



# Nuts & Bolts

*a how to* guide to  
involving volunteers

This guide is the result of learning from the Volunteer Centre Sheffield, New Beginnings Refugee Project. We would like to thank the Big Lottery for providing funding from 2007-2011.



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## Introduction

This is a practical 'how to' guide to help you identify the key things – nuts and bolts – that you need to get sorted out before you engage volunteers in your organisation. There is so much 'Good Practice' information available that it can be a bit overwhelming. We hope that this will leave you thinking that you can get going with volunteers and not be weighed down with extra work.

The inspiration behind this guide came from the experiences of the New Beginnings Refugee project that started in 2004. That project was set up to help refugees and asylum seekers volunteer in Sheffield. Over time we have encountered many barriers that refugees face when trying to volunteer as well as the genuine difficulties that organisations face when involving people from all backgrounds.

This guide offers practical tips on how to overcome barriers to involving volunteers. Although the lessons learnt came from experience with refugees, this will help any organisation make their volunteer programme more accessible and user friendly for all volunteers. This guide might enable you to involve volunteers with additional needs more easily, but that is not the only reason to see what's inside.

In a nutshell, the key to successfully involving volunteers is being clear and keeping things simple. By making things clear, both volunteers and organisations have a transparent process where everyone knows what is expected of them. This should help everyone avoid difficult situations and have a positive experience.

The guide focuses on Agreements, Task Profiles, Recruitment and Induction. These are the things that form the basis of what volunteers do each day, how you identify the right volunteers and how you train them. Getting these things figured out does take a bit of effort but once it's done it will really make life easier in the long run, particularly when you get the 2<sup>nd</sup>, 3<sup>rd</sup>, 4<sup>th</sup> volunteer going through the application process and induction training.

The *Nuts & Bolts* guide will hopefully make volunteering work well for both volunteers and organisations. Our aim was to reduce the headache that paperwork can cause and help you to concentrate more on working with your volunteers.

If you have any comments on this guide or how to use the exercises please do get in touch with me.

Thanks

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# Contents

<b>Checklist for involving volunteers .....</b>	<b>5</b>
<b>Step 1 – Creating a Volunteer Task Profile.....</b>	<b>6</b>
Why bother?.....	6
What is a task profile? .....	6
The benefits of a task profile .....	6
Things to consider .....	7
Who should be involved? .....	7
Before putting pen to paper.....	7
Excluding people and being inclusive.....	8
<b>Step 2 – Volunteer Agreements .....</b>	<b>9</b>
Reasonable expectations .....	9
Reduce obligations on the part of the volunteer .....	9
<b>Step 3 – Recruitment .....</b>	<b>10</b>
Application forms – a last resort .....	10
When you might use an application form .....	10
Using an application form for one role but not another.....	11
Being creative around recruitment .....	11
<b>Step 4 – Induction.....</b>	<b>14</b>
Planning induction and training over time.....	14
Simple tasks.....	14
Complex Tasks .....	14
Be realistic!.....	15
Policies and Procedures.....	15
Setting up an induction timetable .....	16
<b>Appendix One: Creating a Task Profile.....</b>	<b>17</b>
Example of an Administration Role developed through the ‘Developing a Task Profile Exercise. ....	21
<b>Appendix Two: Task Profile.....</b>	<b>25</b>
Task Profile - Refugee Project Admin Role .....	25
<b>Appendix Three: Volunteer Agreements .....</b>	<b>28</b>
Sample volunteer agreement 1 .....	28
Sample Volunteer agreement 2.....	30
<b>Appendix Four: Application Form .....</b>	<b>31</b>
New Beginnings Volunteer Application Form .....	31
<b>Appendix Five: Induction List.....</b>	<b>33</b>
<b>Appendix Six: Induction Spreadsheet .....</b>	<b>35</b>

## Checklist for involving volunteers

The guide focuses on Agreements, Task Profiles, Recruitment and Induction. However, if you are setting up a new volunteer programme or involving volunteers for the first time then there are a few other things that you will want to consider.

Below is a checklist of the things that it is good to look in to. Volunteering England has more resources and good sample policies which can save you a lot of time.

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

Action	Completed
Get approval from the board / trustees to involve volunteers	
Develop a volunteer policy or have volunteers specifically mentioned in existing policies <ul style="list-style-type: none"> <li>• <a href="#">Volunteer Policies and agreements</a></li> <li>• Clarify your budget and policy on expenses</li> </ul>	
Check that your current insurance covers volunteers <ul style="list-style-type: none"> <li>• <a href="#">Insurance</a></li> </ul>	
Draw up your volunteer agreement <ul style="list-style-type: none"> <li>• See p9 and appendix Three</li> </ul>	
Develop a volunteer task profile <ul style="list-style-type: none"> <li>• See p6 and the exercise in appendix 1 and 2</li> </ul>	
Decide on your recruitment method <ul style="list-style-type: none"> <li>• See p10 and appendix 4</li> </ul>	
Plan your induction training <ul style="list-style-type: none"> <li>• See p13 and appendix 5 and 6</li> </ul>	

For more information about volunteering and additional themes please click on the links below to take you to the relevant section of the Volunteering England website.

- [Recruitment](#)
- [Creating volunteer roles](#)
- [Expenses and state benefits](#)
- [Induction and training](#)
- [Support and supervision](#)
- [Reward recognition and retention](#)
- [Dealing with problems, complaints and disputes](#)
- [Protection and Safeguarding](#)
- [Equal opportunities and diversity](#)
- [Legal issues and volunteering](#)
- [Resources for volunteer managers and co-ordinators](#)

# Step 1 – Creating a Volunteer Task Profile

## Why bother?

Some organisations don't use task profiles with their volunteers, preferring the flexibility of defining roles around an individual's skills and aptitudes. Whilst it is good to have the option of taking on people with the enthusiasm and the specific skills for new tasks, using this informal method for all recruitment often leads to organisations being highly selective about who they recruit. This is because it is harder to involve volunteers with low skills or experience without fully thinking through what roles they can actually do and what support or training you can offer. Volunteer task profiles that are well thought through break down barriers to volunteering and ensure you get the volunteers you need.

## What is a task profile?

A Volunteer Task Profile explains, in simple terms, each task that your volunteers will be engaged in. If you have really thought through exactly what you want your volunteers to do then recruitment, induction and training follow on easily. In this way the task profile is key to successful volunteering. It underpins all aspects of involving volunteers, so – although it does take time – getting this first step done properly will help everything else run a lot more smoothly. Although the task profile is similar to a job description that would be used for paid staff, the key difference is that of responsibility. A volunteer may select tasks from the profile but won't hold the responsibility for the completion of all the tasks in the way a paid staff member would. You must avoid the word 'job', as this implies a contract of employment.

