



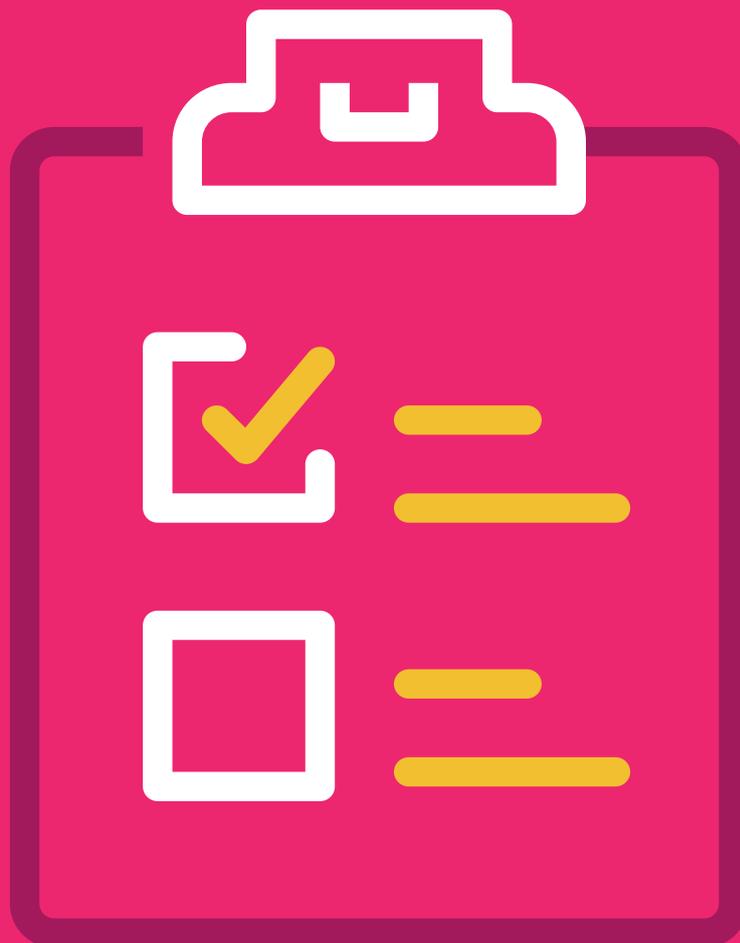
CYMORTH  
GWIRFODDOLI  
GORLLEWIN  
MORGANNWG



WEST  
GLAMORGAN  
VOLUNTEERING  
SUPPORT

# Volunteer Coordinator Guide

A toolkit for volunteer managers





# Contents

<b>Part 1</b> .....	<b>3</b>
<b>A Guide for Volunteer Managers</b>	
Introduction .....	<b>3</b>
Attracting volunteers .....	<b>14</b>
Volunteer Role description – structure.....	<b>15</b>
Where to find potential volunteers.....	<b>16</b>
Induction .....	<b>19</b>
<b>Part 2</b> .....	<b>37</b>
<b>Informal Volunteering</b>	
Introduction.....	<b>37</b>
Staying safe.....	<b>38</b>
Clear roles and tasks.....	<b>38</b>
Managing financial transactions.....	<b>39</b>
Looking after information.....	<b>39</b>
Safeguarding.....	<b>40</b>
Support and resources.....	<b>43</b>



# Part 1 - A Guide for Volunteer Managers

## Introduction

Welcome! if this is the first time you've managed volunteers, for either formal or informal volunteering, or you are starting a new project or taking over from a previous volunteer manager, this guide gives information, tips and ideas in all the areas you'll need to know about to support your volunteers well.

The content of this guide has been produced by Eileen Murphy Consultancy and Laura Hamilton Consultancy in conjunction with Swansea Volunteering Forum, for the West Glamorgan Volunteering Support Project.

### How to use the Guide

Dip into the Guide to focus on certain subjects or read it from beginning to end. We hope you find it useful and that it assists you in developing your professional knowledge and confidence in volunteer management, to give people the best volunteering experience possible.





## **A Guide for Volunteer Managers**

### **By Eileen Murphy Consultancy**

Welsh Government Volunteering Policy (2015) defines volunteering as activity that:

- is undertaken freely, by choice.
- is undertaken to be of public/ community benefit.
- is not undertaken for financial gain.

People volunteer across Swansea and Neath Port in many places including: charities, community groups, the NHS, local authorities, in sports clubs and informally in local communities. NPTCVS and SCVS are committed to celebrating volunteers and volunteering in all its forms, and can help you!



## Volunteer manager role

The volunteer manager/the coordinator, has many responsibilities depending on the size of the organisation, its structure and resources and can:

- Design and implement volunteering policies, procedures and processes.
- Recruit and induct volunteers.
- Match volunteers to tasks and clients.
- Lead on volunteer training and development.
- Offer day to day support, regular supervision and coaching.
- Complete risk assessments and ensure safeguarding.
- Deal with difficulties and solve problems.
- Undertake admin and finance tasks.
- Coordinate and report on volunteering projects.

Be aware of your own capacity and the capacity and resources of your project. You'll need enough time and energy to ensure volunteers are offered meaningful roles and are safe, supported and motivated.

Volunteer programmes need a budget to cover:

- Your time to support and supervise.
- Their training needs.
- Expenses and equipment.
- Your own support, supervision, training and development needs.

It's crucial to work with the funder and be up front with beneficiaries and volunteers about what can be realistically achieved within any timeframes and budgets.



## What motivates people to volunteer?

People choose to volunteer for many reasons, to:

- Have fun.
- Make friends in a new community.
- Learn new skills and build confidence.
- Try out new activities.
- Give something back to an organisation or community.
- Add to their CV.
- Support a future career path.
- Contribute to a cause.
- Make a difference in other peoples' lives.
- Give structure to their day.

By understanding what motivates a person, you can find the best role for them and what support they need during their volunteering.

**We want all volunteers to find volunteering a worthwhile experience.**

## So, why does your organisation involve volunteers?

It's worth stepping back to examine why your organisation involves volunteers but volunteers should not replace staff. They add skills, knowledge, and often have lived-experience, that enhance organisations.

### Does your organisation involve volunteers?

- As part of its ethos and values.
- To build capacity in the community.
- To increase diversity.
- To ensure you are embedded in the community.
- To offer opportunities for service users to become volunteers, building their confidence and skills.
- As a route to employment.
- To increase capacity to offer new services.

