead volunteer development agency in each respective country of the UK. In Scotland, this is Volunteer Scotland. Over 800 organisations have achieved this quality accreditation throughout the UK, ranging from small community groups that are totally volunteer-led to large national multi branch charities that have thousands of volunteers

Achieving the standard shows your volunteers – and potential volunteers – how much they are valued and gives them confidence in your ability to provide an outstanding volunteer experience.

Even if you don't sign up to meet accreditation requirements, the IiV standards are a useful way of checking whether your organisation has everything in place to involve volunteers effectively. You can use the standard to assess your current position and to identify areas for development.

The standards are broken down into nine indicators covering four main areas:

- Planning for Volunteer Involvement
- Recruiting Volunteers
- Selecting and Matching Volunteers
- Supporting and Retaining Volunteers

Checklists and templates in this toolkit could assist you to meet the IiV standards. See the sources of additional help section for more information.

Volunteer Friendly Awards

If you are not yet at the stage of applying for Investing in Volunteers accreditation, you might also want to consider the Volunteer Friendly Awards. The Volunteer Friendly Award is a simple, user-friendly quality standard designed by Volunteer Centre Dundee to support, recognise and reward groups who are good at involving volunteers.

Volunteer Friendly offers a flexible approach which allows your group to work at its own pace, with full support from your local Volunteer Centre. It is based on the national standard Investing in Volunteers (IiV) but is designed for small organisations which may not be ready to undertake IiV yet, or which may be looking for a stepping stone towards IiV.

Self-Assessment Checklist for Volunteer Organiser

Standards	In place	Underway	No
Volunteer policy / code of practice in place (covering recruitment and selection, conditions of service, health and safety, data protection, working relationships with staff and visitors, training and development, support and supervision, and equality of opportunity?	☐	☐	☐
Are you up to date with any legislation regarding recruitment or management of volunteers?	☐	☐	☐
Have you looked at areas with current volunteers to see how improvements might be made in volunteer management in these areas, producing guidelines and developing procedures where necessary?	☐	☐	☐
Do you have role descriptions in place for current volunteer roles and any potential roles identified across the organisation?	☐	☐	☐
Do you match volunteer skills, aspiration and motivations to your organisational goals and opportunities?	☐	☐	☐
Is volunteer recruitment carried out in an open and transparent manner?	☐	☐	☐
Do you provide a thorough induction and ongoing training and support to equip volunteers to undertake new tasks?	☐	☐	☐
Do you match volunteer roles to the individual's needs, abilities and potential?	☐	☐	☐
Do you provide instructions for volunteers on how to carry out their role, and make sure volunteers understand what is expected of them?	☐	☐	☐
Do you encourage volunteers to take ownership of their work and encourage them to suggest improvements?	☐	☐	☐
Do you make sure the use of volunteers does not undermine or substitute the work of paid staff and vice versa?	☐	☐	☐

Standards	In place	Underway	No
Have you identified where volunteers may need additional support and made this available, where appropriate?	☐	☐	☐
Do you communicate with volunteers at all times in ways that meet their diverse needs and show respect for their volunteer role?	☐	☐	☐
Do you monitor volunteering activities, and identify and deal with problems when they occur?	☐	☐	☐
Do you encourage volunteers to extend their volunteer roles within the limits of their knowledge, skills and competence?	☐	☐	☐
Do you provide sufficient support and supervision to allow volunteers to fulfil their roles and carry out tasks effectively, safely and securely?	☐	☐	☐
Do you work with supervisors to evaluate volunteers' work against agreed work requirements, using fair and objective criteria?	☐	☐	☐
Do you provide regular feedback on the work of volunteers and encourage them to reflect on their work and feedback?	☐	☐	☐
Do you respond to enquiries from potential volunteers promptly and appropriately?	☐	☐	☐
Do you encourage colleagues to celebrate the achievements of volunteers and recognise their contribution to wider organisational objectives?	☐	☐	☐
Do you ensure that those with responsibility for supervising volunteers understand and enact good practice in volunteer management?	☐	☐	☐
Do you choose an appropriate time and place to debrief and provide feedback to volunteers and receive feedback from them?	☐	☐	☐

* National Occupational Standards (NOS) define the competences which apply to job roles or occupations. They cover the key activities undertaken within the occupation in question under all the circumstances the job holder is likely to encounter.

