

Be a part of your history



A toolkit for developing a
new volunteer initiative

Ironbridge
BIRTHPLACE OF INDUSTRY



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For more information or extra guidance concerning volunteering in museums, or this guide, please contact the Volunteer Coordinator at Ironbridge Gorge Museum Trust Ltd on **01952 601044** or **01952 435900**

Introduction

If your organisation involves volunteers, or you are thinking of involving them, there are many points to consider before embarking on a new initiative. Volunteers are an extremely useful and valuable resource. By managing them correctly your organisation can tap into skills, knowledge and support otherwise out of reach.

It is important however, to remember the needs of people wishing to volunteer their time. Although volunteers will enhance your organisation, there are lots of things to think about in relation to them. They need to be correctly managed, supervised, equipped and trained. This document should help in putting you on the right track, however every organisation is different and has specific needs, please treat this document only a starting point.

To get your Volunteer Initiative started, first you should consider the whys and hows of building a volunteer base:

- **Think about your reasons for involving volunteers - are they legitimate?**
- **Try to understand why people want to volunteer - not just at your organisation but in general**
- **Consider who you need to consult about your plans, who will be affected?**
- **Develop role descriptions which will benefit both your organisation and the volunteer.**
- **Understand how to recruit volunteers, and how to select and engage them.**
- **Create a useful induction process.**
- **Consider how you will maintain and supervise volunteers. How will they be supported and recognised?**





Understanding why people want to volunteer makes it easier for your organisation to find new and more suitable volunteers. It also makes it easier to provide them with roles, ensure they are fulfilled and to recognise their contribution. Not everyone is motivated by the same factors; people volunteer for a wide range of reasons.

Some of these are:

- **To help the community and others.**
Helping others usually comes to mind first when people think of volunteers, however many people volunteer to help out their local area, to make it better for everyone and improve community spirit.
- **To increase self-esteem.**
Volunteering makes people feel better about themselves. Giving a few hours a week, or even a month, to an organisation gives people a good sense of wellbeing.
- **To gain skills and experience, or qualifications if available.**
- **To help out friends.**
Friends are often the first people we turn to when we need help. Volunteering also can create a great way to get together with friends on a regular basis, however people often volunteer to work with a particular group or sort of person.
- **Escapism.**
To get a break from work, or forget about life problems. To get out of the house, to fill time or to change routine.

Why do people want to volunteer?

The classic stereotype of a volunteer is someone who has lots of time to spare and is looking for something to do. Although this may have been true in the past, there are now many other reasons why people of all ages and backgrounds decide to volunteer.

■ **Team building.**

Local companies often use volunteering as a team building exercise. This gives 'something back' to their local community and also gives staff a chance to get the benefits from volunteering.

■ **Make new friends.**

Volunteering is usually a social activity and people often use this opportunity to meet new people who share their interests and values.

■ **Unemployed or considering a different career.**

People considering a job out of their comfort zone or totally different from their current role often find volunteering a good way to have a go and see if it suits them.

■ **Improve the look of their CV.**

Adding volunteer experience to a CV shows a commitment to helping others or experience in working in a particular field.

■ **Use skills which are redundant otherwise, or to keep skills up to date.**

■ **To keep active.**

■ **To be part of a group.**

■ **Just to try something new.**

■ **Enjoy something they love.**

Many volunteer jobs come with intrinsic benefits for their participants. A volunteer sees behind the scenes at a museum where the public cannot go, they may be able to handle objects, try out a completely new

hobby, or get a break from their day job. They may just love the area or venue and want to be involved.

Keep this list in mind, and you'll realise that you don't have to focus your recruitment efforts exclusively on retired people or others who have a lot of leisure time. If you can provide an environment in which volunteers can bring their friends, meet others who share their interests, and learn new skills, you can encourage even the busiest people into helping. Remember that you have no reason to be apologetic about asking for help: Volunteering benefits those people who step forward to assist you.





Why should your organisation involve volunteers?

There are many reasons why an organisation should involve volunteers. As well as bringing fresh ideas, skills and broadening knowledge base, engaging volunteers gives a link to the local community, allowing them to be directly involved with your organisation.

Volunteers can also provide additional services, support your staff and allow the public a greater degree of access to your organisation simply by being available to help. However, volunteers do bring with them resource implications. Volunteers take a lot of supervision, staff must receive training in order to manage them correctly, and the volunteers in turn need to be trained, supervised, insured, given equipment and monitored. Volunteers are not a tool to replace paid staff members, and the decision to include them cannot be taken lightly.

The benefits of having volunteers in your organisation are plentiful, and although there is a great deal to think about when organising and managing them, the pros will by far outweigh the cons.

Reasons to involve volunteers:

■ To bring fresh ideas and skills into your organisation

Bringing fresh outlooks from outside of an organisation is always extremely beneficial. When an organisation has a small workforce, ideas can become stale and people uninspired; new thoughts can often reignite possibilities and enthusiasm.

■ To provide an outlet for specific or specialist skills

Volunteers offer different skills to that of a paid workforce. They are offering these because they want to, not because they have to, or to get financial gain. Therefore a volunteer may have a personal interest in your organisation and be willing to give their time because of this. Some volunteers may have a skill which they used as a child or at a different point in their life which is now outdated or obsolete in their professional or personal capacity, and which they do not wish to lose.

■ To diversify your workforce

Volunteering offers a chance for people from all walks of life to join in with your organisation. Attracting people of all ages and ethnicities, volunteering gets people involved where they may not normally feel they belong.

■ To allow more access to your service

■ To allow access to additional services, where resources are not otherwise available

■ To give a more personal approach to customers

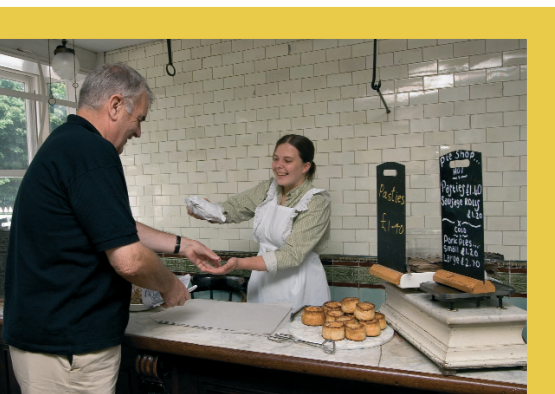
Volunteers can allow more access by giving personalised tours, guiding or filling in the background of exhibits which may otherwise be missed.