### Remember:

What motivates someone to initially volunteer might change over time – check in regularly to ensure they are still enjoying their experience. Initially, they might have volunteered to make friends or build self-confidence; as they develop, they might look for more stretching roles that allow them to try new activities and take on new challenges.



## Volunteering strategy & policy

It's a good idea to have a written Volunteer Strategy and Volunteering Policy so everyone understands your principles and volunteering practice.

### Volunteering Strategy

- Shows your organisation takes volunteering seriously and recognises the volunteer contribution.
- Sets the direction for volunteering. Smaller organisations might decide to include volunteering in their main strategic plan.
- Shares your vision for volunteering, why and how you involve volunteers and describes the organisation's ambitions for volunteering.
- Sets aside resources so you have the capability and capacity to manage volunteers.
- Plans your volunteering programmes for the medium to long term.

## Volunteering Policy

Your Volunteering Policy is the framework for involving volunteers. It sets out practical actions taken to support, supervise, train and reimburse your volunteers. It lists the expectations a volunteer can assume from you and can list hopes for your volunteer's commitment. Make it available for everyone to see.

Check out this information sheet which suggests suitable structure for this policy:



<https://wcva.cymru/wp-content/uploads/2020/06/Creating-a-volunteering-policy.pdf>

### Tips for writing the strategy:

- Embed your organisation's values in the strategy. Clarify what you hope to achieve.
- Involve volunteers and staff responsible for working with volunteers. Share the strategy.
- Work out the resources that are needed to invest in volunteering. Ensure volunteering management and support is included in the organisation's financial plans with buy-in from senior managers and the Board. Set your review date.



## Creating the right culture for volunteers

Aim to build a culture that is pro-volunteering, where volunteers are respected and appreciated. Attracting, motivating and retaining volunteers requires energy and enthusiasm from across the whole organisation.

### The right culture is where:

- Volunteers are engaged in meaningful tasks.
- Volunteers know why their role is important and understand the difference they make.
- There's a great team dynamic, open communications and shared understanding of the value of volunteers.
- There are good relationships across the team of volunteers and staff.
- Volunteers have opportunities to share their ideas and influence the organisation's plans.
- Volunteer management and leadership are valued as professional skills.
- Volunteers feel welcome.

## I wish I'd known that earlier!

### Tips from current volunteer managers

“Join a volunteer manager forum – use the network to pick the brains of experienced volunteer managers to see how they do things. They'll be happy to share their thoughts, documents and lessons learned.”



There is a Volunteer Managers' Forum in both Swansea and Neath Port Talbot – contact your CVC.

“The first important task – calculate your capacity. How many volunteers can you support in terms of your time? (how many volunteers is it safe for you to manage?), your budget (how many reimbursed expenses, induction and other necessary training courses can you afford?) and how many volunteers can you keep busy with meaningful activity? If these figures do not work alongside the project targets speak to your manager asap.”

“Get in touch with your local volunteer centre – they have experienced staff who provide development support for organisations around volunteer management. They can help you recruit new volunteers.”



“It costs money and takes time and energy to manage volunteers. You can’t do this on your own – you need support from within your organisation to deliver a successful volunteer involving project.”

“Volunteer management training is so beneficial – get on a course as early as possible. This will give you confidence, help you build up a network of peers and shine a light on the issues you need to tackle first.”

“Try to source on-going training, mentoring or personal development for you as a volunteer manager – your volunteers will benefit from it too!”



## Setting up from scratch

Develop the essential volunteer related documents with support from others in the organisation. There's no need to start from scratch. There are many model policies and information sheets available via SCVS, NPTCVS and your Volunteer Managers' Forum! Volunteer managers' training can build you knowledge in all the policy areas.

### **You will need the following policies and procedures and more:**

- Volunteering Policy: to cover recruitment, support and supervision.
- Health and safety.
- Safeguarding.
- Equality and diversity.
- Dealing with difficulties.

Volunteers could co-produce the policies /documents with you to make this a volunteer centred activity.

## Picking up the reins

When you take over from another volunteer manager, try to have a handover with your colleague. If this isn't possible, spend time familiarising yourself with any records that exist, before speaking to volunteers. Identify when supervisions are next due and where you are with volunteer and project activity.

When you are familiar with things, contact volunteers to begin getting to know them. It will be useful to note what they wish to get from volunteering and how you can support them to achieve these goals.

As you are new, you will be managing change for them and may discover some volunteers find this difficult; some may even move on. Try to steady the ship but accept change is all part of reinvigorating a project. Make the job your own but don't rush into making change for change's sake. Get to know your volunteers, if they are happy with the way things are going, immediate change may reduce your volunteer base. Your role is to support volunteers through change – keep them informed, involve them in co-producing new ways of doing things, update policies and explain why change is needed.

**Remember to bring volunteers with you and build their confidence to take on any new challenges!**



## Organising

A volunteer file checklist can be used at the front of your volunteers' files and might help you keep things organised if you're starting from scratch.

You can adapt the steps and change the order, depending on what you need. It provides a summary of what stage they are at and any recent communication you have had. You could develop a simple contact log for noting each time you chat with your volunteer. You can insert an action column if you wish. These can be digital or paper based.





## Volunteer Checklist/ Record your interactions

**Volunteer's Name:**

Steps	Date	Notes
Application Enquiry received		
Information pack sent		
Application form received		
References sent		
References received		
Informal chat held		
Formal interview held		
DBS undertaken/received		
Start date		
Induction complete		
Training 1 complete		
Supervision sessions held – list		
Leaving date		

Log of contact

with .....

Date	Notes



# Attracting volunteers

## Creating roles

Decide on your approach to volunteer recruitment – have a look at the Guide: **Diversifying your volunteer base, available from SCVS or NPTCVS**, for top tips from other practising volunteer managers!

One approach is to create specific volunteer roles and then to look for a person who meets the criteria. Another option is to meet potential volunteers to discuss what they can contribute and then to create a role around them. Whatever approach you take, make sure you match the volunteer to a role that suits their reasons for volunteering.

### The route you take depends on:

- The needs of service users.
- The level of formality and structure of the organisation.
- How much flexibility you have i.e. can you create new roles or do you have to stick with the ones you have?
- The time and resources you have to support volunteers.

If there are targets for volunteer numbers, you could look at different types of volunteering e.g. one-off volunteering, face to face and online volunteers, micro-volunteering roles, which can help you recruit the numbers expected. These different types of roles can make volunteering attractive to different people and might help you diversify your base.

