



## Volunteer Toolkit

### Introduction and Content

This toolkit is designed help you set up, market, manage and evaluate your volunteer programmes through best practice. The toolkit was created specifically for England's Past for Everyone (EPE) and Victoria County History (VCH) volunteer programmes, but the practical advice will be invaluable to many other existing and new volunteer groups.

Vision for EPE to provide engagement with local history for life-long learners, young people and school children is delivered through the Learning Programme. EPE is achieving this through projects to involve volunteers in researching local history materials alongside professional historians, and by developing a programme of practical and online material which encourages the creative use of local history in schools.

Over 300 volunteers have been involved in the EPE project to date, and at least 200 of these volunteers have received formal training. Our volunteers have been involved in researching and recording thousands of historical documents/places; their work has directly contributed to EPE's paperbacks, school projects and Explore website. Many of our volunteers are now using their new skills on other local history projects in their communities.

During the course of England's Past for Everyone, we consulted with those delivering volunteer projects, volunteers and volunteer agencies to make sure our programmes started, continued and ended in both a productive and professional manner. This toolkit will give you ideas and suggestions which we hope will help and encourage you to use, and understand the benefits of working with volunteers.

For further information on EPE and VCH: [www.englishpastforeveryone.org.uk](http://www.englishpastforeveryone.org.uk);  
[www.victoriacountyhistory.ac.uk](http://www.victoriacountyhistory.ac.uk).

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## **Working with Volunteers**

### **Why work with volunteers?**

There are a wide range of reasons why we work with volunteers. As well as the skills and experience they bring, it is an opportunity to open our doors and increase public awareness of our activities and allow the public to contribute to their local history. The top three reasons why volunteers have wanted to be part of the England's Past for Everyone project are:

1. To make a difference and contribute to a topic of interest.
2. Develop self-confidence and meet new people with similar interests.
3. Learn new skills; the need for personal change.

### **Volunteer policy**

There are a number of benefits to having a volunteer policy: as well as preventing exploitation it is an opportunity to think through the impact of using volunteers; to provide a framework for effective working; and to ensure standardisation of procedures across the organisation to increase consistency in the treatment of volunteers.

The volunteer policy should be approved and agreed by your trust and staff, to ensure everyone understands and is aware of their responsibilities.

## **Set up and Recruitment**

### **Timetable**

If you are working with volunteers for a specific project, think about your delivery timescale. What research will the volunteers be doing and how will it fit into your research? When do you need to collect their work? How much time will you need to edit the research? Will you launch your project, and will you celebrate the volunteer programme?

### **Volunteer task descriptions or guidance sheets**

A common belief is that unhappiness in volunteers arises from them feeling exploited, as they are not paid. However, research shows that the major factors towards unsatisfied volunteers are not knowing exactly what they are supposed to do, or not having enough to do. This can be solved by creating task descriptions which are user-friendly, but clear about the role of the volunteer.

Task descriptions should include details of supervision and benefits (e.g. training), as well as the five W's:

- **What** are they are expected to do?
- **Why** they are doing it?
- **Where** can they find the research?
- **Which** format the research should be presented in?
- **When** it needs to be completed?

Task descriptions should be given to volunteers before they sign an agreement and if specific tasks are unclear, volunteers should have an opportunity to ask questions for clarification. The task description is a framework to help the volunteer with the task and understand how their research will be used. The task description will also be used to form the basis of the volunteer agreement.

### **Expression of interest forms**

'Expression of interest' forms take the place of an application form. They are an opportunity to gather background information about your volunteers, and ideas about what the volunteers are expecting to get out of the programme. They are also a valuable tool for measuring successes of your programme. The 'Expression of interest' form allows volunteers to see what tasks are being offered, and lets you know when volunteers are available and of any requirements they may have. Most people have found it useful to gather all forms before determining who they will have in task groups and organising their training programme.

## **Recruiting volunteers**

In order to gain a strong group of committed volunteers you need to be clear about why you want volunteers and what you want them to do; this will enable you to recruit people with the right skills and experience for the task. It is therefore essential that you have written your task descriptions and person specifications (if relevant) before you start recruiting volunteers. The make-up of most of our volunteer groups has been White British females aged between 50 – 70 years. Whilst we do not want to discourage this group, it is necessary to cast our net out further and encourage a diverse range of volunteers to represent all the communities we are working within. Some recruitment ideas are:

### Word of mouth

Remember your volunteers are ambassadors to your programme. If you already have volunteers, encourage them to bring along their friends and family.