Volunteers could provide an outreach service, a mobile museum or a presence in a local town or shopping centre.

■ To give the community ownership and involvement with your organisation.

■ To build links with local groups, schools and the wider community

By engaging your local community through volunteering, outreach or school visits you can encourage them to visit your organisation, or act as community ambassadors. Local people are least likely to visit a museum or cultural experience on their doorstep. By involving them in other ways, such as projects, giving local history talks or through special events, you will keep your organisation at the forefront of their minds.



■ **To build a focus group, or panel, to gain advice from the community**

A focus group, run by volunteers, can give your organisation an insight as to how the community and public view you. It could also allow you to find out how different age groups react to your services and if anything is missing - giving them a voice

■ **To become more cost effective**

■ **To support your paid staff, giving them more flexibility**

By giving their time and skills for no monetary cost to your organisation, volunteers can help you to run more smoothly, and with a greater level of service.

■ **To allow an organisation to perform special projects - such as engaging different types of people.**

Volunteers give an organisation freedom to work outside their usual remit, perhaps by running a special project to engage older people, people from BME communities, or young people, without the need for a huge funding injection.

In order to make your volunteering initiative more streamlined, you should think about which of these and any other reasons apply to you. This will enable you to pinpoint the most suitable volunteers.

Once you have decided why you want volunteers, think about what they will do. This is one of the most important parts of your initiative as it will ensure that you are prepared for new volunteers, can train them sufficiently, and can engage paid staff with your ideas.

More information about this on page 20.





Who should you consult about your new volunteer initiative?

Having the full cooperation and support of everyone connected to your organisation will ensure that any new volunteers feel accepted, valued and useful. It will also put paid members of staff and any existing volunteers at ease in the knowledge that they are not being replaced, and any new team members - such as the volunteers, are there to support them.

Before going any further with your organisation's volunteering strategy, consider having a group forum to listen to existing staff and volunteer's views. Being clear and open from the start will make people feel included in the process and more adaptable to change.

Have your forum as an open event, in a relaxed setting-more of a chat than a formal meeting.

Things to think about:

- Start by introducing the idea of volunteers - you could invite a local volunteer ambassador or someone who already volunteers on a regular basis within your organisation to give a brief talk about why they volunteer, what they gain from the experience and why they enjoy it.
- Invite staff members to ask questions and truly understand why someone volunteers.
- Give examples of how volunteers are used in similar organisations to yours.
- Ask the group to think of how a volunteer may be able to help them out, or how service could be improved with extra help.
- Ask the group to think about issues surrounding a new volunteer, such as:
 - Supervision
 - Training
 - Monitoring
 - Equipment
- Discuss how these issues could be resolved and encourage people to offer solutions, not be negative.
- Discuss the need for new policies and the possibility of special projects which could be performed with the use of volunteers, and to raise the profile of the organisation.

Once the forum has taken place, continue to be open about what is going on, involve staff and current volunteers in every part of the process to ensure that they remain energised and positive.

When your volunteer initiative begins, keep up this level of involvement. Introduce new volunteers to everyone and think about involving existing members of your team in the induction process.

More about the induction process appears on page 31.



Policies which apply to volunteering

Your organisation, no matter how small, has a responsibility to ensure that the rights of staff, volunteers and customers are protected. Having a policy framework which involves volunteers, and is regularly updated, means that everyone involved can refer to it, and know where they stand.

None of these documents need to be very complicated, and your local Volunteer Centre may be able to help you write them if they are not already in place.

Policies which you may like to consider having are:

- Volunteer Policy
- Equality and Diversity Policy
- Health and Safety Policy
- Child Protection Policy
- Confidentiality Policy
- Data Protection Policy

As an organisation, you may have some of these policies already in place, or they may not apply to you. Policies such as Health and Safety are very site specific, and Child Protection, Confidentiality and

Data Protection legislation is easily located through libraries or on the internet. These policies are again very specific to your organisation. The following websites may be of interest:

Health and Safety Policy:
<http://bit.ly/1e4wumP>

Child Protection Policy:
<http://bit.ly/214L6bh>

Confidentiality Policy:
<http://bit.ly/1OS5skc>

Data Protection Policy:
<http://bit.ly/1N8ykky>

Equality and Diversity Policy:
The legislation for Equality ('The Equality Act 2010') makes no specific provision for volunteers, but make sure your Equality and Diversity policy follows the legislation regardless. This way, your volunteers can be certain they will be treated fairly. A good place to start is to look at the legislation itself; the following explains it well: <http://bit.ly/1FSRWVp>

In order to start your volunteering initiative, it is vital that you have in place at minimum a Volunteer Policy. Again, this can be researched through the usual channels, and will need to be altered to fit in with your organisation. A template for a Volunteer Policy to get you started, along with some supporting information, is shown on the following pages.

Volunteer Policy model

Developing a Volunteer Policy

If an organisation decides to involve volunteers, it should produce a written record of all aspects of the roles volunteers will play. By having a volunteer policy, an organisation gives clear guidelines to staff, management committees and the volunteer themselves as to what is expected and what they can expect in return from the organisation.

A Volunteer Policy is a working document. Volunteers and staff should consult it in order to answer questions and points which volunteering raises. The document should be easy to read and understand, with clear points and concise information.

Why have a Volunteer Policy?

Having a Volunteer Policy shows that your organisation is committed to volunteers and promoting volunteering in general. It shows that you value volunteers and the contributions which they make, and that your organisation takes volunteers seriously. A policy clarifies the role of volunteers, and gives clear outlines as to their roles and responsibilities.

A clear and professional document raises the credibility of organisations, and is very attractive to potential funders, community groups, volunteering organisations and also insurers.

A policy shows that you respect and appreciate the value which volunteers add to your organisation, and that you have a professional approach to 'best practice'.

How to write your policy, and things to consider

In preparing to write a Volunteer Policy you must bear in mind who your audience is. The document will be read by volunteers, staff and anyone considering becoming a volunteer. It needs to be easy to read and concise. The information it contains should be useful to the reader, helping them to understand the organisation's views on volunteering, and what they can expect.

