



GUIDANCE: MANAGING VOLUNTEERS CHECKLIST

Volunteer Recruitment:

- Define the roles and responsibilities of volunteers.
- Develop clear and detailed volunteer job descriptions.
- Create an application process for potential volunteers.
- Conduct interviews to assess the suitability of volunteers for specific roles.

Volunteer Training:

- Provide comprehensive training to volunteers for their respective roles.
- Include information about the charity's mission, values, and policies.
- Offer specific training related to the tasks they'll be performing.
- Ensure volunteers understand health and safety protocols.

Volunteer Onboarding:

- Welcome new volunteers and introduce them to the team and other volunteers.
- Provide necessary documentation, including volunteer agreements and confidentiality forms.
- Give a tour of the charity's facilities and explain emergency procedures.

Volunteer Support and Supervision:

- Appoint a dedicated staff member to be the point of contact for volunteers.
- Schedule regular check-ins to provide guidance and address any concerns.
- Encourage open communication and feedback.

Volunteer Recognition:

- Establish a volunteer recognition program to appreciate their efforts.
- Celebrate milestones and achievements of volunteers.
- Consider nominating outstanding volunteers for awards or public recognition.

*Guidance is taken from publications on NCVO – The National Council of Voluntary Organisations

Volunteer Scheduling:

- Organise a clear schedule for volunteer shifts and activities.
- Use scheduling tools or software to efficiently manage volunteers' availability.

Volunteer Database:

- Maintain a database of volunteers, including their contact information and roles.
- Keep records of training, certifications, and other relevant information.

Health and Safety:

- Conduct risk assessments and implement safety measures for volunteer activities.
- Ensure volunteers are aware of health and safety protocols.

Equal Opportunities and Diversity:

- Promote equal opportunities and diversity among volunteers.
- Prevent discrimination and create an inclusive environment.

Volunteer Exit Process:

- Conduct exit interviews to gather feedback from departing volunteers.
- Acknowledge their contributions and express gratitude for their service.

Legal and Compliance:

- Ensure that volunteers understand and adhere to the charity's policies and procedures.
- Comply with all relevant legislation, including data protection and volunteer rights.

Volunteer Events and Meetings:

- Organise regular volunteer meetings to discuss progress and upcoming activities.
- Plan volunteer appreciation events to foster a sense of community.



GUIDANCE: CHOOSING AND IMPLEMENTING A VOLUNTEER MANAGEMENT SYSTEM

Choosing and implementing a volunteer management system

A volunteer management system is software that helps you to recruit, train, engage and retain your volunteers in one centralised space.

Volunteer management systems: what is available

There are a number of volunteer management systems to choose from. Different volunteer management systems are often aimed at organisations of different sizes and vary in cost and functionality. Some of the most popular systems include:

- [Assemble](#): a popular option with easy customisation and an app
- [Three Rings](#): offers a handy rota tool so excellent for managing mass shifts
- [Team Kinetic](#): has both free and paid options and works as a brokerage service for volunteering opportunities
- [Volunteero](#): good for charities of different sizes
- [Better Impact](#): has options for volunteer management and for donor, member and client relationship management

Key consideration for choosing a volunteer management system

Be realistic

A volunteer management system is merely a tool. It should be complemented by policies and processes put in place to support your organisation's objectives. It will take time to get up and running and even longer to get a system fully embedded.

Be clear about your requirements

During the procurement process you need to outline your requirements and in a way that suppliers can understand. Your requirements should be focused on the problems/issues you want to address and what you are trying to achieve with this new system. Engage with and really try and gather as much information as possible from those that work closely with and or manage volunteers along with volunteers themselves.

*Guidance is taken from publications on NCVO – The National Council of Voluntary Organisations

Know your audience

You should have a clear understanding of who the system is for. It can be helpful to have your own working definition of a 'volunteer' that is understood by everyone and allows for any future volunteer roles. This will help ensure a shared understanding of the target audience.

Prioritise and compromise

Be clear about what is a priority. You can prioritise requirements by putting them into three categories: Must (absolutely no compromise), Should (really serious problem without it) and Could (nice to have). Be careful not to end up with all requirements in the 'must' category.

Where to go for further guidance and support

- Charity Digital: [This article from Charity Digital](#) gives an overview of how to prepare for implementation and a list of volunteer management systems
- NCVO: [page on choosing new software](#) and digital tools can help.



GUIDANCE: COORDINATING VOLUNTEERS

Coordinating volunteers

- Volunteer coordinator roles
- Volunteer management in other roles
- Support for volunteer coordinators

It's important that volunteers have someone to support them. This helps them do their role well and be safe.

It takes time to recruit, train and support volunteers. This should be a clear part of someone's role, not added to an already busy workload.

Volunteer coordinator roles

A volunteer coordinator is generally responsible for organising volunteers.

Some organisations call this role a volunteer manager or volunteer organiser.

A volunteer coordinator's role often includes:

- finding tasks for volunteers to do
- recruiting volunteers for the organisation

*Guidance is taken from publications on NCVO – The National Council of Voluntary Organisations

- supporting and supervising volunteers
- highlighting the role volunteers play in the organisation
- making changes to roles to make them more inclusive and accessible, for example to disabled volunteers
- developing volunteers and helping them move into new roles.

Volunteer management in other roles

Sometimes people responsible for volunteers have other job titles or roles. Working with volunteers will still be an important part of their job.

For example, a fundraising manager might have to support events volunteers.

Volunteer management is a unique and valuable skill. It's important to make sure anyone working with volunteers has the time and resources to do this well.

Support for volunteer coordinators

- Anyone who manages volunteers in England (including volunteers themselves) can join the [Association of Volunteer Managers \(AVM\)](#).
- People who manage volunteers in the heritage sector can join the [Heritage Volunteering Group](#).
- [National Association of Voluntary Service Managers \(NAVSM\)](#) is a network that supports volunteer managers in the NHS.
- [Association of Voluntary Service Managers](#) is a network of volunteer managers in hospice and palliative care.



GUIDANCE: DISMISSING A VOLUNTEER

Dismissing a volunteer

- Dismissal meetings
- Example

Asking a volunteer to leave should always be a last resort when other ways to solve a problem haven't worked. See our [guidance on solving volunteer problems](#).

*Guidance is taken from publications on NCVO – The National Council of Voluntary Organisations

In rare cases, it's a necessary response to a serious breach of conduct. You might also need to ask a volunteer to leave because of changes to a service, for example, because it's closing. Read our [guidance on ending volunteering well](#).

Dismissal meetings

Dismissing a volunteer is never easy. You'll need to take time to prepare for this conversation.

Make sure you:

- have followed a problem-solving process
- schedule a time to meet with the volunteer, giving them enough notice
- offer them the chance to have somebody with them if they would like
- explain to them that they're being asked to leave and why
- thank them for their contribution
- keep the meeting short and follow it up in writing.

Volunteers will want you to treat them with fairness. Although they aren't covered by employment law, you shouldn't discriminate against them.

While it's difficult, take the opportunity to learn from this experience. Consider what steps you could put in place to avoid having to dismiss volunteers in future.

Example

Jenny works with several volunteers at a library. Someone reports one of the volunteers for using racist language. On investigating further, Jenny finds this has happened several times.

Jenny meets with the volunteer and asks them what happened. They admit to using the racist language but say they don't see why this was wrong. She explains why their actions don't meet the library's expectations of its volunteers. She also explains why their behaviour is a reputational risk for the library.

The volunteer continues to say they didn't do anything wrong. Jenny tells them they may no longer volunteer at the library. Later she checks that the role description shows what they expect from volunteers. She also makes sure equity, diversity and inclusion training is part of the induction.



GUIDANCE: ENDING VOLUNTEERING WELL

Ending volunteering well

- Why volunteers leave

*Guidance is taken from publications on NCVO – The National Council of Voluntary Organisations

- Ending volunteering checklist
- When volunteers leave suddenly
- Organisational change

Why volunteers leave

There are many reasons why volunteers stop volunteering. Often, these are positive. For example, the volunteer might have a new job or feel they've done what they can. Some roles are only needed for a short time.

