

Good practice guide

for leaders and managers
of volunteers in the British
Red Cross

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Introduction

(I) Leading and managing volunteers

A service manager speaking recently about British Red Cross volunteers described them as 'special people'. She said: "Managing them has to be a privilege." This is true. It is also what this Good Practice Guide is about.

Volunteers are the backbone of our organisation. They raise funds and deliver almost all of our services, to hundreds of thousands of vulnerable people across the UK every year. They do their job so well that it's sometimes easy to forget that they are volunteers, putting in so much time and effort for free.

Bearing this in mind, it's the job of Red Cross managers to ensure that our volunteers get the encouragement, support and supervision they deserve so that volunteering is not only a pleasure but makes a positive contribution to their lives. In order to bring this about, it is vital that all those who manage volunteers know how best to carry out their roles.

Systems of volunteer management vary widely across the different services, activities and locations of the Red Cross. In some activities, volunteers have a named manager who is responsible for the recruitment, ongoing management and support of the team. In others, a group leader or coordinator may be in charge of motivating volunteers and supervising their placements while another person is responsible for recruitment and induction.

Some managers of volunteers are volunteers themselves while others are members of staff. Some volunteer managers work full time, some part time. Some have the word 'manager' in their title while others are 'coordinators' or 'leaders'. All this means that a 'one size fits all' approach won't work when it comes to devising a volunteer management system.

The good practice in this guide will help to confirm the partnership between volunteers and staff and that by working together we can achieve the aspirations of the British Red Cross.

While there are many different sorts of managers of volunteers within the Red Cross they do have one thing in common – they are all busy people. They undertake a large number of different roles within the organisation, supporting volunteers as well as managing the activities that help hundreds of thousands of people each month. It is they who create the environment in which volunteering, so vital to the work of the Red Cross, can flourish and expand.

(II) Using the Good Practice Guide

The Good Practice Guide for leaders and managers of volunteers in the Red Cross is designed to be a resource that you can use according to your own needs. You can dip into it as and when you need a reference source to assist you in your task of managing volunteers. You can read it from cover to cover or simply read one or two sections at a time. The choice is yours. It will depend on your role, experience and confidence as well as the challenges you encounter.

So, where do you start?

1. Use the competencies checklist that follow on the opposite page and identify those which are relevant to your role. Discuss and agree them with your line manager.
2. Use one of the self-assessment tools provided (in Appendix III or at www.redcross.org.uk/redevelop) to identify what you do well and what you need to improve on.
3. Use the Good Practice Guide and other sources of help and support to start improving your skills and confidence.

Competencies checklist

Core competencies	
Support, supervise and develop	Relevant to everyone who manages volunteers
Motivate, recognise and retain	Relevant to everyone who manages volunteers
Lead, communicate and involve	Relevant to everyone who manages volunteers
Role-specific competencies	Are you responsible for this?
Plan – agree roles, ensure the resources are in place and conduct relevant risk assessments	Yes/No
Promote and attract – promote volunteering opportunities using a variety of techniques and methods, embrace the diversity of the community, inform volunteers about the range of opportunities available and respond promptly to volunteers	Yes/No
Recruit and select – carry out recruitment fairly using a role description, be clear about expectations and ensure APEL (Accreditation at Prior Experience and Learning) is applied, references are taken up and business processes followed	Yes/No
Induct, prepare and orientate – ensure volunteers feel welcome, plan their induction into the Red Cross and their role, ensure their training and development needs are met and give them the resources they need to carry out their role	Yes/No
Evaluate and adjust – keep pace with the changing motivations and needs of volunteers, enable volunteers to change or cease their volunteering activity, ensure volunteers who are no longer able to continue their role are supported to change it or leave it, and learn from reviewing the volunteering relationship	Yes/No

(III) Obtaining help and support

You are not alone. Like every other task that you undertake in the Red Cross, there are people who are only too willing to help you with leading, managing and supporting volunteers.

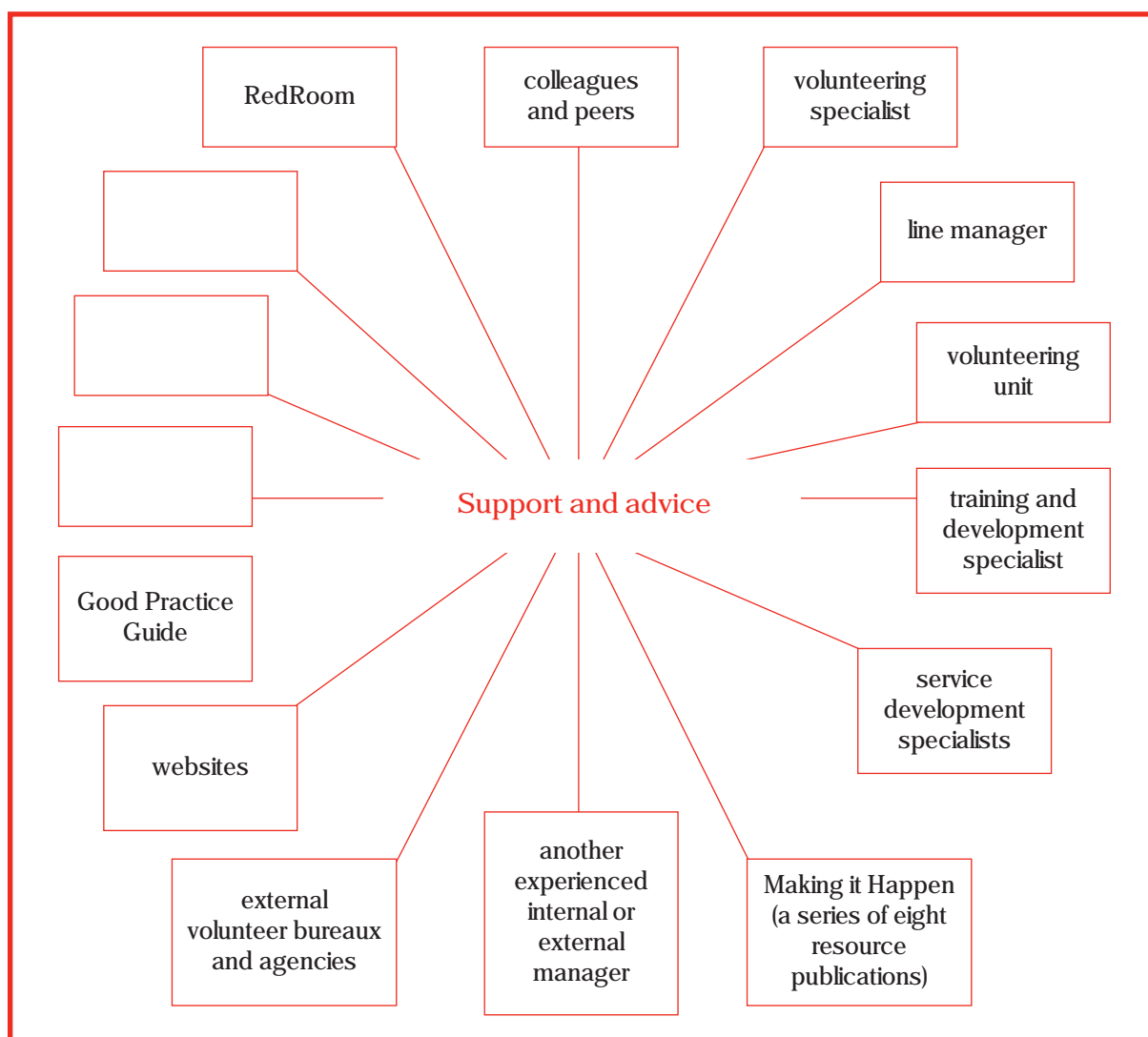
All managers in the Red Cross have a responsibility to support, guide and encourage members of their team, give feedback and provide information. Indeed, sometimes just having the opportunity to chat through options and ideas is all you need. Don't be afraid to ask, whatever your level, experience or role.

