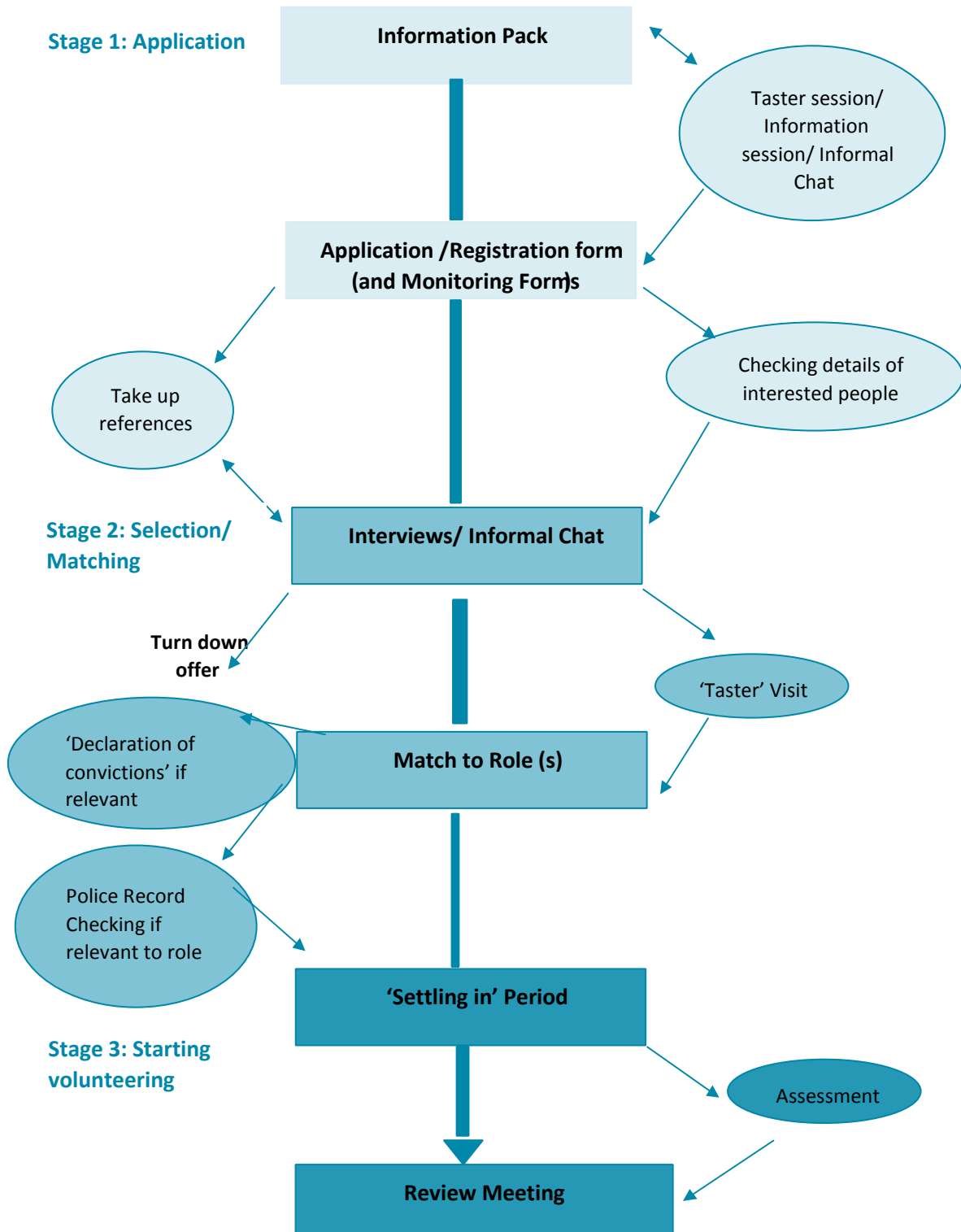


Selection Procedures for Volunteers

Below is a composite of the selection processes described by a number of experienced **people who work with volunteers** in a range of voluntary, community and statutory sector organisations. The steps in bold are those used by all of the people 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 will follow, but please be prepared to consider what is proportionate and appropriate for your roles.



Stage 1: 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. The 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 take the next step, which may be to complete the registration/application form.

