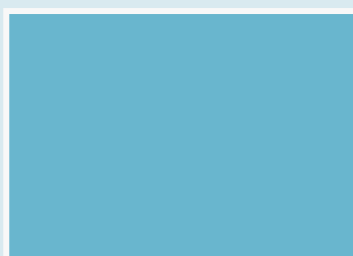
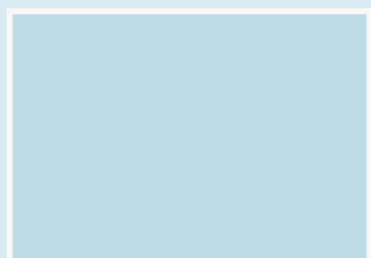
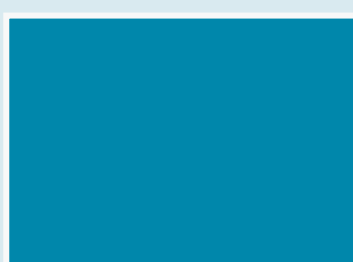
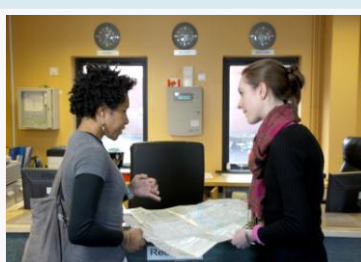


As Good As They Give

Providing volunteers with the management they deserve



Workbook Two Attracting and Selecting Volunteers



Volunteering takes many forms - traditional service giving, mutual aid and self-help, advocacy and campaigning and community action. All such forms of volunteering are equally valid.

Volunteer Now promotes and develops volunteering as a valuable and integral part of life. We believe the following principles and values should underpin volunteering:-

- Volunteering encourages civic participation and demonstrates active citizenship
- Volunteering is an expression of the individual's freedom to choose
- Volunteering is unwaged and benefits from being a reciprocal gift relationship that meets the needs of organisations and volunteers
- Volunteering promotes inclusion and should be open to all
- Volunteering enables people and communities to influence and contribute to social change
- Volunteering works best when it is guided by good practice

This workbook was originally developed in 2001. A review of all five 'As Good as they Give' workbooks was carried out in 2012 , facilitated by funding provided by The Building Change Trust.

These workbooks are available in downloadable electronic format only.

As Good As They Give
Providing volunteers with the management they deserve

Workbook Two - Attracting and Selecting Volunteers

	Page
How to use this book	1
1. Introduction	2
Some key principles	2
Good practice in volunteer recruitment	4
2. What we need is	6
Why does the organisation want to involve volunteers?	6
What does the organisation want volunteers to do?	7
What skills/qualities will the volunteers need?	9
3. Is there anybody out there?	14
Attracting volunteers	14
Recruitment methods	17
Planning a recruitment campaign	19
4. Making the right choice	21
Key principles of selection	21
Procedures for selection	23
Having to say 'no'	27
5. And finally...	29
How will the organisation manage new volunteers?	29
Getting new volunteers started	30
Appendix	
Standards relevant to volunteer management	32

This workbook is aimed at the individual or team responsible for co-ordinating or managing the involvement of volunteers within an organisation or project. It explores basic good practice for fair and effective recruitment and selection of volunteers.

While the workbook attempts to at least touch on all the major issues raised by the recruitment and selection process, volunteers are involved in such a wide variety of organisations, and undertake such a diverse range of tasks that it cannot claim to cover all circumstances and eventualities. Instead, it seeks to identify underlying principles, which can be applied in any type of volunteer-involving organisation regardless of size.

The workbook also outlines procedures and skills for implementing these principles and provides examples of good practice, which, it is hoped, will make it of use as a practical tool when undertaking these tasks in real work situations. However, it also makes frequent use of exercises and activities to encourage you to use your own knowledge and experience to tailor these suggested ways of working within your own organisational contexts.

The workbook has been designed primarily as a learning resource for individuals in a volunteer management position, it could also be used as a basis for group training sessions. However you choose to use the book, it should help you acquire skills and knowledge needed to:

- identify the organisation's reasons and needs in involving volunteers.
- draw up a plan for recruiting and selecting volunteers which reflects good practice.
- identify meaningful work for volunteers and develop volunteer role descriptions.
- identify and respond to safety issues relevant to the organisation, volunteers and users.
- identify and use appropriate methods and media to attract volunteers.
- develop and implement fair and effective selection procedures.
- enable suitable volunteers to commence their work safely and effectively.

The following symbols will help you to use the workbook:



Key principles, which represent the main focus of a chapter or section.



Indicates an **example** or **case study** that illustrates good practice in a particular context. It does not imply an 'ideal' way of applying the good practice principles, just one that worked in that setting.



Reflective **exercises** are designed to draw out ideas and knowledge on an issue, or to help place it in a relevant context.



Tasks, on the other hand, involve practical activities or research with a tangible application to the reader's work.



Finally, **references** to other materials allow more in-depth reading on specific issues which space does not allow us to fully explore in this publication.

Finally, you should be aware that this workbook is part of a series that addresses the key areas of volunteer management. To address only the issues explored in this workbook is to miss the bigger picture. The volunteer-involving organisation (or Volunteer Manager) who tackles good practice issues only insofar as they apply to volunteer recruitment and selection may ultimately find their hard work a waste of effort. No matter how many volunteers are recruited and no matter how carefully they are matched to their ideal volunteer role, they are unlikely to remain for long with an organisation which does not manage and develop their involvement effectively. We would encourage you to work through the first book in the series, *Planning Volunteer Involvement* prior to starting any of the others.

Other workbooks in this series are:

- One - *Planning Volunteer Involvement*
- Three - *Managing and Motivating Volunteers*
- Four - *Managing Volunteer Training*
- Five - *Volunteers and the Wider Organisation*



1. Introduction

Some key principles

Before starting to think about any particular aspect of volunteering, it is vital to clarify what we mean when we talk about 'volunteering'. This workbook is based on three key ideas about the nature of volunteering.

★ The first key idea is about the nature of volunteering. While it is often useful to think about volunteering in the broadest sense - as any community activity or as active citizenship - there are times when we need a clearer definition of volunteering. For instance, when we are undertaking practical tasks, such as formulating policy and procedures for volunteer involvement within our organisation or group, it is important to be able to state clearly to whom such policy and procedures apply.

Volunteering has been defined as... **“the commitment of time and energy for the benefit of society and the community, the environment or individuals outside (or in addition to) one’s immediate family. It is unpaid and undertaken freely and by choice.”**

[Join in, Get Involved: Build a Better Future Volunteering Strategy for NI, 2012](#)

This is the definition that we will use in this workbook and it raises four distinct points about the nature of volunteering:

1. Volunteering involves an active commitment. It is more than simply donating money or lending one’s name to a cause.
2. Whatever the volunteer’s original motivation, the benefits of their voluntary activity are felt beyond the volunteer and his/her immediate family.
3. There can be no element of compulsion or coercion in volunteering. Each individual must make the commitment of his/her own free choice.
4. Volunteering is essentially unpaid. While reimbursing out-of-pocket expenses is good practice, giving or receiving payment for work creates a different kind of relationship to that between a volunteer and the group or organisation with which s/he volunteers.

★ The second key idea about volunteering is that **volunteering is a two way relationship**. The traditional view is that volunteers make a gift of their time, without any desire or expectation of getting anything out of the process. Although the element of altruism is felt by many to be an essential ingredient in volunteering, this ‘one-way’ relationship is no longer seen as either realistic or useful by many of those with a direct involvement in volunteering.



Instead, volunteering is understood as a relationship that, like most relationships, requires both parties to put something into the process in order to receive mutual benefits. On this basis, the organisation has a clear responsibility to plan and manage the way in which it involves volunteers in order to maximise the potential benefits to all concerned - the organisation itself, its clients and the volunteers.





The third and final key idea is that **volunteers have a unique contribution to make** to the organisations and client

groups with which they work, which is different from but complementary to that of paid staff. Many organisations think of involving volunteers only in terms of saving money. This implies that, “If only we had enough money, we wouldn’t need (or even want) volunteers in our organisation.” So volunteers are tolerated as ‘cheap labour’ or second-class staff. This has important implications for every aspect of how you will involve and manage volunteers, from which tasks they do, the resources spent on their involvement and the sense of value they have.

If the economic considerations only produce ‘second choice’ reasons for involving volunteers, what are the ‘first choice’ reasons?



Aim: To examine your organisation’s attitudes to volunteers and its approach to volunteer involvement.

Spend 10 -15 minutes thinking about or discussing why your organisation involves volunteers and try to write down at least three or four reasons in order of importance.

Think about...

- the sorts of roles or functions that volunteers fulfil in your organisation.
- how volunteers contribute to the achievement of the organisation’s objectives.
- the relationship of volunteers to paid staff, and to your service-users.
- what, if anything, your mission statement or constitution says about volunteers.

Look at the reasons you have listed and consider if they pass the following ‘ideal world’ test: In this particular ‘ideal world’, the needs your organisation deals with still exist, but there is limitless money to spend on meeting those needs. Do the reasons you have listed mean that there would still be a place for volunteers within your organisation?

Now read the following extract to see if there are (other) ‘first choice reasons’ for involving volunteers in your organisation.



First choice reason for involving volunteers

If you play this mind game, you will identify some of the unique things volunteers offer an organisation - so special to volunteers that paying a salary negates or changes them completely:

- Volunteers have perceived credibility with clients, donors, legislators, and others for the very reason that they do not receive a paycheck from the organisation.
- It often makes a difference to the recipient of a service that the provider is there purely because he or she wants to be.
- Volunteers are insider/outside, bringing a community perspective and a wide range of backgrounds consciously different from the employees. Because they give a few hours of time, volunteers have a broader point of view than the paid staff who may be too close to the work to “see the forest for the trees”.
- Volunteers extend your sphere of influence and access to additional people, businesses and organisations in the community. Even the volunteer who helps you once a year becomes another person with knowledge about your work.
- Boards of directors of nonprofit organisations are - by law - an intermediary between donors/funders and program participants, acting as “trustees” of funds from which they themselves derive no profit.
- Volunteers bring the “luxury of focus” to their work. While paid staff members must spread their time and efforts equitably among all clients and projects, volunteers can be recruited to concentrate on selected individuals and issues.
- Volunteers bring flexibility, they can be asked to work odd hours, in varying locations, and to fill special needs for which staff time can not be justified yet which are important to individual clients.