In the mind map below (see page 34 for more details on mind mapping), we have provided the sources of support we can think of. Use the blank boxes to add others that you know of.

(IV) The volunteer management competencies

Many of you will have heard of the management development framework which sets out the standards expected of all Red Cross managers. While this framework can be applied to the management of our volunteers, a further set of competencies has been developed to focus specifically on the tasks of volunteer management.

Mind map



These competencies (skills and knowledge) and the associated management behaviours provide the standards expected in volunteer management. They have been designed to be used by anyone who manages, leads, coordinates, supports or supervises volunteers, regardless of whether they are a volunteer or a member of staff.

While they include certain core competencies relevant to all those involved with the management of volunteers, they are also designed to be flexible, since not all managers need to be competent in all areas. The full set of the volunteer management competencies is listed in the appendix at the back of this Good Practice Guide. Also listed there are the management behaviours, which are applicable to everyone regardless of specific roles undertaken.

How to use the competencies

Some managers will already have the skills and knowledge necessary, gained either in their current role, or in previous roles with the Red Cross and/or other organisations. Some who may not have had this experience will have areas where they feel confident and others where they feel further development is required. These competencies are designed to help all those involved in volunteer management assess their roles, skills and knowledge and identify their own development needs. You can use the competencies in a number of ways. Ask yourself the following questions.

Could you use the competencies:

- > to develop managers, leaders and coordinators of volunteers?
- > to review role descriptions for roles involving leadership or management of volunteers?
- > to look at whether volunteers are getting the support they need?
- > to help review and plan management support structures?
- > to identify training and development needs for volunteer leaders and managers?
- > to help compose interview questions for leadership or management roles?

> as part of the feedback or review process for leaders and managers of volunteers?

If you do this and do it well, you can be confident that you are a good manager of volunteers.

Remember that these competencies relate to the discrete skills needed to manage volunteers, which is not simply managing people but the added challenge of managing people who give their time freely to a humanitarian cause.

1 Planning for volunteering

1.1 Introduction

Planning is the stage where thoughts begin to become reality. It is the process that enables a volunteer manager to decide the most effective way of achieving a particular task.

When planning an activity, you will need to give careful consideration to all the resources you need. This includes identifying the right number of volunteers and staff to deliver the activity. Whether it is a home from hospital service, fundraising or tracing and message – you will need to ensure you have the right mix of skills and experience within your team.

While volunteers give their time without cost, they are not 'free'. To retain volunteer interest, commitment and motivation, we must invest in their management.

Planning for volunteering is a core management competency and is vital for success. It will prepare you for any unexpected difficulties and allow you to meet them with adequate resources. It will enable you to identify the volunteer numbers, hours and roles needed to run the activity effectively. It will also ensure everyone on your team knows what the objectives are and what their role is in achieving those objectives. A good plan can be used to draw people in different locations together. It will provide a basis for communicating and coordinating work, serve as a quality control check and monitor progress at different stages.

This section of the Good Practice Guide looks at how to plan effectively, in particular how to:

- > identify appropriate roles and activities for volunteer placements, taking into account the needs of the organisation, users, volunteers and other stakeholders
- > ensure that the differences between volunteers and staff are recognised
- > agree a role description and person specification
- > complete risk assessments and refer to internal policies and good practice
- > consult and involve others when planning for volunteering
- > identify support and supervision requirements for volunteers
- > identify necessary resources to carry out plans and ensure they are available.

1.2 What is planning?

1.2.1 Business planning

Business planning helps identify how to achieve our goals, providing direction at both corporate and business unit level. Clearly things do not always turn out exactly as planned, but having a plan means we are more able to respond to changes. Part of the business planning process is also about planning for volunteering, particularly the resources you will need to manage your activity effectively.

Business planning is a core line management responsibility. All managers are expected to feed into the plans for their business unit. Leaders and managers need to talk to their teams about their aims for the coming year and what needs to happen to make them a reality. It is essential to involve volunteers in planning in order to get the best results. A good way of doing this is to consult volunteers using the Volunteers Councils and Forums.

To start the process, managers need to consider the corporate objectives and key local priorities that support those objectives. It is essential to be realistic, prioritise and involve colleagues. Business unit plans must be aligned, consistent and owned by the teams that will deliver them. Once a business unit plan has been created, individual managers should then look at their own responsibilities and objectives within it to create an individual work plan.

1.3 How to plan

There are various different techniques and tools you can use to assist the planning processes.