Your organisation needs to consider carefully the information you give in your policy, to ensure that it best reflects your own aims and objectives. However this document should give the writer an outline of what your new policy needs to contain.





1. Introduction

This section should introduce the policy, give your reasons for having one, and give information about your organisation in general e.g.:

This document states the NAME OF ORGANISATION policy on involving volunteers in its work across all departments. It also defines how the NAME OF ORGANISATION will recruit and manage volunteers, who are defined as people who spend unpaid time working on defined activities for the benefit of NAME OF ORGANISATION. The purpose of developing a policy is to enable the NAME OF ORGANISATION to think about the value of its volunteers, and to achieve clear, workable principles within which volunteers and their supervisors can operate.

The policy also recognises the value which volunteers add to the NAME OF ORGANISATION, and the commitment they give to it. The policy aims to support volunteers to achieve their full potential, and work towards building a good and successful relationship between volunteers and the people who engage with them.

- This policy provides a basis for the expansion, if required, of volunteer involvement.
- It sees volunteer involvement not as a replacement or alternative to paid staff, but as a way of extending our service as a [museum/gallery/charitable organisation] and the voluntary sector in general.
- This policy gives a framework for recruiting and supporting volunteers.

2. A background

Here give brief details about your organisation such as how long you have been running, if you are a charity and the core aims of your organisation.

- **Highlight and acknowledge the value of volunteers within your organisation and what they add.**
- **If any of your core aims are aimed at, or inclusive of volunteers, explain these further.**
- **Give a clear outline for the reasons behind wanting to include volunteers in the running of your organisation.**
- **Be extremely positive about the roles and responsibilities that volunteers can undertake as part of your organisation - this is a positive document aimed at volunteers; inspire them with your wording.**
- **Give examples of existing volunteer roles to acknowledge the current areas of volunteer involvement.**

3. Application process

For this section, describe the application process a prospective volunteer will go through. You should have an application form, and the reason for necessity. It is to:

- **Gain personal information about the applicant such as address and contact details**
- **Ensure emergency contact details are up to date**
- **Find out when they are available, and what their skills are.**

Outline what the procedure involves after the application has commenced - do you give an interview? Are roles specific and so will many volunteers be interviewed for the same role, before being selected, or will each volunteer be placed separately depending on their skills? Is the interview process formal or informal? Answer as many questions as possible, leaving potential applicants with few or no grey areas.

Also, state that e.g.:

- In involving volunteers, we will be guided by the Volunteering Code of Practice.
- NAME OF ORGANISATION Equal Opportunities policy will be adhered to when recruiting volunteers.
- People who wish to volunteer with NAME OF ORGANISATION will be dealt with as quickly as possible from moment of first contact.
- Volunteers will be required to fill in a volunteer application or registration form.

- References will be requested where this is necessary, at the discretion of NAME OF ORGANISATION. Where a reference is deemed necessary, two references may be obtained for each applicant before a post commences. This can be reduced to one referee in certain circumstances, for example someone who has just left school, or has been retired for a long time. The referees should not be related to the applicant, and will be followed up before any post can commence.

State where volunteer requests or roles will be advertised.

Requests for volunteers will be advertised in a variety of places, such as:

- Press and news outlets
- NAME OF ORGANISATION website [if applicable]
- Local volunteer centres and councils. Volunteer postings and contact information can also be obtained through various volunteer organisations.
- Volunteer roles will be written as 'Role Descriptions' and will define time commitment, necessary skills, supervisor and skills required.
- Once placed, volunteers will be expected to comply with existing policies and procedures.

If your organisation has a trial period (e.g. one month's trial) before a volunteer becomes permanent also state this here.

4. The volunteer's role

The volunteer's role must always be separate to that of a paid staff member. Where a paid member of staff has a 'Job Description' a volunteer works from a 'Role Description'. This is vital and must not be confused. It is also important to specify in this section that e.g.:

Volunteering opportunities will complement, rather than replace, the work of paid staff at the NAME OF ORGANISATION.

See page 20.

5. Expectations

What sort of commitment do you ask of your volunteers? Do they need to attend weekly, monthly, or at certain times? State here what you expect from them. Remember however, that a volunteer is giving their time for free. It is unacceptable to be too demanding, and being more open minded about attendance is a huge bonus for a prospective volunteer. You cannot expect a volunteer to do anything, however you can ask that they respect their position within the organisation, and take it seriously. e.g.:

Volunteers can give as much or as little time as they feel is appropriate for them. Whatever commitment the volunteer can give is a great asset for NAME OF ORGANISATION. However we would ask that Volunteers do consider this as 'a commitment' and if unable to attend for one reason or another, a supervisor, or the Volunteer Coordinator should be informed. In the same way, NAME OF ORGANISATION considers the management of volunteers to have equal importance to that of managing paid staff. Therefore this will be carried out with the same level of professionalism. You can expect to be treated fairly, professionally and above all, as an equal to members of paid staff working alongside you.





6. Supervision and support

Who will be supervising the volunteer?

If you are a voluntary organisation, is there someone who organises the rota, or assigns roles? If you have a volunteer coordinator or manager, how does the volunteer contact them? eg:

The Volunteer Coordinator, supervisor and other volunteers will offer support to the volunteer, and will conduct regular meetings with the volunteer to discuss their role, and regular supervisory sessions will take place to provide a high level of support.

If a volunteer feels they are not being adequately supervised, there is an issue with their post, or if the volunteer has any problems, they are encouraged to discuss this with their supervisor in the first instance or with the Volunteer Coordinator where this is not possible. Private meeting facilities are available at all times, and volunteers can bring a friend if they feel they would like extra support.

7. Rights and responsibilities of volunteers

Being clear about the rights and responsibilities, and what you expect from your volunteers from the outset is important in attracting the right sort of volunteer. Similarly, a volunteer should know what to expect in return from their role. The best way of giving this information is in clear bullet points.