## Recruitment steps

Draft the role description: explain what the volunteer will do and show where their role fits. Good role descriptions identify the skills, knowledge, experience and approach you want from a volunteer. Volunteer role descriptions can look a bit like job descriptions – they are not! They should only describe expectations rather than requirements of a role. Take care not to imply a volunteer is under contract to perform specific activities.

Design roles that are as flexible as possible and enable the volunteer to make a difference. Offer enjoyable opportunities that are part of a team. Remember, don't over-burden the volunteer – offer a role that allows them to learn and develop. Volunteers are busy people. Find ways to accommodate schedules, family commitments and limitations.

Below is a template for a simple one page role description. For many roles there won't be a pre-determined set of skills or knowledge and you might be able to offer training to enable people to fulfil the role. However for some technical roles certain skills and experience will be required.



# Volunteer Role description - structure

## Volunteer role title:

(Keep it simple).

## Purpose:

(How this helps the aim of the organisation).

## Suggested activities:

(Outline of tasks – include any targets or measurements of performance (this depends on the role).

## Time scale:

(How often, day/times, or types of times e.g. office hours/mostly weekdays but some weekends and evenings).

## Venue:

(Base/online/in the community?).

## Support and supervision:

(e.g. 1-2-1 and/or group supervisions every 2 months and access to co-ordinator by phone, Zoom, email).

## Qualities:

(Mention only the necessary skills, knowledge, experience. Including unnecessary requirements creates hurdles!).

## Benefits:

(Mention induction and training, reimbursement of expenses and refer to the 'motivators' – fun activities, opportunities to gain experience, etc.).



## Where to find potential volunteers – advertising

**You can use targeted advertising for specific volunteer roles or specific people or general advertising for your volunteers.**

Your local volunteer centre can help you plan the approach you take. You can raise the profile of volunteering and attract people to the organisation using: word of mouth, open days, posters, speaking at or attending local events, notices on websites, in the press, radio and social media. You can use specialist volunteering websites, volunteer centres, linking with specialist events, attending career's fairs, health and well-being events, building relationships in specific communities, with schools, colleges/universities and partner organisations. Remember to include the contact telephone number/email address and the name of the volunteer co-ordinator. For some volunteer roles, to safeguard vulnerable people you might need volunteers to have a DBS check. Let people know this and some of the main detail when you advertise.

**The Volunteer Details form/Volunteer Application form** enables the volunteer to give useful information about themselves to help you structure an interview/chat. Make sure the format is accessible and considers different languages, formats and abilities. The form should be straightforward and a helpful part of the process, not a barrier. You could fill in the form with the potential volunteer as you are chatting, using the questions to structure the conversation.



## Arrange interviews/chats with potential volunteers

Not every organisation interview potential volunteers. Match your chosen process to the organisation's culture and the type of volunteer role. For formal roles such as Volunteer Mentors where you are looking for a person with particular skills and experience you will want to interview them, and in some cases, use exercises to choose volunteers with the ability to provide a great service to your clients.

In other cases, an informal chat might give you all the information you need to decide whether a volunteer and your organisation are a good match.

Whether you chat face to face, over the phone or online, here are some guidelines:

- Make sure your first contact with the potential volunteer is friendly.
- Explain the process. Send an email in advance explaining the interview/chat. Share questions in advance.
- Use the role description as a checklist for your chat.
- Ask OPEN questions: What? How? Who? When? Where? Which? To what extent? and ask one question at a time, be clear and concise!
- Check that they understand the role.
- Explore why the volunteer is motivated to join the organisation.
- Encourage them to ask questions.
- At the end, let them know what will happen next.

If you are developing a role around the volunteer, involve them! Ask questions and listen to their ideas. Take the opportunity to get their feedback and to discover more about their interests and talents.

## Select your volunteers

Decide if the volunteer has what's needed for the role and discuss potential start dates. Don't forget it's not only about matching the volunteer to the organisation but it's important to match the volunteer activity to the right person. What is motivating them?

You might have to follow additional processes with some roles such as asking for references. Be clear what you're looking for from references – link it back to the role description, send the role description with your reference request. Arrange DBS checks where relevant.





## What happens if someone isn't suitable?

After interviewing a person you may decide they are not suitable for the role. Give the person objective feedback on the reasons. This can be called Counselling Out and should be governed by an agreed and understood process. Can you signpost them to other suitable volunteer roles within your organisation or elsewhere? You can refer to your local Volunteer Centre.

If an applicant decides they don't want to volunteer for the organisation after all, ask them for feedback. Understanding their reasons may be helpful.

## Assessment

Organisations can use a variety of recruitment assessment methods (at interview, on forms, through their training, at post training discussions, via references and DBS/barring list checks) to measure suitability for task. Assessed training can measure, against the role description and organisational values, to display evidence of match. Tasks can be developed to evaluate a potential volunteer including their verbal or written contributions, group quiz or answers to questions in a 1-2-1 post training chat. Assessment helps the volunteer co-ordinator check understanding and can display the need for more training.





# Induction

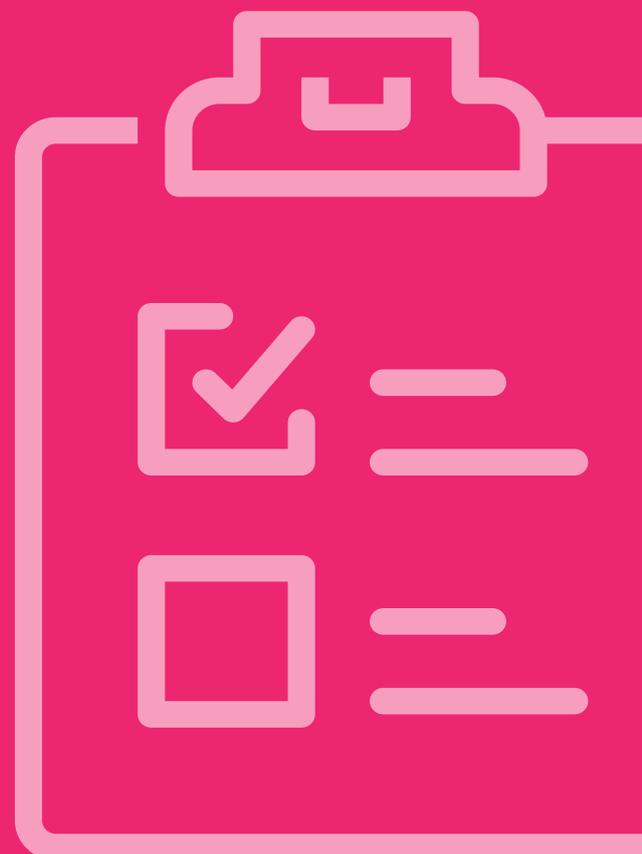
Induction is a crucial chance to welcome the volunteer and help them feel they belong.