- Volunteers often feel freer to criticise and speak their minds than employees do.
- Volunteers, as private citizens, can sometimes cut through red tape and bureaucracies more directly than employees.
- Volunteers can provide new and valuable contacts and networks and extend the reach to new audiences, donors etc.
- Volunteers can experiment with new ideas and service approaches that are not yet ready to be funded - or that no one wants to fund for a wide variety of reasons. Historically, in fact, volunteers have always been the pioneers in creating new services, often against the tide of opposition from more traditional institutions.
- Studies have shown that satisfied volunteers frequently are so supportive of the organisations with which they serve that they become donors of money and goods as well. They also support special events and fundraisers by attending themselves and bringing along family and friends.

So Why Pay a Salary?

Perhaps you have been thinking about the reverse of the question of why you involve volunteers, namely: “Why should we salary anyone?” It is important to recognise that the answer is **not** that offering a salary gets you people with better qualifications. A volunteer can be just as highly trained and experienced as any employee. Instead, offering a salary gives the agency a pre-determined number of work hours per week, the right to dictate the employee’s work schedule, a certain amount of control over the nature and priorities of the work to be done, and continuity.

© Adapted from Lee, J F & Catagnus, J M. *Supervising Volunteers* Energize Inc, 1999

Other Benefits of Volunteers

Since we live in the real, limited-resources world, what are the other benefits to an organisation for involving volunteers?

Volunteers offer:

- Extra hands and the potential to do more than could be done simply with limited salaried staff; this “more” might mean an increased amount of service, expanded hours of operation, or different/new types of services.
- Diversity; volunteers may be different from the salaried staff in terms of age, race, social background, income, educational level, etc. This translates into many more points of view and perhaps even a sort of checks and balances to the danger of the staff becoming myopic.
- Skills that augment the ones employees already possess. Ideally volunteers are recruited exactly because the salaried staff cannot have every skill or talent necessary to do all aspects of the job.
- Community ownership of solutions to mutual problems. Especially if your organisation addresses issues affecting the quality of life, when people participate as volunteers they empower themselves to improve their own neighbourhood (which is your mission, after all).

Finally, one last thought on the ‘second choice’ or economic reasons that you may have for involving volunteers in your organisation. Volunteers do not save money, but they do help organisations to spend the money they have in the most effective and efficient way. Therefore, it is more accurate to say that volunteers provide excellent value for money, with the consequent understanding that volunteers do not come for free. Organisations must be willing to invest in this valuable resource in order to get the best value out of it.

Good practice in volunteer recruitment

Having addressed some of the basic principles around volunteering, we can now start to consider the specific tasks of recruiting and selecting volunteers to become involved in your organisation. Again, it is helpful to start with a clear understanding of what constitutes effective recruitment.

For many volunteer-involving organisations, recruitment is a numbers game - that is to say it's quantity that counts! Many beleaguered Volunteer Managers would find it hard to imagine a situation where



they have too many volunteers – after all there is always so much that needs to be done. Some organisations operate a clear ‘non-rejection’ policy in relation to recruiting volunteers, and for many others the thought of turning down any offer of help would just never occur! But, if the volunteers you wish to recruit are to make a real contribution to the organisation, doing meaningful work, then the qualities that your volunteers bring must also be considered. This means that you may not want to accept every offer of help you receive.

The other problem with judging successful recruitment in terms of the total number of new volunteers you find is that you can be too successful! If you attract enquiries from 50 or 100 potential volunteers, someone must respond to those contacts – and preferably do so promptly. This task alone could take days, before even thinking about any selection process you might need to go through. This might be worthwhile if you need 100 volunteer street collectors, but is it a good use of time if what you actually need is one or two dedicated and skilled counsellors?



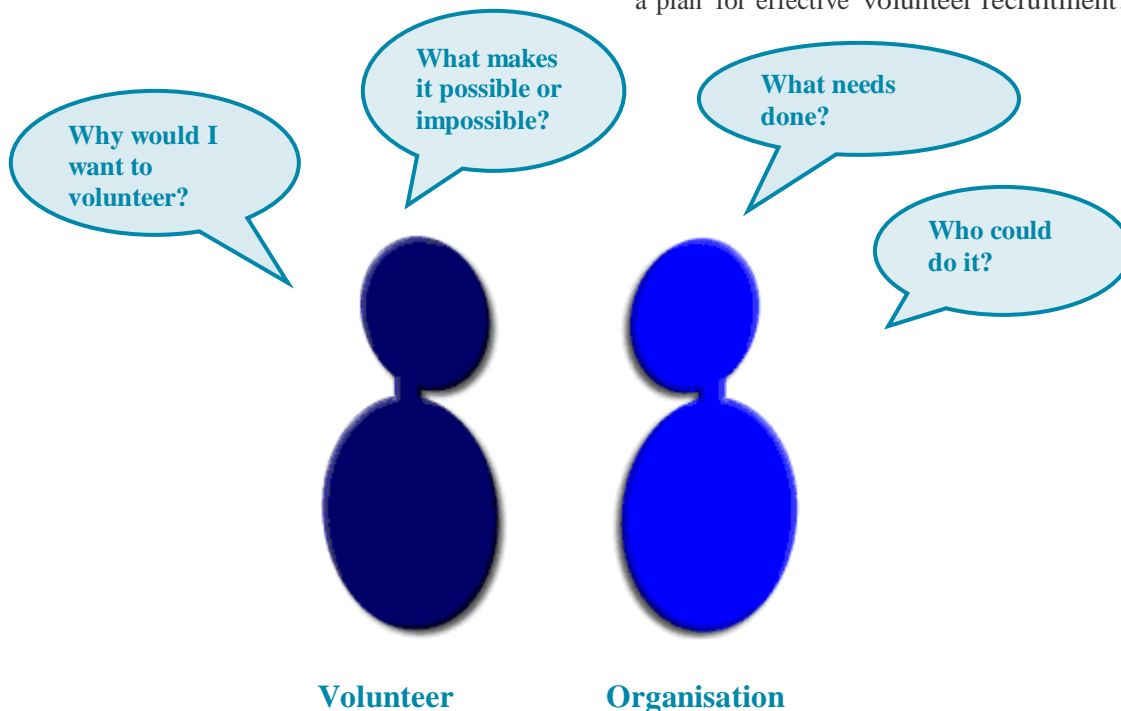
Therefore successful recruitment is not about getting as many volunteers as possible; **it’s about finding the right number of the right type of volunteers.** Unfortunately, there is no magic way of achieving this. If there is a ‘secret’ to successful recruitment, then it is simply to plan ahead.

The rest of the information in this workbook aims to help you to answer the six key questions below:

A Plan for volunteer recruitment

1. Why does the organisation want to involve volunteers?
2. What does the organisation want volunteers to do?
3. What qualities/skills will these volunteers need to have?
4. How will the organisation find volunteers?
5. How will the organisation select which volunteers it wants?
6. How will the organisation manage the volunteers after selection?

When you’ve answered them, you will have a plan for effective volunteer recruitment!





2. What we need is...

This chapter looks at the first three questions in the plan for recruiting volunteers, establishing the main requirements of the organisation. While you may feel tempted to go straight to the next chapter on the 'more difficult' issue of how to find volunteers, it will soon become apparent that one of the main difficulties in finding volunteers - or anything else - is in knowing exactly what you are looking for. So whether you are considering involving volunteers for the first time, or want to revive or expand an existing volunteer programme, read on...

Why does the organisation want to involve volunteers?

As we have already seen in the introductory section, this is one of the most important questions your organisation will need to answer, not just when recruiting volunteers, but in relation to all aspects of volunteer involvement. While you will have considered already first and second choice reasons' for involving volunteers in your organisation, it is important that everyone in the organisation can agree shared values around the place of volunteering. This will not only provide a sound basis for recruiting new volunteers but is vital in order to secure resources and support to manage volunteers effectively once they have been recruited.



Aim: To begin to establish a shared value base for the involvement of volunteers across the organisation.

Look again at the reasons you identified for involving volunteers in your organisation and consider:

- Are they consistent with the wider purpose and values of your organisation? (E.g. Would everyone in your organisation agree with your reasons? Is there any potential conflict of interest?)
- What implications do they hold for your current volunteering practice? (E.g. How do you promote equality of opportunity in practice? Are there issues around [job substitution](#)?)

- What implications do they have for volunteers themselves? (E.g. Can they expect to have access to training? Can volunteers get a 'promotion'?)

Once you have given these issues some serious thought, your task is to find an opportunity to raise these with your management team, colleagues, existing volunteers and/or service users. Perhaps you could.

- include it as an agenda item at your next staff/team meeting.
- circulate a short questionnaire to get the views of a range of volunteers, clients and staff.
- arrange an informal chat with a representative sample of those connected with volunteering in your organisation.



This exercise may raise a lot of new information and ideas. As the individual responsible for volunteering, your long term aim should be to **raise awareness** of the key principles discussed in the introductory section and so begin to **develop a set of values** for the involvement of volunteers that is shared and understood throughout the organisation. It will almost certainly take some time to complete this process, which ultimately should result in an explicit statement of shared values on volunteering within the organisation - a volunteer policy. (See Workbook One Planning Volunteer Involvement) How long it takes to achieve this will depend on the current situation in your organisation. Perhaps you already have a volunteer policy, which just needs to be revised or updated, or you may be right at the start of the process, facing a long period of discussion and debate. Develop or review your volunteer policy using this [available template](#).

In the meantime, it is possible to proceed with further recruitment activities and address other volunteer management issues. However, you are likely to find that you are unable to answer some subsequent questions without first answering this one. (Ultimately a coherent and effective strategy for involving volunteers will prove difficult to develop and maintain without the parallel development of a clear organisational value-base.)



What does the organisation want volunteers to do?

The answer to this question may also seem obvious, especially if you have involved volunteers for a long time. It is easy to assume that volunteers will do what they have always done; but as things change, both in your organisation and externally, the roles you need your volunteers to fulfil will change too. Therefore, it is useful to clarify and periodically update just what the organisation wants the volunteers to do. This may involve revising the parameters of existing volunteer roles or identifying totally new areas of work in which volunteers could become involved.



Aim: To identify potential roles for volunteers, which could help to meet the needs of the organisation.

- First, take 10 minutes to list all the things that volunteers currently do in the organisation.
- Now, spend 10 minutes listing things that really need to be done, but currently are not.
- Finally, spend 10 minutes creating a 'wish list' of things you would like to be able to do, but which don't currently take priority over the things on your previous 'needs done' list.

Now look at each of your lists:

- Does each item describe a meaningful volunteer task or role - can you identify the *purpose* of the work? (Make sure you haven't included any tasks that are really the responsibility of paid staff!)
- Focus on the wider purpose of each particular task or job to see if you can come up with other ways that volunteers could help to achieve that goal. Use your imagination!

Continue to add to your lists over the next few weeks and months. In particular, keep the 'wish list' in your diary or on your desk and add to it every time you find yourself thinking, "If only we could...". This should encourage you to think creatively about the ways in which volunteers could become involved with and enhance the work of your organisation.