### Local volunteer bureaux/centres

Volunteer bureaux/centres are committed to matching volunteers to organisations. Be clear about what your needs are and contact them. They will carry out some preliminary work, such as checking references, which will save you some time.

### Local press and radio

Contact your local paper and any neighbouring papers. Often, recruitment for volunteers is a way of promoting your project. Local radio should also be approached.

### Events and exhibitions

Set up stalls at local history events, exhibitions or adult learning/volunteer days which are usually arranged annually by the local council, often during volunteer week (UK Volunteers' Week is usually between 1 – 7 June each year) – have a contact sheet at the event so you can take names and contact details. Remember, not everyone who signs up will necessarily become a volunteer for your organisation.

### Talks and presentations

Giving talks or presentations to community groups, local history groups, conferences and even colleges will encourage recruitment of a diverse range of volunteers.

### Printed material

Leaflets and posters are a good way of drawing attention to your project and recruiting volunteers from local libraries, places of worship, universities, GPs and dental surgeries, tourist information centres, town halls and other public buildings.

### Websites

Don't forget to draw attention to your programme via the Internet. Keep your website updated, and make it clear why you need volunteers and what the benefits of working on your project will be.

### Working with existing groups

Tapping into existing community groups can be beneficial. There are many examples of organisations working with community groups to deliver a discrete piece of research such as palaeography, oral history, transcription etc. This work can be done in their usual meeting place, whilst allowing them to contribute to your project.

## **References**

References are an opportunity to check you have the right person for the role required. It is important to obtain references for potential volunteers, especially if they will be dealing with children or vulnerable adults. When you ask for references, ensure that the referees understand what your organisation does. It is usually a good idea to send them some literature on your organisation and a copy of the task description. Remember, they will be commenting on the individual's suitability to volunteer for you, so they need to know what is expected of them. Written references are usually more appropriate than verbal ones as they form a permanent record.

## **Agreements for volunteers**

Volunteers are not legally bound to an organisation so they cannot sign a contract. There is a common feeling that signing agreements is heavy handed and unnecessary for volunteers, however, it has been proven that signing agreements helps cement a relationship and offers more commitment on the part of the volunteer to the tasks. Volunteer agreements are simply a description of the arrangements between the organisation and the volunteer in relation to the work they will carry out. The framework for the agreement should be the task description.

Volunteers should also complete a contact sheet which should include their full contact details, details of next of kin, and the name and contact details of two referees. Upon signing agreements, volunteers should also sign a 'Permission to publish' form – this form should be explained to the volunteer. The 'Permission to publish' form is an important document as it notifies volunteers of how we will use their work, and allows the project to use their research.

### **Expenses**

No volunteer should be out of pocket when working on your project; we therefore advise that a budget is set up to support volunteer travel. Volunteers should receive information on how much your organisation will reimburse per mile. Encourage volunteers to carpool if possible, or to use public transport. If claiming expenses, you must remind all volunteers to collect and submit receipts of all expenditure.

### **Timesheets**

Submitting volunteer timesheets was a requirement for the EPE project, but they are generally a good way of seeing how much in kind contribution you are getting from individuals and the community. This could be valuable information when applying for support from other funders or feeding back to current funders/supporters. Timesheets could be collected when they are full, or after quarterly/monthly volunteer meetings.

### **Resources for the project**

Volunteers should always sign equipment in and out so you can keep track of equipment use. Through the EPE project we provided a laptop and digital camera for each volunteer group; you should determine what equipment is required for the tasks you are asking your volunteers to carry out. Resources can occasionally be sourced through other local history groups or your local record office.

### **Regular group meetings**

We have found that volunteers appreciate the social benefits of volunteering, along with the satisfaction and appreciation of their role. Over the course of two years, some of our projects ran volunteer meetings once a month, every two months or every quarter for two hours. These meetings were necessary to keep the volunteers updated on project development and the research material that was coming in. The meetings were also useful for forwarding important information, and allowed volunteers to meet each other – this is especially beneficial if you have

more than one task group. Regular group meetings encourage volunteers to talk about what they are doing, feel part of a team, see that they are contributing to something, and to prevent feelings of isolation. Most importantly, meetings should always provide an opportunity to encourage further work and to thank your volunteers for their time and commitment to the project. Meetings do not have to be intense or overly time consuming. Decide upon a regular venue, date and time. Not all your volunteers will be able to make the date, but they are more likely to attend if a regular date is set in advance.