Through induction we can clarify the role.

## Remember:

Induction is not just about providing information on the task, or how to claim expenses. It's a vital part of helping the volunteer settle in. A volunteer needs to feel welcomed, informed and fully trained so they can undertake their role with confidence. Help volunteers make connections during induction and throughout their volunteering.

Involve other staff and volunteers in induction. Induction is a good time to explain how your volunteer management system works - make sure they know who they can turn to for help and support.





## A simple induction checklist:

You can use this checklist to plan your face to face or online induction.

Subject	Notes:
When/where to arrive on first day - face to face or online	
Who will meet and greet the new volunteer: volunteer co-ordinator details	
Expectations - ours and the volunteers	
Personal information and next of kin details	
Provide outline of the role and tasks (and quality standard)	
The organisation's history, vision, values, aims and structure	
How the role relates to other roles and jobs	
Matching with clients	
Organisational policies/procedures, including process for expenses	
Health and safety and risk assessment	
Introduction to colleagues (staff and volunteers)	
Introduction to relevant networks, steering groups etc...	
Layout of the building/patch	
Introduction to support, supervision sessions, team meetings and appraisal	
Set date for first supervision	
Assessment of initial training and development needs	
What else is relevant to the organisation, service users or this volunteer role?	

Log of contact with .....	
Date	Notes



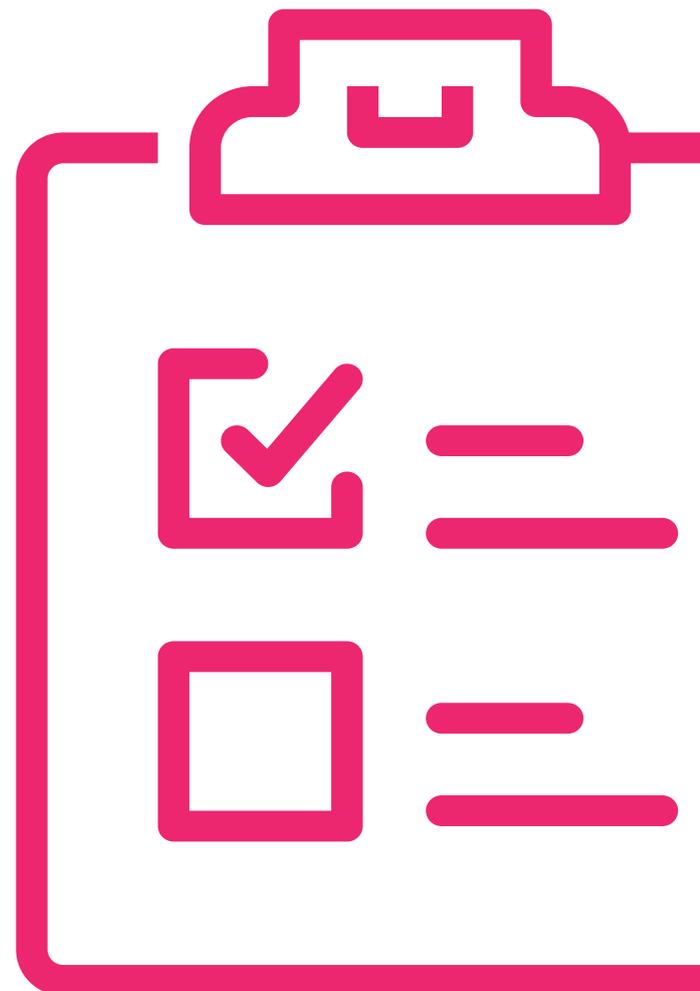
## Communication

Include volunteers in the organisation's communication. Being a real part of the organisation's community is motivating.

- Share information – develop a volunteer email list.
- Keep a bulletin/ebulletin board so they have a regular place to check-in for updates.
- Have a blog/vlog for news and updates.
- Remember communication is two-way – what opportunities do volunteers have to give feedback and to contribute their ideas?
- Keep volunteers informed about proposed changes and developments in the organisation.

## Support and supervision

Volunteers deserve to be managed well. Managing people is enjoyable but sometimes it's hard. Keep your volunteers' motivations in mind! Take care not to lean too much on one volunteer who appears very capable and willing. Effective support and supervision (and in some cases, appraisal) are fundamental to providing high quality services and are an important part of volunteer management.





## Supporting volunteers and recognising their needs

Support should be offered during first interactions and ongoing from recruitment to enable someone to volunteer or continue to volunteer. In the long term, support should take into consideration any changes for the volunteer. Support is not just about what you do but it's also about your approach – your tone of voice and the style of language.

- Always be warm, friendly and approachable.
- You can be friendly whilst not being a friend or too familiar – use a professional, easy approach.
- Be supportive in the language you use, and this starts with the advert and the application process.
- Get to know your volunteers by asking questions, establishing a connection.
- Keep in touch with potential volunteers as they go through the training and application checks. If someone has not volunteered before it's not obvious why delays occur or what comes next.
- Offer support after induction and training sessions (maybe an email/text ahead of induction day, or a quick hello afterwards to check they are enjoying themselves and to get feedback).
- Offer buddies, experienced volunteers, to guide someone into their role.

All volunteers need support; some volunteers might need specific tailored support to be able to take part and get the most out of the experience. For some people, a lack of structured support is a significant barrier to volunteering. Remember that a more person-centred approach may be necessary to enable some volunteers to thrive.

**By providing a listening ear you will find out what support is required, build their confidence in their role and demonstrate your commitment to having inclusive volunteering opportunities, which ultimately helps retain volunteers.**



## What does good supervision look like?

Supervision might be called supervision, monthly reviews, 1-to-1's or catch ups, but the content, aims and objectives remain the same. It is a time, set aside, for a regular dialogue between the volunteer and their manager. It's an opportunity to discuss how the volunteer is getting on in their role and any issues they might be facing. Supervision gives an opportunity to identify support and development needs and to ensure the volunteer can carry out tasks safely and effectively.

Effective supervision must be provided regularly and in a space free from interruptions. The frequency of supervision will differ from organisation to organisation, but consider at least once a quarter. Where volunteers are providing support to vulnerable clients, it is recommended that supervision takes place at least every 6 weeks.