By developing the range of volunteering options that your organisation offers you can maximise the number and 'types' of people who would consider volunteering with you. The previous exercise aims to encourage a little creative thinking in identifying the broad areas of volunteer involvement. This sort of imaginative approach can also be applied to good effect when developing more specific ideas on both *what* volunteers will do and *how* they will do it. Consider all the issues that might influence a potential volunteer in deciding whether or not to make a commitment to your organisation:

- **Why?** It is vital that the work you ask volunteers to do is meaningful and brings clear and identifiable benefits to the service users, the community or the environment. While most people have a number of motivations for volunteering in the first place, the feeling of satisfaction is essential to ensure that they keep coming back!
- **What will the volunteer be doing?** Time is a valuable commodity. Research² commonly identifies flexibility and variety as two of the key things that people want from volunteering. Try to avoid the habit of thinking about voluntary work within the limitations that dictate how paid jobs are organised and make the most of the uniquely flexible approach that volunteers can bring. Try to offer *variety* through short-term volunteer assignments with a limited commitment, as well as ongoing volunteer roles needing a longer commitment. Many people who initially volunteer for a one-off event or short-term assignment are prepared to make a longer commitment to the organisation once they get involved.



Now for something completely different

- The Abbeyfield Society in Northern Ireland has involved volunteers in assessing the Society's new quality standards for their residential homes for older people. A small number of volunteers, who had knowledge of the Society and/or quality management, were recruited and provided with training on both the Abbeyfield Standard and on conducting quality

² *Youth Volunteering: Making a Difference to Community Relations*. Irvine & Schubatz, 2010



audits, to achieve accreditation against the Management Charter Initiative's national standards. Initially, volunteers are only asked to make a limited commitment. Each audit usually involves two or three visits per home, so the minimum time commitment of about 30 hours (including 12 hours for training) can cover two homes and can be completed over as little as three or four weeks.

- The Blind Centre (NI) trained a select number of theatre-loving volunteers in 'audio description' techniques, to provide visually-impaired theatre-goers with a commentary on the on-stage action via earphones. After an intensive weekend training course, volunteers attend one or two performances of a play in order to prepare a 'script', and then work with one or two other volunteers to provide the commentary at one matinee and one evening performance of each piece presented by the local theatre. As the initial period requires intensive training and preparation, volunteers need to be able to make a long-term commitment. However, with experience the amount of time involved is generally limited to 10-12 hours every four to six weeks - for preparation and two 'working' shows for each run of a play.

- **Where and when will the volunteer carry out the role?** Thinking outside the employment model can also produce a much greater degree of *flexibility* in your volunteer opportunities. While it may seem easier to manage regular, rigid work patterns, more flexible ways of working can actually require less management in the long run, as they encourage volunteers to take responsibility for achieving results rather than completing tasks. Some kinds of work demand a regular time commitment - such as a team task, where everyone must be in the same place at the same time. However, many administrative and one-to-one activities could allow the volunteer to set his/her own hours. Think about the location for the work too. Must volunteers come to you (or the service-user) or can they volunteer from home for instance through 'virtual volunteering' or telephone befriending.



What is virtual volunteering?

Virtual volunteering refers to volunteer tasks completed in whole or in part via the internet on a home or work computer. It's also known as online volunteering, cyber service, telementoring, teletutoring and various other names.

The concept is not meant as a substitute for traditional "in person" volunteering. In fact one of the most exciting things about this innovative use of technology is that it is adding both to the quantity of service contributed and to attracting people who have not necessarily volunteered before.

© Ellis, SJ & Craven, J, *The Virtual Volunteering Guidebook*, Impact Online, 2000

If you want to know more about using the internet to recruit and manage volunteers, this 138pp book can be downloaded **free** from

<http://www.energizeinc.com/download/vvguide.pdf>

- **Who will the volunteer work with?** A key benefit from volunteering is meeting people and making friends³, so it is important to be clear about whether the work is solitary, one-to-one or part of a team effort. Of course, there is no reason why many solitary activities could not be organised to allow social contact. Potentially tedious jobs for an individual, such as stuffing envelopes, can be done more quickly when it is done by a group of four or five friends who also get the opportunity for a good old chat. Try also to identify particular tasks that offer the potential for groups or families to volunteer together on an ongoing basis. Another issue to consider is the relationships between the volunteer and paid staff. What is the nature and level of contact between them?
- **What supervision and support will be offered?** If you have been imaginative in designing roles or assignments, you may also need to show the same imagination in the ways in which you support volunteers and supervise their work. The initial induction, which introduces new

³ *It's All About Time*, Volunteer Development Agency, 2007, Table 1.17

volunteers to both the wider organisation and their particular role, becomes even more important when flexible volunteering options make regular, direct contact with some volunteers difficult. If you are expecting volunteers to work autonomously, perhaps at a different site from their supervisor, additional training may be required. In any case it is always useful to allow a 'settling in period' when the volunteer can expect a little extra support and any potential problems can be identified at an early stage. Don't forget about very practical forms of support too - like what out of pocket expenses volunteers will receive.

- **What's in it for the volunteer?** While most volunteers are motivated to some extent by helping to meet a need or fulfilling a moral or social duty, it is important to be able to identify more direct or personal benefits that they could get from a particular role too. Although every individual will have his or her own unique set of motivations for volunteering, it may be helpful to be aware of the most common reasons. Clary & Snyder, two American psychologists, have identified six main types of motivations for volunteering. Notice the mixture of altruism and self-interest encompassed in the list below:

Values - volunteering can provide an opportunity to act on deeply held beliefs.

Understanding - volunteering can allow the individual to gain insight into the people or organisation they work with, or about themselves.

Career - volunteering can develop skills or experience, which can help to start or develop a career.

Social - volunteering can provide opportunities to meet people and develop contacts.

Esteem - volunteering can build confidence and help people feel better about themselves.

Protective - volunteering can allow people to avoid feelings of loneliness, powerlessness or guilt.

If you really cannot think of any potential benefits, you will need to think again or maybe try redesigning the role. However, if you can, it may give you some ideas about the sorts of people who might be most interested in undertaking it. Which leads to the final question in this part of the recruitment plan...

What skills/qualities will the volunteers need?

When you have addressed each of the key issues listed under question 2, you are already half way to answering this question. By specifying exactly what the role requires, it becomes increasingly clear what experience, skills, knowledge and qualities an individual needs to possess to fulfil the role - which means that you will know what to look for when potential volunteers make contact with your organisation. However, make sure that you distinguish between what is desirable for the role and what is truly essential, otherwise you may find you have excluded a whole group of potentially suitable individuals from becoming volunteers. Consider too if volunteers must already possess the identified skills, qualities etc., or if they could develop them in the role or through training.

The following table illustrates how clarifying the nature of the role will help you to identify the right volunteer(s) for the role.





IDENTIFYING VOLUNTEER QUALITIES

	Assignment/Role	Volunteer
Why	<ul style="list-style-type: none"> Identify the purpose of the volunteer role. 	
What	<ul style="list-style-type: none"> List all tasks involved, identifying the key tasks. Identify any aspects that might be difficult or require particular skills. 	<ul style="list-style-type: none"> What skills, experience, attitudes, etc., are needed to do the work? What qualities are needed to work with clients? Are there any physical requirements?
Where & when	<ul style="list-style-type: none"> Specify any set work times or minimum hours or if flexibility is required. E.g <i>It is hoped that the volunteer will contribute 2 hrs per week</i> State where the work is carried out and transport needs. 	<ul style="list-style-type: none"> Is there a minimum/maximum time commitment? Are there set times or days? How important is reliability? Flexibility? Does the volunteer need access to own transport? Public transport? Are there any problems with access?
Who	<ul style="list-style-type: none"> Is this a solitary position or part of a team? Outline relationships between paid staff and volunteers. What is the management system? 	<ul style="list-style-type: none"> What special requirements arise from working alone - or in a team? Will volunteers need initiative, team skills etc.?
Support	<ul style="list-style-type: none"> Outline the support systems and methods of supervision. Describe induction and/or training that will be available. Specify a 'settling in' period. Specify what expenses will be available to the volunteer. 	<ul style="list-style-type: none"> Does the volunteer need to be willing to ask for support? Is attendance at supervision meetings or training compulsory?
Rewards	<ul style="list-style-type: none"> Identify what the volunteer could get out of the role. 	<ul style="list-style-type: none"> What might motivate people to volunteer for this role or to stay in it?



You need to compile this information for every volunteer role or assignment to produce a **volunteer role description** and **volunteer specification**. It may seem a lot of work to do this for every role (it is!), but the volunteer role description and volunteer specification are the basis of good practice in recruiting volunteers. Luckily they also prove useful in all sorts of other tasks from selecting volunteers and matching them to the right role, to identifying training requirements and as a basis for supervision and support systems.



Aim: To begin to compile or update role descriptions and volunteer specifications for each volunteer role or assignment.

Look at the lists you made for the last exercise (p 10) and select one current and one new volunteer role. Choose roles for which you have already identified a clear purpose.

- Photocopy the planning notes (page 12 – 13)* and complete them for both roles. When you have done this, or if you have difficulty completing any of the sections, show the forms to someone who knows the work well and include their ideas. You may want to talk to:
 - Current or former volunteers
 - The person with direct supervisory responsibility for the work
 - Co-workers on the team
 - The service users, their families or representatives
 - The team leader or project manager

Aim to produce or update volunteer role descriptions and volunteer specifications for all your current volunteer roles and assignments. Depending on the number and complexity of volunteer roles in your organisation, this may take some time, but don't be daunted. Take it one step at a time and remember that doing this will make your job easier in the long run! You may also find it more efficient to enlist the help of a number of colleagues, either working as a group or taking individual responsibility for the particular role they know well. Where you wish to develop a new role for volunteers, make drafting the role description and specification the first

step - a pre-requisite to recruitment. This approach ensures that paid staff are clear about the volunteers' place and are prepared to manage their involvement effectively right from the start - especially important if there is any scepticism or resistance to developing volunteering in this area.



The essential truth about recruitment

- Well-defined roles are the basis of all good recruitment efforts. If you know what's on offer you are more likely to follow it up.
- One of the key barriers to volunteering is a fear of the commitment that would be expected. Giving people the chance to try out volunteering, have a chat with an existing volunteer or someone from the organisation can be useful ways of letting people try volunteering before they commit.
- Less formal language to describe the recruitment process can be more attractive to potential volunteers i.e. registration form rather than application form, informal chat rather than interview.

Source: Volunteer Now (2011) 'Making the Connection 2: A Further Exploration of the Attitudes, Lifestyle and Volunteering Activity of the 50+ Age Group in Northern Ireland.'

* N.B: These are planning notes and not necessarily the best format to use for your final role description and specification.