Not all of the points outlined below will apply to your organisation and there are certainly more to add, however some examples of the sort of thing which should be included are:

Your rights

- To know what is expected and to be given clear information and instruction
- To have clearly specified lines of supervision
- To receive a level of support appropriate to the role
- To receive appropriate induction and training
- To be shown appreciation
- To know what to do if things go wrong
- To be a part of NAME OF ORGANISATION
- To have safe working conditions
- To be free of discrimination
- To have the right to say no, and to be able to withdraw from voluntary work

Your responsibilities

- To fill in an application form providing your details, and to let ORGANISATION NAME know of any changes
- To give two referees where applicable
- To give a reasonable and sustainable level of commitment
- To be reliable and safe
- To be honest if there are problems
- To comply with existing policies and procedures (these available to view upon request)
- To take responsibility for your own Health and Safety

Organisation responsibilities

- Enquiries and volunteering offers will be dealt with quickly and efficiently, and volunteer placements will match the volunteer's skills and interests
- Each volunteer will have a Volunteer Agreement and receive a Volunteer Application Pack
- Full training will be provided for every task allocated
- Volunteers will be treated in line with the NAME OF ORGANISATION Equal Opportunities Policy
- Each volunteer will be managed by a nominated member of staff within the department where they will be working





8. Expenses

Give details of any expenses which your organisation will pay. These could be for travel, out of pocket, or meal costs. Be clear and keep it simple. Be aware that if volunteers are paid more than their actual out of pocket expenses (such as a sessional payment or a lump sum) volunteers benefit payments can be affected if applicable.

9. Insurance

Your organisation must ensure that volunteers are covered under their insurance. Here, just assure the volunteer of this, e.g: NAME OF ORGANISATION will insure volunteers to complete their tasks within the organisation.

10. Monitoring

How will your volunteer be monitored? Will they have an annual review, or are there rewards in place for long service or great effort? Encourage volunteers to be involved in the monitoring process, and that they should raise any concerns with their supervisor.

Developing volunteer opportunities

When developing volunteer opportunities it is important to consider:

- a. How volunteers could benefit your organisation, and
- b. Why people want to volunteer.

Meeting both of these criteria will ensure that everyone is kept happy, and that your organisation benefits from volunteer involvement. Having exciting and interesting opportunities will also ensure that you have a wide range of people applying to work with you.

Start by discussing with any current staff and volunteers any roles which immediately come to mind. Also think about your organisation's aim and objectives, or strategy. Consider how volunteers could improve your service, or add depth to exhibitions. Think about visitors to your organisation - how could their experience be improved with the help of volunteers?

Once you have identified some roles which you may like to develop, ask about each one:

- Would I like to do this role, what could attract me to it?
- What would I get out of it if I were the volunteer?
- What training would I need?
- What sort of person/sort of skills would be needed to fill this role?
- How could I measure success?

Once you have considered these points and can answer each one, construct a Role Description for each prospective post. A detailed volunteer role description is particularly useful if you are recruiting volunteers through a volunteer development agency or other third party.

N.B. It is extremely important at this point to mention the use of language when dealing with volunteers. A volunteer role description (also known as a volunteer task description) is a document which details the specific activities a particular volunteer is involved in. It is rather like a job description, although using separate terminology is recommended to avoid implying a contract of employment for volunteers. Volunteers do not and should not have a contract of employment and so don't have the rights of an ordinary employee or worker. These include the right to a minimum wage, holiday and sick pay, and other statutory rights. However if you use words like 'Job Description' and 'staff' in describing volunteers or their roles you may leave yourself open to employment tribunals in the future.

Case Study

Name: Justyna

Age: 21

Justyna is from Poland, she has been in the UK for three years, and has been granted permanent residency. Justyna came to the UK for a better life for her and any children she may have in the future. Justyna felt that in Poland, the only work she could expect was in a factory at low pay, and with unsociable hours. This was not what she wanted in life, so came in search of a better career here.

After arriving, Justyna studied hard for several qualifications in business management, maths and IT to further her job prospects, and registered with agencies to find her work. However with limited English language skills, and no experience she found that it proved very difficult to gain employment which she wanted - office based. She found herself right back in the factories which she left Poland to escape.

Justyna got in touch though VInvolved - a government funded body who helps volunteers aged 16-25 find placements. Since starting as a volunteer in an admin post, Justyna has been able to practice the things she learnt at college - such as her IT skills and maths, plus improve her English and be part of a busy office - seeing what it is really like. Justyna had very little interest in history, so would not have usually applied for a museum role; however this was an admin post so it fitted her criteria. As it happens, Justyna has adored learning

about the history and visiting the museums - a great result all round!

Justyna is now working towards a hundred and fifty hours of voluntary work, and hopes that this experience - along with an excellent reference from Ironbridge - will see her gain the work she wants. As well as this, she has been an excellent addition to the office, creating spreadsheets, recording information, answering phones and generally pitching in - a huge help for our Museum!



Writing a volunteer role description

Below is a simple role description template. The description should be clear, to the point and informative. It does not need to be long; it is just there to give a brief outline of the volunteer's role and responsibilities. See below:

Volunteer role description

Title: Volunteer [role title]

Accountability: [who will be supervising the role on a day to day basis]

Hours: [what hours is your organisation open, does the role have specific hours, or is this negotiable?]

Location: [Give address of where the position is based]

Purpose of role:

[Give description of why the volunteer is needed, a brief description of the role and any special requirements/skills needed. Be friendly, and give the volunteer information about how their role will benefit your organisation - sell it to them!]

Role and responsibilities:

[list day to day tasks, training which must be taken etc]

- 1.
- 2.
- 3.
- 4.
5. To report any concern to the Volunteer Coordinator, or supervisor.
6. To take part in any relevant training.
7. To adhere to the Volunteer agreement, and Volunteer Policy.
8. To comply with, and implement, the Equal Opportunities Policy and procedure, together with all other agreed policies and procedures of the NAME OF ORGANISATION.

[your name]

[Date]



Attracting volunteers

Marketing

Marketing your volunteering opportunities will be mostly a local affair, however there are a number of factors to consider when devising methods of publicising your volunteer needs.

If your opportunities could appeal to a wide range of people, you could try print advertisements in the form of flyers, posters, local press and internet. Post these in community centres, libraries, local school and college newsletters. If there are local groups who may be interested get in touch with their leaders and give information too.

Obviously your search can be streamlined if you are appealing to a certain group. If an opportunity is quite specific, you could

target groups who have similar interest. This could be college courses offering similar activities or in certain sections of your local library.