## The benefits of a task profile

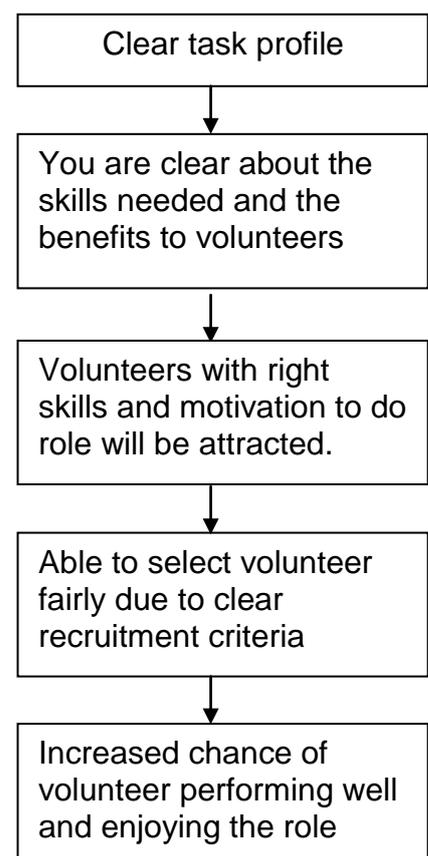
The process of developing a task profile helps to give you a clear idea of what the volunteers are needed for, tasks they will do and benefits they will receive.

When doing this, you will need to identify the skills that they need to do the job and the skills that they can develop in the role through development and training.

Being clear about what the tasks involved and benefits of a role are will help attract people who might not otherwise be interested in your organisation.

When you know what skills and availability you want from a volunteer you can set clear selection criteria so you will more easily recruit people who are suitable for the role.

If the volunteers you select are capable of doing the role, know what they are doing and are motivated to do it, they are likely to enjoy it and stay with you.



## Things to consider

Think about why someone would volunteer for your organisation. Understanding what motivates people to do things for free is fundamental to thinking through and defining the work that volunteers will do for your organisation. Volunteering is a social activity, something outside of work, family and other responsibilities. It is done through choice and competes with other spare time activities, such as going for a walk or watching a film. It has to press the right buttons.

## Who should be involved?

This will depend on your organisation structure, but whoever will be responsible for the volunteer/s must be involved in drawing up the task profile. Also anyone whose work or services will be affected, such as other staff and service users. On the other hand, trustees and board members need to know about and support the involvement of volunteers, but they don't necessarily need to help draw up task profiles.

## Before putting pen to paper

*Put yourself in the volunteer's place:*

- Why would I want to do this volunteering?
- What will I get out of it?
- What experience/skills/training will I need to do it?
- How will I get trained up?
- How will I know when I have all the skills and experience I need to fulfil the role properly?
- Does the volunteering accomplish real work, make a real difference and is it challenging enough to attract me?

*The organisation might consider:*

- What are we doing now that we would do more of if we had the resources?
- What tasks are we not doing that would improve the quality of our service?
- What parts of the work are time-consuming or less satisfying? Might a volunteer with the right time/skills enjoy getting their teeth into these?
- What could we do if we had specialist skills?
- What could we do if we had unlimited resources?
- Who will be responsible for training and supervising the volunteers?

*Could you recruit a broader range of volunteers?*

You may only be able to respond to some of these questions/suggestions, but it can be helpful to think about all of them:

- Is your organisation offering a broad enough range of opportunities to attract a diverse group of people?
- Are there general roles that can be filled by a willing helper, as well as specialist opportunities for people with expertise?
- Is there flexibility in the way the tasks can be accomplished?
- Is there something for people who have a lot of time to spare as well as those who have a little?
- Is there something for people who are happy to make a long-term commitment as well as opportunities for those who only want to volunteer occasionally?
- Are there opportunities for groups and families to work on something together?
- Do you have opportunities that fit in with people's availability, such as during the day time, evenings and weekends?

## **Excluding people and being inclusive**

We all exclude some volunteers through our working practices but what is important is that we look closely at our practices and ensure that we remove the barriers we can and understand why we keep certain barriers in place.

This is true of the type of application process you use but starts with the criteria you set in your task profile. If you have set the requirements of the role too high then you will exclude everyone without those requirements. For some roles that may be necessary. However, it might be possible to break down one complex role into two or three easier roles. This will enable you to involve a more diverse group of volunteers.

## **Create your Task Profile!**

In **Appendix One: Creating a Role Profile** you will find a worksheet that will lead you through an exercise in how to think through and define the key tasks that your volunteer/s will conduct and the skills and training that they will need to perform this role. **Appendix Two** has an example of a completed Task Profile.

## Step 2 – Volunteer Agreements

A Volunteer Agreement is a document that sets out an organisation's commitment to its volunteers as well as what it hopes for from its volunteers. Such an agreement acts as a reference point for the volunteers and a reminder to the organisation to meet the standards of good practice that it has set itself.

Use the word 'Agreement' and never the word 'Contract'. There are serious implications if an organisation is deemed in law to have formed a contract with its volunteer (you could be found by law to have 'employed' the volunteer and be liable for back pay).

### Reasonable expectations

Care must be taken to set out what the organisation will provide, how it will treat the volunteer, and what it expects from the volunteer without in any sense creating mutual obligations, which could be regarded in law as a contract.

Typically, in an Agreement an organisation would commit:

- To provide a full induction and any training necessary for the volunteer role.
- To provide a named supervisor for the volunteer, with regular supervision meetings.
- To treat volunteers in line with its equal opportunities policy.
- To reimburse out-of-pocket expenses where there are receipts or similar evidence of cost to the volunteer.
- To provide insurance cover for the volunteers.
- To implement good health and safety practice.

Typically, a Volunteer Agreement would expect volunteers to:

- Follow the letter and spirit of the organisation's policies and procedures, including equal opportunities, health and safety and confidentiality.
- To meet mutually agreed time commitments, and give notice when this is not possible.

### Reduce obligations on the part of the volunteer

Any hint of obligation (for instance volunteers agreeing to volunteer for the next six months) runs the risk of the document being seen as contractual. It is better to talk of hopes and expectations, with the understanding that volunteers are free to come and go as they wish. You could suggest that if the volunteers stay in the role for a specified time then both they and the organisation will get the most out of the experience.

### Sample Agreements

There are 2 sample agreements in the **Appendix 1**. The first is more formal. A benefit of a more formal agreement is that it contains an explanation of the expenses that volunteers can claim rather than relying on a separate document. Use whichever type of agreement most suits your organisation and amend the examples as you need.

## Step 3 – Recruitment

Once you have established what tasks you need your volunteer to do, and you are clear on what skills they must have, you are in a position to recruit.

You can register your opportunity with the Volunteer Centre – visit [www.volunteercentresheffield.org.uk](http://www.volunteercentresheffield.org.uk) to download the forms you will need to complete. Your opportunity will then be made available to people coming into the Volunteer Centre and will be uploaded onto the national volunteering website [www.do-it.org.uk](http://www.do-it.org.uk). You might also put up notices advertising your voluntary roles in local shops and organisations.

When potential volunteers start to contact you, you will need to have a recruitment process in place. This process can vary widely depending on the volunteer role and on your capacity to take on volunteers but it must be relevant to each role, fair and transparent.

### Application forms – a last resort

Consider whether you really need an application form. How will you use the information? Can you get this information through completing the form during an informal meeting with the potential volunteer or whilst talking to them over the phone?

Application forms are a significant barrier to involving volunteers as they will put some people off. Some people may not fully understand what is expected on the form and, if they are not used to filling out forms, it will be a daunting prospect. Also, people who are not confident will undersell themselves, so the information you receive might not be accurate. By completing the form with a person in an informal interview you will be able to tease out of people the skills that they have and their suitability for the role.

The question to ask is whether the application form is so important a part of the process that it is worth excluding potential volunteers by using one.