The planning documents are useful for you to see the key facts that should be included in these documents. You may wish to present your final role description and specification in a few short paragraphs. It is important to tailor the style and amount and type of information to the context you are using them for *i.e. part of an information pack for potential volunteers, marketing purposes and website use.*

Overall, it is always important to use clear plain, non employment related language, avoid jargon, make it as interesting and as short as possible.





VOLUNTEER ROLE DESCRIPTION

Planning Notes

Role title: _____

Main purpose: _____

Questions/issues	Notes
<p>1. What?</p> <p>List all tasks in order of priority, identifying any client/user group the volunteer will be working with. What might be difficult or unpleasant?</p>	
<p>2. When?</p> <p>Hours per week? Day, evenings, weekends? Short or long term involvement?</p>	
<p>3. Where?</p> <p>Include everywhere the volunteer will be expected to go.</p>	
<p>4. With whom?</p> <p>Will volunteer work alone or with other volunteers or paid colleagues?</p>	
<p>5. Support, supervision, training.</p> <p>Who will support/supervise the volunteer? What training, support, supervision will be needed?</p>	
<p>6. Expenses etc.</p> <p>What expenses do you offer? Travel, telephone, stationery, meals etc? What else do you offer to help volunteers to carry out their role, e.g. child care?</p>	
<p>7. What does the role offer volunteers?</p> <p>Make two lists - what the role does and does not offer. A challenge? Friendship? A chance to change things? Personal development? Training? etc.</p>	

Have you thought about diversity when developing your role?

There can be value in encouraging diversity in terms of the people involved in your organisation and in the range of volunteer opportunities available. For further information visit the [publication section of volunteernow.co.uk](http://www.volunteernow.co.uk) to view a range of best practice information sheets that provide guidance on how to increase inclusivity, including; involving different groups i.e. [Older People](#), [Young People](#), [Involving People with Disabilities](#).



VOLUNTEER ROLE SPECIFICATION

Planning Notes

Role title: _____

Main purpose: _____

Questions/issues	Notes
<p>1. What? What skills, experience, attitudes, etc., are needed? What is needed to work with clients? Physical requirements? Qualities to cope with difficult aspects?</p>	
<p>2. When? Minimum/maximum time commitment? How important is reliability?</p>	
<p>3. Where? Do volunteers need own transport, or be willing to use public transport? Access requirements?</p>	
<p>4. With whom? What special requirements arise from working alone - or in a team? Initiative? Team skills?</p>	
<p>5. Support, supervision and training. What is expected in terms of: Willingness to ask for support? Attendance at supervision or training?</p>	
<p>6. Expenses etc. Does the volunteer have to fill in forms to claim expenses? Are you expecting people to be out of pocket?</p>	
<p>7. What does the volunteer want? You can not fill in this space in advance - it is up to the volunteer!</p>	



3. Is there anybody out there?

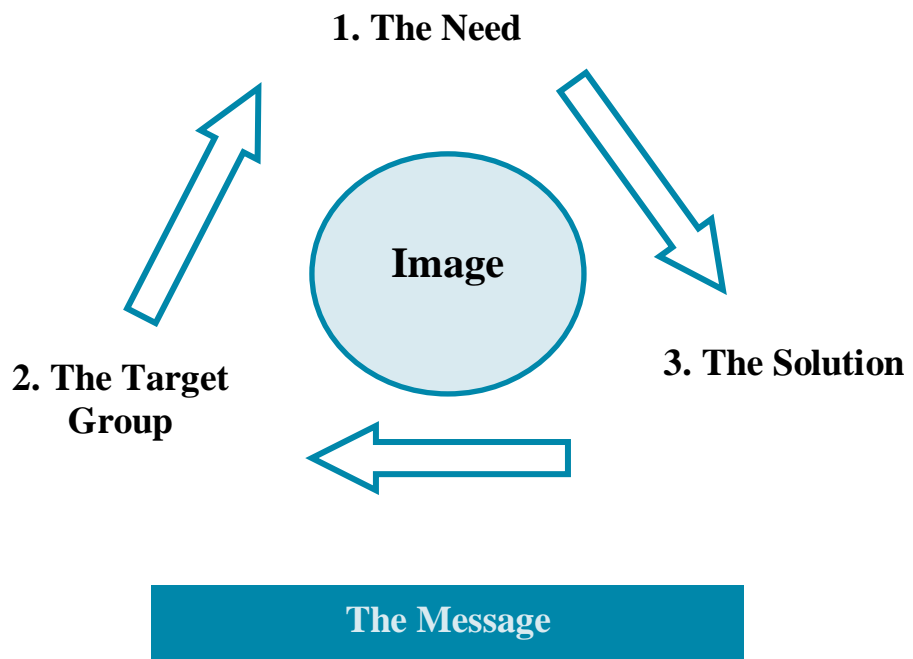
Now that you have clearly identified what you are looking for, you are ready to start planning your recruitment campaign. Different organisations have different approaches to volunteer recruitment. Some conduct periodic campaigns, while others require a more or less continuous flow (or steady drip!) of new volunteers. Recruitment may target a specific role or be general, finding suitable work for each volunteer later through a matching process. Mostly, organisations use a mixture of approaches, depending on their particular needs and resources at any given time.



In all cases, an awareness of the need to **actively attract** people to volunteer with your organisation is essential.

Attracting volunteers

We need to start by thinking about this idea of attracting volunteers when we address Question 4 in the recruitment plan, *'How will the organisation find volunteers?'*. Your organisation faces fierce competition for volunteers' time, not just from other volunteer-involving organisations, but from the vast range of alternative leisure pursuits available. If you want your volunteering opportunities even to register as an option with your potential volunteers, you need to raise public awareness of your organisation, the work it does and the opportunities it provides to become involved in that work on a voluntary basis - but how? It can be helpful to think about attracting volunteers in terms of 'selling' volunteering and recruitment as a sort of marketing exercise, as illustrated below.





As you may have spotted, we have already looked at three of the features of this basic marketing model. The marketing process begins by identifying a '**need**' for the product or service. When recruiting volunteers our 'product' is voluntary work, and we identify the need by answering the first question on the recruitment plan, '*Why do we want volunteers?*'. The '**solution**' to the need is, of course, the product or service itself. By designing volunteer roles to fulfil a purpose rather than just to complete a task (Question 2 of the Recruitment Plan) we can make sure that our solution really meets the need. The third element of the marketing campaign involves identifying the '**target group**' - who wants or needs this product or service? Question 3 of the recruitment plan helped us to work out who might fill a given volunteer role by drafting a volunteer specification. This helps to identify not only what skills and qualities the organisation wanted, but also who might be attracted to volunteer because of what the role has to offer them.

We will look at these three elements in more detail at the end of the chapter, with an exercise to test out this marketing approach in relation to your own organisation's recruitment needs. However, the rest of the information in this chapter will focus on the two 'communication' elements of this approach to volunteer recruitment - the **image** and the **message**.

As you can see from the marketing model diagram, **image** is central to the marketing process. Perhaps it is because we feel that our work speaks for itself that in non-profit organisations we often fail to recognise the importance of public perceptions. Although it is true that our organisations are not accountable to shareholders in the conventional sense, they are usually highly dependent on the interest and goodwill of a vast constituency of 'stakeholders', such as current and potential funders, service-users, partnership organisations, local communities, volunteers and paid staff. An organisation's image is made up of all the perceptions and assumptions that these people hold about it, and that may not always match the organisation's image of itself!



Aim: To consider stakeholders' perceptions of your organisation and the implications of image for volunteer recruitment.

- Think of a well-known company, organisation or other grouping from any sector that has a 'good image' and try to identify the elements of that image. Think about perceptions of their relationships with their various 'stakeholders', the quality of their products or services and their overall mission or purpose.
- Now do the same for your own organisation. This can be very difficult to do as an 'insider'. Try to remember what you knew about it (if anything!) before you started to work there. Ask friends (but not colleagues) for their impressions. You could check some of these ideas with recently recruited volunteers.
- Finally list the ideas and perceptions under 'positive', 'negative' and 'neutral' headings. What impact might these impressions have on potential volunteers? To what kinds of people might the positive images appeal?

This exercise should help you to understand what might appeal to potential volunteers about your organisation, the work you do and how you do it. These could form some of the basic 'selling points' when trying to promote your volunteer opportunities. However, as we have seen, an organisation's image can carry negative as well as positive connotations, and these may create barriers to volunteering. Identifying and removing such barriers is tied to much wider issues of equal opportunities in volunteering, which have implications for the whole organisation. The current chapter does not have the scope to address all those issues,⁴ and restricts itself to looking at common barriers to volunteering in the context of how they can undermine positive aspects of the organisation's image and make recruiting volunteers harder. The table overleaf lists some common obstacles to volunteering, as well as some suggestions on how to overcome them. Note down any other ideas in the 'Solutions' column.

⁴ You may want to look at Workbook Five *Volunteers and the Wider Organisation* for a broader perspective on this issue.



BARRIERS TO VOLUNTEERING	
Barrier	Solutions
Lack of knowledge about the organisation	Lots of positive publicity Make information available in a variety of formats Arrange open days/visits
Lack of experience of volunteering	Offer a 'settling in' period Provide training
Previous negative experience(s) of volunteering	Emphasise benefits of volunteering Explain how volunteer involvement is organised and managed in your organisation
Fear of over commitment	Indicate length of commitment required in recruitment materials Offer short-term and/or 'taster' assignments Offer a 'settling in' period
Cares for dependants	Provision of crèche facilities Advice/information Offer to reimburse such expenses
Don't know anyone that volunteers / don't think they have skills to offer	Specifically target marketing messages to under-represented groups. Set out the skills, experience, aptitudes that you are looking for.
Difficulties with timing or transport	Organise transport options e.g. car pools Build in greater flexibility to roles
Can't afford to volunteer	Reimburse out-of-pocket expenses
Problems with physical or cultural access	Improve physical access to premise Offer voluntary work at other locations Target excluded groups in recruitment campaigns
Fear of discrimination	Implement equal opportunities and harassment policies Use targeted marketing at under-represented groups
Not wanting to work on own	Create opportunities for volunteers to work in pairs or groups

Remember, your organisation's image has developed over a period of time and is based on the perceptions and experiences of a diverse range of stakeholders. Unfortunately the old saying that, "A happy customer (or volunteer, service user, staff member etc.) tells seven people, but an unhappy customer tells 77" is true! You

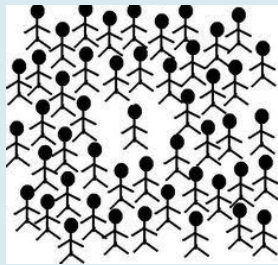
cannot change the way people view your organisation overnight, nor would such a superficial change do much good. In order to create a positive image to attract volunteers, the only real option is to focus on providing a well managed and fulfilling experience for volunteers. Removing some of these common obstacles is a good start.