Consider the words and terminology which you use carefully. Advertisements which simply say “Volunteers Wanted” will probably not catch the eye of someone who has never volunteered before. In order to draw someone in who is new to volunteering, emphasise the benefits of volunteering to the individual. Highlight how interesting, exciting and important to the organisation and the local community the opportunity could be. Give details of any benefits a volunteer will receive such as free/discounted entry for friends and family, reimbursement of any expenses or specific training which will be given. You need to try and sell the opportunity, and encourage them to get in touch with you, be enthusiastic.

Word of mouth will also be very important to your recruitment strategy. Many of your volunteers will be attracted to your organisation depending on someone else's experience, whether it be as a visitor or a volunteer. Having a professional application process will help with this. If someone has a good experience they are much more likely to pass on the idea of volunteering to friends and colleagues. Think about giving a presentation to your current staff and volunteers explaining what roles are available, and discussing the

benefits, they are very likely to know someone who may be interested. You could also think about holding an open day to allow local people to pop in and have a chat about volunteering.

A wonderful way of showing the things which volunteers can do within your organisation is to take photographs of current volunteers and your organisation. This gives a personalised touch, and allows people to put a face to the opportunities.



Where to advertise

You may wish to consider the following:

- Local press – print and radio.
- www.do-it.org.uk through your local Volunteering Centre - for this you must first register with the centre, however they will then support you in numerous ways.
- Community notice boards (library, community centres, local shops) and newsletters (parish magazines, local schools).
- Local schools with a sixth form are often very keen due to the inclusion of volunteering aspects involved in certain awards that students are often trying to obtain such as the CoPe award and The Duke of Edinburgh award.
- Specialist volunteering organisations such as Vinvolved who are aimed at encouraging young people aged 16-25 to volunteer. Some of these are linked to doit.org, but have many local and regional offices. Depending on your organisation's emphasis BTCV may also apply - see what is around your area.
- Organisations run by specific social groups that are generous with their time for example The Rotary Club, The Lions, Probus, The Cadet Force, W.I., Youth Organisation etc.
- Hold an open day.
- Through your local Job Centre - back to work schemes or work experience for example.

■ Your organisation's website, if you have one. The internet is generally a useful tool for sourcing volunteers or at least getting your information out.

■ Re-enactment organisations both local and national will often be pleased to lend their expertise.

Application process

A basic application form is a necessity for a number of reasons other than just gaining the volunteer's contact information. For Health and Safety and insurance purposes, all volunteers will need to provide emergency contact information should there be any problems. With an application form the information will be easily accessible in an emergency. The reference form could also be included.

This is merely an example of an application form. You will most likely need to adapt and modify to suit your volunteer needs. However this will give you an idea of what to include.

Volunteer Application Form

Please complete all sections of this form to help us with your application to become a volunteer at NAME OF ORGANISATION. All information will be held by NAME OF ORGANISATION and will remain confidential.

to

Name of Contact and Organisation Address

Date: __/__/__

Your Details:

Title	
Surname	
First name/names	
Home address	
	Postcode:
Home telephone number	
Mobile telephone number	
Email address	
Do you consider yourself to have a disability?	Yes: <input type="checkbox"/> No: <input type="checkbox"/> (please tick)
If yes, please give details.	Details:

Emergency Contact Details

Relationship to you	
Name	
Home address	
	Postcode:
Home telephone number	
Mobile telephone number	
Email address	

Volunteer Opportunities

Type of role which interests you Please give details if you have seen a role advertised and where you saw the advertisement.	
---	--

Availability

Are you currently:	Full-time Student <input type="checkbox"/>	Part-time Student <input type="checkbox"/>	Employed <input type="checkbox"/>
	Unemployed <input type="checkbox"/>	Retired <input type="checkbox"/>	(please tick)

When would you like to volunteer? (if you aren't sure, leave this section blank)

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
AM							
PM							

Thank you for your time.

If you have any questions regarding this form, or would like help filling it in, please contact NAME of CONTACT, TELEPHONE, EMAIL.

Referees

At the NAME OF ORGANISATION we want to provide volunteers, staff and the public with a safe, reliable and fun experience. The purpose of asking volunteers for a reference is just to make sure we know what to expect, and in the same way as references are asked for with staff, that people are genuine in their search for a role. Please provide details of two referees to support your application, bearing in mind that we will contact them soon after your application is received.

Please don't put relatives as your referees, as we cannot accept them, however, people such as ex-employers, people you may have volunteered for in the past, a social worker or anyone you have a professional relationship with are fine. One of your referees can be a friend, someone you have worked with, or a fellow volunteer. If you have any reservations about giving referees, please get in touch with NAME OF CONTACT/ORGANISATION, we are here to help, and will do in any way we can.

REFEREE 1

Name	
Relationship to you	
Address	
	Postcode:
Telephone	
Email address	

REFEREE 2

Name	
Relationship to you	
Address	
	Postcode:
Telephone	
Email address	

Thank you, please return with your completed application form



Selecting and engaging volunteers

Interview

It may seem that an interview is unnecessarily formal for your organisation, or you may not find yourself in a position to select and reject potential volunteers, but organising an informal meeting before appointment can be highly beneficial for both parties. This gives both you and the prospective volunteer a chance to ask questions, see if the role is suitable and to generally get to know each other. However informal you wish the meeting to be, it can be beneficial to use traditional interview formalities to create a structure.

You may wish to consider covering conventional points, depending on what information you need to give your potential volunteer and what information you need to collect. Also, having a checklist will ensure that you do not miss out anything important, and you can relax.

Interview checklist

- **Confirm applicant's personal details**
 - **Information provided to volunteer**
 - Role Description
 - Personal Specification (what sort of person is needed, special skills etc)
 - Organisation information
 - **Completed application forms**
 - **Volunteer Policy/Handbook explained**
 - **Expectation of volunteer**
 - Time commitment/availability
 - Training and support
 - **Applicant's aims and what they wish to gain or impart**
 - Relevant skills, experience and training
 - **Volunteer skills and location identified**
 - Your organisation may be responsible for more than one property and the site of interest must also be identified.
 - **Volunteer be made aware of reasons for selection/rejection (if applicable at this stage)**
 - **Equal Opportunities Policy observed**
 - **What will happen next**
 - Volunteer and Organisation sign the Volunteer agreement regarding the conditions of their role
 - Start date agreed and induction/training in place
- If you can identify a role for the potential volunteer it is advised to have the following in place before they start their position:
- **References obtained and reviewed**
 - **Necessary documents and checks such as DBS (Disclosure and Barring Service).**

This might apply if the volunteer is working in certain regular or unsupervised roles with vulnerable adults and/or children.
 - **For more information: <http://bit.ly/1N279cP>**

The induction process

The way in which you welcome any new volunteer is your first step to a happy and sustainable volunteer base.