- Book supervision dates in advance.
- Use a standard agenda to give structure and purpose – and take notes.

The agenda is likely to cover at least three main areas: Volunteer tasks, Support and well-being and Learning and development.

## Volunteer tasks

- Discuss progress since last supervision.
- Clarify tasks, responsibilities, priorities – review role description.
- Plan for the next period of volunteering.
- Identify areas where additional support or training are needed.
- Discuss safeguarding. Confidentiality is conditional if there are safeguarding concerns, but supervision should feel like a safe space.
- Discuss any problems and work on solutions. Remember to deal with any problems as soon as they arise.



## Well-being and support

- Check volunteers have enough to do but are not overloaded.
- Discuss how outside factors are affecting their volunteering.
- Explore how the volunteer feels about the role.

## Learning and development

- Identify and plan to meet training needs.
- Discuss any learning since last time.
- Coach the volunteer in areas of development.
- Provide a framework for discussing and agreeing changes.

## The benefits of good supervision

Supervision is a chance to have a 1-to-1 conversation between the volunteer and the volunteer manager. It's an opportunity to give feedback to the project, from a volunteer's view point and to gather quotes which can be useful for project evaluation.

### Effective supervision:

- Offers a chance to gain clarity about the expectations of the role and to deal with any issues at the earliest opportunity.
- Builds the relationship between volunteer and manager.
- Is a formal opportunity to give feedback on performance, achievements and commitment.
- Can make the volunteer feel valued and supported.
- Builds confidence.



## Supervision skills

Use active and reflective listening  
Good supervisors listen really well!

- Give your undivided attention; listen with empathy and without judgement.
- Be aware of what stops you from listening and your non-verbal communication.
- Summarise and reflect-back what you have heard.

## Ask the right questions

Excellent questions encourage a two-way conversation between you and the volunteer. We want to encourage volunteers to reflect and learn from their experience and build their confidence.

- Ask OPEN questions: What? How? Who? When? Where? Which? To what extent?
- Ask one question at a time, be clear and concise.
- Ask questions that encourage the volunteer to reflect.
- Start with general questions and drill-down by using more specific questions.
- Build up a bank of great questions.
- Avoid 'why?' questions.

Remember questions are about gaining insight and understanding not just about gathering information.

## Give feedback

Regular, constructive feedback supports personal development – it makes people aware of what and how they are doing. Before you give feedback, check out the volunteer's perspective – **How are things going? What are you pleased with? What's going well? What could improve?**

- Make sure all feedback, whether it is positive or negative, is constructive.
- Respect the volunteer's feelings, views and opinions and ask for their ideas.
- Be specific and focus on what can be changed.
- Check you have been understood and discuss and agree the way forward.
- Agree any actions and set dates. You can revisit these at the next supervision.

When giving feedback, consider any changes in circumstances that you need to take account of. Consider how much feedback to give and when to give it. Don't forget, we can only cope with so much criticism! You need to give feedback when it's still relevant and current. Finally, ask has the feedback been clear and accurate?

For some roles it might be appropriate to discuss SMART objectives. **SMART** stands for: *Specific, Measurable, Achievable, Relevant and Timebound*. It's easier for volunteers to know what's expected if their objectives are clear and it's easier for the manager to give specific feedback.



## Making volunteering meaningful

Ask yourself:

- Do volunteers have opportunities to share their knowledge or develop new skills?
- Can you co-produce roles and activities with volunteers?
- Do volunteers have opportunities to see the impact of their role- the difference it makes?
- Do you provide opportunities for volunteers to take up more diverse responsibilities if they want to or to step back if their circumstances change?
- How can you include volunteers in conversations about future plans and changes?

## Volunteering Safety

Safety is paramount to everyone involved in volunteering. All organisations have a 'duty of care' to protect the health, safety and wellbeing of everyone involved, including volunteers.

In this section we highlight some key areas to consider. Organisations new to volunteering are strongly advised to contact SCVS and NPTCVS for further guidance.

## Important safety questions

Do you have suitable insurance? It is essential for the safety of your organisation, employees and volunteers that your insurance covers volunteer roles.

- 1 How do you know you have the right people for the volunteering role?** Refer back to the section on Recruitment – if the role requires previous experience or specific skills, you will need to assess these during the interview and induction. Does the role require a DBS check or references?
- 2 Does the training cover everything volunteers need to know to carry out their role safely?** Do you include content on: Health and Safety, Safeguarding, Boundaries, Confidentiality? Do you as the Volunteer coordinator feel fully prepared and trained?
- 3 Do you have appropriate policies and procedures in place?** These include Volunteering policy, Health and Safety Policy, Risk Assessments, Safeguarding, Confidentiality Policy, Data Protection Policy, amongst others. For guidance on how to write suitable policies, look at the Information sheets and get in touch with your CVC and join your Volunteer Managers' Fora.
- 4 Do you have adequate systems in place to review and plan volunteering activities?** Discuss safety during supervision and team meetings, to ensure volunteers are getting the support they need. Make sure volunteer activity is recorded accurately. This helps safeguard the organisation and volunteer should any complaints be made in future. Accurate recording is vital if a safety concern needs to be reported.



## Safeguarding

Think about safeguarding throughout! Regularly undertake safeguarding training yourself so you are up to date.

Safeguarding is about understanding the risks of harm to others, putting actions in place to eliminate and reduce those risks and about reporting concerns. We must safeguard volunteers and service users. Make sure you support safeguarding in all volunteering policies, procedures and activities. Ensure volunteer induction and training includes how to safeguard service users and cover safety and safeguarding in supervision and team meetings.

## Risk

**Risk is everywhere – it's part of our day-to-day lives. Risk assessment is an essential part of managing volunteers.**

Through risk assessment we control and minimise risk and its impact. Risk management is more than health and safety. Risk identification relates to the volunteering role, environment and the client group you're supporting. The more demanding the volunteer role and the more contact they have with clients, the greater the potential for risks.



## Examples of risks include:

- Potential health and safety risks to the volunteer and/or service user.
- Breaches of confidentiality.
- Volunteers misrepresenting the organisation, risking its reputation.
- Harm or abuse.
- Breaches in the law.
- Volunteers stepping outside boundaries or their expertise.

## There are 3 stages to managing risk:

- Identifying risks.
- Assessing their seriousness.
- Managing the risks.

Once you have identified potential risks – assess if the volunteering activities are low, medium or high risk. Of course, higher risk activities will require more preventative measures to be in place.