Volunteers can also leave for negative reasons. They might be feeling unappreciated, or that they are not making a difference. You can reduce the chances of this happening by supporting your volunteers well.

See NCVO [guidance on supporting and managing volunteers](#).

Ending volunteering checklist

Here are some things you can do to end a volunteer's time at your organisation well.

- Ask the volunteer for their feedback, both good and bad. You can use a questionnaire or have a chat.
- Thank the volunteer and recognise the contribution they've made.
- Plan with the volunteer to handover their ongoing activities to others.
- Offer a reference to the volunteer. This can help if they're looking to volunteer or work elsewhere.
- Check if the volunteer would like to stay in touch or receive updates about the organisation's work, and how.
- Ask them to return any data or equipment, such as laptops or building passes. After they've left, you'll also need to remove their access to any internal systems.

See NCVO [guidance on thanking volunteers](#).

When volunteers leave suddenly

Sometimes volunteers stop volunteering without telling you. They might stop signing up to shifts or answering your attempts to contact them.

While this can be difficult, it's good to give people the benefit of the doubt. Sometimes volunteers feel they're letting someone down in stopping volunteering. They may feel it would be an awkward conversation.

If you have tried several times to contact a volunteer but haven't heard back, then decide when you'll stop.

If you think a volunteer may be at risk, follow your organisation's safeguarding process.

See the NCVO [guide to safeguarding for volunteer managers](#).

*Guidance is taken from publications on NCVO – The National Council of Voluntary Organisations

Organisational change

Sometimes volunteers have to leave because of changes in your organisation. For example, funding for the service they support may be ending, or their role may have changed.

In such cases it can be a challenge to end things well. Volunteers may resent the changes or feel their efforts are not appreciated.

It's important to take the time to communicate upcoming changes to volunteers. Explain why the changes are happening and try to involve volunteers in decision-making. This will help them understand and be supportive of change.

There may be other ways they can continue to support the organisation. Make sure it's clear and easy for them to get involved in other ways if they wish to do so.



GUIDANCE ON RUNNING A VOLUNTEER INDUCTION

Running a volunteer induction

- What volunteer inductions are
- What to include
- Sharing more information
- After the volunteer induction

What volunteer inductions are

Volunteer inductions introduce new volunteers to your organisation and their role.

They help volunteers feel more confident and able to start their roles well. This is an important part of offering a good volunteering experience.

Volunteers come from many backgrounds, with different skills, experiences and motivations. It's important to run volunteer inductions that work for your volunteers, as well as the role they will be in.

What to include

Start by covering practical information about a volunteer's role. You should:

- check they understand their role and what you expect of them
- introduce them to other staff and volunteers
- show them around the place where they will be volunteering

*Guidance is taken from publications on NCVO – The National Council of Voluntary Organisations

- explain who they can go to if they have any questions or problems
- show them where they can find the resources they need
- let them know about breaks
- explain how to claim expenses
- ask them to shadow other experienced volunteers or paid members of staff
- make sure they have anything else they need to be able to volunteer successfully, such as flexibility around childcare.

Sharing more information

It's also good to share more information about your organisation and the role.

This often includes:

- policies and procedures, such as safeguarding, equal opportunities or data protection
- the organisation's history, values and structure
- how to deal with complaints and areas of concern
- different aspects of the volunteer's role
- your organisation's volunteer agreement.

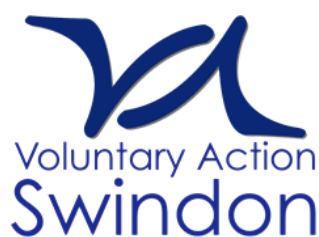
You should go through this information with the volunteer. Encourage them to ask questions about anything they aren't sure about.

It often helps volunteers if you also give them this information in a handbook or pack. Ask them if they need the information in another format, such as large print or as an audio recording.

After the volunteer induction

Continue to check in with new volunteers after their induction. This will help you to understand how they work, what support they need, and what they hope to gain from their role. It will also give them another chance to ask questions or request more support if they need to.

Some volunteers will need a longer induction process or more training to do their role. This will depend on the role and level of resources available. Make sure it's clear to volunteers what their induction period will involve and how long it will last.



Investing in volunteers (iV) Essentials

*Guidance is taken from publications on NCVO – The National Council of Voluntary Organisations

Investing in volunteers (liV) Essentials

- How it works
- Getting started
- Contact us

liV Essentials is a free online tool designed especially for volunteer-involving groups and organisations. It was developed nationally and is supported by NCVO, Volunteer Now, Volunteer Scotland and WCVA.

This tool will help you do a basic health check on your volunteer practice. It covers the basic areas to model good practice for involving and managing volunteers. It will help you to think about volunteers' experiences and how volunteers can help make the biggest difference to your cause.

liV Essentials is based on the six core areas that make up [Investing in Volunteers](#).

How it works

The tool asks you 12 questions, each with a brief explanation to support your discussions and asks you to rate how fully your group or organisation is addressing each question. Where you identify areas for development you can make notes to start your own action plan to help address areas for improvement.

liV Essentials can be used:

- as a way to do a basic 'health check' on your practice to make sure that your volunteers have the best possible experience and can make the biggest difference to the cause
- as a sensible 'health check' for any new volunteer initiatives or for existing volunteering that has undergone change (developed or grown) during covid-19
- as a simple and easy way to get started on improving the volunteer journey at your organisation
- as a tool to engage everyone in your group or organisation in discussions about your volunteer involvement
- if you want to move on to use the full Investing in Volunteer quality standard development journey in the future.

Getting started

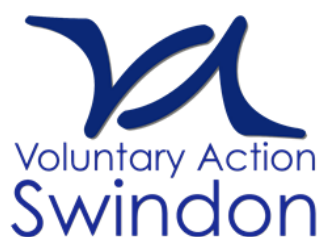
To get started, [visit liV Essentials](#) where you'll sign up and receive your own unique link to a bespoke version of the tool. This will take you back to your answers and results at any time and allow you to update them.

Contact us

To talk to someone about the liV Essentials tool please contact the liV manager for your country:

*Guidance is taken from publications on NCVO – The National Council of Voluntary Organisations

- [England](#)
- [Scotland](#)
- [Northern Ireland](#)
- [Wales](#) – you can download a Welsh version of liV Essentials below. Please [contact WCVA if you have any questions](#).



GUIDANCE: KEEPING VOLUNTEERS

Keeping volunteers

- Meet volunteers' motivations
- Make it as easy as possible to volunteer
- Value volunteers' contributions and time
- Offer volunteers development opportunities

Meet volunteers' motivations

The best way to keep volunteers is to make sure what they do meets their motivation for giving their time.

Each volunteer will have different reasons for volunteering. Be flexible and open to meeting your volunteers' needs where possible, but be clear if a role will not be a good match.

Make sure roles are meaningful. Volunteers should get some enjoyment or fulfilment from volunteering. They should feel welcome in the organisation and able to be themselves.

See [guidance on supporting volunteers](#) on the NCVO webpage.

Make it as easy as possible to volunteer

Remove any unnecessary barriers to getting and staying involved. If processes or systems are difficult to use, raise this with your organisation.

Give volunteers the information they need to do their role and keep them updated in the way they prefer. Make sure they hear about any important updates or changes as soon as possible.

Make sure volunteers are not out of pocket when they volunteer by paying their expenses.

If volunteers' situations change, explore how they might stay involved. This could be in the same role, or by supporting in a different way.

*Guidance is taken from publications on NCVO – The National Council of Voluntary Organisations

See [guidance on paying volunteer expenses](#) on the NCVO webpage.

Value volunteers' contributions and time

Giving time is a valuable donation. It's important to respect this. Avoid asking volunteers to do unnecessary tasks for the sake of it.

Take an interest in your volunteers and get to know them, where this is possible. Be sure to thank your volunteers and highlight their efforts.

Listen to and seek volunteers' thoughts, ideas and suggestions. Make sure they have a voice in the organisation, and can contribute to how it works and makes decisions.