Once a volunteer has been recruited it is very important to give them a sense of belonging, make them feel welcome and valued, and to orientate them into your organisation. Before they start ensure that everyone knows they are coming and are prepared for what implications it has for them.

For example, if someone will need to take time out of their schedule to show them the fire exits, or will be sitting next to the new volunteer, just show courtesy and let them know in advance.

A thorough induction will ensure that a volunteer understands their role and how it will benefit the organisation. It should also enable the volunteer to carry out their work safely and effectively.

The induction should include a variety of information to bring the volunteer up to date with policies and procedures at your organisation as well as to give them information about activities which take place within the organisation, and most importantly, where they fit in.

To make your induction efficient and helpful for the volunteer, include:



- The structure of your organisation
- Details about the history of your organisation
- Important policies such as Child Protection and Health and Safety, and your Volunteer Policy
- Introductions to their supervisor and colleagues or other volunteers
- What to do in the event of an emergency
- How to deal with problems
- A breakdown of their daily tasks
- A training schedule

The induction is your time to make sure that every new volunteer has a named person who they can ask if they are unsure about anything, make sure that they know where to find things, how to work them if necessary, and what their role will entail.

It is a good idea to walk new volunteers around the site of your organisation to help them get their bearings. This could be performed by the volunteer coordinator, and member of staff, or another volunteer. It might also be extremely helpful for them to have a 'buddy' within the organisation who is at their side for their first few sessions or until they are settled in. This will make sure they feel welcomed, and that they have someone to turn to if they are unsure about anything. You don't want your new volunteer to feel like they have been thrown in at the deep-end!

Before you set your new volunteer free, check they have appropriate skills, qualifications and experience. Also check that they have a clear and accurate understanding of their role and any responsibilities which they will be taking on.

Don't assume that a new volunteer will know things about your organisation - they may be too shy to ask lots of questions so giving as much relevant information as possible will be a bonus.

Once inducted, take time early on to give new volunteers feedback on how they are doing. People like to know how they are

getting on, if they are doing well and to be given the opportunity to improve. Think about having a month long trial period, where at the end you can comment about how they have got on and iron out any problems. If the placement is not working, signpost them to other organisations who may be better suited to their needs and skills.

You may find a Volunteer Induction Checklist useful when introducing a new volunteer to ensure that all aspects are covered. This can be used to make sure that you are fully aware of where your new volunteer is with their induction, and to make sure that nothing is missed out.

For new volunteers, you could also consider producing a simple information pack that includes:

- **A copy of their role description - outline of what is expected of them.**
- **Their points of contact (such as supervisor, who to go to in emergency, first aiders, etc.)**
- **Contact numbers, e-mail and postal addresses of key people.**
- **Details of what expenses can be claimed and how to do it.**
- **An overview of the organisation's history, its management structure and how they will fit into it.**

Case Study

Name: Rebecca

Age: 24

Rebecca had just finished studying for an MA in the hope of becoming an Archivist. Despite being very highly qualified, Rebecca was finding it very difficult to get a job. She hoped to volunteer as an archivist in order to gain experience.

Ironbridge does not use volunteer archivists, as we have paid staff to help with this, however we did feel that we could offer different experiences to Rebecca, which could further her career and give her a taste of the museums world.

Rebecca started volunteering as a Guide on a weekly basis, and soon took on several more posts due to enjoying the role so much. Rebecca now volunteers two or three times a week, helping out with guiding visitors and writing supporting information. She also volunteers with Blists Hill Victorian Town's curator, helping out with accessioning and on the large site in general.

Rebecca therefore gets to do some of the things she initially wanted to do, is getting great experience and is volunteering in the environment where she hopes to work at some point. From the Museums' side, we have a wonderful guide, who is also extremely useful and knowledgeable about other things around the museum, and a great asset to us.

Volunteer Agreement

When your volunteer starts, you may wish to discuss a Volunteer Agreement with them. Volunteer Agreements can be used to set out both an organisation's commitment to its volunteers, and what it hopes for from them. The agreement may act as a reference point for the volunteers, and a reminder to the organisation that it should meet the standards of good practice that it has set itself. The document is not in any way a contract, and is not legally binding; it is just to help both organisation and volunteer to understand what is expected. For this reason, the document is not signed by either party.

A sample Volunteer Agreement is below, however every organisation is very different, and you can find a lot of example agreements on Volunteering England's website (www.volunteering.org.uk) and also from your local Volunteering Councils or Centre.



Volunteer Agreement

We, [NAME OF ORGANISATION] will do our best:

- To provide a thorough induction designed to introduce you to the work of the [NAME OF ORGANISATION], your volunteering role and the induction and/or training you need to meet the responsibilities of this role.
- To provide regular meetings with the Volunteer Coordinator [if applicable], so that you can tell us if you are happy with how your tasks are organised and so that we can provide you with feedback.
Your manager's/supervisor's name is _____
- To respect your skills, dignity and individual wishes and to do our best to meet them.
- To reimburse your meal costs up to our current maximum.
- To consult with you and keep you informed of possible changes.
- To insure you against any injury you may suffer or you may cause due to negligence.
- To provide a safe workplace.
- To apply our Equal Opportunities Policy.
- To apply our complaints procedure if there is any problem.

I, _____ agree to do my best:

- To work reliably to the best of my ability, and to give as much warning as possible whenever I cannot work when expected.
- To provide referees as agreed who may be contacted.
- To follow rules and procedures of [NAME OF ORGANISATION] including Health and Safety, Equal Opportunities and Confidentiality.

More details on these issues are provided in the volunteer pack, and in the various corresponding policies, which you are advised to read.