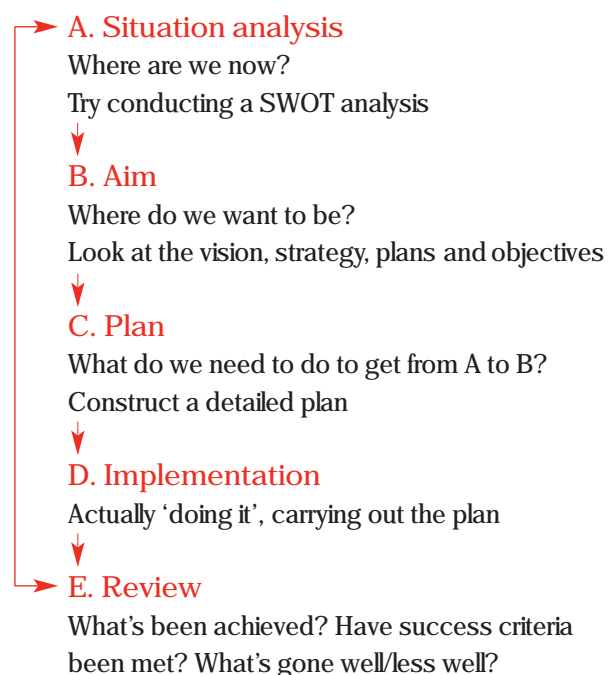
When planning ahead consider:

where? what? why?
when? who? how?

- > Where are we now?
- > What are our objectives?
- > What do we need to do to continue as we are?
- > What do we need to do to progress?
What resources are required?
- > Why do we need to do this?
What will be the impact?
- > When does this need to be done?
Can it be done in stages?
- > Who is going to be involved?
Who do I need to communicate with?
- > How are we going to achieve our objectives?
- > How will we know we have achieved our objectives?

You will also want to think about money. Make sure that your plans are costed, including the costs of volunteer support systems, recruitment costs, equipment, etc. Talking to your colleagues will give you a good estimation of these costs.

1.3.1 Planning flowchart



1.3.2 Planning techniques and tools

> SWOT analysis

Conducting a SWOT analysis (Strengths, Weaknesses, Opportunities and Threats) can be an effective planning tool. To find out how, see page 26.

> Mind mapping

Mind mapping is a planning technique useful for generating a wide range of ideas. For information on how to apply this technique, see page 34.

> Boardblasting

Boardblasting (also known as brain storming) helps develop creative solutions to problems using a free, uncritical approach. It should encourage unusual ideas and approaches, which can then be translated into logical thoughts and actions.

> Gantt charts

Gantt charts can be used to show the relative timings of a set of tasks. To find out how to use a Gantt chart, see page 35. There are also other project planning tools and techniques.

1.3.3 Who else to involve

Who to involve in the planning process depends on your role. However, there are some groups of people that you should involve:

- > Existing volunteers, so they feel involved and are able to contribute their suggestions
- > Other leaders and managers in similar roles
- > Your line manager, for support and direction
- > Administration manager and receptionists need to know of plans that impact on them
- > Your volunteering specialist may be able to give advice on good practice, recruitment and supervision. They can also help you with coordination throughout the area
- > Training and development teams may need to be aware of any specific training plans

1.4 Legislation and policies

Recent court cases (see page 139) have shown just how important it is for managers to have a basic understanding of the legislation relevant to volunteering and to plan how it will affect them. The National Minimum Wage Act and anti-discrimination laws are just two areas of legislation

that have a bearing on volunteering. You'll also find a list of internal policies and procedures which you may need to consider in your planning stages on page 137. Remember that volunteering and HR specialists are there to advise you, so check with them if you are unsure.

1.5 What to consider when planning

1.5.1 Resource planning: How many volunteers do I need?

The first step in effective volunteer management is to assess how many volunteers are needed to complete a particular task, what roles they should perform and where they can be found. We know from research that the more specific the request for a volunteer, the better the response.

The first question you need to ask yourself is – what am I trying to achieve? Once you are clear about this, you can think about the staff and volunteer resources you will need to be able to achieve your objectives.

A service co-ordinator wants to deliver a high quality home from hospital service that meets the needs of the local community.

The service co-ordinator will need to ask a number of questions to be able to identify the staff and volunteer resources required to ensure that the service is delivered effectively throughout the year. So, what's the starting point?

Existing service

The co-ordinator would need to consider:

- > contractual requirements – checking what our proposal/tender and contract state we will deliver
- > existing levels of provision – i.e. the number of home from hospital visits made during the previous year
- > expansion plans and opportunities – i.e. the number of visits volunteers are expected to make next year (considering any promotional activities, expected changes in local needs, alternative local provision etc).

- > the current average number of volunteer hours given per month for the delivery of the service
- > the expected number of volunteer hours required for the delivery of the service next year.

Just by asking these simple questions the service co-ordinator would have a good idea of the number of volunteer hours needed to ensure the service was delivered effectively the following year.

The next set of questions to ask include:

- > How many extra volunteer hours will I need to recruit for next year? (Think about turnover – using historical data on how many volunteers are likely to leave in the next year)
- > How many hours per month are spent supporting an individual volunteer?
- > How many hours will I need to invest in attracting, recruiting and inducting new volunteers next year?

This will allow them to determine how many hours are required to support volunteers. This is a vital part of resource planning. All too often we enthusiastically recruit more volunteers without really considering their support requirements!

Starting up a new activity

Managers will need to go through a similar process when starting up a new activity. In order to achieve this, they will need to make comparisons with similar services in other areas. For example, if other areas already have similar services, make contact and ask them for details of volunteer hours, level of activity and support requirements. It is a good idea to get hold of a few different comparisons in order to make informed decisions. It is important to be confident that you can put in place the necessary staff and volunteer resources to deliver and maintain the service effectively.

1.5.2 Planning checklist

Planning involves thinking ahead and setting out objectives for what you want to achieve. There are many things to consider including:

- ☐ **Assessment of** the number of volunteers/volunteer hours required
- ☐ **Definition of roles**
- ☐ **Support structures** for volunteers
- ☐ **Advertising** volunteering opportunities
- ☐ **Recruitment** of volunteers:
 - > Ongoing recruitment of volunteers to service current levels
 - > Planning for the future – expansion of service/activity
 - > Planning for the future – volunteers leaving or changing commitment
- ☐ **Local processes** to respond to volunteer enquiries
- ☐ **Relevant checks** that need to be carried out
- ☐ **Diversity** of volunteers
- ☐ **Induction** of volunteers. Consider finding out about:
 - > training courses
 - > buddying opportunities
 - > arranging service specific training
- ☐ **Training and development** needs of volunteers. Leaders and managers will need to liaise with other managers and the training and development team in the Area/Territory.
- ☐ **Resources** for volunteers:
 - > Equipment that needs replacing/updating
 - > Refreshments for volunteers meetings
 - > Expenses of getting people together
 - > Workwear or equipment for new starters
- ☐ **Effective** communication with volunteers
- ☐ **Setting standards** and adhering to them

Don't forget: If your project or service is externally funded, you should be writing the costs associated with recruiting, training, supporting and managing volunteers into the funding bid. For British Red Cross funded services and activities, these costs must be built into your operating budget.