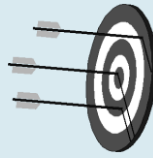
Recruitment methods

Now let's switch our attention to the other, more deliberate form of communication featured in the marketing process - the **message**. While our image sends out implicit or indirect information about us, we also need to communicate directly with our target group when recruiting volunteers. The information we send out reaches certain groups more easily than others.

Who does and does not hear our message depends on how our message is directed (the **recruitment method**) and what it says (the **content**). Let's look first at some methods of recruitment.



'**Warm body**' recruitment involves spreading your message as widely as possible – to any 'warm body' in fact. The assumption is that the more people hear about your volunteering opportunities, the more people will respond. This is a rather 'blunt instrument' in recruitment terms, and really only suited to particular types of volunteer roles. When you need to recruit large numbers of volunteers for roles which do not require specific skills or a high level of commitment - for example, street collectors or stewards at a one-off event - warm body recruitment may indeed be the best approach. Use print or broadcast media - newspapers, posters, community service announcements - to reach a mass audience, but think carefully about the timing and content of your message. (We will look at these aspects of the model later in this chapter). Be aware that one potential problem with warm body recruitment is that you can be too successful! How will you handle large numbers of enquiries? If you find yourself having to turn away too many would-be volunteers, you may find your successful recruitment campaign turning into a public relations disaster.



The other most common approach to recruitment is '**targeted recruitment**', more similar to the approach used to recruit paid staff.

This focuses resources on identifying the particular 'type' of person needed for a role and then designing the campaign to reach them. Therefore, it is most appropriate when the volunteer role requires specific skills or qualities and/or a higher level of commitment. Targeted recruitment works best when the qualities you are looking for are clearly identifiable and observable, as this makes it easier to communicate these requirements in your recruitment message. Obviously this approach requires more time and effort than warm body recruitment, but it also gives you more control and has a high success rate if done well. It can also be very economical as you can use any media that will reach your target group - including asking 'target' individuals directly!



Finally, one of the most consistently successful methods for recruiting volunteers is the '**concentric circles**' model. This approach capitalises on the 'ripple'

effect of using people already connected with your organisation to recruit new volunteers from among their own contacts. It can work for any type of volunteer role and can be very economical as it is done mainly via word of mouth, but you will still need good back-up materials, (e.g. information packs). Although it sounds like a 'lazy' way of recruiting, it requires a lot of effort to get it off the ground as you need to create a culture where *everyone* in the organisation - paid staff, volunteers, service users etc. - accepts an individual responsibility for recruiting new volunteers. Even then you will need to continue to inform, support and motivate your 'recruiters' to find the right people, for instance by providing good recruitment materials for them to use and having an efficient and friendly procedures for dealing with would-be volunteers. If this method has one serious limitation, however, it is that it tends to attract more of the same kinds of people as your organisation already has, and therefore risks stifling diversity unless carefully monitored.



It is easy for organisations 'to get stuck in a rut' with a particular recruitment method. Think carefully about what you want from your recruitment campaign and don't be afraid to use a variety of recruitment methods, it is more likely that you will get interest from a greater diversity of people.

Now let's think about the **content** of our message. Obviously it is vital to give prospective volunteers sufficient accurate information to help them decide if your organisation or volunteer role is the one for them. Furthermore, your recruitment message is likely to be your first contact with potential volunteers, so it is also important to create the right first impression. If you don't grab someone's attention in the first minute or so, they are unlikely to keep listening, reading, or watching. So, staying with the idea of 'marketing' volunteering, we can think of the

★ recruitment message as an advertisement, whatever form it actually takes. The purpose of the advertisement is just to motivate people to get in touch with you. More detailed information about the organisation and the role can follow later so **keep it short and simple**.

So what do they need to know? Think back to our model of a marketing exercise. The two key issues that the message needs to convey to the target group are the **need** and the **solution**. Your recruitment message should open by describing the basic need you are trying to address. Why does the work need to be done? What will happen if it isn't? If the work is with a particular client group, you may want to focus on the needs of a (real or imaginary) individual or, if this isn't appropriate, on how their quality of life is enhanced by the work done. Next, it should tell the individual what they could do about the need. What does the voluntary work involve, and how does that tackle the problem? These two pieces of information should enable an individual to make an initial decision on whether the work is of interest to him/her.

However, they may also raise subsequent issues that need to be addressed before prospective volunteers are persuaded to actually do something about it. First and foremost, the description of the problem and/or of the work may raise fears,

primarily about their ability to actually do the work or cope with the identified problem. Your recruitment message should, therefore, explain briefly what sort of support would be provided, including any training that is available. Other fears may be around practical issues like the time involved - is there a minimum number of hours per week or period of commitment? The other question that is likely to occur to the would-be volunteer is why they should devote their time and energy to this work over and above any other, so try to finish by highlighting the benefits that volunteering brings for the volunteer. All that needs to be added is what the volunteer should do next - whom to contact and how. Again, maximise the options by including a telephone number and email address (if you have one) and try to give a name rather than a job title as the contact - it's much friendlier!

Finally, you will need to give some thought to the media you use and to the timing of your recruitment message. Your choice of media may be dictated to some extent by cost and availability, but where possible you should also try to use media that best suit your chosen recruitment method and your target audience. Consider:

- Posters
- Community service announcements
- Local press advertisements
- Word of mouth
- Articles in newspapers
- Presentations to local groups/Open evenings
- Volunteer Now website
- Volunteer Now offices /Volunteer Centres
- Leaflets and flyers
- Organisation's website
- Internet sites and message boards
- A message on your answerphone
- Direct mailings
- E-groups
- Messages on your franked post
- Church bulletins
- Email signature messages
- Social Media

The timing of your campaign will be influenced mainly by when your target audience is most likely to see and/or hear the message. For instance a community service announcement targeting the



parents of school-age children should not be broadcast during the post-school rush. Think also about the time of year. Students are less likely to see, let alone respond to, posters placed in the students' union during exam time. Be wary too of coinciding with other major events. Potential football coaches may be difficult to reach on cup final weekend.

Planning a recruitment campaign*

As is no doubt apparent by now, attracting the right number and type of volunteers is a little more involved than just putting a 'volunteers needed' advertisement in your monthly newsheet. The six key principles below sum up the basics for recruiting volunteers:

1. Organisations must have a clear value base for involving volunteers;
2. The needs of the organisation and the needs of the volunteer must be met;
3. A clear role with full information about what is required, is important;
4. Organisations need to make it easy for people to volunteer;
5. The image of the organisation is important;
7. A well thought through recruitment message is key.

Don't fall into the trap of these common recruitment mistakes

- Not getting back to people's enquiries promptly;
- Not having information ready to go;
- Not having an informed person taking enquiries.



Aim: To plan a volunteer recruitment campaign using a 'marketing' approach.

Answer the questions overleaf to develop an 'advertisement' to be the centrepiece of your next volunteer recruitment campaign.

- You must have a role description and volunteer specification (or at least draft versions) for the volunteer role(s) for which you wish to recruit.
- Try to be as specific as possible about your target group - the more accurate your aim the more likely you are to hit your target. You may want to develop more than one 'advertisement' if you identify a number of distinct groups to target.
- You may plan to use any media (print, broadcast or electronic) you can realistically access, depending on what you think would be appropriate to the particular target group you have identified.
- Try to include images as well as a written/verbal message in your advertisement, as images can have a powerful impact, but be careful about stereotyping.

Remember the Language that is used is Important

Awareness of the suitability of language with respect to all areas of volunteer management and communication is important.

Research with older people (50+) has found that use of softer language to explain recruitment processes can be more attractive, especially to those who would be put off by the use of more formal language. For example people may respond better to terms such as 'informal chat' and 'registration form' rather than 'interview' and 'application form'.

* For more information on recruiting volunteers see [Recruiting Volunteers Information Sheet](#)



PLANNING YOUR CAMPAIGN

1. What is the role?

List the basic details of the role using your role description/volunteer specification

Title _____

Purpose _____

Tasks _____

Requirements _____

Pro's & Con's _____

2. Who would want to do this work and why?

In marketing language the 'why' is their 'motivational factor' and you will want to appeal to this in your 'advertisement'. For instance, do they (or did they) use some of the required skills in other contexts? (e.g. paid work) On the other hand they may be looking for a complete change from their daily routine at work or home. Perhaps they want to gain the skills/experience involved in the voluntary work for use in another context (e.g. to find or change jobs), or the issue has a personal significance for them or their family?

Who would want to do this? _____

Why? _____

Motivational factor _____

3. What do they do instead of volunteering with you? Where do they do it?

This should give you some ideas about where and how to distribute your recruitment materials. Does your target group go to particular kinds of venues where you could place posters or leaflets? Do they read particular newspapers or specialist publications in which you could place an advertisement or a flyer. Do they watch TV or listen to

radio at particular times when you could broadcast a community service announcement? Do they visit particular web sites where you could advertise?

What do they do instead? _____

Where do they do it? _____

How do we communicate with them? (media, timing etc.) _____

4. What do we say? Who/what will say it?

Finally, work out how you can grab their attention and encourage them to get in touch. Describe the need and the solution, address their fears and highlight the benefits. How do they get in touch? When you have worked out the basic content of your message, you need think about presentation. Can you compose a one-sentence 'headline' that appeals to their 'motivational factor'? Think about the language you use. Use references they recognise. Avoid jargon, unless it belongs to the target group. Be careful with humour! Then think about what imagery can you use - a person or object - that will appeal to the target group? This is known as the 'spokesperson' and should be someone/thing they identify with, admire or aspire to.

The message _____

Headline “ _____ ”

Spokesperson/thing _____

Image(s) _____

4. Making the right choice

By now, you should have at least a few ideas on how to spice up your volunteer recruitment, and are no doubt keen to get started. But wait – remember the recruitment plan? There are still a few things to sort out before you launch your campaign – such as, *'How will the organisation select which volunteers it wants?'* (Question 5). This chapter is all about the potentially thorny issue of selecting volunteers.

Key principles of selection

The basic argument for a selective approach to involving volunteers has already been put in Chapter 1 and is closely linked to the value placed on volunteers' work. If volunteers are expected to carry out meaningful work (i.e. to achieve specific objectives to a certain standard), it follows that not everyone will be suitable or able for a particular role. The other important consideration is that selecting volunteers is less a case of finding the right person for the role and more about finding the right role for the person, and thus a two-way process. If your organisation develops a wide variety of roles and tasks for volunteers, it should be possible to find a place for almost anyone in your organisation. But insisting on a rigid non-rejection policy may carry a number of inherent risks:

1. It may be harmful to the volunteer.

Volunteering is sometimes offered to individuals recovering from (or still suffering from) physical or mental ill health as a therapeutic diversion. While volunteering can be *therapeutic*, it is not *therapy* and should never be seen as a substitute for treatment. This does not imply that these groups of people should be excluded from volunteering, merely that it is necessary to ensure that a given role matches the needs and abilities of any individual who volunteers to do it.