At any point, the individual may 'self-select', deciding that the role of 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. You might already have this on your website or Facebook page. 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 or expenses policy.

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. Think of other ways that you could cater for their needs, such as providing the material in another language or format, setting up meetings where, for example an Interpreter or Translator are involved.

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 main factual information needed at this stage, and be user-friendly. Ask yourself- do I really need the information? And if the answer is no, do not ask for it!

- **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 that you do need to know this sort of information, make sure the reasons are justifiable- think equal opportunity and data protection!
- Questions about the applicants' skills, experience and interests are relevant, but think about whether you really need to ask about specifics, e.g. is there 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, dependents, 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 form), if this is considered necessary for the role. Organisations may now only ask applicants to declare any convictions that are not subject to filtering, e.g. 'Do you have any convictions that are not protected (as defined by the Rehabilitation of Offenders (Exceptions) (Northern Ireland) Order 1979, as amended in 2014- [Declaration of Criminal Convictions Form Template](#).'

- Finally, don't forget to ask about what the volunteer wants from the experience.

[Sample Volunteer Registration Form Template](#).

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 workforce? Some volunteer programmes are obliged to monitor the makeup 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 of 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 when assessing the application itself.

Getting to know you

Depending on the nature of the role, it may be appropriate to seek **references**, usually before meeting the volunteer for an "interview" or chat. References are commonly used, but opinion is divided on how useful they really are. Some would say that they find references 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 unsuitable volunteers. If you do decide to use references, make sure to give the referee sufficient information on the required skills/qualities, by including a role description and/or 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, so you may need to be flexible about the status of a referee- see a [Sample Reference Form Template](#).

Stage 2: Selection/Matching

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 only have a limited number of places to fill, you may decide to check details of potential volunteers and create a **shortlist** from the information you have been given. By comparing the information gathered at the initial application/registration 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 in 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 next stage of the process- the **informal chat** with the volunteer or the more formal selection **interview**- fairness and consistency are key. It really does depend on the nature of the role as to how rigorous this needs to be, but you will need some kind of "conversation" with the volunteer. Interviews may not be regarded as essential for every volunteer role or activity, yet it remains the cornerstone of most selection procedures- and there are some very good reasons why...

1. 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.
2. 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.

3. The format of this interaction can be fairly flexible, for instance using telephone or group interviews may be adequate for particular roles which do not require especially rigorous selection interviewing.
4. It provides an opportunity to create a favourable impression of your organisation.

As with so many things, it is important that you are fair and effective regardless of whether you conduct an informal chat, or a more formal interview and good planning and preparation will help you do that.

Before the informal chat/interview, you will need to:

- Familiarise yourself with the volunteer's application, the relevant volunteer role description(s) and the volunteer specification(s).
- Draft questions based on requirements in the volunteer specification to ensure you cover all the information you need.
- Gather any information the volunteer might want or need.
- Make practical preparations- allow enough time; book a quiet, welcoming space to meet; inform anyone else who might need to know that you are meeting a potential volunteer.

During the informal chat/interview, you will need to:

- Be punctual and prepared
- Try to create a relaxed and welcoming environment
- Introduce those involved and explain the purpose and structure of the conversation
- Structure the conversation with an introductory phase with a few general questions to put everyone at ease. The main part of the conversation should be focus on seeking and giving information. The closing phase should include a summary of the discussion to clarify and check the main points, and to agree next steps. 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.
- Give the volunteer your full attention, focusing on the content of what they say.

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.

As each volunteer role is slightly different from the next, effective selection processes may vary from one role to another. This is to ensure all the information you and the volunteer need is covered, in order 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 used. Instead of simply asking 'Have you any experience of..', the interviewer puts a 'What would you do if...?' scenario to the volunteer and invites them to act out their response. While this can be a highly effective way of assessing complex interpersonal skills, it is a technique that 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 role. On the other side of the coin, **taster visits** allow would-be volunteers to meet current volunteers and see what the volunteering is really like. Make sure to prepare for such visits and gain whatever permissions might be needed for volunteers to observe certain situations.