Case study 1

How Many? Eight years ago, when asked how many volunteers I would be recruiting in my county during the next year, my answer was maybe ten to twelve. Now, working on three-year plans across four counties my response would be 'it depends on needs and funding opportunities'.

Why? Because no volunteer recruitment or training should be considered without a thorough development plan being carried out.

How? Local community knowledge should be investigated. Population size and areas of poverty should be taken into consideration.

This is not how a volunteer bureau sees volunteer recruitment. They believe a willing volunteer should always be accommodated. So when you receive offers of help for a particular service which you can't accommodate, as a volunteer manager you need to give a sound explanation why you are unable to recruit them at that particular time.

Golden rules

1. When a volunteer offers to work every week because they are so enthusiastic, advise them to start out by working fortnightly. It is always easy to add more help but difficult to withdraw once a volunteer is in place, and funding arrangements have been set.

2. How many volunteers should be in any one place depends on the numbers of users accessing the service, funding and management support for volunteers. Carol Pitfield, skin camouflage and therapeutic care co-ordinator, Wales and Western

Case study 2

In order to respond to clients wishing to access tracing and message services, we often need to communicate in languages other than English. The volunteer workforce in our services is multi-cultural and we encourage potential volunteers to offer their language skills.

When there is a conflict, political upheaval, or natural disaster we aim to be prepared for an increased demand for our services by trying to recruit volunteers with the relevant language skills and cultural background.

Asylum seekers are often keen to volunteer as they cannot take paid employment and, frequently, they have benefited from Red Cross or Red Crescent services here and/or in their country of origin.

Consider:

- > possible volume of work/predicted number of service users
- > languages needed
- > gender, age, ethnicity of volunteers needed
- > roles of volunteers (administration, interpretation, service delivery)
- > training needs (e.g. specialist training for destitution work)
- > volunteer support structures
- > resources for volunteers and associated costs
- > cultural diversity enhances our work
- > the volunteers must understand the Fundamental Principles and complete Red Cross World.

It is important to remember that some volunteers do not have bank accounts and should be re-imbursed for expenses through petty cash.

Pat Smith, volunteer resource planning for refugee/international tracing and message services, Wales and Western

1.5.3 Succession planning

It is important to ensure that there are highly competent people in all positions, not just today, but tomorrow and next year. 'Succession planning' establishes a process for recruiting volunteers, developing their skills and preparing them for advancement.

It is about being proactive. If you're not geared up for it, this could have an effect on your ability to provide required levels of service and may well impact on any contractual arrangements you have. Failure to deliver could be costly.

With good succession planning, people are ready for new roles so that when someone leaves, another volunteer should be ready to take over their role. This principle applies equally to people in leadership roles so that volunteers continue to be supported.

Good succession planning requires you to:

- > determine volunteer retention trends and identify expected volunteer vacancies based on previous volunteer turnover rates and any known leavers
- > understand the long-term goals and objectives of the Red Cross
- > identify critical volunteer roles
- > develop a volunteer recruitment plan to meet current and future needs
- > identify individual volunteers who may want to join the service and develop their skills
- > identify current and future competencies for different roles
- > identify gaps in current volunteer competency levels
- > identify individual volunteers' development needs
- > develop and implement coaching and mentoring programmes
- > assist with transition and development.

1.5.4 Contingency planning

Most services and activities rely on volunteers and are therefore vulnerable to any volunteering problems that could prevent them from operating. This can range from a volunteer not turning up, to all of your volunteers leaving suddenly. Managers have a responsibility to recover from such problems in the minimum

amount of time, with minimum disruption and at minimum cost. This requires careful planning.

You will need to start off by thinking about likely scenarios. e.g. a volunteer resigning on the spot or your volunteers being called to help with a local emergency. Contingency planning involves thinking in advance what you would need to do in these situations. You may, for example, need to ask your volunteers whether they would be happy to be contacted in an emergency. You will also need to prioritise, looking at what you have to do and what you could stop doing.

Do remember that you're not superman or wonderwoman. If on the day you can't sort things out, don't put yourself in a risky position just to keep things going.

"With the limited number of volunteers available, and in order to ensure appropriate levels of service, I need to have contingency plans in place well in advance. This is crucial, especially where volunteer numbers may fall short of expectations."

Chris Hillier, volunteering support manager

1.6 Planning volunteer roles

Each volunteer should have a role description providing a summary of the tasks to be done. This provides a tool for supervision and quickly focuses a new volunteer – it tells them what to do. It also ensures that volunteers are recruited to perform valid and meaningful roles. Although some managers are not keen on role descriptions, they can be very useful, as long as the role is reviewed and updated regularly.

1.6.1 What is a role description?

A role description is an outline of the role, covering its overall purpose, typical tasks the volunteer will be expected to perform and qualities and skills being sought. It should also include the time commitment required and the line of reporting.

As it is important not to create a contract, (see page 138) the word 'job' must not be used. In addition, the role description lists the qualities and skills we are looking for, rather than the

specific qualifications and experience required for a paid job.

Role descriptions are important:

- > so the British Red Cross is clear about what it needs volunteers to do in order to deliver the activity
- > so volunteers know what they are doing
- > so the manager, coordinator or leader is clear about the role
- > to set the standard for what is expected
- > to give value to the role
- > to make things measurable
- > to make responsibilities clear
- > to clarify line management responsibility
- > to help prevent overlap
- > to assist with recruitment (both advertising the role and the interview process)
- > to assess whether expectations are being met
- > to provide a basis for review and giving feedback.

1.6.2 How do you create a role description?

There are some standard role descriptions available which you can also adapt to local needs. Please refer to the volunteer recruitment and selection manual (available on RedRoom or from your volunteering specialist) for examples.

A role description is essentially a list of tasks you would like someone to carry out. It should also include a person specification, giving an idea of the skills and qualities required to perform the role effectively. However, managers do need to be flexible and ensure that the role suits the individual. Managers will often need to make adaptations to specific volunteer roles in order to cater for individual needs.

Although it is important to have standard volunteer role descriptions for your service or activity, you may sometimes need to think 'outside the box'. For example, there is a current trend for volunteers to want to give their time to more project-focussed tasks, in which case you could create a one-off role description or perhaps split a role into two.

It is good practice to talk to other people performing similar roles, perhaps existing volunteers who do the same/similar role. Your line manager should also check they are happy with the role description you create.

1.7 Structuring your team

Working out the right structure for your team is an important part of the planning process. Poor planning at the beginning can lead to an inadequate volunteer support network. Getting the structure right in the planning stages together with an effective review process will help avoid problems later on.