This agreement is in honour only and is not intended to be a legally binding contract of employment.

Engaging and maintaining your volunteers

After induction, it may be comforting to your volunteer and to yourself to devise a Training Schedule. The schedule could include the following:

- **Health and Safety information**
- **Expectations of volunteer and of the specific role**
- **Job specific training for example**
 - Specific computer software training if relevant
 - Historical and/or organisation specific training
 - Technical training should they be required to use any kind of machinery (within Insurance and H & S regulations)
 - Shown clearly how to do any tasks that are part of their role

Training will always be an on-going part of any role. Make it clear to the volunteer that if they believe they should have specific training, this should be highlighted to their supervisor. The organisation should also take responsibility for specific training they identify for their volunteers. The most common and economical method of training that you will provide will be on-the-job training,

however there are many organisations that can offer free training for volunteers.

- **Contact the Local Authority website, they offer support, training and seminars for volunteers and organisations**
- **Contact your local Volunteering Centre, they often offer training themselves at a nominal sum**
- **Volunteering websites and organisations have large amounts of information on training**
 - <http://bit.ly/1kGVsgV>
www.learndirect.co.uk

Training your volunteers in phases may work better for your organisation. If you have a fairly high volume of new starters you may want to cover the more general issues as a group and then provide specific role training on their commencement.

You may wish to consider asking an existing and 'well-versed' volunteer to assist in the training process. They could offer volunteer-specific information to help the new volunteer assimilate into the organisation.

Creating some hand-outs and reminder instructions for new volunteers will help them settle into their role. It will help them to feel more self-sufficient and avoid them feeling awkward if they need to ask questions that may have been covered at some stage.

Supervising and monitoring

Providing a solid support system for your volunteers is a positive step in keeping your volunteers feeling useful and valued plus maximising their impact on your organisation.

They should know who their supervisor is at all times they are volunteering or in their absence whom to approach should they need assistance.

You may wish to have regular meetings with your volunteers to find out how they are getting on. As they are new they may have some ideas for increasing and improving current systems. This could also be an opportunity to discuss training needs.



Rewards and recognition

There are many simple ways in which you could acknowledge the contribution of your volunteers, such as:

- Letters and emails of thanks after particularly busy periods, events and other times when the volunteer has put in more than they originally agreed.
- Christmas and Birthday Cards
- Coffee and Cake mornings where volunteers can socialise and discuss their experiences. Some volunteers may never actually cross paths except at social events
- Group outing in the off season (if you have one) or on a day when closed.
- Investigate helping a volunteer to attain some form of accreditation for their work. Volunteering England have masses of information regarding all types of volunteering:
www.volunteering.org.uk/
- Regional and national awards: There are many philanthropic and organisation awards held every year that honour the work of volunteers.

Dealing with issues or complaints

Complaints about volunteers

Serious issues with volunteers are generally very rare. However every so often you may find that an issue arises which needs a much more proactive approach. With an influx of new people joining your organisation, no matter how well prepared you are there may be some issues along the way. It is therefore very important to have a clear system in place which your organisation can follow if such a problem arises.

In terms of problems, grievances so often arise from misunderstandings and lack of communication. You will usually find that talking them through with everyone involved in an informal manner is certainly the best course of action and this should always be your first option where volunteers are concerned. However should a more serious, or regularly occurring issue come to your attention, you must have a procedure in place to follow.

Problems which may need your attention:

- Misuse of facilities, or taking advantage of position
- Regular lateness
- Offensive or inappropriate language or behaviour
- Drugs or substance misuse

- Breach of Health and Safety regulations
- Failure to show respect to other staff, volunteers or customers
- Discrimination

In terms of actions to take, you should never dismiss a volunteer on the spot. You must ensure that you do not act rashly, as there are two sides to every story. If the complaint is very serious, call a meeting immediately, and if necessary suspend the volunteer. However you must adhere to a formal system to ensure fairness. Your first steps should be:

- **Give warning.** Notify volunteers (in both verbal and written communication) when they violate policies.
- **Investigate the alleged offence(s).** This includes documenting the volunteer's side of the story and any proof of policy violation.
- **Action.** Consider developing an action plan to correct the problem, depending on the seriousness of the offence(s). Each item of the action plan will have specific dates for accomplishment. Develop the plan with input from the volunteer.

What to do

Step one:

Your initial approach to dealing with a complaint or problem regarding a volunteer should always be to organise a meeting with the person or persons involved. This meeting, although fairly informal should be carefully planned so that you or whoever is taking it is sure of what they wish to say, and are ready to listen. The meeting should also be minuted to ensure that details are recorded and actions highlighted.

If they wish, the volunteer should be able to bring a friend to the meeting for support. Keep the meeting friendly and open and explain why their behaviour is inappropriate - they may not realise they are doing anything wrong at all. You may find at this point that the volunteer would prefer to take a different role within your organisation, and at this point you should try to accommodate this. Some problems may simply arise because a volunteer doesn't feel their role is suitable for them, or they are perhaps bored or uninspired. Take time to listen to their side of the story and be ready to make changes to help them.

If you need to, draw up an action plan with the volunteer to mark any changes they need to make, and also what the organisation needs to do. Give a clear time frame, for example two weeks, in order to make these changes, and stick to it. Organise a further meeting to take place once this time has elapsed to evaluate further.

If the volunteer has followed the plan successfully, extend it to a month, and so on. You will probably find that the volunteer did not mean any wrongdoing, and that increased supervision will help considerably.

Step two:

If after this initial meeting the problems do not ease, a second, more formal meeting needs to be arranged, and a written warning issued. This meeting should possibly involve a senior member of your organisations team, and the aim of the meeting will be to give the volunteer a clear outline of what the issues are, and what steps **MUST** be taken to ensure they remain a volunteer within your organisation.

Present this information in a written document, which you should go through step by step with the volunteer ensuring that every point is clear and understood.

Again, the volunteer should be encouraged to bring a friend or trusted colleague so that they do not feel 'ganged up on'. The meeting should address the previous action plan, and a further plan should be produced, this time with a smaller time frame, and more instruction.

This is a very serious step to take and the volunteer must understand that this is the final step before the offer of volunteering is withdrawn. You may find that at this point a volunteer may not wish to continue, and if so attempt to part

company in the best possible way. Remain calm and collected at all times, no matter what the situation is and if you need it, ask for peer support.