2. It may also be harmful to service-users.

It is in the nature of many voluntary services that those who use them are in

some way 'vulnerable' - children, adults with illness or disabilities or individuals who are emotionally vulnerable as a result of a particular experience. Your organisation has both a moral and legal responsibility to avoid placing them at unnecessary risk through the incompetence or malice of those who work with them. Selection procedures are only one of the ways in which you can prevent any such harm to your service users, but they are potentially one of the most important as they can prevent unsuitable people from getting involved in the first place.

3. Last but not least, it may be harmful to the organisation.

Very few people appreciate being placed in a position where they are almost bound to fail. Placing a volunteer in a role for which they are not suited is unfair to the volunteer concerned, and unfair to the other paid staff or volunteers who have to work with them or manage them. If the volunteer 'fails', they fail too, and that harms the organisation. Not only can it affect morale, but it can also damage the organisation's reputation and image. Remember what we said about one unhappy volunteer in the last chapter!

Bearing all this in mind, it is vital to have a flexible process for selecting volunteers, which not only protects all those concerned, but is also open, fair and effective. As with most volunteer management issues, while it is possible to identify underlying principles, it is usually impossible to lay down a set procedure that fits all situations. So, don't be overwhelmed by the range of possible procedures discussed in this chapter. Relatively few volunteer roles will require you to use all of them to achieve fair and effective selection process. Consider whether each action will help you make the right choice of volunteer and then tailor-make a thorough selection process, appropriate to the nature of your volunteer roles, your volunteers and your organisation.





★ Check that these **six key principles** underpin the process you end up with.

- Having the wrong volunteers is worse than having no volunteers at all.
- Organisations must take all reasonable steps to prevent unsuitable people from volunteering.
- The selection process must be appropriate to the role - rigorous enough to help you make the right choice, but not unnecessarily bureaucratic.
- All volunteers must go through the same selection procedures for the same roles.
- Volunteers should have equality of opportunity too - leave the prejudices behind! *
- Be honest from the start. Make it clear to all volunteers that there is a selection process, and that not everyone will be selected.

Procedures for selection

The diagram that follows is a composite of the selection processes described by a number of experienced Volunteer Managers working in a range of voluntary, community and statutory sector organisations. The steps in bold are those used by all of the Managers consulted, and are recommended as the minimum good practice measures. None of them used every step in the process, but everyone was able to trace a path through the diagram that described their own procedure, although you may find it more suitable to vary the order of the steps. A few thoughts on each step in the process follows.



Stage 1: Application

Information Pack

Taster session/
Information session/
Informal Chat

**Application /Registration form
(and Monitoring Forms)**

Take up
references

Shortlisting

**Stage 2: Selection/
Matching**

Interviews/ Informal Chat

Turn down
offer

'Taster' Visit

Match to Role (s)

ACCESS (NI) 5

**Stage 3: Starting
Work**

'Settling in' Period

Assessment

Review Meeting

5 Safeguarding Vulnerable Groups (NI) Order 2007



Application

Initial contacts

Throughout the selection process, it is important to remember that both you and the potential volunteer are deciding on whether you are suitable for each other. At each contact, you still need to 'sell' the volunteer role to him/her. This first contact allows you both to gain an initial impression of the other and provide basic information about the organisation and the work.

Offering an opportunity for the potential volunteer to try out the volunteering (taster session) or talk to other volunteers are useful tools which can help them decide whether to complete the registration / application form.

At any point, the individual may 'self select', deciding that the role or the organisation is not well matched to his/her needs and/or abilities. This should be regarded as a positive outcome, assuming that there really is a poor match, and that the would-be volunteer has not been put off by a poor welcome, too much bureaucracy or a lack of information!

At this initial stage, potential volunteers may want quite a lot of information, so it is useful to compile some sort of

information pack for them to take away, or to send out. Such a pack might include information on the organisation's purpose and activities; the service users or client group; the range of volunteer roles and/or role descriptions; and the application and selection process. Other more detailed information may include, for example, training opportunities for volunteers, the organisational structure, or the volunteer reimbursement of expenses policy.

However, this information is only useful if the would-be volunteer reads it. Too much information at this stage could be off-putting, so keep it relevant and succinct. Give some thought to the presentation of the pack as well. People with a learning difficulty, visual impairment or English as a second language may have difficulty reading the information at all. How will you cater for their needs?

For the record

The information pack is also the ideal place for an **application** or **registration form**.

This form should be designed specifically for the purpose, *not* just a version of the organisation's employee application form. It should request only the mainly factual information needed at this stage and be 'user-friendly'.

- Do ask for personal details, such as the volunteer's name and how to contact them, but **don't** ask for details such as date of birth, marital status or nationality unless you really need to know this. If you decide you *do* need this sort of information, make sure the reasons are justifiable - think equal opportunity and data protection!
- Questions about applicants' skills, experience and interests are relevant but think about whether you really need to ask about qualifications (e.g. if there is a minimum requirement for the role).
- You will need to know about the volunteers' availability and any factors that would limit how or when they can volunteer, such as a medical condition, dependants, or criminal convictions. It is usual to ask would-be volunteers to declare previous convictions and to give their consent to criminal records checks (on a separate page), if this is considered necessary for the role (see below). It is important to request proof of identification in two forms – one photographic and one to confirm current residence eg. Utilities bill.
- Finally, don't forget to ask about what the volunteer wants from the experience!

As we have already seen, recruitment raises a number of equal opportunity issues, and there are a good practice measures to address some common pitfalls, but how do we know if these measures are really helping develop a diverse volunteer workforce? Some volunteer programmes are obliged to monitor the make-up of their volunteer workforce by funders and / or others do so as a matter of good practice. At the recruitment stage, **monitoring** applicants' details can help show whether your volunteer opportunities are accessible to various groups. It can also highlight possible shortcomings in selection or management procedures if there is a big difference between the range of people who apply to volunteer with the organisation and those who actually end up doing so.

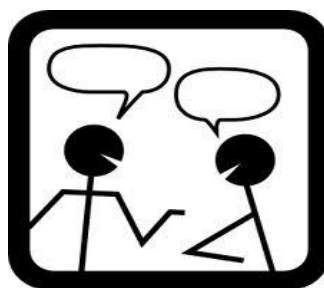
Monitoring forms can be included with application/registration forms and should carry a clear statement that the information is gathered for equal opportunity purposes only and will not be used in assessing the application itself⁶.

Getting to know you

Depending on the nature of the role it may be appropriate to seek **references**, usually before interviewing. References are commonly used, but opinion is divided on how useful they really are. Some Volunteer Managers find they provide valuable additional information on a volunteer's skills and disposition. Others say that referees rarely bother to return them, and those that do tend to stick to strictly neutral comments. At the very least, seeking this sort of personal recommendation is one more way of protecting staff and service-users from patently unsuitable volunteers. If you do decide to use references make sure to give the referee sufficient information on the skills and qualities the role(s) requires, by including a role description and/or a leaflet on the organisation and its work. Equally importantly, make sure to get the information you need by providing a clear, structured format for the referee to use. You could also consider contacting referees by telephone if you feel you need a fuller picture. Not everyone will have an employment history; be open to the status of the referee i.e. non-family.

Selection

If you are dealing with large numbers of applications from would-be volunteers, and either lack the resources to deal with them all at that time, or have only a limited number of places to fill, you may decide to create a **shortlist**. By comparing the information gathered at the initial application stage with the requirements of the role description and volunteer specification, you can ensure that only those who meet the minimum requirements proceed to the next stage - saving your time and their time. If you still have too many people to choose from (an unlikely scenario for most organisations!) make sure that any additional criteria used to select potential volunteers are relevant and are applied equally to all remaining applicants.



Interviews

The same basic approach applies when we consider the volunteer selection **interview** - fairness and consistency are key. Strictly speaking, interviews may not be regarded as essential for every volunteer role or assignment, yet it remains the cornerstone of most selection procedures - and there are some very good reasons why. First and foremost, it is one of the most efficient ways of giving and getting relevant information, especially when that information involves 'soft' skills or qualities rather than factual issues. Secondly, this sort of contact accommodates the two-way nature of volunteer selection, allowing the volunteer to ask questions and form opinions about your organisation and the work as well as vice versa. Furthermore, the format of the interview can be fairly flexible, for instance telephone or group interviews may be adequate for particular roles which do not require especially rigorous selection interviewing. Finally, the interview provides an opportunity to create a favourable impression of your organisation. As with so many things, good interviews - that is to say fair and effective interviews - depend on planning and preparation.

Before the interview you will need to...

- familiarise yourself with the volunteer's application, the relevant volunteer role description(s) and volunteer specification(s).
- draft questions based on requirements in the volunteer specification to ensure you cover all the information that you need.
- gather any information the volunteer might want or need.
- make practical preparations - allow enough time, book a quiet, welcoming room to meet in and inform anyone else who might need to know, such as the receptionist.

⁶ See Workbook Five *Volunteers and the Wider Organisation* for more information on a pro-active approach to equal opportunities. Example monitoring form and good practice on promoting and monitoring the diversity of volunteers - available [Equality and Diversity Section of Volunteer Now's Volunteer Management Publications](#).





During the interview itself...

- be punctual and prepared.
- try to create a relaxed and welcoming environment.
- introduce those involved and explain the purpose and structure of the meeting.
- structure the interview with an introductory phase with a few general questions to put everyone at ease. The main part of the interview should focus on seeking and giving information. The closing phase of the interview should include a summary of the discussion to clarify and check the main points, and agree the next step. Don't forget to thank the volunteer for attending.
- cover all the information you need, following up on important points, but give the volunteer time to ask questions too. In a balanced interview, you should talk for no more than 30% of the time available.
- give the volunteer your full attention, focusing on the content of what they say rather than their presentation.

As soon as possible afterwards...

- write up any notes or records while the information is still fresh.
- follow up on any further information you need to help make the match or selection.
- keep the volunteer informed of your progress and any decisions.



Aim: To use your own interview experiences to identify helpful and unhelpful interviewer behaviours.

- Think of a negative interview experience you have had. It could have been for paid or voluntary work, entrance onto a course of study or anything else you can think of. Specify exactly why it was bad. Was it poorly organised or structured? Did the interviewer(s) lack the necessary skills? Was the environment unsuitable?
- Now, describe what the interviewer(s) did or failed to do that was unhelpful.
- Now, repeat the process for a good (but not necessarily successful!) interview experience, focussing on why you felt positively about it and what the interviewer(s) did to facilitate that.