1.7.1 How many volunteers can one person manage?

There is no straightforward answer to this question. It depends on:

- > the volunteering activity and risks
- > the volunteers' roles
- > the level of support required
- > geographical location
- > the skills of the manager
- > the needs of the individual volunteer.

In some Red Cross services and activities, one coordinator will support hundreds of volunteers. Although this can seem to work, the actual level of support to individual volunteers will be limited. The majority of services and activities have between 20 and 40 volunteers, which provides an acceptable level of support.

If a volunteer coordinator is responsible for a large group of volunteers, this may have a knock-on effect on recruitment and retention. The more people you are managing, the harder it can be to take on someone who needs extra support. In order to include diverse groups of people, managers should not be responsible for too large a team.

As a guide, the coordinator should be responsible for leading a maximum of 40 volunteers. Where there are more, the coordinator should definitely look at introducing an alternative support structure such as team leaders, group leaders or senior volunteers.

“I manage 350 volunteers. What I lack in paid full-time staff, I substitute with voluntary assistance in the form of volunteer leaders, who are responsible for supervising their own group. The volunteer leaders report to me and we have regular management meetings to set goals and review policies. I don’t see how I could possibly manage all 350 volunteers without the assistance of these group leaders.”

External volunteer coordinator

Case study

Diane is a home from hospital coordinator who manages 20 volunteers. To help the volunteers get to know and support each other, she organises quarterly meetings. She also meets them individually every few months. This system works well and volunteers feel that they have a personal relationship with Diane and that time is available to them for support whenever they need it.

It is essential that when planning for an activity, either as part of the business cycle or when initiating a new activity, support requirements are considered. Managers must consider the average number of hours per month needed to effectively support a volunteer and the number of volunteers requiring support, and plan accordingly to meet these needs.

1.7.2 Volunteer team leaders

What options are there for supporting volunteers, other than paid staff?

Volunteer leaders have been an important part of the Red Cross for many years – a large number of volunteers look to a volunteer leader for their support and supervision. Here is what you’ll need to do if you want to set up this type of structure:

- > Review your structure. Check how much current supervision volunteers receive
- > Review existing formal and informal volunteer leader roles
- > Ask your line manager, colleagues and volunteering specialist for suggestions on the structure
- > Identify what you need volunteer leaders to do and what skills and qualities they need

- > Draft a role description and person specification for volunteer leaders
- > Decide on timescales and systems, e.g. do you want the volunteer leader to be voted in annually or will you appoint a permanent team leader?
- > Advertise the roles, taking time to involve your existing volunteers
- > Interview applicants and check they have the required skills and knowledge. Beware of appointing people just because they are involved in everything. Check that they can meet the time commitments and have the ability to perform the role
- > Once appointed, review the training and development needs of the volunteer leaders. Look at the management behaviours and competencies for managers of volunteers and help them to assess any training and development needs, or make sure they have a copy of this Good Practice Guide
- > Agree support requirements for the volunteer leaders. Look at how you can encourage learning between them as a group.
- > Organise regular meetings and individual support and supervision sessions with them

1.7.3 Reviewing the structure

Here are some questions you might want to ask when reviewing your structure:

- > Are volunteers doing what we need them to do to deliver the activity effectively and meet local needs?
- > How many volunteers do I currently have in place and how many hours do they give on average?
- > Who is responsible for supporting volunteers?
- > Does the person responsible know who all the volunteers are? Who do the volunteers think their manager is?
- > How often do they have contact with them?
- > Are all the volunteers getting the support they need?
- > Is information getting to the volunteers?
- > What communication channels are currently in place? How effective are they?
- > How involved do volunteers feel?
- > How motivated are they?

You can use a SWOT analysis to review your structure (see Figure 1.1 for an example of SWOT analysis).

Example SWOT analysis – reviewing the structure

Pete is a transport and escort service coordinator in the Whereington Area based in X county. X county itself currently has 40 volunteers. Pete also has responsibility for two other counties in the area, Y and Z, each of which has 20 volunteers.

<h3>Strengths</h3> <p>What are you doing well? What are your advantages?</p> <ul style="list-style-type: none">> We are meeting local needs and delivering a quality service> Volunteer roles are effective> Tasks are allocated well to volunteers (all three counties)> Volunteers in X county seen regularly> Volunteers in X county have opportunity for one-to-ones> Volunteer party once a year (all three counties)> Meeting training and development needs> Inductions organised across the area and therefore people don't have to wait> Good buddying scheme in X county> Good service user feedback in X county	<h3>Weaknesses</h3> <p>What is being done less well? What could be improved?</p> <ul style="list-style-type: none">> One person is responsible for supporting 80 volunteers> Volunteers in counties Y and Z not supported very well> The quality of work is not as good in counties Y and Z> Volunteers in Y and Z feel isolated> Volunteers in counties Y and Z don't know their coordinator> No time for one-to-ones in counties Y and Z> Standards in counties Y and Z dropping> Volunteer turnover has increased in counties Y and Z> Lack of funds to provide refreshments for volunteer get-togethers
<h3>Opportunities</h3> <p>What opportunities are there for you? What is happening in the area?</p> <ul style="list-style-type: none">> Develop more escort duties linking into new community groups with transport needs in counties Y and Z> A couple of longer serving volunteers in Y and Z have taken on informal support role to other volunteers> Attract new volunteers> Give responsibility for support to three volunteer team leaders> Hold quarterly meetings for the volunteers in each county> Free up the coordinator to spend more time on counties Y and Z> Produce service-specific area newsletter for volunteers	<h3>Threats</h3> <p>What obstacles do you face? What is the 'competition' doing?</p> <ul style="list-style-type: none">> Cost of recruiting new volunteers and volunteer team leaders, expenses, resources> Don't have three volunteer team leaders> Volunteers may be reluctant to change the support structure> Lack of time for the coordinator to invest in setting up systems and structure> Geographical distance causes problems in meeting volunteers face to face> Competition from other agencies for new contracts

Figure 1.1: Example of SWOT analysis

What do I need to do next?