Step three:

If again, no improvement is made, or if the complaint regarding the volunteer is of a serious nature, you may find that asking the volunteer to leave the programme is the only option. A serious complaint could be:

- Assault
- Harassment
- Racism
- Gross misconduct
- Illegal, violent or unsafe behaviour

In the event that a volunteer has to be dismissed, invite the volunteer to an Exit Interview. This should be done personally by the Volunteer Coordinator or person who supervises volunteers directly.

- Be quick, direct, and absolute.
- Announce, don't argue. There has already been time for the issue to be investigated and rectified.
- Do not attempt to counsel. If counselling were an alternative, it would have been done earlier in the process.
- Confirm withdrawal of the offer of volunteering with a written letter, and settle any unfinished business needed to end the volunteer's relationship with you.

Appeals

Finally, you must allow the volunteer to appeal. They may feel that they have been unfairly treated. Remember that if a volunteer leaves feeling that they have been badly treated, they are much more likely to tell others about the terrible treatment they received. This can damage the reputation of both future volunteering projects and your organisation in general. An appeal should have clear guidelines which are made clear to the volunteer.

Appoint someone, such as a senior manager, the chair of the trustees or a nominated trustee to be the main contact for such an appeal.



The volunteer should be informed about their right to appeal from the moment the complaint is brought to the surface. In your first written correspondence outline clearly what the procedure is, giving a named contact and also a set timeframe.

This could be written as follows:

The volunteer has the right to appeal against any disciplinary decision to the [NOMINATED PERSON]. The employee / volunteer should inform [NAME OF ORGANISATION] in writing of their wish to appeal within five working days of the date of the decision which forms the subject of the appeal.

Any appeal hearing will be held as soon as possible when the volunteer will be given an opportunity to state their case. The volunteer may be accompanied by a work colleague or representative. The decision of the appeal will be notified to the employee in writing and will be final and binding under this procedure.

OR

Volunteers dismissed from their volunteer position may appeal the decision. Such appeal must be in writing to the [NOMINATED PERSON] and received within 10 working days of receiving notice of their dismissal. The written appeal is to outline why the volunteer feels he should not be dismissed and any other pertinent information that may prove helpful in reviewing the dismissal.

The [NOMINATED PERSON] will determine steps necessary to review the decision to dismiss (for example to convene a special committee, gather information from the dismissing supervisor or personally interview the volunteer, dismissing supervisor or others as appropriate or other means to consider all information), and will determine if the decision to dismiss will stand or be overturned. Such decision will be reported to the volunteer.

Volunteer complaints

No matter how well you try to look after your volunteers or how many policies and procedures are in place, you may find that a volunteer wishes to make a complaint.

If a volunteer has a complaint about their role, your organisation, a member of staff or another volunteer it must be recorded and handled in the same way as a staff complaint. If you have a complaints procedure already make sure that this would apply to volunteers as well as staff. If not, think about producing one. Good places to look for information about dealing with complaints can be found on www.volunteering.org.uk.

In short however, think about the following:

Most problems should be able to be solved informally. Ensure that the volunteer knows who to approach. A volunteer coordinator should be the designated person, however if you do not have one, a senior member of staff or volunteer should be the appointed person. However you should give the volunteer a few options to ensure they are able to report any concern—for example if the problem involves the volunteer coordinator then the volunteer should have someone else to talk to.

If the complaint is about their role, you may find something simple like giving them an option to change will ease their worries. Solving the issue quickly and efficiently should be your main concern.

If the complaint cannot be solved so easily, arrange a meeting at the volunteer's convenience to discuss it. You should deal with the complaint within 14 days, so within that time, arrange the meeting and set up an action plan.

If the issue is still not resolved then it should be put in writing to the appropriate senior manager or member of the board of trustees. The matter should again be dealt with within 14 days, and the matter resolved.

Troubleshooting

Once you begin to meet, give roles to and induct prospective volunteers, various issues may arise. The following table may help you to develop opportunities which can be inclusive to as many people as possible, and also to have answers to any problems before they arise.

Obstacle	Possible remedies
<ul style="list-style-type: none"> – the volunteers don't drive or have their own transport – it's not easy to get to your base by public transport – there is no parking or public transport close to the volunteering opportunity 	<ul style="list-style-type: none"> – are there other volunteers nearby who could offer a lift? – develop a rota to share transport – arrange to pick up volunteers – provide a taxi – develop group/family volunteering activities – develop home-working opportunities
<ul style="list-style-type: none"> – your opening times don't match the volunteers' availability – your volunteering only takes place in the day-time, and therefore not available to people with full-time work 	<ul style="list-style-type: none"> – consider changing/extending your opening hours – develop new opportunities that can be carried out at other times such as projects or outreach – develop home working opportunities
<ul style="list-style-type: none"> – the work is boring – there is too much to do 	<ul style="list-style-type: none"> – be prepared to build opportunities around volunteers' abilities and interests – rotate volunteering tasks – have lots of social opportunities
<ul style="list-style-type: none"> – there are hidden costs not covered by expenses – out-of-pocket expenses are not paid, or are difficult to claim 	<ul style="list-style-type: none"> – make a commitment to pay expenses and raise funds to achieve this – have accessible, easy to understand expenses procedures – be clear from the start about what can and cannot be claimed for
<ul style="list-style-type: none"> – your organisation is unpopular, or not very well known 	<ul style="list-style-type: none"> – improve your marketing and promotional activities – hold an open day – visit local community groups or schools to get your service out and about
<ul style="list-style-type: none"> – existing volunteer clique 	<ul style="list-style-type: none"> – join the volunteer group for a few sessions until the new volunteer feels comfortable – ask an existing volunteer to 'buddy' newcomers
<ul style="list-style-type: none"> – new volunteers are frightened of the activities, and unsure if they would be able to complete tasks 	<ul style="list-style-type: none"> – provide training – hold open days and taster sessions so that new volunteers can get a taste of what you do
<ul style="list-style-type: none"> – volunteer feels that they do not have the correct skills or confidence to perform tasks 	<ul style="list-style-type: none"> – provide additional training – 'buddy' volunteer for support

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