### When you might use an application form

- There are some occasions where you may need to put up barriers to volunteering – through using application forms - as a means of filtering out the numbers of volunteers that apply to work for your organisation. If you do this, you will need to think creatively about other ways to ensure that disadvantaged people are not excluded from your organisation.

*Example:* an advice organisation that receives dozens of applications via the do-it website or via email. They don't have the capacity to call let alone meet everyone who wants to volunteer so they send out application forms to see who is really interested. They have found that a large number never return the forms. A manageable number of volunteers do return the forms and these people are contacted and interviewed.

- You may need to use an application form to test out the skills that will be required in the role that you are looking to fill.

*Example:* an advocacy organisation uses an application form as part of their selection process. All of their volunteers need to be able to help people complete forms and write letters. By getting prospective volunteers to complete a form it is a way of identifying people who are suitable.

However, before copying this approach consider if the skills to fill in the form are essential or whether you can teach these skills once the volunteer has started volunteering with you.

At the Volunteer Centre we use application forms when recruiting administration volunteers, but invite people to complete them on computers in our office. This has proved successful with very capable asylum seekers who don't have access to computers at home.

You may as an organisation have clear and good reasons to use an application form but remember, it is still a barrier – and you will exclude people who do not have the confidence to complete such a form.

## **Using an application form for one role but not another**

If you have volunteers doing admin, attending events and washing up at a lunch club you might use different recruitment methods. Completing an application form is directly relevant to the admin role but might not be relevant to the lunch club or event volunteer roles. If a volunteer doesn't complete forms, use computers or write letters as a core part of their role then an application form is not a necessary test of their ability for the role. You can gather the information you need by talking to them.

The recruitment process you adopt should reflect the roles you are offering. The process will be fair as long as there is a consistent approach to each role – but you don't have to use the same method for all your roles.

## **Being creative around recruitment**

The length of time it takes from applying to actually starting to volunteer can put people off. It is often a barrier and good volunteers are lost. It can be worth thinking about how you can reduce the waiting time and keep volunteers engaged.

*Example: taster sessions.*

An alcohol support group allows volunteers to attend group sessions to see if they want to volunteer before they complete application forms and take up references.

### **Benefits for volunteers**

- Allows volunteers to see immediately what the role is like and can work out if it is what they want to do.

## Benefits for organisations

- This takes minimal work to arrange in this case. The volunteers who then apply often turn out to be very committed and are patient with the length of time the application form, references and CRB check takes.

### *Example: a two-week trial period.*

A two-session/two week trial period has been used successfully by an advocacy project and by a lunch club.

### Benefits for volunteers:

- If you don't like it, you only have to turn up once more before you can let people know it's not for you. This means less pressure. You can walk away without feeling guilty.
- You can start quicker on something you want to do.

### Benefits for Organisations:

- If the volunteer leaves you can get feedback as to why they don't want to volunteer. You might be able to use this feedback to improve the way that you work
- If you decide that the volunteer is not suitable asking them to stop is much easier after only 2 sessions. Once they have been volunteering for 6 weeks or longer they really become part of a team and both organisation and volunteer have invested a lot of time and effort in each other.

### *Example: Drop in sessions to find out more*

Having regular drop in sessions, e.g. every monthly, twice a month can be a more efficient and manageable way of dealing with a high volume of requests to volunteer with your organisation.

### Benefits for volunteers:

- They have a clear understanding of the process your organisation has.
- Although they might want to have a more personal response they are clear about how to get involved.

### Benefits for organisations:

- Enables staff to manage their time more effectively. Key messages about the organisation and the roles can be given to groups rather than repeating to individuals.
- You give clear service so volunteer expectations can be managed

Some organisations will take people on trial whilst waiting for written references / CRB checks. In these instances, there are additional benefits:

- The volunteer can start quickly.
- You can reduce the amount of admin work around recruitment. In many cases you can do a verbal reference check before the trial period and only follow up full references, do CRB checks, and put on full training once you know that the volunteer likes the role and wants to stick at it.
- If the volunteer doesn't like the role the staff member has invested less time in inducting/training and is not as disappointed.

**Please Note:**

It is very important that the roles carried out by volunteers on trial periods are supervised and that there is no access to confidential information or to vulnerable people. You should also consider whether you want volunteers in this position to have easy access to money or other valuables – remember, you know little about them at this stage.

## **Step 4 – Induction**

Induction is the process of introducing a new volunteer to the knowledge and skills that they will need in the role you have recruited them for. Putting together a clear induction plan will help you to structure the induction of your volunteers and, although it takes a bit of time, it will save you far more time in the long run. It will also help you to give a consistent induction and keep a record of what you have or have not done with each volunteer.

### **Planning induction and training over time**

If you have completed the Task Profile in the way we suggest in Appendix 1, you can use this to plan your induction, as all the skills necessary to the role will be clearly listed.

Some parts of the induction will be 'tick box'. You can use a checklist for these, for example 'show someone where the toilets are'. Do it once and you probably won't have to do it again? Other aspects of training are learnt over a period of time where volunteers' confidence and ability builds up bit by bit. A table or spreadsheet (sometimes called a Gantt chart) can help you plan training over a period of weeks and to track volunteers progress over time (see 'Setting up an Induction Timetable below').

When inducting volunteers it's important not to overwhelm them, but nor do you want to patronise or bore them, so it may take some fine-tuning. The key is to have a rough plan so you can spread out the training over a manageable timeframe and keep a record.

### **Simple tasks**

For simple tasks, you may only need to explain the task and then check that volunteers are doing it well. Adding this to your induction record might seem a bit over the top. However, there may well be a value in keeping a record of the training that you have given and how many times you have explained something. For example, if everyone makes the same mistakes on a task and needs lots of help, perhaps you have not got the training right. This could help you to develop more realistic induction training. On the other hand, if most people pick up a task on the first session but one volunteer still asks questions after the sixth session then you may need to evaluate if they are suitable for the role. If you have a record you can use the information to improve your training or review / reassign volunteers.

### **Complex Tasks**

More complex tasks will require more in-depth training. This may involve a new volunteer shadowing staff members or more experienced volunteers and then being observed before they are considered fully trained. If a volunteer only comes in for half a day a week, they may well forget what they learnt in the previous week, so it could take longer than you expect to train them. For example, you may decide that, to be considered fully trained in interviewing clients, volunteers will need to shadow 5 interviews and be observed in 5 interviews. If you keep a record of this, the volunteer can then see how they are progressing and have a clear goal to work towards. It means you can monitor the progress and support needs of your volunteers.

Using a Gantt chart (see Setting up an Induction Timetable below) can be very useful in making explicit how someone's training will be conducted over a set period of time. This helps you to have realistic expectations and it also encourages the volunteer, as they know they are not expected to pick everything up and remember everything straight away.

## **Be realistic!**

It often takes new staff, working full time, 4 weeks or more to really get to know their job. To put that in hours, we're talking about 35hrs x 4 wks = 140 hours. If a volunteer comes in for 4 hours a week it will take 35 weeks to reach 140 hours! In order for people to be useful and feel like they are contributing and achieving it's important to think about what they can realistically achieve in the time they have.

## **Policies and Procedures**

This is one area where there is a clear distinction between expectations of staff and of volunteers. As a paid staff member, you have an obligation to read the staff handbook and act in accordance with the organisation's policies. Volunteers, on the other hand, should not have the same obligation to familiarise themselves with the organisation's policies and they may not have a great motivation to read a big handbook when they only come in once a week. The responsibility for ensuring a volunteer understands its policies lies with the organisation.