If there are complaints or problems, make sure to handle these fast and with fairness.

See guidance on from NCVO on:

- [thanking volunteers](#)
- [solving volunteer problems](#).

Offer volunteers development opportunities

Some volunteers will have management or leadership skills and experience.

Giving them more responsibility can be very rewarding for all. For example, they could help you recruit or support other volunteers.

Offering opportunities that develop a volunteer's skills helps maintain their interest. This is true even when they find their usual role very fulfilling.

See NCVO [guidance on training volunteers](#).



GUIDANCE: RISK EVALUATION - VOLUNTEERS

Introduction:

Volunteers play a crucial role in the success of charities in the UK by dedicating their time and skills to support various causes. However, engaging volunteers also presents certain risks that must be assessed and managed to ensure the safety of the volunteers, beneficiaries, and the charity itself. This risk evaluation aims to identify potential risks associated with volunteers in a UK charity and propose appropriate measures to mitigate these risks effectively.

Health and Safety Risks:

- a) Injury during volunteering activities: Volunteers may be exposed to physical risks while participating in activities such as event setup, manual labour, or working with equipment.
- b) Work-related stress and burnout: Volunteers who are overcommitted or not adequately supported may experience stress or burnout, affecting their well-being and performance.

Mitigation Measures:

- Conduct thorough risk assessments for all volunteer activities and provide appropriate training to minimise physical risks.
- Implement health and safety guidelines, ensuring volunteers are aware of the protocols and their responsibilities.
- Monitor volunteers' well-being and workload to prevent burnout and provide support when needed.

Safeguarding Risks:

- a) Vulnerable beneficiaries: Volunteers working with vulnerable groups, such as children, elderly, or individuals with disabilities, may be at risk of unintentional harm or allegations of misconduct.
- b) Unsuitable volunteers: Inadequate screening of volunteers may lead to individuals with malicious intent joining the charity.

Mitigation Measures:

- Develop robust safeguarding policies and procedures, including background checks, references, and DBS (Disclosure and Barring Service) checks for volunteers working with vulnerable groups.
- Provide clear guidance and training to volunteers regarding appropriate behaviour and interactions with beneficiaries.
- Establish reporting mechanisms for any concerns or incidents related to safeguarding.

Data Protection and Confidentiality Risks:

- a) Access to sensitive information: Volunteers may have access to personal and confidential data, risking data breaches or misuse.
- b) Lack of awareness of data protection regulations: Volunteers may inadvertently mishandle data due to a lack of awareness.

Mitigation Measures:

- Limit access to sensitive information on a need-to-know basis and ensure volunteers sign confidentiality agreements.
- Provide data protection training to all volunteers, emphasizing the importance of safeguarding personal data.

Financial Risks:

- a) Mishandling of funds: Volunteers involved in fundraising or financial activities may mishandle funds, leading to financial losses or reputational damage.

*Guidance is taken from publications on NCVO – The National Council of Voluntary Organisations

- b) Fraudulent activities: Inadequate oversight could lead to fraudulent actions by dishonest volunteers.

Mitigation Measures:

- Implement clear financial procedures, ensuring proper checks and balances for handling funds.
- Assign multiple volunteers to oversee financial activities to minimize the risk of fraudulent behaviour.

Public Perception Risks:

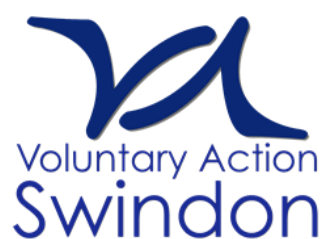
- a) Misrepresentation of the charity: Volunteers acting on behalf of the charity may unintentionally misrepresent the organisation's values or objectives.
- b) Social media risks: Volunteers' actions on social media can impact the charity's reputation.

Mitigation Measures:

- Provide volunteers with clear guidelines on representing the charity and communicating its message accurately.
- Monitor and guide volunteers' social media activities to ensure alignment with the charity's values.

Conclusion:

Volunteers are invaluable assets to a UK charity, but their engagement must be accompanied by a comprehensive risk evaluation and management strategy. By identifying potential risks and implementing appropriate mitigation measures, charities can ensure a safer and more effective environment for their volunteers and beneficiaries, while safeguarding the charity's reputation and mission. Regularly reviewing and updating these risk assessments will help adapt to changing circumstances and evolving risks over time.



GUIDANCE: SOLVING VOLUNTEER PROBLEMS

Solving volunteer problems

- Identify problems
- Have a problem-solving process
- Investigate the problem
- Take action

*Guidance is taken from publications on NCVO – The National Council of Voluntary Organisations

- Possible solutions
- If the problem continues
- Learning and improving

Volunteers bring many benefits to organisations, but sometimes there are problems.

Taking fast, fair action to solve issues reduces the risk that volunteers will leave. It also reduces risks to the organisation's reputation.

Identify problems

Problems you might face with your volunteers could include:

- volunteers struggling to do what the role asks
- volunteers doing too much and feeling overwhelmed
- difficult behaviour, such as not getting on with others or not turning up when they say they will
- volunteers being unhappy with things the organisation is doing or not doing.

More serious problems carry a reputational risk to the organisation. These could include:

- bullying or harassment
- sharing confidential data
- fraud or stealing funds
- being under the influence of alcohol or drugs.

Problems with volunteers often aren't very different to problems with paid staff. But you'll need to handle them in a different way.

Have a problem-solving process

It's important to have a problem-solving process for volunteers. This makes it clear to staff and volunteers what to do if something goes wrong.

This should be separate from a disciplinary and grievance process for paid staff. It can link to your complaints process, which you should share with your volunteers.

Your problem-solving process should cover:

- who the problem-solving process is for
- what's seen as a problem, so everyone is clear when the process will apply
- who is responsible for handling different kinds of complaints
- steps to the process, such as fact-finding, an initial meeting, followed by a review meeting, and who is responsible for these
- what happens if problems continue
- what happens in the case of serious breaches in conduct

*Guidance is taken from publications on NCVO – The National Council of Voluntary Organisations

- how volunteers can appeal any decisions they're unhappy with.

Investigate the problem

Talk to the volunteer and find out the facts. If the problem involves several volunteers, try to speak to all involved.

If you are investigating a problem:

- avoid taking sides
- listen to what people have to say
- don't become defensive
- try to stick to facts
- avoid blame.

Once you understand the issue, you can work out the best course of action.

If it's difficult for you to remain fair and objective, involve someone else in the process.

Take action

Explain to the volunteer what the problem is and the impact it has had. They may be unaware of the issue and drawing their attention to it could fix things.

Avoid blaming the volunteer, as the problem may not be their fault. Approach it as trying to tackle the problem together.

Decide with the volunteer what they would like to happen and how you'll try to solve the problem. Involving volunteers in the solution will help make it a success.

Finally, agree when and how you will review progress.

Possible solutions

Be flexible and open to doing things in a different way. Here are some solutions you could try.

- Re-explain the role and expectations. A reminder of the role, its boundaries and what you expect from the volunteer may solve the issue.
- Offer more support or training. Sometimes it takes people a little longer to learn new skills. If the volunteer is struggling with their role or part of it, they might need more support.
- Change their tasks. If a task is causing an issue, see if someone else could do it or if the volunteer could do it in another way. Other resources could also help.
- Offer another role. If the role isn't meeting the volunteer's expectations, see if they can support you in another way. Set a time frame for trying out any new roles, approaches or behaviour.

If the problem continues

If the problem doesn't improve, you'll need to try another solution. Set a time to review things again.

*Guidance is taken from publications on NCVO – The National Council of Voluntary Organisations

You'll need to be clear with the volunteer what will happen if the problem isn't solved. For more serious problems, you might need to dismiss the volunteer.

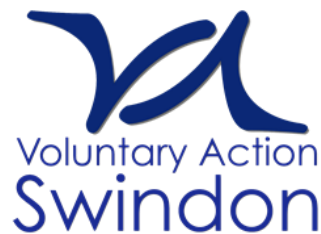
If there's no improvement, it's likely the volunteer will decide to leave by themselves. Try to handle this as well as possible. Make sure they are clear about the process and what you've done to try and solve the problem.

