

## **Starting a Volunteering Programme - what volunteering documents do we need?**

Please note that this information sheet is not insisting that all volunteer-involving organisations have all the documents we list below, in place. They may not be relevant to your volunteer programme. You may find that one of your documents covers several functions listed below. We describe each document to allow readers to understand what they are meant to achieve, and to see whether they are needed, or whether the same aim can be filled another way.

The purpose of having documents such as these in place should always be to support volunteering and make things work well. Don't over-formalise volunteering, but use policies and procedures as a tool to help and support volunteers and the staff who work with them.

Some of this material is also in our 'Starting a volunteer programme' information sheet.

### **What policies and procedures do we need to have in place?**

There will be core organisational policies to help your organisation to run. We recommend, similar, but separate, versions for your volunteers, although some organisations have policies which cover both. These policies reflect your legal responsibilities towards staff and volunteers, or the people they work with. Typically, these would include at minimum:

- Health and Safety Policy
- Equalities/Equal Opportunities/Diversity Policy
- Safeguarding/Child Protection/Vulnerable Adult Protection Policy
- Confidentiality Policy
- Public liability insurance

Beyond this it makes sense to have some volunteering-specific policies and procedures in place to give a structure to your involvement of volunteers. Some policies are based in employment law, which does not apply to volunteers. However, it is likely that you will still want your volunteers to follow them as a matter of internal policy, so that you can meet your organisational legal obligations.

### **What volunteering-specific documents might we need?**

Again, this list is not setting out what all organisations should have in place. Some volunteering will be fairly informal, particularly in peer led organisations. Brief procedures or policies might be included within the volunteer policy or handbook. However, do read through them all so that you understand the function of everything listed, and can then make a decision as to whether particular documents are needed.

### *Volunteer policy*

A volunteer policy sets out how volunteers will be involved. This is a good place to spell out the values and ethos behind your volunteer involvement. It should also cover topics such as

- Recruitment
- Induction
- Training
- Support and Supervision
- Health and Safety
- Equalities
- Confidentiality
- Behaviour standards
- Dealing with problems

The exact content will depend on your circumstances. Some content may simply summarise and signpost to longer documents. It's generally best if the policy isn't too long and involved – you want volunteers to read and understand it.

### *Volunteer handbook/induction pack*

The volunteer handbook is like a reference guide for volunteers. It sometimes takes the form of an induction pack, gathering together the information and documents a volunteer needs to be aware of on starting their role. It's a good place to give information such as the history and purpose of the organisation and how it is run, or about staff and volunteer meetings, where to store bags and clothing and so on. A good rule of thumb for content once a handbook is in place is to ask current volunteers 'What would have been good for you to know when you started? What took you 3 months to find or work out?'. This is also a great place for a paragraph setting out how much you value your volunteers, and how they positively contribute to the work of your organisation.

### *Volunteer agreement*

A volunteer agreement sets out what the volunteer should expect from the organisation and what the organisation expects of its volunteers. It is not intended to be a legally binding document (in fact you want to avoid it coming across as one, as this could contribute to the volunteer acquiring employment status in law), and should be simple, straightforward and short – one side of A4 is usually sufficient. It is usually signed by both parties with a short statement to note that it is simply an agreement, not a contract.

### *Recruitment and Supervision procedures*

These describe how you will recruit and support volunteers. This could be covered by a few paragraphs in the handbook or volunteer policy. In larger organisations it makes more sense to have separate procedures or guidelines to help ensure consistency.

### *Problem solving procedures*

The equivalent of disciplinary and grievance procedures, these will help provide a structure for when things go wrong. They may mirror those used for paid workers, but should be as clear and easy to follow as possible. Volunteers need to know where they stand if you raise an issue with them, or if they have a complaint about their treatment. Again, it makes sense

not to use employment based language, to avoid confusion about a volunteer's status in the organisation

### *Application/Registration form*

Application forms should not be too long, or too complicated. Your aim should be to make the recruitment process as straightforward as possible. For many people their frame of reference for an application form will be those for paid work, where applicants have to sell themselves and make the most of their skills and experience. This can be off-putting for anyone with low confidence, long term unemployment and so on. Only ask for information you need at this point.

You may choose to avoid using application forms, but will still need something along the lines of a registration form to gather information such as contact details. Most organisations nowadays seek references, but these would generally be personal references, rather than employment based, unless there is a good reason to ask for the latter. Remember to make volunteers aware if you will be applying for a DBS check on the role.

### *Volunteer file*

This is just somewhere to store details like the registration form, training records, task description, supervision records and so on. Do remember that personal information held on volunteers is subject to GDPR. Ensure that only people with a legitimate need around volunteer involvement have access to it, and take reasonable steps to keep it secure (e.g. in a lockable desk drawer or filing cabinet, or password protected or in a private network drive for digital information storage).

### *Risk assessments*

Risk assessments should be carried out on any activity your organisation initiates, and must take into account the involvement of volunteers.

### *Role descriptions*

These are the equivalent of job descriptions, setting out what tasks you are expecting potential volunteers to carry out. They make it easier to think through what it is you want people to do, and for potential volunteers to make an informed decision to get involved.

### *Induction checklist*

This is a list of the information that you believe every volunteer should receive as part of the induction process. It means you can be sure that all volunteers have, for example, been told what to do in the event of a fire, or have been introduced to key staff and volunteers.

### *Exit questionnaire*

An exit questionnaire is a tool for gathering volunteers' opinions of their experiences with you. Asking at this time gives volunteers the opportunity to look back over their time in your organisation, and it can be easier to be candid at such a point.

### *Evaluation forms/volunteer survey*

You may wish to evaluate your volunteer programme, either on overall performance or on specific areas such as diversity.

### *Volunteer support and supervision policy/guidance*

This is primarily guidance for anyone supervising volunteers on what support they should be providing and how best to do so.

### *Expenses policy/procedure*

This could form part of the volunteer handbook. You should be clear what expenses will be reimbursed, and how they should be claimed. For example, you may want to set a cap on lunch expenses. Remember also, that there are HMRC limits on benefits that may be offered to volunteers, otherwise they may fall into the category of “benefits in kind” and incur a tax liability for the volunteer (<https://www.gov.uk/volunteering>)

### *Volunteering strategy*

This sets out a vision and action plan for volunteering. What this will be, will depend on organisational priorities, but may also reflect your evaluation of your volunteer programme – for example, this might lead you to aim to increase the diversity of your volunteers.

### *Lone/Home working policy*

If volunteers will be working on their own you should consider the same issues as you would a paid member of staff. The Health and Safety Executive has guidance on these issues:

- *Working alone: Health and safety guidance on the risks of lone working:*  
<http://www.hse.gov.uk/pubns/indg73.pdf>
- *Homeworkers: Guidance for employers on health and safety:*  
[Prepare a health and safety policy - HSE](#)

### **Further information:**

#### *Volunteer Scotland template volunteering documents*

This is a good resource, but beware of using off-the-peg policies and procedures without adapting them to meet your needs.

[Tips and Templates - Volunteer Scotland](#)

#### *Wales Council for Voluntary Action*

A similar collection, with the same caveat.

[Policies, procedures & practical matters - WCVA](#)

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