Having completed your SWOT analysis, you then need to look at how to turn your weaknesses into strengths and your threats into opportunities. Here is an example action plan for the transport and escort service in the Whereington Area:

Task	Who	When
Write volunteer team leader (VTL) role descriptions	Coordinator, with support from volunteering specialist	Mid Feb
Discuss VTL posts with volunteers	Coordinator	March
Advertise and promote VTL posts	Coordinator/volunteering specialist	End March
Conduct interviews for VTL posts and appoint	Coordinator	End April
Set up service-specific area newsletter	Coordinator, with support from Territory communications and Area administration	Start May
Organise quarterly meetings in every county	Coordinator	When VTLs in post
Organise standards refresher training	Coordinator and volunteer trainer	Run three sessions during May/June
Research service development opportunities	Coordinator	Complete by end April
Work with VTLs to devise volunteer recruitment plan	Coordinator and VTLs	May/June

Figure 1.2: Example of action plan

1.8 Key messages

A good volunteer planning process requires you to:

- > identify the need via a situation analysis (using planning techniques and tools to assist)
- > know how many volunteers and staff you need to deliver the activity and what you need them to do
- > involve others, such as volunteers, colleagues and your line manager, in your plans
- > anticipate how many volunteers and staff are needed in the future through succession planning
- > anticipate what to do if an emergency arises and you are without some of your volunteers
- > get your support structure right to ensure volunteers remain motivated and committed
- > ensure you are aware of policies and legislation relating to volunteering.

1.10 Resources

- > Refer to Chapter 2 for details on planning for recruitment.
- > See British Red Cross Business Planning Guidance,
- > The Volunteer Recruitment and Selection manual is available as a printed copy from your volunteering specialist and electronically on RedRoom.
- > Refer to the Appendices for legislation relating to volunteering.

1.9 Review and improve

1. Look at your current volunteer support structure and use the example on page 26, to conduct a SWOT analysis for your service/activity.
2. See what is required to turn the weaknesses into strengths and threats into opportunities.
3. Arrange a one-to-one with your line manager to discuss your findings. Think about what you want to keep doing, what you want to do differently and what new things you want to try.

2 Promoting opportunities and attracting volunteers

2.1 Introduction

Attracting volunteers to the Red Cross and promoting opportunities for them is vital to the success of the organisation. Without new recruits, the number of volunteers would gradually decline. Eventually, the organisation's services and activities would simply be unable to function.

New faces also bring a fresh approach along with a reinvigorated sense of enthusiasm both of which greatly benefit the organisation. It is important to reach out to as diverse a range of people as possible when recruiting which is just one reason why good recruitment takes time, effort and skill and is a core management competency.

This section of the Good Practice Guide concentrates on recruitment techniques, enabling volunteer managers to:

- > use varied, cost effective and targeted methods and techniques to promote volunteering opportunities
- > promote volunteering opportunities that are inclusive and accessible, using images and language that reflect the communities we work in
- > respond promptly and appropriately to potential volunteers
- > help potential volunteers to explore opportunities and make informed judgements about volunteering.

2.2 Why do people volunteer?

Volunteering in the UK is huge. The last National Survey of Volunteering found that nearly half of all adults volunteer their time to an organisation or group. According to Baroness Amos, Leader of the House of Lords, “Volunteers make a massive difference across the UK. Their role is invaluable, changing and enriching the lives of millions of people while also playing a part in building and maintaining a sense of community.”¹

People volunteer for all sorts of reasons. They may want to make a difference to their community, learn new skills, improve their CV or meet new people. Indeed, the social element is vital. People will join if they think they will be able to make friends and enjoy themselves. It is also worth bearing in mind that the main reason why people do not volunteer is because they were not asked to.

As probably the best-known voluntary organisation in the world, the Red Cross is in a great position for attracting volunteers. However we should not assume the public knows what we do locally or what volunteering opportunities are available. Making the Red Cross known in your local community is essential if the organisation is going to continue to recruit new volunteers.

Current trends

- > Retirement volunteering
- > Short-term volunteering
- > Corporate volunteering
- > Flexible volunteering
- > Student/CV enhancement volunteering
- > Volunteers being more selective

Did you know?

The Spanish Red Cross takes a whole week in August to mount exhibitions across Spain to recruit enough volunteers for the rest of the year. Literally the entire National Society gets involved – mounting displays in towns across the country and talking to the local community about what the Red Cross does and how they can get involved.

2.3 Planning for recruitment

2.3.1 Why do you need to plan for recruitment?

The most important reason for planning for recruitment is if you don't, it is unlikely to happen. Planning also enables you to carefully target the people you want to recruit, ensuring a diverse range of volunteers. By reviewing what happened last time, you can look at how well your approach worked and how to measure the effectiveness of your methods this time. One thing is for sure – you will need to recruit volunteers at some point so start planning now.

Planning your recruitment campaign should only take an hour or two at the most. You will need to think of ideas and then spend time considering who to involve, how you are going to do it, what exactly you are planning to do and when. It doesn't need to be a fancy, 20-page strategy but something that works for you.

Getting your existing volunteers on board in the early stages will help create a sense of urgency and mutual support. Also ask your peers and line manager for ideas and help. It is also a good idea to involve volunteering specialists because they may be able to offer some different suggestions and help you link up with other local initiatives.

When developing your volunteer recruitment plan remember:

- > traditional methods, such as word of mouth are very effective
- > you will need to be innovative to stand out from the crowd but feel free to copy others
- > perseverance and stamina are essential in attracting new volunteers
- > 49 per cent of volunteers get involved because they were asked.

¹ Quoted on www.timebank.org.uk

2.3.2 What do you need to consider when planning for recruitment?

- > What other work is going on. A recruitment initiative needs to be planned and dovetailed with other initiatives and strategies.
- > Know why you need people to volunteer, what roles you require them to perform and try and focus on one volunteer role at a time.
- > Consider trends, potential benefits and barriers to volunteering and the image of the Red Cross in the community
- > Set specific objectives. (e.g. to recruit 3 medical loan volunteers by September) and plan what resources and budget you have available and need.
- > Be creative in your thinking about where to look for volunteers. Try brainstorming ideas with existing volunteers
- > Plan what you want to communicate and how best to get a response
- > Remember that there are no rights or wrongs about where to recruit, so be inventive! However do seek advice before trying something costly or labour-intensive
- > Plan how you will measure progress, successes and failures
- > Be prepared for applicants to contact you and develop a welcoming and prompt system for getting people involved
- > Always remember that it is flattering to be asked to volunteer
- > Finally, whether it works or not tell others so they can learn from your mistakes or successes

2.3.3 Mind mapping

Figure 2.1 shows an example of a mind map based on a Red Cross shop manager getting suggestions and ideas from existing volunteers for recruiting new volunteers.