See [guidance on dismissing a volunteer](#) on the NCVO webpage.

Learning and improving

Problems are an opportunity to learn and think about how to do things better. This will help you avoid issues in future.

- Check that your roles meet volunteer expectations. Is it clear in your volunteer agreement what they're being asked to do and how?
- Review how you recruit volunteers. Do you expect them to come with certain skills or abilities and do you check this?
- Make sure your induction and training covers what it needs to. You should also check that volunteers find it useful.
- Make sure the support volunteers get is right for the role they do. Check that your policies and processes are easy to find and understand.
- Make sure volunteers hear about what they need to, when they need to. Communicate with them in clear language, without lots of jargon.



GUIDANCE: SUPPORTING VOLUNTEERS

Supporting volunteers

- Supervising volunteers
- Encouraging feedback
- Peer support

After you've recruited your volunteers, they will need support. You should decide what level of support and supervision you need based on possible risks.

You can offer regular meetings with volunteers to see how things are going and get to know them.

You could talk about:

- what they are enjoying about their role

*Guidance is taken from publications on NCVO – The National Council of Voluntary Organisations

- successes they have had
- difficulties they've had
- support or training they might need going forward.

It can be hard to find time to talk to each volunteer, especially if you are responsible for many. But it's essential to give volunteers the opportunity to give and receive feedback.

Make it clear who volunteers should contact if they have a problem, and when this help is available. If volunteers are active in the evenings or weekends, you may need to offer support at those times.

Supervising volunteers

Some volunteer roles will be easier to oversee than others. If volunteers are at home or in the community, you won't be able to check what they are doing all the time. Nor would that feel like a positive experience.

Give people the resources and guidance they need so that they can be as independent as possible. A reporting or logging system helps you see what volunteers have done. Debriefs at the end of shifts let volunteers talk through their tasks and any concerns they had.

Make sure it's clear to everyone who has responsibility for supervising volunteers. This might be a different person from the one who recruited and chose the volunteers.

Roles that are emotionally demanding or more specialist might need further supervision. Some volunteers offer caring or clinical services, such as counselling or psychotherapy. Be clear how they will get supervision to meet professional and ethical standards.

Encouraging feedback

Feedback from volunteers is vital to providing a good experience. You can learn what they enjoy about volunteering and what might be causing them problems. You can also find out how useful the training and support you offer is for their role.

There are different ways of getting feedback from your volunteers. You could:

- use questionnaires
- do interviews
- set up groups of volunteers to come together and discuss things you would like feedback on.

Peer support

Volunteers are often the best support for each other. Make it easy for volunteers to speak to and learn from others. You can do this by setting up group sessions, having a buddy system or by having online spaces they can use.

In some roles, it's useful to have two or more volunteers volunteering together. Try to offer a range of options to suit different lifestyles and commitments.



GUIDANCE: TRAINING VOLUNTEERS

Training volunteers

- Why train volunteers
- What training to give
- How much training to give
- More support

Why train volunteers

It's your organisation's responsibility to make sure volunteers can carry out their role. Training is one way to make sure they're well prepared.

If their training is good, volunteers will feel more able to do their role. This is likely to make them want to continue volunteering.

Volunteers may be hoping to enhance their CVs or to develop new skills by volunteering. Training is often a way to meet this need.

For new volunteers, see NCVO [guidance on running a volunteer induction](#).

What training to give

You'll need to train volunteers on whatever they need to feel confident doing their role. This will vary depending on what they do and the skills and experience they already have.

Training can involve:

- shadowing other volunteers or staff
- reading resources
- online workshops
- formal lessons
- external courses.

Support and supervision sessions also provide training opportunities. Here volunteers can think about their work and how they contribute to the organisation.

Some volunteers will take longer to build their skills and confidence. In these cases, make sure you continue to provide the training they need.

*Guidance is taken from publications on NCVO – The National Council of Voluntary Organisations

How much training to give

To decide how much training to offer, think about:

- how much time volunteers have available
- how they prefer to learn
- what they need to be able to volunteer successfully
- what resources you have, such as staff time, materials and budget.

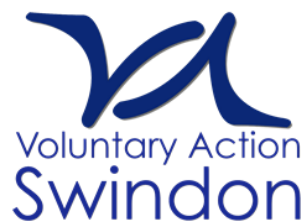
Depending on your resources, volunteers may get the same training as a paid member of staff.

Keep training relevant and appropriate to the volunteer's role. This avoids taking up too much of the volunteer's time.

It also makes sure training isn't seen as a perk or reward, which could make the volunteering look like paid work.

More support

- For more guidance on training, learning and development, visit [The Chartered Institute of Personnel and Development \(CIPD\)](#)



GUIDANCE: DATA PROTECTION AND VOLUNTEERS

The data protection principles

Section 4 and Schedule 1 of the act set out the eight data protection principles. Personal data must be:

- used in a fair and lawful way
- collected for a lawful reason and not be used for anything that is not part of this reason
- adequate, relevant and not excessive for the reason for which it was collected
- accurate and kept up to date
- not kept longer than needed
- collected and stored in ways that respect the data subjects' rights
- kept with appropriate security measures

*Guidance is taken from publications on NCVO – The National Council of Voluntary Organisations

- not moved to a country or territory outside the European Economic Area unless the country or territory has laws that protect data subjects from their personal data being used inappropriately.

Fair processing

Personal data should only be used for one or more of the following reasons.

- The individual has given consent for the data to be used. This means: he or she knows who is using the information, what for and who it is likely to be given to. Consent can be implied if it is obvious what the information will be used for – eg application forms.
- It is needed to carry out a contract that the individual is a part of or to make a contract that the data subject has asked to be a part of.
- The processing is necessary to comply with a legal obligation that the data controller is under, other than an obligation implied by contract.
- It is necessary for the administration of justice or for other specified purposes, including public or statutory functions
- It is needed to protect the ‘vital interest’ of the data subject. Vital interest is ‘a life or death situation’ according to the Information Commissioner’s guidance – for example, disclosing medical information where it could save a person’s life.
- Where processing information is in the ‘legitimate interests’ of the data controller or a third party. This is to allow for the reasonable use of data which falls outside the other fair processing conditions. This has to be balanced with the interests of the individual, and be a fair and lawful use of the information.

Apart from the first condition, where the data subject has given consent, the conditions are based on ‘necessity’ – needing the information. Necessity is not defined in the act, but as a guide an organisation could think about whether its obligations or aims can be reached without collecting or using the information – if not, the information could be seen as necessary.

Sensitive personal data

Some personal information is particularly sensitive. This ‘sensitive personal data’ has tighter rules about how it can be used. It is defined as personal data that includes information about the data subject, which includes:

- racial or ethnic origin
- political opinions
- religious beliefs or other beliefs of a similar nature
- membership of a trade union (within the meaning of the Trade Union and Labour Relations (Consolidation) Act 1992).
- physical or mental health or condition or medical history
- sexual life
- criminal record (or allegations that they’ve committed an offence)

*Guidance is taken from publications on NCVO – The National Council of Voluntary Organisations

- details of criminal proceedings taken against a person, including any sentences.

As well as meeting one of the [‘fair processing’](#) reasons listed, there are separate conditions that need to be met for sensitive personal data to be used, such as the data subject giving explicit consent.

Individuals’ access to information about them

The Data Protection Act 1998 says that people who want to see data held about them can write to the data controller to ask for this. This is called ‘subject access’. The data controller can charge up to £10 and must reply promptly (within 40 days of receiving the fee).

The response should include information about:

- what data they have about the data subject
- how and why the data is being used
- details of anyone who may see the data.

The data subject cannot always see this information, for example:

- if it involves also giving information about another individual
- if it is being held for certain research purposes
- in some social work agencies
- if it might harm the physical, mental or emotional health of the individual.

Volunteer records

There are no clear guidelines about how long volunteer records should be kept.