## Managing risks can include:

- Training volunteers including safeguarding and confidentiality.
- Clear assessed induction which includes do's & don'ts and instruction about boundaries.
- Reviewing practice during supervision.
- Ensuring volunteers have insurance cover.
- Altering volunteer roles.

The actions you take will be dependent on the seriousness of the potential risk. Effective risk management approach should be:

- Systematic.
- Regular.
- Recorded.
- Monitored and reviewed.
- Effectively communicated across the organisation including with the volunteer.

**Every time you design a new project or create new roles, ensure you complete a risk assessment.**



## Recognition and retention

Recognising volunteer contribution motivates and can retain volunteers. Retaining volunteers is a good sign they feel valued.

### Saying thank you

Make sure the whole organisation says thank you and recognises volunteer's commitment and impact.

- Show gratitude – formally recognise contribution.
- Tell volunteers how they make a difference.
- Organise volunteer 'thank you' events – perhaps a meal and a chance to get together. You could do a similar 'gathering' online.
- Send thank you notes/emails whenever a volunteer does something extra.
- Celebrate Volunteers Week – 1-7th June every year. Download resources and ideas from NPTCVS and SCVS websites to help you mark the occasion.
- Engage volunteers in developing routes for progression – offer additional training or adaptations to their role. It may include supporting volunteers to find opportunities elsewhere.
- Reimburse expenses.
- Social gatherings.
- Certificates of attendance and achievement.
- Nomination for awards.
- Including volunteers in team decisions and planning. Recognise their expertise and position within the community.
- Provide references when asked or in line with policy. Some projects offer references after a set amount of time when they feel they can honestly describe a volunteer's skills and abilities, often using the volunteer's role description or supervision notes.



## Transition from service user to volunteer

If managed carefully, there can be great value in transitioning service users to volunteers.

Lived experience means volunteers can easily relate to the experience, challenges and feelings of service users. For example, peer mentoring projects can benefit greatly from volunteers who have lived experience. However, lines can become blurred and volunteers might find the role emotionally challenging.

### When offering volunteer roles to service users, ask yourself:

- Do you want to be able to engage previous service users in volunteering? If so, why?
- Is there a clear timescale for transition, perhaps two-years between being a service user and moving into volunteering? This might be a mandatory timescale or some people might be ready to support others earlier.
- Is there a clear role description and good training setting out the boundaries?
- Have you explored the potential challenges with new volunteers?

### Help your volunteers to be self-aware and recognise if they need to step away from volunteering or take a break.

Where possible, ensure volunteers link with different staff from those who supported them. Make sure you regularly supervise and check-in too.



## Learning and development

Many organisations recognise the importance of upskilling their volunteers to deliver high quality services and to get the most out of their experience with learning and development; this helps with.

- Feeling part of the team, valued, recognised and motivated.
- Better retention.
- Greater confidence, resilience and well-being.
- Improved team efficiency.
- Volunteers adapting to changes.

It is recommended that you have a training plan for volunteers. First assess what the training need is. Training needs come from many sources, including changes in:

- The law.
- Service users' needs.
- Organisation's culture or structure.
- The volunteer role.

You can build learning and development solutions that are cost effective and have a measurable impact. Training can develop volunteers in their current role and support their personal development goals.

### **Here is a short menu of how we can meet development needs:**

- Volunteering in a new project.
- Online workshops and webinars.
- Coaching and mentoring.
- Education through community learning providers, colleges and universities.
- Self-directed research.
- Shadowing someone else.

Some organisations run tailor-made training courses during volunteer induction or as part of assessment around suitability for the volunteering role. Check out the training available through SCVS and NPTCVS.

New volunteers might benefit from having a mentor, a more experienced volunteer who can guide them, and this offers longer serving volunteers a new opportunity. Long term volunteers will benefit from ongoing training to meet changing demands and legal requirements. Support and supervision sessions are a good place to discuss these ongoing training needs, and training could become a fixed agenda item in group or 1-to-1 supervision. When considering training for volunteers, remember the amount of time volunteers have available, their own preferred learning style and the resources you have available; e.g. capacity, time, location, materials and budget!



## Accreditation or not accreditation?

Accreditation is a process where learning programmes are quality assured and 'badged' to confirm high quality standards of delivery and that it addresses specific learning objectives. Learners who follow an accredited programme usually have to demonstrate their learning, sometimes by producing assignments.

After meeting the requirements of the programme, they receive their accreditation in the form of a certificate, confirming their learning. Offering accredited training can attract new volunteers. One accreditation body used in the Third Sector is Agored. For more information contact **NPTCVS** and **SCVS**.

## Investing In Volunteers quality standard

Your organisation may wish to assess itself against a quality framework to ensure it is offering the best experience for volunteers. Check out this one and its indicators. If you do pursue the award it will probably be your role to steer the process and prepare the evidence. There are several options with The Investing in Volunteers award based on size of organisation and its volunteer base and budget. You can get more information from SCVS, NPTCVS & WCVA.

## Code of Practice for Organisations involving volunteers

Check out this best practice code setting out a checklist of points to ensure you are doing the best for your volunteers.



<https://wcva.cymru/wp-content/uploads/2020/01/Code-of-Practice-Cod-Ymarfer.pdf>



## Learning and development for a volunteer coordinator

Volunteer managers, like all managers, need support, and opportunities for training and development. Having good supervision and support and taking the time for continuing professional development are important for all coordinators. When the volunteer coordinator feels well supported, they can ensure they support their volunteers.

“Volunteer management training is so beneficial – get on a course as early as possible. This will give you confidence, help you build up a network of peers and shine a light on the issues you need to tackle first.”

“Volunteer management training is so beneficial – get on a course as early as possible. This will give you confidence, help you build up a network of peers and shine a light on the issues you need to tackle first.”

“Try to source on-going training, mentoring or personal development for you as a volunteer manager – your volunteers will benefit from it too!”

## Managing challenging situations

### Boundaries and handling volunteer behaviour

Perhaps one of the most difficult areas to deal with is how to deal with volunteers who behave inappropriately or who have difficulties with boundaries. Each organisation will have different guidelines. Understanding boundaries helps people volunteer confidently and reinforces service users' expectations.

#### Boundaries for volunteers may include:

- Not sharing personal details with the service users.
- Not handling people's money or accepting gifts.
- Not behaving in an offensive or discriminatory manner.

Outline expected behaviour in induction training, some may consider using a code of conduct. Having a clear understanding of what's expected in the role, and what isn't, helps protect volunteers and the service users.