Many volunteers have all the policies and procedures explained to them on the first day. The information is impossible to retain. Some are told to read the handbook at home but they either do not do this or get information overload.

Where possible go light on policies to start with. Bring them in once people understand the role that they are doing. If you plan in a brief revision of policies later on in the induction you can make sure they understand how the policy relates to their work. People will be much more likely to remember the policies if they are linked to their role in a practical way.

## Setting up an induction timetable

- Write down all the tasks or training that the volunteer/s will need to complete, then organise these in the first column of a table or spreadsheet.
- Put dates or session numbers across the top so that you can plot the training across a number of sessions.
- Make a list of what you will need to prepare before the volunteer starts.

This table below is called a Gantt chart and is helpful in making the planning process visual and clear. It also helps volunteers to see how far they are on the training process.

What you need to train the volunteers. A training manual might be ideal, but it's not always best to write a full manual until you have tested the roles properly

How long do you think it will take you to explain each task? Pace the induction over several sessions so you don't overwhelm volunteers.

	A	B	C	D	E	F	G	H
19			<b>Stage 1 Induction</b>					
20	<b>Task</b>	<b>Questions / things to get in place before starting induction</b>	<b>Session 1</b>	<b>Session 2</b>	<b>Session 3</b>	<b>Session 4</b>	<b>Session 5</b>	<b>Session 6</b>
21								
22	Call volunteers to make appointments at the office (and giving directions)	See training handbook						
23		Shadowing						
24		Observation						
25								
26	Writing simple case notes on database about appointments arranged							
27		Shadowing						
28		Observation						
29								
30	Use the diary to record appointment times							
31		Shadowing						
32		Observation						
33								
34	Post pro-forma letters e.g. appointment letters							
35		Shadowing						
36		Observation						
37								
38	Confirming appointments in diary e.g. call / text reminder to clients for tomorrow							
39		Shadowing						
40		Observation						
41								
42	How to use Text message software	See training handbook						
43		Shadowing						
44		Observation						

## Appendix One: Creating a Task Profile

### Why do this exercise?

We have found this exercise to be a very useful way of identifying what you need from your volunteers. Ideas can be hard to pin down. This exercise will enable you to get everything you can think of up on a wall and then put your ideas in order. Part of this re-ordering means you may discard tasks, which on reflection are inappropriate. You can also challenge whether the skills you think you need volunteers to have are really necessary for all the tasks. Can volunteers with less experience do simpler tasks and gain experience which will then enable them to develop and move onto harder tasks?

Keeping things realistic and manageable is the main goal of the exercise. When you finish you should have real clarity about what you want your volunteers to do, what skills they need, what training you will provide and the order in which you need to provide training.

### How to do the exercise

This exercise works well in practice but is difficult to explain on paper, so you might need to use your imagination. We hope the example of a completed exercise, which you can find after the explanation, will help you, and in **Appendix Two** there is an example of a Task Profile that was developed using the exercise

**Who should do the exercise:** whoever will be responsible for the volunteer/s and anyone whose work or services will be affected, such as other staff and service users.

**What you need:** 3 sets of different coloured post-it notes, a pen and a wall.

Post-its:

The **first** colour will be for the key headings. These should be written beforehand:

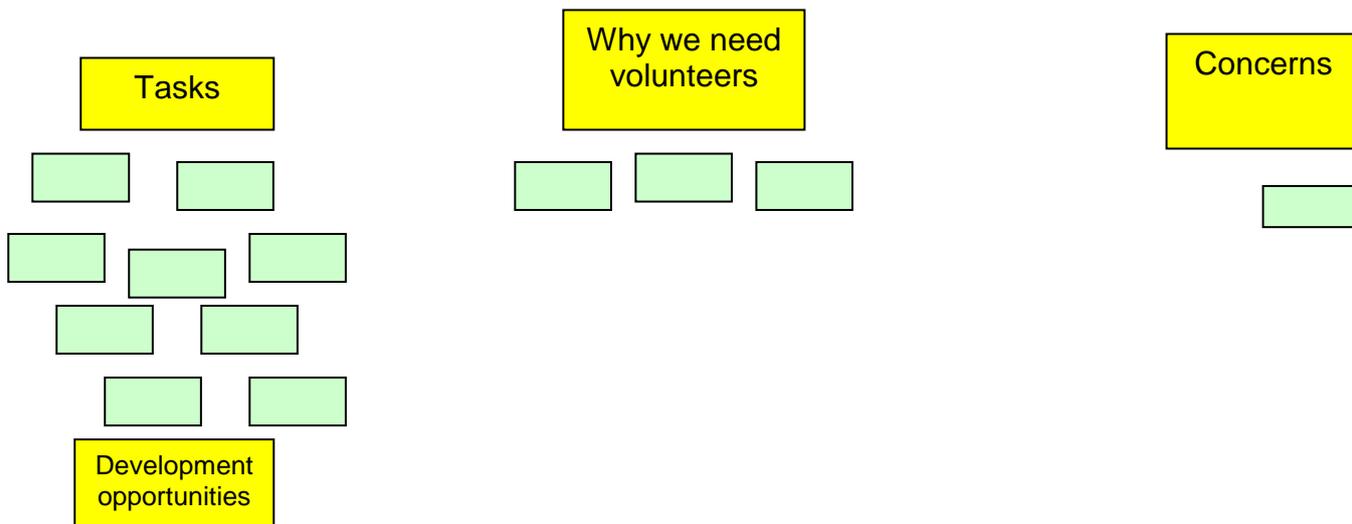
- Why we need volunteers
- Concerns
- Tasks
- Development opportunities
- Skills
- Knowledge
- Understanding
- Qualities
- Training needed

The **second** colour post-its you will write on as you do the exercise, filling in what should go under each of the headings in relation to the volunteer role that you are developing. They will create the content of the volunteer profile.

The **third** colour post-its are for any themes that come up. You may find you can group some of the content on the second colour post-its into themes such as task areas, themes for training, etc.