Organisations regulated by a body such as the Care Quality Commission must follow the guidelines from the appropriate guidance or inspecting/regulating body. Other organisations should follow the data protection principle that data should not be kept longer than for the purpose which it was taken. For example, contact details of people who have enquired about volunteering but have not wished to progress to becoming volunteers should not be held.

The [Disclosure and Barring Service Code of Practice](#) says that disclosures must not be kept for longer than six months, except in exceptional circumstances. In its general guidance it recommends that organisations speak to the DBS if they think they may need to keep disclosures for longer.

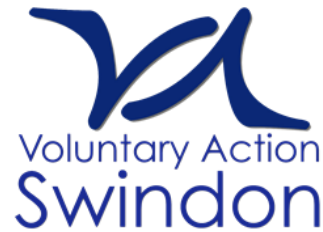
Organisations subject to regulation and inspection by bodies such as the Care Quality Commission may need to keep records between inspections.

Organisations working in areas with particular health and safety concerns – such as work with hazardous substances – should look for guidance on legal requirements for keeping health and safety records.

Records about accidents should be kept for at least three years – the time limit for personal injury claims under the Limitation Act 1980. There can be exceptions to this if long-term health effects may emerge, as with asbestosis. The three-year limit then starts when the individual is first aware of the problem.

*Guidance is taken from publications on NCVO – The National Council of Voluntary Organisations

Organisations that have volunteers who give advice or similar services should be aware that the Limitation Act 1980 says there is a six-year time limit for damages claims that are not about personal injury. A case like this might require training records and similar information to show that the organisation took the right steps to avoid damage.



GUIDANCE: EQUITY, DIVERSITY AND INCLUSION IN VOLUNTEERING

Equity, diversity and inclusion in volunteering

- Volunteering and the Equality Act
- Make sure volunteers understand equity, diversity and inclusion
- Promote diversity among volunteers
- More support

Everyone should be able to make a difference through volunteering.

Whatever their background, your organisation should treat its volunteers with equity and fairness. It should also help them see how equity, diversity and inclusion relates to their role.

Volunteering and the Equality Act

The Equality Act protects people against discrimination because of protected characteristics. It defines these as:

- age
- disability
- gender reassignment
- marriage and civil partnership
- pregnancy and maternity
- race
- religion or belief
- sex
- sexual orientation.

*Guidance is taken from publications on NCVO – The National Council of Voluntary Organisations

Volunteers aren't legally protected by the Equality Act in the same way as employees. But it would be very poor practice to discriminate against a volunteer.

In theory, the law could consider volunteering as a service offered to volunteers. This would mean the Equality Act would apply, but this has not been tested in court.

Learn more about [what the Equality Act means for voluntary sector organisations](#).

Make sure volunteers understand equity, diversity and inclusion

Organisations that deliver services must uphold the Equality Act and avoid unlawful discrimination. This includes keeping people working for them safe from harassment or discrimination.

Volunteers will need to understand how the Equality Act relates to their role. They shouldn't discriminate against anyone who uses or is part of the service. This includes other volunteers and paid staff.

At induction, you should explain the organisation's responsibility to be inclusive. Be clear what volunteers can do to support this and how you expect them to behave while volunteering.

Some examples might include:

- offering extra help to a disabled customer in a charity shop
- using gender neutral language in publications they write
- using a fair recruitment process if they recruit other volunteers.

Share your organisation's equal opportunities policy with your volunteers. Discuss it with them and give them the chance to ask questions about it.

Promote diversity among volunteers

Having a diverse group of volunteers benefits organisations and the communities they serve.

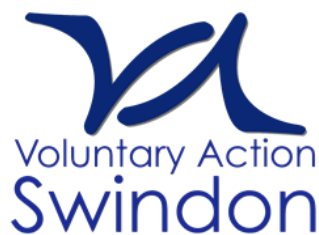
- It brings new ideas and perspectives to organisations.
- It opens up the benefits of volunteering, such as skills development, to everyone.
- It helps people from different backgrounds to work together and understand each other.
- It makes organisations more representative of the communities they serve.

To improve diversity among your volunteers:

- value and embed diversity at all levels of your organisation and invest in ways to improve it
- have processes that are easy to understand and that welcome all volunteers
- reach out to those under-represented among your volunteers and help them get involved
- encourage and support volunteers to be themselves and listen to what matters to them
- create flexible volunteer roles that you can adapt to people's needs
- collect data and information to understand who volunteers for you and why
- seek out any barriers that may exist for volunteers and take action to remove them

*Guidance is taken from publications on NCVO – The National Council of Voluntary Organisations

- use language and images that reflect and welcome diversity
- offer and provide training and development opportunities to volunteers.



GUIDANCE: MAKING SURE YOU DON'T CREATE AN EMPLOYMENT CONTRACT

Making sure you don't create an employment contract

- Don't give volunteers an income
- Reduce perks that could be seen as consideration
- Reduce the volunteer's obligations
- Don't use contractual language
- Make it clear that you don't intend to create a contract
- Create a distinction between paid workers and volunteers
- Treat your volunteers fairly
- Interns

It's important to be aware of the risk of creating employment contracts with volunteers, but you can minimise this risk. You should strike a balance between having some structure in place to make the most of volunteers and making sure they don't accidentally become workers: organisations need some commitment and reliability from volunteers, and not many people would volunteer if they were getting absolutely nothing from the relationship.

Here are some ways to make sure that your work with volunteers is a genuine volunteer relationship and minimise the risk of creating an employment contract.

Don't give volunteers an income

Make sure that volunteers are only reimbursed for out-of-pocket expenses, or a reasonable pre-estimate of actual expenses, and collect their receipts and transport tickets. It may be more convenient to give a flat rate, but remember that any amount over actual expenses may be seen as a [consideration](#). Calling payments 'stipends', 'sessional payments' or 'honoraria' doesn't change this – they will still be seen as a consideration.

*Guidance is taken from publications on NCVO – The National Council of Voluntary Organisations

Reduce perks that could be seen as consideration

This can be difficult if volunteers are used to getting substantial benefits. However, clear perks (but not items needed for the voluntary work such as protective clothing) are likely to be seen as consideration by tribunals. Even something of value which is needed for the volunteer to carry out their work (such as training) can cause problems if the volunteer seems to have an obligation to do something, for example, if an organisation offered their volunteer some valuable training, but only if they stayed in the role for six months. [The Relate case](#) illustrates this point.

Any minor perks should be described and administered – as being at the organisation’s discretion instead of an automatic right as part of the relationship. Organisations should be careful not to let ‘discretionary’ payments become customary.

Reduce the volunteer’s obligations

Time commitments can be a difficult area for organisations.

Many organisations ask volunteers to commit to minimum time periods. This should be avoided if possible. A compromise could be to acknowledge that volunteers can leave at any time, but suggest that if they stay in the position for at least a certain amount of time, they (and the organisation) will get the most out of the experience.

Another option for the organisation is to explain that it hopes the volunteer will stay for a certain amount of time.

[The Grayson case](#) clarified this a little: it’s fine to outline ‘reasonable expectations’, but this does not mean minimum time requirements are acceptable.

Don’t use contractual language

If you don’t want the relationship to be based on a contract, then it makes sense not to make it look like one. The Migrant Advisory Service case in our guidance on [tribunal decisions](#) demonstrates this point.

Avoid using language that is used for employment. Words such as ‘contract’, ‘job’ and ‘requirements’ are inappropriate for volunteers, where the language should be ‘agreement’, ‘role’ and ‘hopes’ or ‘expectations’. For example, ‘role or task descriptions or outlines’ for volunteers could be used instead of ‘job descriptions’.

Make it clear that you don’t intend to create a contract

It is advisable to explain in volunteer documents, such as agreements or policies that there is no intention to create a legally binding relationship.

For example: ‘This agreement is not intended to be a legally binding contract between us and may be cancelled at any time at the discretion of either party. Neither of us intend any employment relationship to be created either now or at any time in the future.’

This is not an easy get-out clause. If the arrangement between the organisation and its volunteers is clearly contractual, it would be ignored by a tribunal or court.