## Managing difficult conversations

Don't be tempted to let difficulties, poor behaviour or conflict go unresolved. It's better to address issues early rather than waiting. Breaches of boundaries should be dealt with straight away. Refer to your policies on dealing with difficulties. They will guide you through the process. Manage difficult conversations with skill and confidence and watch out for these pitfalls.

- Avoiding the conversation.
- Responding with the same emotion.
- Delivering bad news by email.
- Trying to fill in the silence.
- Rushing to get it over with.

## Prepare yourself

- Have you got your facts?
- What's the purpose of the conversation?
- What specifically do you want to say?
- Look beyond the immediate situation – get to the root of the problem.
- Prepare yourself emotionally.
- Make sure you have time: to have the conversation and to take any follow-up action.

## The meeting

- Follow the guidelines in the appropriate policy and procedure.
- Use all your communication skills – ask great questions and listen deeply!
- Go into the meeting with a problem solving approach, willing to explore options and solutions. Is there an option to compromise?
- What external or personal factors might be affecting behaviour or performance? Have they had sufficient information, training and support? What further support can be offered?
- If you get stuck, what you can agree on and focus your attention on areas of difference.
- Work out your response if they reject your view of the situation.
- Stay calm!
- Monitor progress – ensure the problem doesn't recur.
- If the problem re-occurs – what do you propose to do?



## Asking volunteers to go

Most volunteering comes to a natural conclusion when a volunteer feels they are ready to leave an organisation or move on to other things. Occasionally there are circumstances when an organisation considers it necessary to ask a volunteer to leave, this may be formalised in an agreed and understood 'Letting Volunteers go' procedure. A volunteer will automatically be asked to leave if, they are found to have breached the agreed behaviours set out in induction/organisation's Code of Conduct.

Examples of this sort of behaviour include:

- Breaches of policies and procedures, especially confidentiality, health and safety and safeguarding.
- Theft and deliberate falsification of expenses claims.
- Acts of violence.
- Criminal convictions which affect the volunteer's suitability for the role.
- Abusive and Inappropriate behaviour, including harassment and discrimination.

It's important to look into any allegations before a meeting. Depending on the nature and seriousness, alternatives to leaving may include:

- Additional support and supervision.
- Further or repeated training.
- An alternative role within the organisation.

However it may be appropriate to finish the volunteer's role. The volunteer manager should tell the volunteer the decision in a meeting with them, perhaps with another member of staff and follow up with a letter confirming the decision and providing information on any arrangements.

Check out this information sheet:



<https://wcva.cymru/wp-content/uploads/2020/06/Managing-volunteer-exits.pdf>



## **This is the End!**

When volunteers leave, exit questionnaires, surveys or chats can help you to gain insight into why people have left. Leaving is not always a bad thing. Volunteering can help your volunteers to gain confidence, skills and experience which might take them onto other paths. Sometimes life takes our volunteers in other directions. As a volunteer coordinator you are part of their journey. Be proud! The volunteering landscape means some volunteers choose to get a variety of experiences and can't stay forever.

You maybe required to give them a reference. You did a great job!



## Part 2 - Informal Volunteering

[www.laurahamiltonconsulting.com/](http://www.laurahamiltonconsulting.com/)



### Introduction

The impact of the Covid-19 pandemic encouraged many of us to connect with others locally to help those in need. Some call it volunteering whilst others see it as helping their neighbours in difficult times.

This guide is for anyone who is involved in coordinating this type of informal volunteering. Coordinators have an overview of what help is happening, communicating with others in the group, managing WhatsApp or Facebook groups and problem solving. We often refer to guidance and information that can be found at your local CVS and links to this can be found at the end of this guide.

### Staying up to date

Keep up to date with guidance from local and national Government and/or from organisations such as Public Health Wales. You can then share accurate information with other volunteers and plan your activities accordingly. This will help reduce risks and ensure everyone stays as safe as possible.

#### Suggestions:

- Check websites and/or follow Government and Public Health Wales social media accounts for the latest information.
- Check with your local CVC or Wales Council for Voluntary Action for guidance around volunteering.
- Contact other community groups and organisations to share ideas and access useful practical information. This can help ensure you are not duplicating existing activities.
- Encourage everyone to check the sources of information shared in the group for accuracy. Delete inaccurate posts and explain why you have done so.
- Training for volunteers including the co-ordinator is a great way of staying up to date – your local CVC and/or local authority will be able to help you find good quality training which can be often be free or at a reasonable cost.

*Ahmed wants to organise a food and clothing collection for local people affected by flooding.*

*Ahmed checks the Local Authority's social media for guidance. He also speaks to his local foodbank to find out the process for dropping donations at the evacuation centre and what items are most needed. They advise that they want to minimise the number of people driving to the centre. Ahmed uses his street WhatsApp group to update volunteers. He puts out a request for the items that are needed and coordinates the collections so they can be taken and dropped off by one car.*



## Staying safe



### Suggestions:

#### Risks

- Complete a simple risk assessment, your local CVC can help: make a list of the risks and a list of the steps you can take to minimise them. Share this information with volunteers.
- Can you provide Personal Protective Equipment? e.g. masks/gloves, your local CVC can help. Remind others about using PPE.

## Clear roles and tasks

- Be clear about the tasks that your group can help with. It's ok to say no to additional requests and to limit support to a small geographical area.
- Make sure someone has an overview of requests for help, tasks and knows who is doing what, where and when.
- Share an induction sheet with new volunteers, this could include information about the type of help the group offers and things volunteers need to know to stay safe. It should also set out behaviours expected. Make it clear bullying nor behaving inappropriately towards people receiving support or volunteers is not tolerated.
- It could also explain how to signpost and what to do if volunteers have concerns.
- Staying safe if volunteering alone.
- Think about volunteering in pairs.
- Encourage volunteers to always let someone know where they are going and what time they expect to return.
- Make sure that volunteers understand that if they feel unsafe or threatened, their priority is to remove themselves quickly from the situation and go to a safe place.



## Managing financial transactions

- Have a clear and transparent system for purchasing/reimbursing the cost of shopping. This prevents need for volunteers to pay upfront and handle cash, which is much safer for everyone involved. Make sure that everyone is aware of the process.
- Think about using Supermarket Volunteer Shopping Cards, Bank Volunteer Cards, Post Office Payout Now or BACS transfers.
- Ask volunteers to provide a receipt for shopping/ photo of the receipt.
- Make sure that volunteers never use bank card and/or PIN numbers.
- Check those receiving shopping support agree the steps are being followed correctly.
- Consider opening a group bank account and getting public liability insurance. Your local CVC can provide further advice.