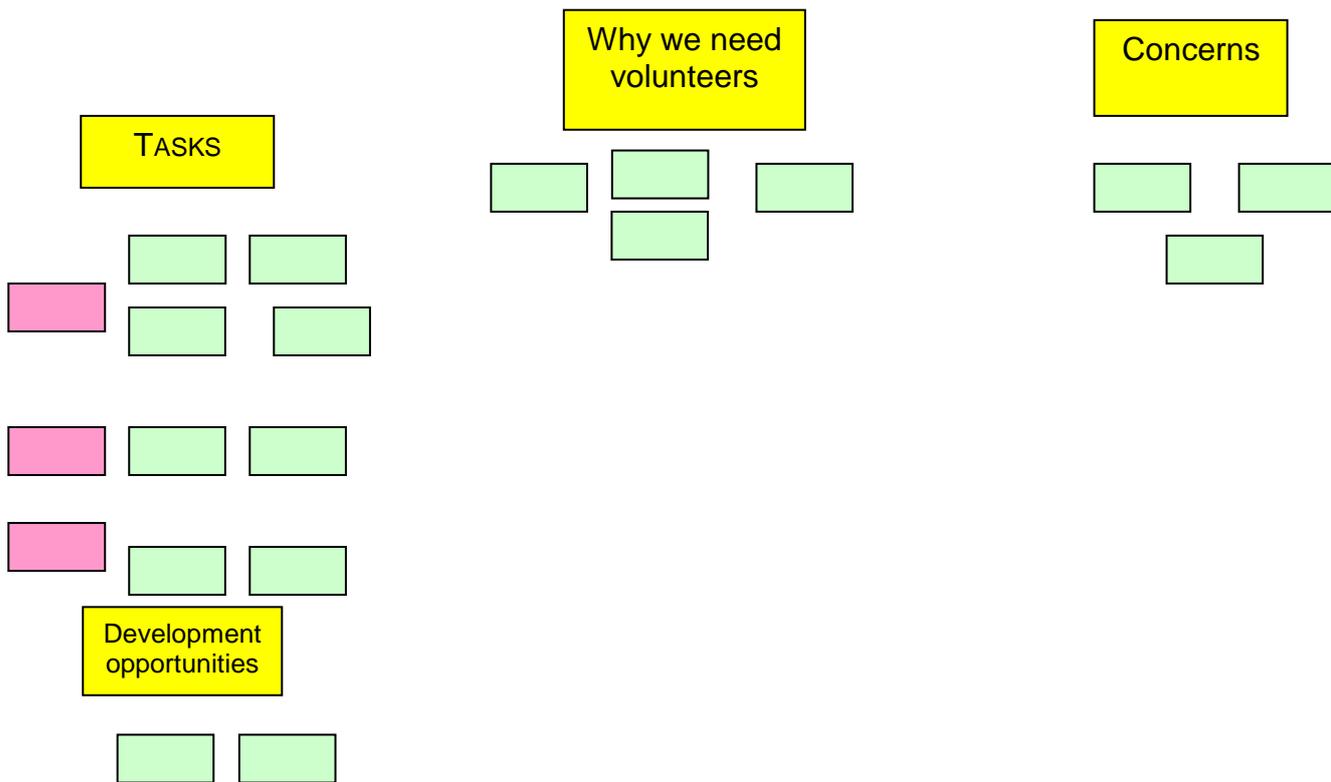
**How to do the exercise:** just follow the outlined steps.

- Headings:** Put all the first colour post-its (the headings) onto the wall as below. Then (using the second colour post-its) write your responses/answers to:
  - Why we need volunteers
  - What tasks they will perform
  - Any concerns (e.g. We won't have capacity to train the volunteers)Place the post-it under the appropriate heading. This can be done by individuals or by a group. Your wall should now look something like this:



- Stand back, look at the post-its and decide:
  - Will the identified tasks help address what you have put as your need for volunteers?
  - Are there any tasks here that don't relate to what you have put as your need for volunteers?
  - Should any tasks be removed?
  - Have you managed to express clearly enough what you do need volunteers for?
  - Do we need to take account of any concerns at this stage?
- Finalise Tasks:** Take any tasks away that do not relate to your need for volunteers and/or write new post-its to express why you need volunteers. The aim is to have a clear relationship between your stated need for volunteers and the tasks they will do. More concerns may arise.
- Arrange Post its:** Tidy up your post-its by seeing if you can group them against themes, for example 'tasks to be done on a Monday', 'basic tasks', 'advanced tasks', 'development opportunities' etc. There may well be themes specific to your organisation.

The wall should now look something like this.



5. Add the remaining headings to the wall. These are: Skills, Knowledge, Understanding, Qualities and Training Needed (see what the wall will look like below).

6. **Identify Skills:** Consider each task and identify the **skills, knowledge, understanding and qualities** that will be needed to complete it. Don't worry too much about whether something is a skill or knowledge. As long as everything is listed, you can always change it later. This is a rough guide to each one.

KNOWLEDGE – what the volunteer has found out or can find out

SKILLS – what the volunteer has learnt or can learn / be taught

UNDERSTANDING– an ability to align with the values, ethos, issues or emotions of a situation. A volunteer will be able to demonstrate this or might gain it from doing the role.

QUALITIES – what the volunteer must already have. They are harder to teach.

- Write these on your second colour post-its (one per post-it) and put these up on the wall under the Skills, Knowledge, Understanding, Qualities headings.
- Decide which skills, knowledge, understanding and qualities you can train volunteers to have (which will be desirable) and what skills, knowledge, understanding and qualities volunteers must have already (are essential) to start volunteering. Write an E for essential or D for desirable on each of the post-its, as you put them up.

NB: some roles, such as Admin, will have more tasks and a narrower range of skills and knowledge. Other roles, such as befriending, will have a smaller number of tasks and you will need to concentrate your efforts on identifying what the required skills, knowledge,

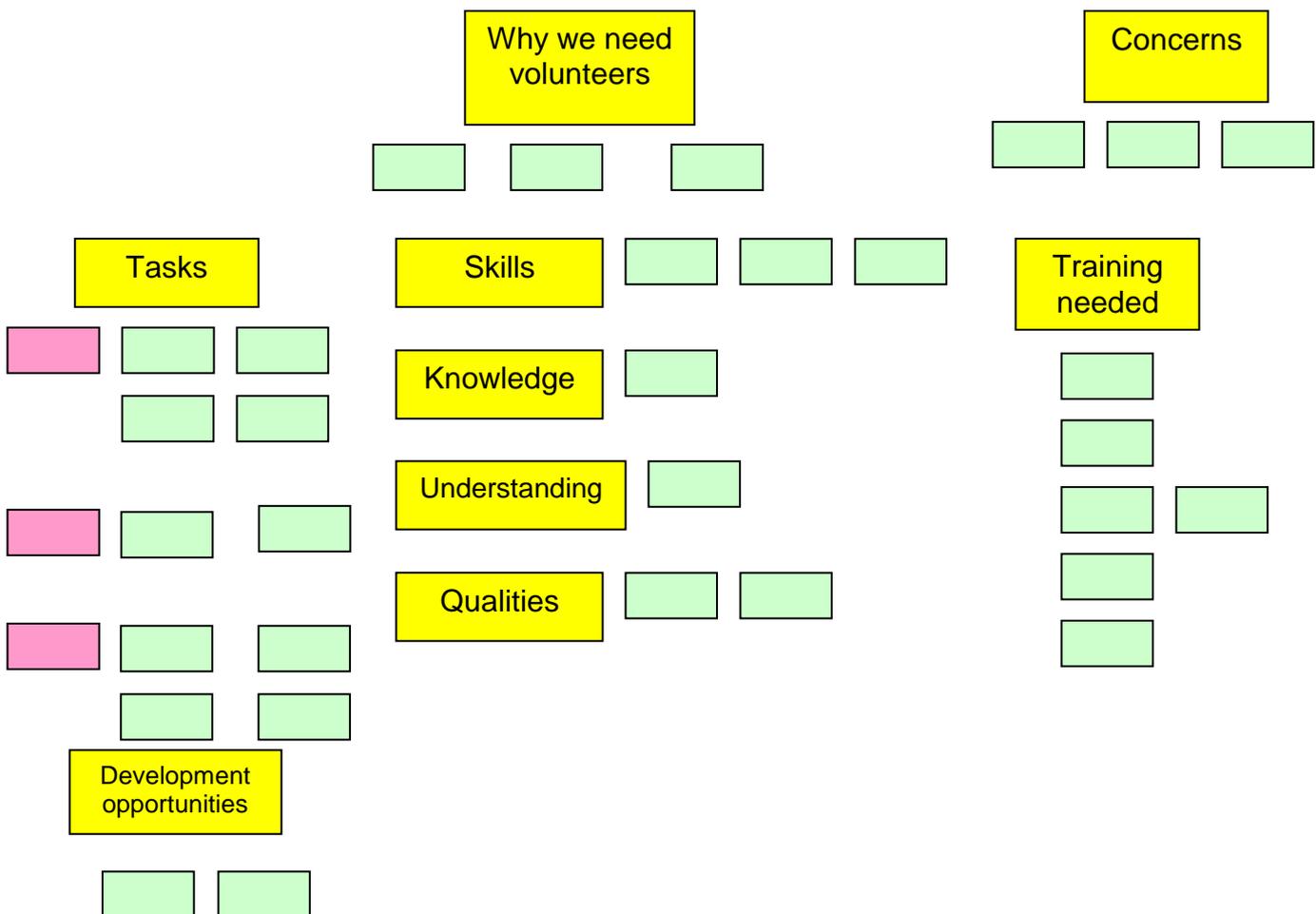
understanding and qualities are so you can clearly state these and which are essential and which you can provide training for.