Sources of Additional Help

Organisations

Heritage Volunteer Organisers Scotland (HVOS)   HVOS is an informal, free network open to anyone and everyone with an interest in volunteer management in the Heritage Sector, regardless of role.

https://hvoscotland.wordpress.com/
Facebook: Heritage Volunteer Organisers Scotland   Twitter: @hvos_network

Museums Galleries Scotland (or MGS) is a membership organisation offering support to museums and galleries throughout Scotland.

www.museumsgalleriesscotland.org.uk

Volunteer Scotland is Scotland's Centre for Excellence in volunteering. It aims to leads the way in informing and modernising approaches to volunteering policy, enhancing practice and improving the quality of the volunteering experience for the people of Scotland.

www.volunteerscotland.net/

Volunteer Scotland Disclosure Services manages the essential service of providing free disclosure records, guidance, advice and support to voluntary sector organisations working with children, young people and protected adults.

 http://www.volunteerscotland.net/disclosure-services/for-organisations/

Disclosure Scotland is a service designed to enhance public safety. It provides potential employers and voluntary sector organisations with criminal history information on individuals applying for posts.

https://www.mygov.scot/organisations/disclosure-scotland/

Health and Safety Executive provides information on the work of the HSE and its partners in delivering higher standards of workplace health and safety in Scotland.

www.hse.gov.uk/scotland/index.htm

Information Commissioners Office helps you to understand your obligations in terms of protecting personal information, responsibility to notify the ICO in case of data breaches and requirement to respond to Subject Access Requests.

https://ico.org.uk/for-organisations/

Investing in Volunteers is the UK quality standard for good practise in volunteer management. It is managed by each of the lead volunteering development bodies in England, Scotland, Wales, Northern Ireland and the Republic of Ireland.

https://iiv.investinginvolunteers.org.uk/

Volunteer Friendly Award is a simple, user-friendly quality standard designed by Volunteer Centre Dundee to support, recognise and reward groups who are good at involving volunteers. It is based on the national standard Investing in Volunteers (IiV) but is designed for small organisations which may not be ready to undertake IiV yet, or which may be looking for a stepping stone towards IiV.

http://volunteerfriendly.org.uk/

Volunteering England is an independent charity and membership organisation, committed to supporting, enabling and celebrating volunteering in all its diversity. Their web site contains lots of useful information and resources including good practice guides for managing and involving volunteers

www.volunteering.org.uk

VM Movement hosts a weekly blog, discussion and tweet chat for managers of volunteers everywhere. The blog is published late Wednesday each week, and the Thoughtful Thursday chat can be found on Twitter under the hashtag #ttvolmgrs.

www.twitter.com/VMMovement/ or http://vmmovement.org/content/thoughtful-thursdays

UK Visas and Immigration provides information relevant for enquiries for potential overseas volunteers.

www.gov.uk/government/organisations/uk-visas-and-immigration

Research Papers

Heritage Volunteering

Volunteering in the Historic Environment (Published June 2016)

Research carried out by Volunteer Scotland on behalf of Historic Environment Scotland

http://www.volunteerscotland.net/policy-and-research/research/volunteering-in-the-historic-environment/

The Whole Picture: Volunteering in Museums and Galleries in Scotland (Published Jan 2015)

Research commissioned by Museums Galleries Scotland into volunteer involvement in museums

https://www.museumsgalleriesscotland.org.uk/research/the-whole-picture-volunteering-in-museums-and-galleries-in-scotland/

The Management of Volunteers in the National Trust (Published June 2016)

A comparison of the management of volunteers to paid staff in the National Trust, carried out by De Montford University

https://www.dmu.ac.uk/documents/research-documents/business-and-law/hrm/crowe/managing-a-volunteer-workforce-report-june-2016-final.pdf

General Volunteering

The Social Value of Volunteering (Speech given 9 September 2014)

Speech given by Andrew Haldane, Chief Economist at the Bank of England, on the social value of volunteering

http://www.bankofengland.co.uk/publications/Documents/speeches/2014/speech756.pdf

Bibliography and References

From the Top Down: The Executive Role in Successful Volunteer Involvement (2015 edition)
Authors: Rob Jackson and Susan Ellis

The BAFM Volunteer Managers' and Administrators' Handbook
Publisher: the British Association of Friends   of Museums
More information available at: http://www.bafm.co.uk/resources/

Credits

Contributions

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Photograph 12
Event volunteers showing off some artwork produced from the half-term family event *Romans* at National Museum of Scotland

Thank you for using this toolkit!

hvos

Heritage Volunteer Organisers Scotland
www.hvoscotland.wordpress.com

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