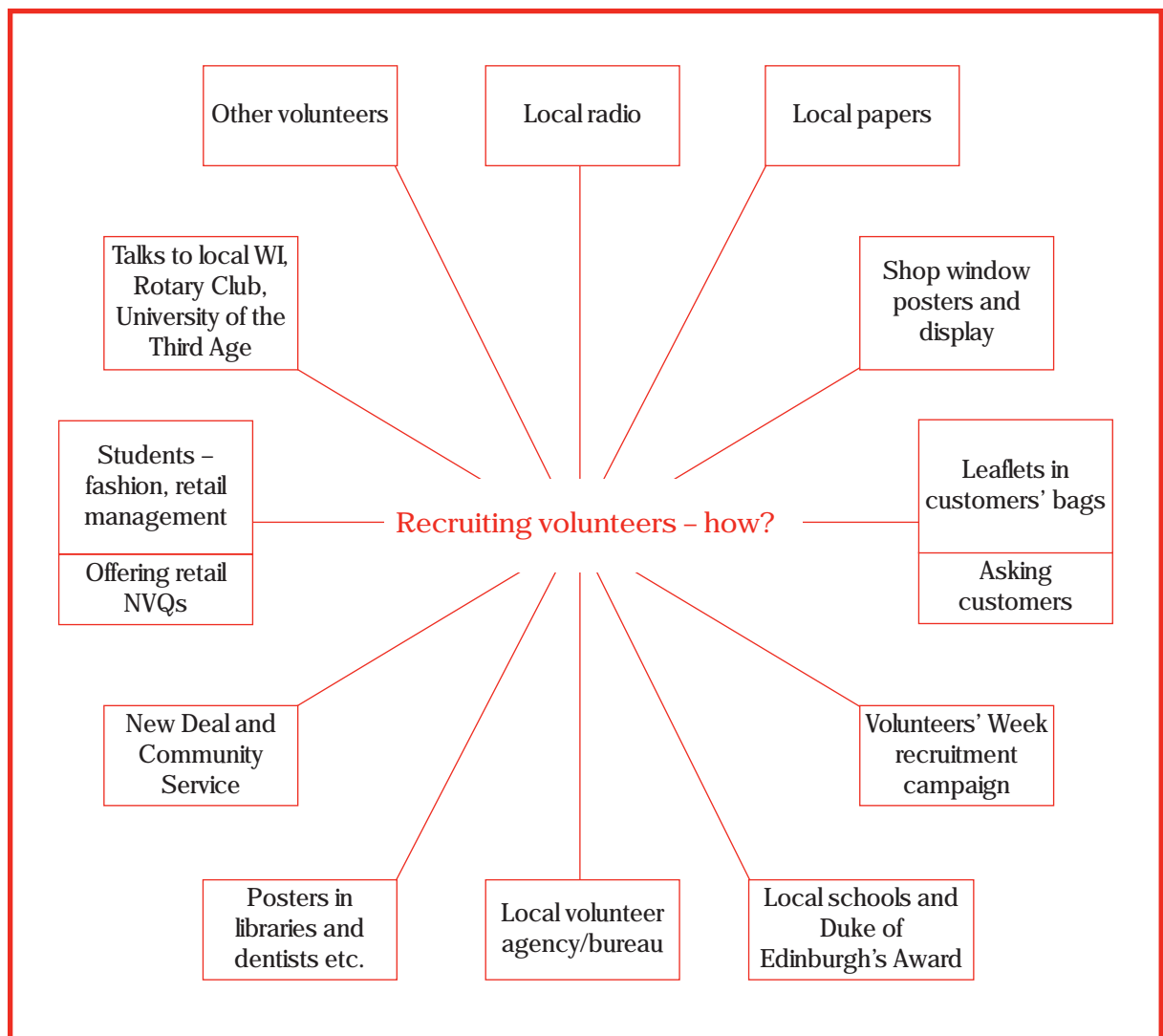


Figure 2.1: “Recruiting volunteers” mind map

To use the mind mapping technique, write the task you need to plan (e.g. recruitment) in the centre of the paper. Ask your volunteers for suggestions and note them down in the surrounding boxes. Once all the ideas have been exhausted, each box should be revisited to see if there are possibilities that can be worked on. Then decide where to focus attention initially in terms of recruitment, and determine which other ideas should be developed for the future and which are not feasible.

The following questions may help:

- > What can I do now?
- > What can others do now?

- > What are likely to be the most effective methods?
- > What have I tried before?
- > Which ideas are cost effective?
- > How much time commitment do they involve?
- > Which can be done without obtaining specific resources or support?

For example, having gone through this process, the shop manager may decide that they can start asking customers and make a display in the shop window immediately, but will plan a Volunteers' Week recruitment promotion for the future.

2.3.4 Gantt charts

Gantt charts are simply a method of planning and managing a project. This example in Figure 2.2 is based on a home from hospital coordinator who is planning a six-month recruitment drive to attract 30 new volunteers. The coordinator used a Gantt chart to plan their recruitment initiative, creating a timeline for tasks to be completed.

	Jan	Feb	Mar	Apr	May	Jun
Radio	Advertise on hospital radio		Promote service expansion on local radio	Advertise on hospital radio		Volunteers' Week service promotion
Newspapers	Free advert in Wherever Mail		Editorial in County Times		Free advert in Wherever Mail	Volunteers' Week service promotion
Posters	Schools and colleges	Doctors and dentists	Hospitals and health centres	Village halls	Local clubs	
Talks		Wherever college	GP meeting	Wherever school		GP meeting
Promotion	Hospital X reception		Hospital Y reception	Hospital Z reception		Volunteers' Week service promotion

Figure 2.2: Example of a Gantt chart for a volunteer recruitment drive

Leaders and managers need to plan both their recruitment initiative and what will happen next. For example, they need to be ready to receive enquiries, conduct interviews and induct new volunteers.

Case study

It is important to plan ahead

When David, the senior services manager, attended a local volunteer recruitment fair, he was delighted to collect over 100 names of potential volunteers. However on returning to work, he quickly became aware of the lack of time and people to take on so many at once.

The service managers were going through a busy period and didn't have time to talk to them. The area had run out of volunteer application forms, which needed to be ordered before applications could be processed. David realised the task was getting bigger and seemed so huge that in the end none of the interested people was contacted again. Not only did the Red Cross miss out on new recruits, its image could have been damaged by not bothering to get back to them.

2.4 Diversity in volunteering

Achieving true diversity in volunteering is an ambitious and important goal and is directly relevant to the Fundamental Principles of the Red Cross. To attract volunteers from many different backgrounds, managers have to be prepared to make some changes to the way they work.

"Since being with your own kind makes you feel safe, while being with those who are different makes you feel uncomfortable, there is a natural tendency in organisations for managers to recruit – or promote – clones. This is hardly good for business: if everyone thinks the same, you won't get new ideas. Similarly recruiting people because their face fits is hardly the best way of picking talent."