**7. Identifying training.** Look at the tasks, skills, knowledge and understanding to identify what training your volunteers will need and write up these training needs under the post-it 'Training needed'.

*An example:* a befriending scheme might be concerned that volunteers will put too much pressure on the person they are befriending, or might not be able to keep within appropriate boundaries. In this case the volunteers will need 'Understanding' of the importance of having boundaries and 'knowledge' of what appropriate boundaries are, and the skills to employ boundaries. The skills, knowledge and understanding required means the volunteer will need boundary training to ensure the volunteers are confident and safe in their role.

When you have got your final list of training needs, you may be able to move the post its around to put the training into the order that it will be delivered in.

Your wall should now look something like this:



**8. Concerns.** You will need to address any of the concerns you have raised for your volunteering programme. These may need to be addressed through training, through the

management of your volunteers, or through policies and procedures. The important thing is to have actions that will alleviate the concerns that can be tracked.

**9. Benefits.** List the benefits that volunteers will get from this role and put them up on post-its. Think about the things that are often quoted as necessary on job application forms and demonstrate how they can achieve them through this role. Volunteers will also gain skills from the core training you provide and the 'desirable' skills that they develop through volunteering.

**10. Congratulations!** You have completed the exercise. It can now be written up into task profile. We give an example of a role profile at **Appendix Two**.

**Afterwards:** It is worth typing up what you have written on post-its, before writing the role profile itself. Here are notes from a task profiling exercise that we did for an admin role within our New Beginnings Project (you will find the completed role profile in Appendix Two):

### **Why we need volunteers.**

- Lots of jobs that need doing. Many could be done better than they are at present if we had more capacity.
- There is room for improvement in our admin systems, how we store information e.g. advisors misplace info and forms often run out and need re-printing.
- Refugee and asylum volunteers act as role models and make service users feel at home, understood.

### **Tasks**

#### Stage 1 tasks.

- Explain the services that we offer to people (over the phone and in person)
- Keep information folders up to date (by checking printing out documents)
- Photocopying and organising paper files / checking for missing documents.
- Organise leaflet rack, help filing VCT papers
- Use database to keep track of work done with clients
- Write case notes on work carried out e.g. appointments arranged
- Call volunteers to make appointments at the office (and give directions)
- Use the diary to record appointments
- Post letters to clients e.g. appointment letters.

#### Stage 2 tasks.

- Send reminder text messages to clients with appointments the next day
- Check emails and reply to enquiries, make appointments
- Check voicemail and respond to tasks appropriately - record messages
- Answer the office phone
- Contact volunteers and organisations regarding email / telephone messages (e.g. to follow up a referral query).

#### Irregular tasks

- Help with mail outs to clients e.g. feedback forms. (quarterly only).

### Development Opportunities

- Petty cash
- Preparing monitoring statistics.

**SKILLS** – what the volunteer can already do or can learn / be taught.

Good computer skills including some experience of using Office (Word, Excel etc)	E
Able to use email programs (yahoo, hotmail, Outlook)	E
Able to write English clearly	E
Good interpersonal / communication skills	E
Able to prioritise	E
Some experience of volunteering in an office	E
Level 1 English.	E
Confident to talk over the phone.	E
Able to organise your work e.g. Make task lists	E
Able to find out information on the internet	D
Experience of working in a UK office	D
Experience of writing case notes	D
Able to use a photocopier	D

**KNOWLEDGE** – what the volunteer knows or can find out

Knowledge of office systems and filing systems	D
Knowledge of the issues that asylum seekers face	D
Knowledge of Sheffield's voluntary sector	D

**UNDERSTANDING**– an ability to align with the values, ethos, issues or emotions of a situation. A volunteer will be able to demonstrate this or might gain it from doing the role.

Understanding of the issues that asylum seekers face	E
--	---

**QUALITIES** – Usually the volunteer must already have these as they are harder to teach.

Can work on their own initiative	E
Reliable	E
Punctual	E
Enjoys admin and organising things, creating organised systems.	E
Patient and able to communicate well with people who don't speak fluent English.	E
Creative, able to find jobs to do	D
Able to negotiate	D

## **Concerns, preparation needed for this role:**

- It will take too long to train the volunteers
- They might need more support or direction to find tasks than we are able to give.
- Quality of work and how that impacts on our reputation. They will be communicating with other organisations on our behalf so we want them to give a good impression of us.

## **Training needed**

### Core / Induction Training:

- Intro to the service and what VAS / VC does
- Office orientation – how the filing systems work, what forms / documents we use, where they are etc
- Confidentiality
- Equal Opportunities
- Health and Safety
- How to use the database
- Telephone skills –for calling external agencies / clients
- Email etiquette –for emailing agencies / clients
- Voicemail, message book etc.

### Developmental training:

- Management experience through training and supervising other volunteers
- Train as an advisor

## **Benefits for the volunteer:**

The advanced admin role will give you excellent experience and all the skills that admin jobs will require.

- You will be able to demonstrate you are confident using MS office including Outlook, Access Database, Word and using the internet to find information.
- You will get experience of taking messages, dealing with emails, writing letters advanced telephone skills etc.
- There is a significant customer service element to the role through the telephone skills and case work which will help you to gain and demonstrate good organisational skills as well as interpersonal skills when working with people from many different backgrounds.
- You will get experience of working independently and also of co-operating in a busy team and will have responsibility to make decisions e.g. prioritising and deciding who deals with emails, voicemail messages etc.

- You will also build up a good knowledge of the volunteering opportunities available in Sheffield. This might help you to move on to the follow up or advisor roles within the organisation or other advanced roles within charities in Sheffield.

**Finally, to be added to the task profile:**

- Background to the Service
- Role Purpose (summary of above).

## Appendix Two: Task Profile



### Role Description - Advanced Admin Role

#### Background to the New Beginnings Project

Our project helps refugees and asylum seekers to volunteer in Sheffield. Volunteering helps to reduce isolation, to increase integration and helps people increase their skills and/or English for work.

The core work of the project involves:

- Giving in-depth support to refugees and asylum seekers who want to volunteer and helping them to find a volunteer placement.
- Helping local organisations to involve asylum seekers and refugees as volunteers in suitable opportunities.
- Promoting good practice in volunteering so it is a positive experience for both the refugees and asylum seekers and the organisations involving them.