*Guidance is taken from publications on NCVO – The National Council of Voluntary Organisations

Create a distinction between paid workers and volunteers

It should be clear to an outside observer that the relationship between the volunteers and the organisation is different to that between the organisation and its paid staff.

Of course, volunteers should still be treated well and their work should be seen as being valuable.

Some organisational policies should cover both paid and voluntary staff. This includes:

- Equal Opportunities
- Health and Safety
- Data Protection/Confidentiality
- Safeguarding

Insofar as these policies have content that is specific to employees, however (for instance, links to the disciplinary policy) it should be made clear that this content is not applicable to volunteers.

There should be separate policies for volunteers' recruitment, supervision, problem solving and other parts of the individual's relationship with the organisation.

Treat your volunteers fairly

Everyone in an organisation should be treated fairly, including, of course, volunteers. Following good practice and having clear procedures for dealing with problems and grievances mean it is less likely that volunteers will feel the need to attempt to take a case to tribunal.

Interns

'Intern' is not a concept that is defined under UK law. A person undertaking an internship is legally an employee, a worker, or a volunteer, and the tests described above will need to be applied to determine which status exists.

As internships often demand a certain amount of time from participants, and may come with perks or benefits, there are dangers of creating an employment relationship.

In the employment tribunal case [Vetta v London Dreams Motion Pictures Ltd](#), an unpaid, 'expenses-only' intern was found to be entitled to the minimum wage. In *Hudson v TPG Web Publishing* (2011) an intern successfully claimed the right to the minimum wage, as they were involved in recruitment and management without being paid.

To make sure that unpaid internships stay as voluntary relationships, it should be clear that interns are not under obligations. Avoid offering incentives to recruit or keep interns, such as benefits in kind or the possibility of paid work.

It may be more appropriate in some circumstances to offer paid positions instead of longer term internships that may imply a more 'work-like' role. You should also think through other issues, like how accessible the role or opportunity may be.



GUIDANCE: VOLUNTEERING, TAX AND NATIONAL INSURANCE

Volunteering, tax and national insurance

- Volunteers who get more than out-of-pocket expenses
- Tax and reimbursements
- Keeping records

If volunteers only get reasonable out-of-pocket expenses then this will not have tax implications.

Volunteers who get more than out-of-pocket expenses

Payment that is more than out-of-pocket expenses will be treated as taxable income, so income tax and national insurance regulations will apply. These rules will apply even if you describe payments with terms such as:

- expense
- pocket money
- sessional payment
- stipend.

As well as such payments having potential implications for the legal status of the volunteer, the payment would also need to be taxed.

Tax and reimbursements

Volunteers should be reimbursed for expenses incurred in the course of their volunteering. These costs should be genuine and have been necessary for the role. Adequate records should be kept of the expenses eg receipts, travel tickets or other evidence.

These can include the sort of expenses for which employees would be reimbursed, eg:

- travel while volunteering
- post and phone costs
- the cost of protective clothing or special equipment needed for the role.

These can also include volunteer-specific expenses for which employees would not be reimbursed, eg:

- travel to and from the organisation (or wherever the voluntary work is taking place)
- meals while volunteering

*Guidance is taken from publications on NCVO – The National Council of Voluntary Organisations

- care of dependants (eg children or older parents) while volunteering

However, volunteer-specific expenses can only be reimbursed tax-free for genuine (ie unpaid) volunteers. So if 'volunteers' get payment or income from the organisation over out-of-pocket expenses, they will be taxed on volunteer-specific expenses.

[Sign up for email updates](#)

[Get regular support on NCVO's help, support and services](#)

Keeping records

Volunteers should be asked to give the organisation their receipts, travel tickets or similar evidence for expenses. Reimbursement of out-of-pocket expenses does not have to be entered on the tax form P11D, organisations should be able to show that they were not giving volunteers taxable income. It is helpful to have an expenses claim form for volunteers, which can be kept with the receipts and other evidence of the costs incurred by volunteers.

Good practice guidance

Tax issues can be complex. The clearest information on volunteering on the HMRC website is in [technical manuals for staff](#).

For example, the [Employment Income Manual](#) says:

Voluntary workers

Before tax can be charged under the provisions relating to employment income there must be:

- either an office or an employment
- and earnings from that office or employment.

A person who does voluntary unpaid work for a voluntary organisation, for example, a charity or local society, will not normally be engaged under a contract of employment and will not normally be the holder of an office. If there is no office or employment, it follows that the reimbursement of any expenses incurred by voluntary workers in doing the work of the organisation will not give rise to liability to tax.

Similarly, voluntary workers who are otherwise unpaid are ****not**** liable to tax on the reimbursement of the extra cost they might incur because they undertake such work, for example, the expenses of travel between home and the place where the work is done.



GUIDANCE: VOLUNTEERING AND HEALTH & SAFETY

Volunteering and health and safety

- Duty of care
- Health and safety legislation
- The Management of Health and Safety at Work Regulations 1999
- Risk assessment
- Health and safety policy
- Insurance and liability
- Legislation to provide peace of mind

Most health and safety legislation only applies to paid workers, but volunteers must still be protected from risks. Organisations have a duty of care towards their volunteers, and an obligation to protect them under [section 3 of the Health and Safety at Work etc Act 1974](#).

Organisations also have a moral duty to think about the health and safety of volunteers. It is hard to imagine a situation where it would be justifiable to treat volunteers in a less favourable way than paid staff, even if it were possible to do so legally.

Duty of care

The duty of care is a common law duty to take reasonable care to avoid harming others.

Organisations have a duty of care towards their volunteers. The organisation and its trustees could be liable if a volunteer is injured because the duty of care was not met.

This means that reasonable steps should be taken to reduce the likelihood and potential seriousness of injury to volunteers, for example:

- giving volunteers the right information
- training volunteers
- making sure volunteers use safety clothing or equipment
- supervising volunteers closely.

Health and safety legislation

The [Health and Safety at Work etc Act 1974](#) states that employers must look after the health and safety of anyone who could be affected by their work, which would include volunteers. They must also provide any relevant information on health and safety. This means that under both legislation and common law organisations must protect their volunteers from harm.

The act says every employer has to:

*Guidance is taken from publications on NCVO – The National Council of Voluntary Organisations

... conduct his undertaking in such a way as to ensure, so far as is reasonably practicable, that persons not in his employment who may be affected thereby are not thereby exposed to risks to their health or safety

It also says that an employer must:

... give to persons (not being his employees) who may be affected by the way in which he conducts his undertaking the prescribed information about such aspects of the way in which he conducts his undertaking as might affect their health or safety.

The Management of Health and Safety at Work Regulations 1999

[The Management of Health and Safety at Work Regulations 1999](#) say employers must do risk assessments that look at potential risks to their employees and others who may be affected by their activities (which would include volunteers). If they have five or more employees, these assessments must be written.

Organisations without any paid staff are not required to do risk assessments. However, it is hard to argue that the duty of care is being taken seriously if the organisation has not looked at what could go wrong and what could be done to protect volunteers from injury or harm. It makes sense for all organisations to do written risk assessments, which find potential problems, show that they have done this and help to put safety measures in place.

Risk assessment

A risk assessment involves looking at hazards and risk. 'Hazard' means anything that could cause harm. 'Risk' is a combination of the likelihood of that happening and the potential seriousness if it did. It is advisable for organisations working with volunteers to have an overall risk assessment for the volunteer programme and smaller risk assessments for individual roles. Other risk assessments should also think about volunteers.

The legislation does not say how the risk assessment should be done. However, the Health and Safety Executive (HSE) recommends this five-step approach:

1. Look for the hazards.
2. Decide who might be harmed and how.
3. For each hazard, work out the chance of harm being done and decide whether the precautions are good enough.
4. Record what the risk assessment finds, such as the main risks and the what you have done to deal with them.
5. Check your assessment regularly and change it if needed.

What organisations need to do will depend on the type of hazard, for example:

- giving information or training
- changing how the programme is carried out
- giving more supervision
- changing how things are done

*Guidance is taken from publications on NCVO – The National Council of Voluntary Organisations

- giving protective clothing or equipment.
- avoiding an activity if it has been found to be too hazardous.