Keeping Safe

Organisations working with vulnerable groups need to apply good safeguarding practice. One important element of this is having robust recruitment and selection procedures. Before recruiting for a role, the role description will have been drawn up, outlining the purpose, scope, responsibilities and tasks required, and it is at this point that the organisation must consider if the post is eligible for a police record check (also known as an AccessNI check in Northern Ireland). If there is eligibility, the organisation should make this known in their recruitment material, as this may prevent unsuitable people from applying.

In some instances, some roles working with children/young people or adults at risk will be defined as 'regulated' activity (as outlined in The Safeguarding Vulnerable Groups (NI) Order 2007, as amended by the Protection of Freedoms Act, 2012). Regulated activity is work which a barred person must not undertake. It is a criminal offence for a barred person to seek or undertake regulated activity, and it is an offence for organisations to 'knowingly involve' a volunteer in regulated activity, if they are barred.

If a post meets the definition of regulated activity, there is eligibility for an Enhanced Disclosure with Barred List check on the preferred candidate prior to confirming an offer of volunteering. If not barred, the organisation must use its discretion regarding any criminal history information which may be contained on the Disclosure certificate. For more information about Access NI and eligibility for checking, go to [Access NI- What you need to know](#).

An AccessNI check will provide information on convictions, cautions and bind overs, and you have discretionary powers about involving volunteers with convictions. Having a criminal conviction does not automatically preclude someone from volunteering and you must be prepared to make decisions based on the information presented to you. 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 of these issues in conjunction with each other. You could consider 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. In relation to the offence, you should consider the nature and seriousness of the offence, the background to it (how long ago it occurred/whether it is related to similar work, etc.)- see our [Ex-Offenders and Volunteering checklist](#).

The Access NI check should be the final stage of the recruitment process. The preferred applicant should be offered the role subject to the result of the check. 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.

Be aware that potential volunteers may see criminal record checks as a barrier to engagement, but organisations should always encourage inclusivity and explain why checks are appropriate for certain roles.

- For more information on recruitment and selection processes when working with children and young people, see [Keeping Children Safe: Our Duty to Care](#)
- For more information on recruitment and selection processes when working with adults at risk, see [Keeping Adults Safe: A Shared Responsibility](#)

Exercising careful judgement

It is important to exercise careful judgement considering an applicant's criminal history information. Nominated people within the organisation should:

- Find out the **precise nature of the information**, e.g. the information could relate to indecent behaviour which could be urinating in an entry and considered much less serious than indecent assault, which is a sexual offence.
- Consider **when the offence(s) took place**. Minor offences many years ago may be less significant than recent offences.

- Consider **whether the offence is relevant to the job or role**, e.g. motoring offences may be important if the post involves driving. Dishonesty offences may be important if the job or role involves handling money. Otherwise, they may not be relevant.
- **Patterns of offending and frequent offending** may give rise to more concerns than a single offence.
- Depending on its nature, **failure to disclose information** may cast doubt over a person's honesty. It is therefore essential to cross reference the self-declaration and the disclosure certificate.

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. So, there are two questions to ask:

1. *“Does what the volunteer offers match the needs of a particular role or task that needs done?”*
2. *“Does what that role offers match what the volunteer wants?”*

If you can answer both of these YES, you can offer the volunteer the role and proceed with the steps in Stage 3 of the Selection Process- See [Resource Guide 4](#).

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. It can be quite a challenge for some people to volunteer in the first place and undergo a selection process, so they deserve to be given a decision- even if it isn't the one they want.

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 them 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 and acknowledge any negative feelings they express.
- Is there anything you can do for the volunteer- redirect to other types of volunteering; suggest relevant training; identify other ways to meet the needs they had hoped to fulfil through volunteering? Whatever you do though, don't simply pass your problem onto someone else!

Disclaimer

Reasonable precautions have been taken to ensure information in this publication is accurate. However it is not intended to be legally comprehensive; it is designed to provide guidance in good faith without accepting liability. If relevant, we therefore recommend you take appropriate professional advice before taking any action on the matters covered herein. Charity Registration No. NIC101309. Company Limited by Guarantee No. NI602399. Registered in Northern Ireland. Volunteer Now, Skainos Centre, 239 Newtownards Road, Belfast, BT4 1AF. T: 028 9023 2020
E: info@volunteernow.co.uk W: www.volunteernow.co.uk