#### Why we need volunteers

We are a very busy office, helping over 200 people each year, and we have regular clients who come to see us again and again. Volunteers help us keep on top of all of this work. We would not be able to provide the welcome we give or our level of service without the skills and time that our volunteers give to the project. Volunteers who are refugees and asylum seekers themselves play a special role, as they can speak personally to our service users about the benefits they have gained through volunteering.

#### Role Purpose

To help us ensure that clients receive a really good service with regular follow up contact and support.

Core tasks – we will provide training on all of these tasks. You will:

- Explain the services that we offer to people (over the phone and in person)
- Keep information folders up to date (by checking printing out documents)
- Photocopy and organise paper files / check for missing documents.
- Organise leaflet rack, help filing VCT papers
- Use our database to keep track of work done with clients
- Write accurate case notes on work carried out e.g. appointments arranged

- Call / text / email / write to volunteers to make appointments (and give directions) and reply to enquiries
- Confirm appointments in the diary e.g. call / text reminders to clients for tomorrow
- Post letters to clients e.g. appointment letters
- Use the diary to record appointments
- Check emails and reply to enquiries, make appointments
- Check voicemail and respond to tasks appropriately - record messages
- Answer the office phone
- Contact volunteers and organisations regarding email / telephone messages (e.g. to follow up a referral query)
- Help with mail outs to clients e.g. feedback forms (quarterly only).

**Skills / experience/qualities – you need to have these already in order to do this role:**

(You can have developed these from working in your home country or in the UK.)

- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li>• Level 1 English</li> <li>• Able to write English clearly</li> <li>• Confident to talk over the phone.</li> <li>• Able to use email programs ( e.g. yahoo, hotmail, Outlook)</li> <li>• Good interpersonal / communication skills</li> <li>• Good computer skills including some experience of Office (e.g. Word, Excel)</li> <li>• Some experience of working or volunteering in an office</li> </ul> | <ul style="list-style-type: none"> <li>• Able to organise your work e.g. make task lists.</li> <li>• Enjoy admin and organising things, creating organised systems.</li> <li>• Can work on your own initiative</li> <li>• Understanding of issues asylum seekers face</li> <li>• Patient and able to communicate well with people who don't speak fluent English</li> </ul> |
|--|---|

**Skills / experience you will gain in this role:**

(You may have these already but if not we can teach you.)

- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li>• Knowledge of Sheffield's voluntary sector</li> <li>• Ability to use a photocopier</li> <li>• Experience of writing case notes</li> <li>• Knowledge and experience of general admin work.</li> <li>• Knowledge of UK work environment and systems of referral, etc.</li> </ul> | <ul style="list-style-type: none"> <li>• Experience of using a database.</li> <li>• Experience of researching information on the internet</li> <li>• Negotiating skills.</li> </ul> |
|--|---|

**Benefits of volunteering in this role**

The advanced admin role will give you excellent experience. It will enable you to demonstrate all the skills that a paid admin job will require.

- You will be able to demonstrate that you are confident using MS office including Outlook, Access Database, Word as well as computer based search engines.
- There is a significant customer service element to the role. You will get experience of taking messages, dealing with emails, writing letters and you will develop telephone skills.
- You will develop and will be able to demonstrate interpersonal skills as you will have worked with people from many different backgrounds.
- You will develop and be able to demonstrate good organisational skills.
- You will get experience of working independently and also of co-operating in a busy team.
- You will build up good knowledge of the volunteering opportunities available in Sheffield, and will understand how the voluntary sector works.

### **Development or progression opportunities**

- Management experience through training and supporting other volunteers
- Opportunity to get experience of doing petty cash
- Opportunity to help prepare reports and gather monitoring statistics
- You may decide to move into other volunteer roles within the Volunteer Centre (such as an advisor role) or to more advanced admin roles within other charities in Sheffield.

### **Support**

The Refugee Project Worker will train you and give you support so that you are able to perform the role confidently.

### **Expenses**

Travel expenses will be paid – on the day you volunteer. If you volunteer for a full day we also offer lunch expenses.

# Appendix Three: Volunteer Agreements

## Sample Volunteer Agreement 1

This Volunteer Agreement describes the arrangement between **[name of organisation]** and you. We wish to assure you of our appreciation of your volunteering with us and will do the best we can to make your volunteer experience with us enjoyable and rewarding.

### Part 1: the organisation

Your role as a volunteer is **[state nature and components of the work]** and starts on **[date]**. This work is designed to **[state how the work benefits the organisation]**.

**[Name of organisation]** commits to the following:

#### 1. Induction and training

- To provide thorough induction on the work of **[voluntary organisation]**, its staff, your volunteering role and the induction and/or training you need to meet the responsibilities of this role. The Volunteer Handbook provides full details of the organisation.

#### 2. Supervision, support and flexibility

- To explain the standards we expect for our services and to encourage and support you to achieve and maintain them.
- To provide a named person who will meet with you regularly to discuss your volunteering and any successes and problems.
- To do our best to help you develop your volunteering role with us.

#### 3. Expenses

To repay the following expenses following procedures in the Volunteer Handbook:

- Travel to and from home to **[the place you volunteer]** and any required as part of your volunteering role. See the Volunteer Handbook for rules on methods of travel and car mileage allowances.
- Meal allowance to a maximum of £ [ ] per day with a receipt [To be eligible you must volunteer around meal times or for at least [4] hours a day].
- Specialist clothing where this is required and provided by you.
- Actual cost of crèche, childminding fees or other dependant costs incurred in order to be available for voluntary work.

#### 4. Health and safety

- To provide adequate training and feedback in support of our health and safety policy, a copy of which is in the Volunteer Handbook.

#### 5. Insurance

- To provide adequate insurance cover for volunteers whilst undertaking voluntary work approved and authorised by us.

#### 6. Equal opportunities

- To ensure that all volunteers are treated in accordance with our equal opportunities policy, a copy of which is set out in the Volunteer Handbook.

#### 7. Problems

- To try to resolve fairly any problems, grievances and difficulties you may have while you volunteer with us.
- In the event of an unresolved problem, to offer an opportunity to discuss the issues in accordance with the procedures set out in the Volunteer Handbook.

### Part 2: the volunteer

I agree:

- To help [***name of organisation***] fulfil its [***services***].
- To perform my volunteering role to the best of my ability.
- To follow the organisation's procedures and standards, including health and safety and equal opportunities, in relation to its staff, volunteers and clients.
- To maintain the confidential information of the organisation and of its clients.
- To meet time commitments and standards agreed to and to give reasonable notice so other arrangements can be made when this is not possible.
- To provide referees as agreed who may be contacted, and to agree to a police check being carried out where necessary.

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

## Sample Volunteer Agreement 2

Volunteers are an important and valued part of [***name of organisation***]. We hope that you enjoy volunteering with us and feel a full part of our team.

This agreement tells you what you can expect from us, and what we hope from you. We aim to be flexible, so please let us know if you would like to make any changes and we will do our best.

We, [***name of organisation***], will do our best to:

- Introduce you to how the organisation works and your role in it and to provide any training you need. The initial training agreed is [...].
- Provide regular meetings with your manager so that you can tell us if you are happy with how your work is organised and get feedback from us. Your manager's name is [...].
- Respect your skills, dignity and individual wishes and to do our best to meet them.
- Pay your travel and meal costs up to our current maximum\*.
- Consult with you and keep you informed of possible changes.
- Insure you against injury you might suffer or cause due to negligence\*.
- Provide a safe workplace\*.
- Apply our equal opportunities policy.
- Apply our complaints procedure if there is any problem.