The aim of the risk assessment is to be able to show that potential problems were identified and that something has been done to lower risk.

Health and safety policy

The Health and Safety at Work etc Act 1974 says organisations with five or more employees must have a written health and safety policy. However, organisations with fewer than five paid members of staff should also think about writing a health and safety policy and giving it to staff and volunteers.

A policy shows that health and safety is important to the organisation and explains how things are done and who is responsible for what. It also shows that the duty of care is taken seriously.

Volunteers should be included in the policy. They should have a copy or be able to read it. Inductions should explain the policy and what it includes.

The [Health and Safety at Work etc Act 1974](#) says:

Except in such cases as may be prescribed, it shall be the duty of every employer to prepare and as often as may be appropriate revise a written statement of his general policy with respect to the health and safety at work of his employees and the organisation and arrangements for the time being in force for carrying out that policy, and to bring the statement and any revision of it to the notice of all of his employees. The prescribed cases are organisations with fewer than five employees.

This paragraph explains three aspects of a health and safety policy:

- A 'statement of intent' that explains the aims and ethos of the organisation about the safety of its paid staff, volunteers and anyone else who may come into contact with it.
- Who is responsible for what – this also helps explain who volunteers and other staff should go to report an incident or seek help or advice.
- The 'arrangements' in place – the systems and procedures that should be followed. These doesn't all need to be described in detail but it should be mentioned and explained elsewhere. This might include procedures for first aid, reporting and investigating accidents, fire procedures etc. Organisations such as the Health and Safety Executive can give [information on writing a health and safety policy](#).

Insurance and liability

Breaking health and safety law is a criminal offence. The Health and Safety at Work etc Act 1974 says that if someone has committed an offence under health and safety law that was due to the actions of someone else, or their failure to meet a legal responsibility, this other person can be charged with the offence (whether or not the first person is charged). This could include committee members and senior managers, as well as the individuals directly involved.

For example, if a volunteer's line manager failed to warn the volunteer about a potential hazard in an activity the volunteer was supervising and someone else came to harm, the line manager may be

*Guidance is taken from publications on NCVO – The National Council of Voluntary Organisations

charged – or potentially a senior manager or trustee where there has been a systemic failure to ensure safety ([Health and Safety at Work etc. Act 1974 s.36](#)).

Who is liable for negligence (causing loss, damage or injury because the duty of care hasn't been met) depends on the structure of the organisation. In [unincorporated associations](#) and trusts, the members of the governing committee may be personally liable. In incorporated organisations (eg those limited by guarantee), the organisation will usually be liable and not the individual governing body members. Trustees can be protected against such costs by their organisation.

Incorporated charities (eg a company limited by guarantee or a charitable incorporated organisation (CIO)) are subject to the Corporate Manslaughter and Corporate Homicide Act 2007. This means that the organisation can be found guilty of corporate manslaughter or homicide. This can happen if senior management's failures contributed to negligence, or a serious breach of the duty of care in an activity, that led to a death. The Crown Prosecution Service offers [a clear guide to the implications of the Act](#).

The Health and Safety Executive has produced guidance for directors and members of governing bodies, [Leading Health and Safety at Work](#) (pdf, 600KB).

It should also be borne in mind that an organisation is likely to be held liable for any actions or omissions by its volunteers which impact on the health and safety of others.

It is important that volunteers are adequately insured. Organisations are likely to have cover but it is important to check that the policies cover volunteers. Insurance cover does not mean that health and safety responsibilities can be neglected.

See [guidance on insurance and volunteers](#) from NCVO.

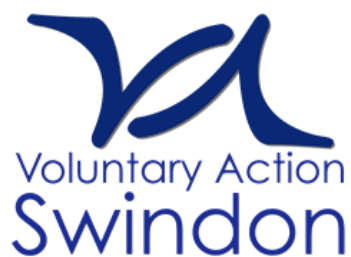
Legislation to provide peace of mind

Many people think that there is a compensation culture in health and safety issues, or that red tape stops sensible activities happening.

Two pieces of legislation explain the position of (1) voluntary organisations and (2) volunteers. Arguably both acts merely reflect what courts were already doing when faced with such cases.

1. **The Compensation Act 2006 (section 1)** tells courts considering a case of negligence or of failure to meet a statutory duty that if they're deciding whether steps could have been taken that could have prevented or lessened the seriousness of the accident they may take into account whether these steps would have prevented a 'desirable activity' from going ahead or have put people off from participating in it. 'Desirable activity' is not defined, but the idea is to reassure voluntary groups, sports groups etc that they will not fall foul of spurious claims for compensation. This does not remove the duty of care towards volunteers (or others) or the duties under section 3 of the Health and Safety at Work Act.
2. **The Social Action, Responsibility and Heroism Act 2015** has similar instructions to courts about the liability of individuals. When considering a claim that a person was negligent or in breach of statutory duty:

[it] must have regard to whether the alleged negligence or breach of statutory duty occurred when the person was acting for the benefit of society or any of its members'. In the context of volunteering, this means that courts must take into account that an individual was volunteering at the time of the incident they are considering.



GUIDANCE: GETTING VOLUNTEER INSURANCE

Getting volunteer insurance

- Employers' liability insurance
- Public liability insurance
- Motor insurance
- Other types of insurance
- Buying volunteer insurance

Understand what insurance your organisation needs if it involves volunteers

Organisations need insurance to protect themselves and their volunteers from risk.

The type of insurance you need depends on:

- your organisation
- how it works
- what it does.

Here are some types of insurance that can cover volunteers.

Employers' liability insurance

If your organisation has paid employees, it's required by law to have this insurance. Some insurers will cover volunteers too.

It protects your organisation if:

- it causes injury or illness to an employee while they are working
- it needs to pay compensation or legal costs following an employee's claim.

Public liability insurance

This covers your organisation's interactions with other organisations or people ('third parties'). Some insurers will cover volunteers too.

This insurance protects your organisation if it needs to pay compensation to a third party following a claim for:

*Guidance is taken from publications on NCVO – The National Council of Voluntary Organisations

- causing accidental injury to the third party
- causing accidental damage to the third party's property.

Check with your insurer to make sure your insurance covers your volunteers and what they do. You may need employers' liability insurance, public liability insurance or both.

Looking for insurance?

NCVO's [trusted supplier](#) Zurich Insurance provides many different types of insurance for charities, social enterprises and community groups of all shapes and sizes.

Motor insurance

You may need this type of insurance if your organisation has volunteer drivers.

- If volunteers drive your vehicles, check your insurance covers this.
- If volunteers drive their own vehicles, they should check their insurance covers this. If it doesn't, you can arrange occasional business use cover for them from your insurer.

Some insurers charge extra for volunteer driving. Check with the insurer to see if they do this or not.

Other types of insurance

Your organisation is likely to need other insurance depending on what it does and who it works with.

See our guidance on insurance for voluntary sector organisations.

Other types of insurance

Your organisation is likely to need other insurance depending on what it does and who it works with.

See guidance on [insurance for voluntary sector organisations](#) from NCVO.

Buying volunteer insurance

When buying insurance, you should:

- make sure the insurance policy meets your organisation's needs
- check the insurance policy covers volunteers
- make sure the insurance policy covers the activities your volunteers do
- read the insurance policy terms, conditions and exclusions.

It's a good idea to speak to an insurance provider about your organisation's specific needs. [Zurich Insurance](#) is our trusted supplier for insurance.



GUIDANCE: INVOLVING PAID STAFF AS VOLUNTEERS

Involving paid staff as volunteers

Some paid staff wish to volunteer for their organisation. While there is nothing to stop this happening, it is important to avoid potential problems. To distance the volunteering from the paid work, the volunteer role should be substantially different to the paid role.

If this is not the case, and the total number of hours for both the paid and unpaid work divided by the employee's pay came to less than the minimum wage, minimum wage inspectors might see the 'voluntary' work as being an extension of the paid work and could think that the organisation is not following the [National Minimum Wage Act](#). The limits on hours in the [Working Time Regulations 1998](#) might apply if the voluntary work is combined with the paid work.