*Fiona co-ordinates a neighbourhood action group. She keeps a record of requests and who is volunteering. Fiona reminds volunteers to let her/ someone know where they are going and what time they expect to return. Fiona ensures the volunteers use the Supermarket Volunteer Shopping Card. Fiona checks regularly with those receiving shopping via the volunteers that all is well.*

## Looking after information

As a coordinator, you will have access to personal contact details and/or sensitive information including about people's health. Looking after personal information and respecting confidentiality keeps people safe and offers respect.

### Suggestions:

- Be clear about why you are asking for information, only keep the information you need and limit who you share it with.
- Store personal information securely – password protect devices and securely store paper documents.
- Delete information promptly when you no longer need it, (this can include WhatsApp chat) or if you are asked to.
- Encourage volunteers not to share personal contact details or sensitive information.
- Create a link to invite new volunteers to your WhatsApp or Facebook group.
- Your local CVC can provide guidance on GDPR.

*David set up a WhatsApp group for his street early on in the pandemic. David wants to make sure that personal details and requests from vulnerable neighbours are removed from the chat. As the admin, David enables the 'disappearing messages' function, which automatically clears that chat history after seven days.*



## Safeguarding is everyone's responsibility

We all have a responsibility to look after the safety and wellbeing of others and to report concerns. Anyone could be at risk of harm or abuse. It is important for volunteers to share concerns and information with their volunteer coordinator and to report to appropriate services such as the Police or the Local Authority.

### Suggestions:

- It is not the role of the volunteer coordinator nor the volunteer to investigate. Concerns should be passed as soon as possible to the appropriate service who will deal with the situation and act accordingly.
- If you have immediate concerns for someone's safety or you witness a crime, call 999.
- These situations can be upsetting and it is important to check in with the volunteer who reported concerns to make sure they are ok. Volunteer co-ordinators may also need support.

There are also simple steps we can take to make sure we are not putting people at risk.

### Suggestions:

- Make sure people are aware that this is a group of neighbours helping out and do not give the impression that you have carried out references, DBS checks etc.
- Be clear about what tasks you can and can't help with. Do not undertake personal care and you need to consider risks if helping in people's homes or transporting people by car.
- Make it clear that your group does not tolerate bullying, behaving inappropriately.
- Your local CVC can provide additional safeguarding guidance and training for community groups.

*Helwyn delivers shopping to her neighbour. When the neighbour answers the door, Helwyn notices that she has bruises around her wrist and up her arm. Helwyn asks if she is ok and her neighbour looks anxious but says everything is fine. Helwyn feels concerned as her neighbour is older and lives alone. Helwyn follows the information on her induction sheet, speaks to you and then contacts the Local Authority Single Point of Contact Team. You then check in with Helwyn afterwards.*



## Signposting to other services

There are a wide range of services and support organisations who are set up to best meet people's needs. Signposting to them is a good idea whether its regarding personal care, support with housing and finance, issues around domestic violence or health. Don't offer specific advice or guidance.

### **Suggestions:**

- As a coordinator, notice if volunteers seem to be over stepping boundaries and ensure steps are taken to signpost those receiving support to appropriate services.
- Local CVCs can provide your group with information about other organisations and support services for signposting.

*Derek's neighbour lives alone and has been struggling since having COVID-19. You notice that Derek seems to be providing daily meals for his neighbour. You message Derek to remind him of a local organisation providing hot meals and local food projects including the food bank, which he can pass on to his neighbour.*

## Supporting each other

Volunteering can have both positive and negative impacts on our emotional wellbeing. As a coordinator, you may have to deal with stressful situations or conflict in the group.

### **Suggestions:**

- Looking after yourself is important. Arrange down time, when you are not volunteering spend time doing things that you enjoy. Share reminders in the group about self-care and remind people to positively manage their time. Be kind to yourself and others.
- Welcome new volunteers and introduce them to others.
- Check in regularly 1-2-1 with all volunteers and encourage the volunteers to get to know each other.



## Sharing what we learn

Tap into your volunteers' valuable insights, record successes or unmet need and share with your local authority and CVCs. The difference you have made locally may encourage your group to develop. This may include growth, creating more formal processes and changing the way you are organised.

### **Suggestions:**

- Reflect together on what is happening in your area and what you are learning.
- Listen to everybody involved: volunteers and those receiving support.
- Link with your local CVC and local authority to share you learning and to show the need for your provision.
- Reach out for information, training and guidance to help your group develop.

**Thank you for making  
a difference locally!**





## Who can help?



Swansea CVS:  
<https://www.scvs.org.uk/>



Neath Port Talbot CVS:  
<https://www.nptcvs.wales>



Wales Council for Voluntary Action for information about volunteering:  
<https://wcva.cymru/>

## Safety & Safeguarding

The Suzy Lamplugh Trust has a range of advice about personal safety and lone working:



<https://www.suzylamplugh.org/>

## Resources:

Informal Volunteering Info sheet:



<https://www.scvs.org.uk/Handlers/Download.ashx?IDMF=998820e5-5536-42eb-9253-67b1d8fdb6b2>

Volunteering via Swansea Local Area Coordination film:



<https://www.youtube.com/watch?v=SIX9USxtioM>

Safeguarding information:



<https://www.safeguarding.wales/>

## Reporting concerns in our region

Swansea Child and Family Integrated Information, Advice and Assistance Service 01792 635700 or

[access.information@swansea.gov.uk](mailto:access.information@swansea.gov.uk)

Swansea Common Access Point for Health and Social Care (for adults and carers)

01792 636519

07796 275412

[CAP@swansea.gov.uk](mailto:CAP@swansea.gov.uk)

Neath Port Talbot's Adult's and Children's Single Point of Contact Team (SPOC)

[spoc@npt.gov.uk](mailto:spoc@npt.gov.uk)

01639 686802

**West Glamorgan Volunteering Support** is a multi-agency project creating shared resources to develop the knowledge, management and coordination of volunteers and volunteer involving organisations across the Swansea and Neath Port Talbot areas. It has been funded through the Welsh Government Volunteering Recovery Fund.

**The project partners are:**

Neath Port Talbot Council, Neath Port Talbot Council for Voluntary Service, Swansea Bay University Health Board, Swansea Council, Swansea Council for Voluntary Service and West Glamorgan Regional Partnership.

**For more information visit:**  
**[www.westglamorgan.org.uk/wgvs](http://www.westglamorgan.org.uk/wgvs)**