I, [name of volunteer], agree to do my best to:

- Volunteer reliably to the best of my ability, and to give as much warning as possible whenever I cannot volunteer when expected.
- Follow [***name of organisation***] rules and procedures, including health and safety, equal opportunities and confidentiality.

\*More details on these issues are provided in the Volunteer Handbook.

Note: this agreement is in honour only and is not intended to be a legally binding contract of employment.

# Appendix Four: Application Form



## New Beginnings Volunteer Application Form

You can complete this form at our office. If you want to do this, contact James to arrange a time when you can come in.

First Name	Family Name:
------------	--------------

Address
---------

Post Code:
------------

Phone Number	E-mail Address
--------------	----------------

Level of English / class:	
---------------------------	--

Age:

<input type="checkbox"/> 19-25	<input type="checkbox"/> 26-29	<input type="checkbox"/> 30-34	<input type="checkbox"/> 35-39	<input type="checkbox"/> 40-44
<input type="checkbox"/> 45-49	<input type="checkbox"/> 50-54	<input type="checkbox"/> 55-59	<input type="checkbox"/> 60-64	<input type="checkbox"/> 65+

### 1. When are you able to volunteer? (please tick)

Monday	<input type="checkbox"/>	Morning 10-1pm	<input type="checkbox"/>	Afternoon 1-4pm
Tuesday	<input type="checkbox"/>	Morning 10-1pm	<input type="checkbox"/>	Afternoon 1-4pm
Wednesday	<input type="checkbox"/>	Morning 10-1pm	<input type="checkbox"/>	Afternoon 1-4pm
Thursday	<input type="checkbox"/>	Morning 10-1pm	<input type="checkbox"/>	Afternoon 1-4pm

### 2. Why would you like to volunteer

e.g. getting new skills to get a job, meeting new people, building confidence etc

**3. To do this role there are some skills or experiences that you need to have already. These are listed in the role profile.**

**Please only write about the ones you have got already. Don't worry if you don't have all of the skills and experiences as you will learn them through volunteering.**

e.g. Using your computer at home to send emails to friends and family. I worked as a secretary in Iran

**3. References:** please give the names and addresses of two people who can provide a character reference for you. One should preferably be a manager or colleague from your current or most recent paid or voluntary work. The other may be a friend or neighbour who knows you well or someone who works with you e.g. a teacher, key worker, support or social worker.

If you find it difficult to provide two referees then please get in touch with us to talk about it.

<b>Referee 1</b>
Name
Address
Post code
Telephone
E-mail
How do you know this person?

<b>Referee 2</b>
Name
Address
Post code
Telephone
E-mail
How do you know this person?

**Please contact James Kazadi if you have any questions:** Tel. 253 6655

**Please return this form to:**

James Kazadi, Volunteer Centre Sheffield, VAS,  
Freepost RRJG-ZJYU-RSJX, Sheffield S1 4ZJ

**Or**

**Drop it in to our office at:**

Volunteer Centre Sheffield, The Circle, 33 Rockingham  
Lane, Sheffield, S1 4FW

**Email:**

[refugee@vas.org.uk](mailto:refugee@vas.org.uk)

## Appendix Five: Induction List

<b>General Induction for all volunteers</b>
<p><b>1. Tour and Introductions</b></p> <p><b>Reception</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Receptionists</li><li><input type="checkbox"/> Signing in and out on Reception</li></ul> <p><b>The Volunteer Centre</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Volunteer Centre Staff</li><li><input type="checkbox"/> Locker - safety and security in office</li></ul> <p><b>Toilets &amp; Kitchen</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Kitchen / Toilets</li><li><input type="checkbox"/> Tea and coffee / Water Cooler</li><li><input type="checkbox"/> First Aid box, first aiders</li></ul> <p><b>Fire procedures</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Fire exits, alarm, extinguisher and assembly point</li></ul> <p><b>Upstairs and Downstairs</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Meeting Rooms</li></ul>
<p><b>2. About You</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Home address and phone number</li><li><input type="checkbox"/> Birthday (for calendar)</li><li><input type="checkbox"/> Preferred day/time to volunteer</li><li><input type="checkbox"/> Emergency Contact number</li><li><input type="checkbox"/> Emergency medication / medical conditions staff should be aware of.</li></ul>
<p><b>3. Introduction to the Work of the Volunteer Centre and VAS</b></p> <ul style="list-style-type: none"><li>• Introduction to Voluntary Action Sheffield (VAS)</li></ul>

**Volunteer Centre**

- VC's place within VAS
- Services we offer to organisations
- Services we offer to the public
- Specific projects e.g. New Beginnings and ESV

## Appendix Six: Induction Spreadsheet

	Induction Training Programme for Core Admin volunteers						
		Stage 1 Induction					
Task	Questions / things to get in place before starting induction	Session 1	Session 2	Session 3	Session 4	Session 5	Session 6
Date							
Explain the services that New Beginnings offers to people.	What services do we provide to people: Yellow flyer VCT Front desk service						
	Shadowing						
	Observation						
Keep information folders up to date (by checking printing out documents)	Which documents do we need to keep in stock. Where are they kept? How many do we want on display / in the desk folder at any one time						
	Shadowing						
	Observation						

<b>Task</b>	<b>Questions / things to get in place before starting induction</b>	<b>Session 1</b>	<b>Session 2</b>	<b>Session 3</b>	<b>Session 4</b>	<b>Session 5</b>	<b>Session 6</b>
Photocopying and organising paper files / checking for missing documents.	Which docs should be photocopied, which should be printed out? What files need organising, which documents should be in order?						
	Shadowing						
	Observation						
Overview of the database, how it works, motivation behind recording processes							
Call volunteers to make appointments at the office (and giving directions)	See training handbook						
	Shadowing						
	Observation						
Writing simple case notes on database about appointments arranged							
	Shadowing						
	Observation						

Task	Questions / things to get in place before starting induction	Session 1	Session 2	Session 3	Session 4	Session 5	Session 6
Use the diary to record appointment times							
	Shadowing						
	Observation						
Post pro-forma letters e.g. appointment letters							
	Shadowing						
	Observation						
Confirming appointments in diary e.g. call / text reminder to clients for tomorrow							
	Shadowing						
	Observation						
How to use Text message software	See training handbook						
	Shadowing						
	Observation						

**Stage 1 review**

**Volunteers comments**

**Co-ordinators comments.**

**Development interests or needs**

		Stage 2 Induction					
Task	Questions / things to get in place before starting induction	Session 1	Session 2	Session 3	Session 4	Session 5	Session 6
Check emails and reply to enquiries, make appointments	Initial training 30 MINS						
	Shadowing						
	Observation						
Contact volunteers and organisations regarding email / telephone messages (e.g. to follow up a referral query)							
	Shadowing						
	Observation						
Check voicemail and respond or delegate tasks appropriately							
	Shadowing						
	Observation						
Answer the office phone							
	Shadowing						
	Observation						
Writing accurate case							

notes on work carried out.							
	Shadowing						
	Observation						
Send mass mail outs to clients e.g. feedback forms.		Training when required					
	Shadowing						
	Observation						