Differences between the paid and unpaid roles will also help to avoid confusion in the organisation about the person's role. However, there may be problems including confusion over the boundaries between roles and pressure to deal with issues from the paid work while volunteering.

If issues were to arise about the conduct of an employee while volunteering then it may be possible for disciplinary proceedings to be taken, in the same way that they could be for other behaviour outside of the workplace and/or working hours. In such cases employers need to be very clear about the seriousness and the relevance of the conduct outside of work, and, ideally, should have made it clear to employees that such conduct could be taken into consideration at work.

Organisations should get legal advice about such situations.



GUIDANCE: VOLUNTEERS WHO CLAIM BENEFITS

Volunteers who claim benefits

- People can volunteer if they claim benefits
- Be clear it's volunteering
- Give volunteers the information they need
- Help volunteers meet their benefits rules
- More information

*Guidance is taken from publications on NCVO – The National Council of Voluntary Organisations

People can volunteer if they claim benefits

People who claim benefits can volunteer as many hours as they like, but they must follow certain rules.

Here's how to make sure your volunteers' benefits claims aren't affected by their volunteering.

If your volunteers do have any issues with their benefits claims, they can contact [Citizens Advice](#).

Be clear it's volunteering

It's important that volunteering doesn't look like paid work. This could reduce or stop the benefit payments someone gets.

As someone involving volunteers, make sure:

- any agreement you have with them doesn't look like an employment contract
- you only pay them out-of-pocket expenses and keep receipts or other formal records to show this.

Some volunteers will need money for their expenses upfront. It can be difficult for volunteers on low incomes to come up with money for travel or food.

In such cases, make sure:

- the volunteer keeps and gives you their receipts
- they return any unspent amount to you, or you take it from their next payment.

See guidance on [writing volunteer agreements](#) and on [paying volunteer expenses](#) on the NCVO webpage.

Give volunteers the information they need

Volunteers must tell their benefits office about their volunteering.

This will need to include:

- how many hours a day or days a week they will be volunteering
- if this will change week to week or stay the same
- what they will be doing
- if they will get out-of-pocket expenses
- anything else you give volunteers to help them do the role, which may not be money.

The volunteer must tell their benefits office if this information changes. They should also tell them if they stop volunteering.

If you need to change the volunteer's role or hours, you must let them know with as much as notice as possible.

Help volunteers meet their benefits rules

Jobseeker's allowance

*Guidance is taken from publications on NCVO – The National Council of Voluntary Organisations

Jobseeker's allowance (JSA) is for people able to work and seeking work.

Volunteers claiming jobseeker's allowance will need to:

- be easy to contact about work
- be able to attend an interview with 48 hours' notice
- be able to start work within a week.

Employment and support allowance

There's no limit to the hours people receiving this benefit can volunteer.

They may need some flexibility to go to appointments they need to keep to claim this benefit.

Universal Credit

People receiving Universal Credit can still volunteer.

If they have to search for and prepare for work, this will usually be for 35 hours a week. Volunteering can count as a 'work search activity' for up to half (50%) of this time.

People can volunteer for longer if they choose to. If so, they will still need to commit half of their total hours a week to searching or preparing for work.

If you need to change the hours or days your volunteer does, you must give them as much notice as possible. They can then make other arrangements for their work preparation activities.

Example

Andrew receives Universal Credit and must spend 35 hours a week looking for work. He volunteers at a local heritage site for 17.5 hours a week. He spends the other 17.5 hours a week researching and applying for jobs.

Andrew enjoys volunteering and one week he gives 20 hours. He still has to spend 17.5 hours that week researching and applying for jobs.

After a couple of months Andrew decides to drop his volunteering hours down to 10 a week. He now needs to spend 25 hours a week researching and applying for jobs.

More information

- View the [UK government guidance on volunteering and claiming benefits](#).
- View [Citizens Advice guidance on how volunteering affects your benefits](#).
- NCVO members can access our [guidance on volunteers and the law](#), including [information about volunteering and benefits](#).



WHO ARE VOLUNTEERS

Who are volunteers?

Volunteers give time, carrying out activities that aim to benefit community or society. Volunteers are unpaid and choose how they wish to give their time.

Volunteering takes place in every sector from charities and not for profits to the public and private sector. The activities volunteers take part in are diverse, ranging from campaigning and fundraising to mentoring and befriending, running events and sports clubs to more formal roles like trusteeships. While trustees have legal obligations toward the charities they govern, there is no legal definition of 'volunteer', and this includes trustees.

Volunteers have fewer rights and less legal protection than paid staff, because relevant legislation – such as the Equality Act 2010 and the Employment Rights Act 1996 – does not apply to volunteers. There have, however, been some rare cases in which volunteers successfully claimed such rights by showing that, from a legal point of view, they had an employment relationship with their organisation.

Volunteers should, of course, be treated fairly and with respect. An organisation that treated volunteers badly would struggle to keep volunteers, and face negative publicity. Organisations should know about volunteering good practice, and get support and resources from local volunteer centres, like Volunteering Swindon or NCVO to make sure they use the right structures and approach.

More information on Volunteering guidance can be found on our webpage [Volunteering Swindon](#) or on the [NCVO webpage](#).



GUIDANCE: APPOINTING VOLUNTEERS

Appointing volunteers

- Contact applicants
- Carry out checks
- Turning down volunteers

Contact applicants

Once you've chosen your new volunteer, contact them to offer them the role. Thank them for attending the interview and suggest a start date and induction time. You can also offer some feedback on what you liked about their interview answers.

*Guidance is taken from publications on NCVO – The National Council of Voluntary Organisations

Let other applicants know they haven't been successful. Provide constructive feedback and explain the reasons you're not accepting them as a volunteer. You can consider whether they are suitable for a different role within the organisation. You can also suggest contacting their nearest volunteer centre to find other suitable roles.

Before you confirm your volunteer can start, you'll need to make some checks. These need to be proportionate to the requirements of the role and the level of risk involved.

If necessary, contact a volunteer centre for guidance.

Carry out checks

References

You can ask new volunteers to give references. In most cases, a simple letter or email from two referees is enough.

You could also talk to the referees by phone to check what you discussed at the interview.

Health and safety

Consider the health and safety risks involved with your volunteer role. Use our [health and safety guidance](#) to carry out a risk assessment.

Ask volunteers if they have any health conditions you should be aware of. Volunteers shouldn't feel pressured into sharing anything they don't want to. The information should be used to make adjustments and provide support. It should never be used to discriminate against people.

Use NCVO [data protection and GDPR guidance](#) to make sure your volunteers' health data is protected.

Right to volunteer

Asylum seekers, people on benefits, and ex-offenders can all volunteer.

If volunteers are from overseas, you will need to check that their visa allows them to volunteer and any conditions that apply.

- See NCVO guidance on [volunteers from overseas](#) and [volunteers who claim benefits](#).
- See NCVO safeguarding guidance on [choosing staff, volunteers and trustees](#).

Remember that [there is a difference between volunteering and voluntary work](#). People who are allowed to volunteer are not always allowed to carry out voluntary work.

Criminal record disclosures

A criminal record check gives you information about an applicant's criminal history. It's an important part of safeguarding. It makes recruitment safer and stops unsuitable people from working with vulnerable groups.

It's not always lawful to carry out a check on volunteers, so make sure you know when to ask for one.

- See NCVO guidance on [getting started with criminal record checks](#).
- Take a look at GOV.UK's page on [the DBS check application process for volunteers](#).

*Guidance is taken from publications on NCVO – The National Council of Voluntary Organisations

Turning down volunteers

Once you've completed your checks you may decide the person is not suitable for the role. Provide constructive feedback and explain the reasons that you're not accepting them as a volunteer.

Consider whether they are suitable for a different role within your organisation. You could also suggest that they contact their nearest volunteer centre to find other suitable roles.

Applicants may also decide they don't want to volunteer for your organisation after all. In this case, ask the applicant for their reasons. This insight may be helpful for future recruitment.