Your notes from this exercise should help you identify gaps in your own interviewing skills and highlight those qualities or traits that need to be exercised with care in interview situations. It may also have suggested which techniques and procedures are most useful in different kinds of selection scenarios. As each volunteer role is slightly different from the next, effective selection processes may vary from one role to another, in order to cover all the information that both you and the volunteer need to achieve the right match.

Digging deeper

You may decide that additional procedures other than those outlined above are needed in order to give and get sufficient information. For instance, if the role is particularly complex or sensitive, role-play scenarios can be incorporated into interviews. Instead of simply asking 'Have you any experience of...', the interviewer puts a 'What would you do if...' scenario to the volunteer and invite them to 'act out' their response, with the interviewer playing the role of the client or whatever. While this can be a highly effective way of assessing complex interpersonal skills, it is a difficult technique to use well and requires specialist knowledge of the area, practice and sensitivity.

Some organisations use other forms of **assessment**, perhaps including an induction training or orientation day as part of their selection process. These can be a good way to find out about teamwork qualities or very practical skills, if these are essential to the work. On the other side of the coin, **taster visits** allow would-be volunteers to meet current volunteers and see what the work is really like. Make sure to prepare for such visits so that someone is on hand to welcome the volunteers and answer their questions without disrupting the work that is being done. Permission may be needed from service users or other staff too. If you want to observe how your applicants interact with the client group or react to situations, keep numbers to a minimum and aim for as natural a situation as possible.

Keeping safe

It is important to identify in advance which volunteer roles involve work with children/young people or vulnerable adults. If the post involves work with children or



young people up to the age of 18, you must identify in advance those posts that are ‘regulated activity’ as defined by the Safeguarding Vulnerable Groups (NI) Order 2007. There is a requirement to use the Access NI service to check volunteers in these posts to ensure that they are not ‘barred’ from working with children. You are legally prohibited from accepting anyone in a paid or volunteer post to work with Children that is on the Children’s Barred List. (More information on the SVG (NI) Order is available on the Independent Safeguarding Authority website www.isa.homeoffice.gov.uk/)

An AccessNI check will also provide information on convictions, cautions and bindovers and you have discretionary powers about involving volunteers with convictions. Having a criminal conviction does not automatically preclude someone from volunteering. However, all convictions, including ‘spent’ convictions must be declared and taken into consideration during the selection process.

The table which follows identifies criteria against which you will need to assess both the degree of **risk** involved in the role and the **relevance** of the offence to the work. You will need to be able to make a judgement by looking at both these issues in conjunction with each other.

doubt, the issues that may arise can be discussed and elaborated upon with the candidate, perhaps during a follow-up interview. Information resulting from Access NI checks, and indeed all personal information collected during the selection process must be stored securely. At the end of the process, you should destroy any such information that is no longer needed for your records whether the volunteer has been successful or not.

If the post involves work with ‘vulnerable adults’, as defined by the SVG NI Order 2007, you must identify in advance those posts that are ‘regulated activities’, as defined by SVG. There is a requirement to use the AccessNI Service to check volunteers in these posts to ensure that they are not ‘barred’ from working with vulnerable adults. You are legally prohibited from accepting anyone in a paid or voluntary position who is on the Adult Barred List. An AccessNI check will also provide information on convictions, cautions and bindovers and you have discretionary powers about involving volunteers with convictions. In relation to making decisions about volunteers with convictions, the same process and practice applies as for volunteers working with children.

The AccessNI check for regulated activity is an enhanced disclosure certificate and will also include relevant non-conviction information.

(i) The role	(ii) The offence
<ul style="list-style-type: none"> • The nature of the role • The degree and level of supervision • The degree and level of access to vulnerable groups or property which would be manifestly incompatible with the person’s offending background 	<ul style="list-style-type: none"> • Nature and seriousness of offence(s) • Background to the offence(s) • How long ago it/they occurred • Whether it/they related to similar work

From *Coping with Convictions*, NIACRO

You should consider these criteria systematically and look at the conviction(s) in the context of the volunteer’s overall application. When you receive the information, you need not make yes/no decisions straight away. This should be part of a process of examining the relevance of convictions in the most structured fashion possible. If there is any

Making a match

By this stage of the process you should have all the information you need to **match** the volunteer to a role or to tailor a unique assignment for him/her. Obviously this is the ultimate point of the selection

⁷ For more information on criminal record checks and the Access NI Service, see *Safeguarding publications on Volunteer Now’s website* <http://bit.ly/LBsuKw>



process, and many Volunteer Managers want a foolproof technique for getting the match just right. Of course the truth is that an effective process will provide all the information both you and the potential volunteer need to make the right match.

There are just two questions to ask, 'Does what the volunteer offers match the needs of a particular role or task that needs done?' and, equally important, 'Does what that role offers match what the volunteer requires?' If you can answer both of these in the affirmative you can offer the volunteer the role and proceed with the steps in Stage III of the selection process - Starting Work (see the next chapter).

Having to say 'no'

However, if no match can be made, you face a much less enjoyable part of the process - **turning down an offer** of help. As with the matching process, there is no magic hint to make this step easy and it's tempting to hope that people will forget or just lose interest if you don't get in touch. However, it can be quite a challenge for some people to volunteer in the first place and undergo a selection process, and they deserve to be given a decision - even if it's not the one they want. So take a deep breath and...

- Don't put off telling volunteers for too long - this will only add insult to injury.
- Where possible, offer to meet the volunteer face to face.
- Involve the volunteer in reaching the decision. Encourage him/her to identify any problems in the match between their needs/skills and the benefits and demands of the role.
- Be clear why you are turning down the offer. Is the problem with the volunteer or the role? Is there any way to overcome this?
- While there is no need to spell out the volunteer's shortcomings, if a volunteer asks a straight question, try to be honest. Don't get caught up in elaborate 'explanations'.

- Be caring and sensitive. Provide every opportunity for the volunteer to 'save face'. Emphasise your appreciation of their offer. Acknowledge any negative feelings s/he expresses.
- Is there anything you can do for the volunteer - redirect to other types of work; suggest relevant training; identify other ways to meet the needs they had hoped to fulfil through volunteering? However, don't just pass your 'problem' on to someone else.



Aim: To review your organisation's volunteer selection practices and identify potential improvements to create a fairer/more effective process.

- Try to trace a path through the 'Selection Process' diagram at the start of this chapter, which reflects your current selection process. At each step ask yourself:
 - Does this procedure help me find out sufficient relevant information about the applicant?
 - Does it help the applicant find out sufficient relevant information about the role?
 - Is this procedure applied fairly and equally to all would-be volunteers?
 - Could this procedure unfairly disadvantage any particular group or type of volunteer?
- Now look at the process as a whole and check it against the six Principles for Effective Selection of Volunteers at the start of this chapter.
 - Are there any areas where the process needs to be strengthened?
 - How will you do this?



5. And finally...

You should not be deceived by the reassuring title of this chapter. Although, it may seem that everything is now in place and it's time to get out there and find those new volunteers, there is still one more question on the recruitment plan.

How will the organisation manage new volunteers?

Before you can even start to recruit real volunteers, you need to decide, how the organisation will manage the volunteers after selection. While at first glance this may appear to be a separate issue, it is in fact an essential part of your recruitment strategy.

Having spent the time and effort planning how to recruit the right volunteers and find them the right role, it may be regarded as downright pessimistic to worry about whether they might leave before they have even started. However, this is exactly the right time to think about why so many organisations seem to find it so hard to keep their volunteers - and blaming the volunteers just won't do! Some of the most common reasons are given below.

Almost all of these situations could be avoided with good volunteer management. Developing such a system is a complex task, involving a wide range of procedures, but for the purpose of preparing for volunteer recruitment, a basic checklist should include:

- volunteer agreements.
- induction.
- 'settling in' period and review
- training.
- codes of practice.
- support and supervision.
- procedures for dealing with difficult situations.

Also consider looking at the [Involving Volunteer Checklist](#), [Volunteer Agreement Info sheet](#) and the [Recruitment Plan for Volunteers Info Sheet](#) that are available from the Volunteer Now website.

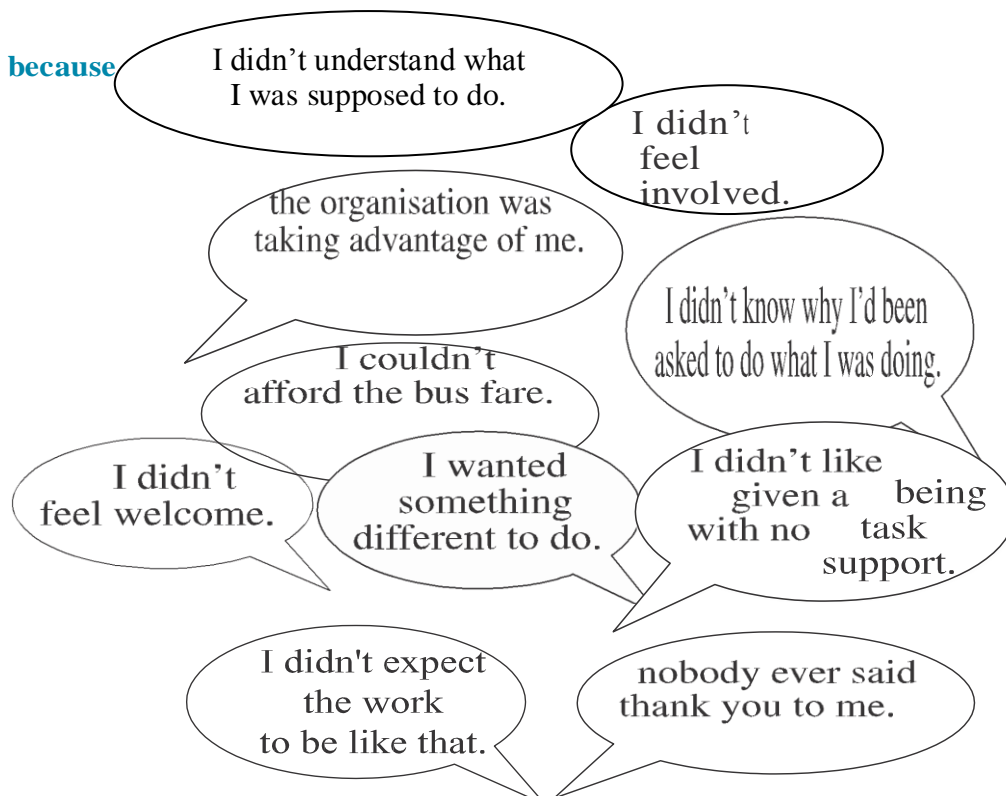


Another truth about recruitment

Good recruitment can attract people, but only good volunteer management keeps them. 'Recruitment' actually continues throughout the life of the volunteer, since 'retention' is simply the process of re-recruiting the volunteer every time they show up.