## Training

Training should be specific to the tasks the volunteers are being asked to do, and every volunteer should receive training in the record office if they are expected to use it.

Think about the training needs within your task groups. What skills will benefit their work? This should be your main, but not your only, concern when creating a training programme. The 'Expression of interest' form will also give you ideas of subjects/topics of personal gain which will act as an incentive to volunteers – for example, Palaeography will appeal to most volunteers interested in researching their family history.

Along with informal training in the form of seminars and talks, EPE training has involved:

- Photography
- Oral History
- Palaeography
- Field Study
- Using the Record Office
- Building Survey
- Wills and Probate

## **Role of the Volunteer Group Leader**

### **Volunteer Group Leaders**

It is essential that this role is a paid position and links directly to the county editor/team leader. This will enable the Volunteer Group Leader (VGL) to assign tasks related to the required research and communicate back to the volunteer group(s). The VGL should also have a clear understanding of who is responsible for their management; a reporting system should be put in place so the county editor/team leader can monitor work progress to ensure key deadlines are met.

Training is essential for the VGL to understand the project structure, use of the research collated, and how the research should be collected. This position is best supported by an organisation, like a record office, which can provide a base and some form of regular contact for volunteers. VGLs should have a link to other group leaders across the counties to share best practice advice and experience.

### **One to one meetings**

Good communication is essential between the Volunteer Group Leader and the county editor/team leader. Monthly one to one meetings offer an opportunity for the VGL to discuss the progress of the work of the volunteers and the research currently taking place. These meetings also provide a safe and confidential environment to discuss any concerns with the project. In addition, regular meetings give the county editor/team leader an opportunity to prioritise research requirements and update the VGL on the project.

### **Leading and mentoring within task groups**

Often you will find that people emerge within your task group who have more experience and are natural leaders. If you feel these people are reliable, you can have a discrete conversation with them about leading their group if relevant. Some county editors have found that group leaders have been able to coordinate their groups, assist with any problems and ensure the work is delivered in the right format for the team leader/VGL.

We have also found that in some groups, having a mixture of experienced and non-experienced volunteers working together provides a useful mentoring and informal learning environment. Remember that your volunteers are not paid workers; have a conversation with any potential mentors or task leaders, inform them of the role and give them an opportunity to decline if they do not wish to take on this role.

## Legal Requirements

### Induction

Volunteers should be given a proper induction as there is some information which they will need to know immediately in order to be fully equipped to do their work. Remember that people learn at different paces and volunteers will come to you with different experiences and prior knowledge, therefore the induction needs to be appropriate for the individual and their specific role. Often volunteers will be recruited in large groups, and it may be worth setting up a volunteer meeting and doing your induction as part of this. Your induction should include:

- A warm welcome and an emphasis on the importance of volunteers on the project.
- The roles and responsibilities of all the paid staff, and introductions were possible.
- The structure of the organisation.
- Going through the volunteer role description.
- Travel expenses.
- Clear lines of communication – who do the volunteers talk to if they have a problem, and how do they contact them?
- Health and Safety.

### Health and Safety, and copyright

You have a responsibility to ensure that all aspects of your volunteers' involvement with your organisation comply with the law. Most of this should be covered in your volunteer policy, but here are a few things to consider when managing volunteers:

#### Payment

You must ensure you are not treating your volunteers as employees. For example, only reimburse actual out of pocket expenses – do not give your volunteers a set amount of money to cover their costs each week.

Remember, do not expect your volunteers to do things paid employees would not do.

#### Health and Safety

You must take responsibility for the health and safety of your volunteers. Ensure they have a Health and Safety induction when they begin.

You should carry out risk assessments on activities to help safeguard volunteers from injury.

### Equal opportunities and Data protection

You should ensure you follow good practice and comply with the race, sex, age and disability discrimination legislation.

If any of your volunteers are expected to work with children, young people or vulnerable adults, they must undergo a CRB (Criminal Records Bureau) check. These checks can be purchased online: [www.disclosures.co.uk](http://www.disclosures.co.uk). There is a small fee for each check, and they will take approximately two weeks to process. You must also understand the implications of the Protection of Children Act 1999.

Ensure that you comply with the Data Protection Act of 1998, as you will be storing the personal details of individuals. You should have permission from your volunteers before you can use images of them or work they have done; this permission could be built into the volunteer agreement. You also need to ensure that the volunteers' personal details are kept confidential and are not passed on to other without their consent. It is your responsibility to make sure your Volunteer Group Leader and volunteers understand the Data Protection Act. More information can be found at: [http://www.ico.gov.uk/what\\_we\\_cover/data\\_protection.aspx](http://www.ico.gov.uk/what_we_cover/data_protection.aspx).

### **Volunteer insurance**

Volunteers working on the EPE project are currently insured by Marsh Ltd. The insurance premium will usually depend of how many volunteers are working for your organisation.

Any accidents should be reported and logged in an accident book in case of any later insurance claims. For EPE, any claims were reported to the central team staff for enquiries and claim processing.

Your organisation may have sufficient insurance to cover all aspects of volunteering, for example employer's liability insurance, and buildings and contents insurance. Please check this at the start of your project. If volunteers drive for you, you should make sure they have contacted their insurance company.

## **Publicity and Marketing**

### **Writing a press release**

Writing a good press release can make a big difference to the quality and, sometimes, the quantity of the coverage you receive from your local media. Never try to bulk out your release with useless information; journalists would prefer a short, succinct release to one that needs to be sifted through for key points.

Try to avoid jargon or language that is too academic. Remember that unless your release is going to a specialist magazine, the people who read the story (including the journalist) are unlikely to have an in-depth historical or architectural knowledge. If you need to use unusual or technical terminology, include an explanation at the end of your release denoted by a \* after the term used.

### **Volunteers' Week**

UK Volunteers' Week usually takes place between 1 – 7 June each year; it is a celebration of the work volunteers do all over the country. During the week, events are held across the country to recognise, reward and recruit volunteers. This is a perfect opportunity for you to raise awareness of your project with press releases and photo opportunities.

The Volunteers' Week website provides a range of tools and resources to help you celebrate the week and the contribution of the volunteers you work with: [www.volunteersweek.org.uk](http://www.volunteersweek.org.uk).

### **Documentation and photography**

Documenting your volunteers' activities does not only act as a record of your project progress, but will also enable you to forward engaging photographs to the press, funders and supporters. Keep your photos updated – try to take photos that show volunteers in active situations.

## **End of Project and Evaluation**

### **Ending the relationship**

Where possible, conduct an exit interview when a volunteer leaves. This will acknowledge the important role the volunteer has played on the project, and will also give you the opportunity to discover why the volunteer is leaving. Whether you do or do not hold an exit interview, use a volunteer evaluation form to ensure you get feedback from any volunteers who have worked on the project (in any capacity).

Take this opportunity to thank them for their time and contribution to the project, and (if you feel comfortable doing so) offer to write a letter of reference.

### **Volunteer celebrations**

The best volunteer celebrations are the ones that give the volunteers an opportunity to talk about their experiences. Along with acknowledging and thanking them, it is a place to tell the volunteers how their research has contributed to your project/organisation. Celebrations are best kept short, unless you tie it in with a seminar, field trip or site visit of interest.

### **Evaluation**

You can use positive and negative feedback to help you develop the way you manage volunteers in the future. Feedback can be given formally through an exit interview or evaluation form, or informally through a conversation. Through your practice and evaluation, you should be able to see how successful your project has been, what the volunteers have got out of the project and what you could improve or do differently next time.

Don't always wait until the end of the project to do your evaluation; if your project spans a few years, it is useful to regularly ask the volunteers how they feel they are getting on. This could be done through volunteer meetings or an annual event.

## Other useful information

### Volunteering England

Volunteering England is the national volunteering organisation. They hold resources which provide information on England-wide volunteer centres and development agencies, funding, policy and free information sheets for working with and managing volunteers:

[www.volunteering.org.uk](http://www.volunteering.org.uk).

### Publications

Bradley, Kate (2003), *Deciding whether to involve volunteers*, Volunteering England, London.

Restall, Mark (2005), *Volunteers and the Law*, Volunteering England, London.

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