© McCurley S. & Vineyard S. *101 Tips for Volunteer Recruitment* Heritage Arts Publishing, 1988

I left because





This chapter considers only the procedure highlighted under Stage 3 of the Selection Process - the 'settling in' period and review. The remaining procedures, which relate to wider management issues, are dealt with in detail in other workbooks⁸ in this series.

Getting new volunteers started

In reality, the selection process is only truly finished once the volunteer has actually started the work and completed a 'settling in' period. The purpose of having an agreed 'settling in' period is to allow both the organisation and the volunteer a way of ensuring that their expectations of the relationship are in fact being met. The length of the 'settling in' period depends on the nature of the work, the number of hours the volunteer works etc., but should be long enough for all the parties to get used to each other and form realistic opinions of how the arrangement is working out.

During the 'settling in' period you should be prepared to offer the volunteer additional support while they get used to the work and the organisation. They should also be supervised more closely to ensure that the work is being done in the right way and to the necessary standard, which also provides an opportunity to make an initial assessment of the new volunteer's training needs. During this time it is also vital to provide the new volunteer with a full induction.⁸ The purpose of induction is simply to enable the volunteer to get off to the best possible start in his/her role and within the organisation. There are five main types of information they need to do so:

1. **Organisational information** - e.g. mission statement, background, size and structure.
2. **Procedural information** - e.g. health and safety, code of practice, grievance procedures, communication.
3. **Role-related** - e.g. tasks, responsibilities, training, equipment and materials, supervision.
4. **Personal** - e.g. cloakrooms, toilets, kitchen, parking, expenses.
5. **Team-related** - e.g. who they will work with, line management, availability, meetings.

It is important that the 'settling in' period is clearly brought to a close, usually with some sort of a review meeting between the volunteer and the Volunteer Manager, and perhaps the volunteer's direct supervisor. This meeting should allow all parties to discuss what is going well, and what is not going so well, to raise any anxieties and address any potential problems at an early stage. You may decide to:

- continue with the current arrangements.
- add to or amend the arrangements, for instance by reducing the number of hours the volunteer works or providing additional training.
- change the arrangements by agreeing with the volunteer on a different role.
- terminate the arrangement by ending the relationship.

Whatever the outcome, it is vital that any decisions taken at this meeting are made clear to all involved and followed through.

⁸ See Workbook Three *Managing and Motivating Volunteers* and Workbook Four *Managing Volunteer Training*.

Also consider looking at the [Volunteer Induction Checklist](#)

A final thought

Well done on reaching the end of Workbook Two! You should now have a clear idea of how to plan and carry out an effective recruitment campaign and fair, efficient selection procedures in order to find the right number of the right type of volunteers. I hope you will have gained lots of ideas for making this work for your organisation's particular needs - you may even have revised your ideas of what those needs are. If, however, you are feeling overwhelmed by what appears to be a huge amount of work just to get your volunteers in the first place, take heart. There is a lot of work involved in really good volunteer recruitment and selection but, like most things, it gets easier with practice. Even better, finding the right

volunteers for the work and for your organisation, should mean that the rest of your work becomes easier. Well-chosen volunteers should work more effectively and make fewer mistakes. If the role meets their needs too, they should also be more motivated and reliable, which facilitates good relationships with staff and service-users. Happier volunteers will also stay longer, reducing the time you need to spend recruiting new volunteers to replace those who leave. The final benefit, though, brings us full circle, as happy volunteers will spread the word and become the best recruiters for your organisation. I hope that this can inspire you to put into practice the principles of this workbook.

Good luck!





Appendix

Standards relevant to volunteer management

There are two complementary standards, both important for those who work with volunteers and have an interest in improving practice - **National Occupational Standards for Managing Volunteers and Investing in Volunteers.**

NATIONAL OCCUPATIONAL STANDARDS FOR MANAGING VOLUNTEERS

The National Occupational Standards for Managing Volunteers have been developed and agreed by a group of national organisations with expertise and experience in volunteer management, including Volunteer Now in Northern Ireland.

What are occupational standards and what do they describe?

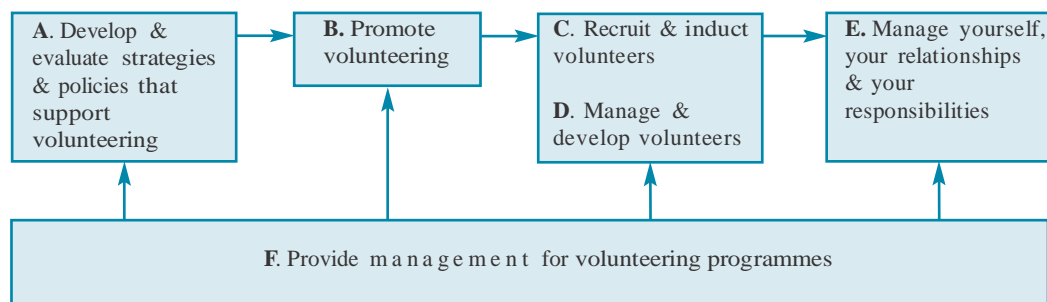
Occupational standards define a framework of good practice in the way people work, based on the functions of their job. They describe:

- The **main roles or functions** that can be part of your job
- The **specific activities** involved within these roles
- The **standards of performance** expected when carrying out these activities
- The **knowledge, skills and understanding** which you will need to meet the performance standard

What are the national occupational standards for volunteer managers?

The National Occupational Standards (NOS) for Managing Volunteers specify the standards of performance that those recruiting and supporting volunteers should be working to across the UK. They also describe the knowledge and skills that managers of volunteers need in order to perform to the required standard.

The occupational standards define the whole spectrum of activity required to develop and implement a volunteering strategy within an organisation effectively. They are based around 5 key areas, each with their own units of competence.



These standards are for you if you perform, manage or support any of this work, either as a volunteer or as part of your paid work. Whatever the circumstances, you should find these standards relevant. They have been designed primarily with those working in the voluntary and community sector in mind but should also be appropriate if you work in the public sector, such as in a hospital or school. You are not expected to be carrying out every activity described in these standards - there are rarely two volunteer management roles that are exactly the same so the NOS do not intend to provide a single template job description. What they do is describe the functions, activities and tasks that **can** be part of volunteer management.

The benefits of national occupational standards to those who manage volunteers include having a:-

- Clear description of the work standards you need to meet
- Statement of knowledge and skills required to meet each standard
- Tool to help you plan your current career development
- Qualification structure to support your career development
- Heightened awareness of your job role and responsibilities
- Chance to obtain objective appraisal and feedback from your manager
- Better understanding of how to transfer your skills from one situation to another
- Sense of achievement from a job well done
- Greater confidence to do your job well.

Volunteer involving organisations can also use the standards to ensure that those involved in the management of their volunteers are competent and have the knowledge and skills to do so effectively and appropriately.

Full text and further information about the standards can be downloaded free of charge from www.skills-thirdsector.org.uk Follow the link for National Occupational Standards and then Managing Volunteers.





INVESTING IN VOLUNTEERS

Investing in Volunteers is the UK quality standard for the involvement of volunteers within an organisation. It is designed to help volunteer-involving organisations review and improve their volunteer management. It is a nationally recognised award that allows organisations to publicly demonstrate and promote their commitment to volunteering. Investing in Volunteers complements National Occupational Standards by providing a motivating framework for reviewing and improving how **your organisation** attracts, values, supports and develops volunteers.

The Investing in Volunteers standard clearly lists the organisational practices and procedures that should be in place to effectively manage volunteers. Whether an organisation chooses to go through the assessment process or not – the Investing in Volunteers Quality Standard is an invaluable tool that all volunteer involving organisations should refer to. Those organisations not yet ready to commit to Investing in Volunteers can still use the standard as a **self-assessment tool** to benchmark the organisation and drive up performance, and as a resource **for developing knowledge, good practice and learning** within the organisation.

Organisations that achieve the Investing in Volunteers standard will be able to prove to funders, stakeholders, volunteers and service users that the contribution of volunteers is valued and that they are well-managed. This means organisations can demonstrate that they meet these *Nine Indicators*:

- There is an expressed **commitment** to the involvement of volunteers, and recognition throughout the organisation that volunteering is a two-way process which benefits volunteers and the organisation.
- The organisation commits appropriate **resources to working with volunteers**, such as money, management, staff time and materials.
- The organisation is open to involving **volunteers who reflect the diversity of the local community**, and actively seeks to do this in accordance with its stated aims.

- The organisation develops appropriate **roles for volunteers** in line with its aims and objectives, and which are of value to the volunteers.
- The organisation is committed to ensuring that, as far as possible, **volunteers are protected** from physical, financial and emotional harm arising from volunteering.
- The organisation is committed to using **fair, efficient and consistent recruitment procedures** for all potential volunteers.
- Clear procedures are put into action for **introducing new volunteers to the role, the organisation, its work, policies, practices and relevant personnel**.
- The organisation takes account of the varying **support needs of volunteers**.
- The whole organisation is aware of the need to give **volunteer recognition**

For those organisations that want to be assessed against the Standard, Volunteer Now offers a tailored package of support and assessment to help the organisation through a 6 step process of accreditation.

Check out www.investinginvolunteers.org.uk for a copy of the Standard and for information on the registration process and costs. If you have any queries regarding the Investing in Volunteers Standard please email investinginvolunteers@volunteernow.co.uk



Governance Best Practice

[The Code of Good Governance](#) is a best practice document, it sets out the standards for all governing committees/boards in the Voluntary and Community Sector in Northern Ireland. It is endorsed by the Charity Commission and the Department for Social Development. The Code of Governance covers 7 key principles:

1. [Leadership](#)
2. [Responsibilities and obligations](#)
3. [Effectiveness](#)
4. [Reviewing and renewing](#)
5. [Delegation](#)
6. [Integrity](#)
7. [Openness](#).

The principles provide a valuable checklist for Voluntary and Community Sector Organisations in complying with their statutory responsibilities and meeting best practice.

Resources to Support the Code

A range of resources have been developed to support the implementation of the Code:

- [DIY Committee Guide](#); this is an online governance resource with a range of information mapped against the seven key principles www.diycommittee.org
- [Governance health check](#) A self assessment tool developed as a practical resource to assist committees/boards to work towards adhering to the principles of the Code of Good Governance. The aim of this health check questionnaire is to help committees/boards review their governance arrangements, check that they have appropriate systems in place and identify areas where they could improve. It is a best practice tool - it is not mandatory. However, this resource can also help committees/boards of any size to demonstrate their good governance practices to their stakeholders, beneficiaries and funders alike. Available to download from <http://www.diycommittee.org/resource/governance-health-check>



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