Geraldine Brown, Human Resources, 1999

2.4.1 What are the benefits of diversity in volunteering?

Diversity in volunteering ensures that the Red Cross represents the communities it serves. In doing so, it presents a more welcoming image to volunteers, service users, partners, donors and customers, enabling the organisation to respond to community needs better and with greater understanding.

A diverse volunteer base also means the Red Cross will benefit from new ideas and approaches generated by people from different backgrounds, ages, genders and cultures. It will be more adaptable and more able to communicate with and attract service users, donors and customers from diverse groups.

When thinking about diversity of volunteers consider:

- > gender
- > age
- > ethnicity
- > sexual orientation
- > language spoken
- > income level
- > race
- > education
- > community power/influence
- > disabilities
- > skills
- > years with the organisation
- > geography
- > having ever been a service user/client/donor.

2.4.2 Reasons for a lack of diversity in volunteering:

- > Relying on word of mouth as the main recruitment method
- > Delivering services and running activities that appeal more to certain sections of the population
- > Failure to reach out to and specifically target diverse groups
- > Lack of flexibility in roles/hours
- > Paid workforce lacks diversity
- > Current volunteers and staff may not be welcoming to difference/newcomers

- > Fixed image of the Red Cross in the community
- > The culture of the organisation
- > Assumptions about what people can achieve/do (for example, young people)

2.4.3 What you can do to increase diversity

- > Review your current volunteer diversity
- > Examine the demographics in the area
- > Design roles that welcome difference
- > Enable people to do 'parts' of a role
- > Advertise in specific places/media
- > Translate adverts into different languages
- > Use recruitment methods other than word of mouth
- > Create a welcoming atmosphere for all volunteers by building an open management style that encourages expression of opinion and debate
- > Be aware of the unique contribution and needs of different volunteers and adapt expectations accordingly

There may be tension between new volunteers and veteran volunteers, particularly if the new volunteers are from a different background. You need to think how to overcome these sorts of difficulties. Try talking to your volunteers and getting them to help you with diversifying or introduce a buddy system for new recruits. Remember that your Volunteers Council can also help. The Red Cross is open to all and you and other volunteers have a responsibility to welcome everyone.

"When I volunteer in certain groups, lots of older volunteers look at me as a young whipper snapper and there have been times when I have felt discriminated against because of my age."
Christine Miller, a 22-year-old first aid volunteer

2.4.4 Researching the demographic makeup of your area

In order to review the diversity of your current volunteers and decide which groups to target, it is useful to look at the demographics of the area. The Office of National Statistics, which conducts the UK Census, has detailed information

available on its website at www.statistics.gov.uk. Click on the icon at the top entitled 'Neighbourhood'. You can then search your local area. Information available includes:

- > age and gender profiles
- > ethnic groups and places of birth
- > health
- > work/status (including numbers unemployed, students, retired, carers etc)
- > education and housing

2.5 How to attract volunteers

Here are some of the most common recruitment methods used in the Red Cross.

2.5.1 Word of mouth

Word of mouth recruitment is the simplest way to attract new volunteers. It works on the theory that those people already connected with the organisation are the best targets for a recruitment campaign. This type of recruitment is often known as a 'concentric ring' (like the pattern a stone makes when it is dropped in the middle of a pond). Word of mouth recruitment concentrates on approaching those who might already have a good reason for helping out.

Word of mouth recruitment is the least labour intensive way of attracting new volunteers and is likely to have the highest response rate. This method is more likely to get a positive response as the people you approach are already favourable towards the Red Cross. Once established, it will provide a steady flow of 'replenishment' volunteers.

Start with people already connected to the Red Cross and work outwards. You can capitalise here on the fact that most volunteers are recruited through people they know such as friends, other volunteers and former clients.

The main disadvantage is that word of mouth recruitment tends to lead to 'cloning' and has a tendency to create an in-bred group. It is not an effective way of diversifying the volunteer base.

“There are many ways of attracting new volunteers – often this is through word of mouth. Volunteers find what they do really rewarding and often talk about it to their friends, who in turn want to become involved.”

Patricia Edwards, services manager

Ideal groups for word of mouth recruitment are:

- > current volunteers
- > clients, service users and their friends and relatives
- > donors and customers
- > staff
- > people in the neighbourhood
- > partners or sponsors
- > others in the same professional field.

How to recruit using word of mouth:

- > Ask your volunteers, friends, family and neighbours to help you by talking to people they know
- > Ask your customers, service users and donors whether they had thought about volunteering. Red Cross shops often recruit from their customer base, while refugee and asylum seeker services often successfully encourage previous service users to volunteer
- > Talk to delegates attending commercial courses about the range of volunteering opportunities, explaining that taking part in first aid duties is a great way of keeping skills up to date. Public first aid training can also be a great source of new volunteers
- > A personal approach to existing volunteers can be quite successful for some activities and services. Remember that the volunteers you need might be right there under your nose doing something else for the Red Cross!
- > Use contacts that volunteers have with local companies, such as current or previous employers or their families' and friends' workplaces. You could ask them to hold an event such as a dress down day or abseiling weekend

“When recruiting first aid volunteers we take time to talk about the different duties people can get involved in. For example, we explain the volunteers will be able to get into Fulham Football Club and go to theatres and concerts as part of their volunteering.”

Margaret Longridge, senior service manager

2.5.2 Warm body recruitment

Warm body recruitment is about spreading the message to as wide an audience as possible. The theory is that there will be some people 'out there' who find the message interesting. Warm body recruitment does work, if you distribute enough information and give out the right messages. It is particularly useful when recruiting for volunteer positions that can be done by most people or for large numbers. The different techniques used in warm body recruitment are listed below.

Service/activity promotion

- > Try holding open days or service taster sessions. Make sure you have resources available, such as posters, leaflets, equipment and plenty of volunteers on hand to talk to the public. It may also be worthwhile attending external open days (e.g. fire station open days can be a great place to recruit fire victim support volunteers).
- > Organise service demonstrations in shopping centres or supermarkets, with volunteers present to talk to people about what they do. Invite the local press to help publicise these events.
- > Put up information stands and displays in local hospitals, adult education centres, at large local events and while on public duties.
- > Try using a continuous loop TV and video showing the work of the Red Cross, as moving images tend to make people stop and look.

Talks

Why not make contact with suitable clubs in the area, offering to come along and talk about your service and the Red Cross? You could consider schools, colleges, the Women's Institute, youth groups, day centres, agencies working with refugees and asylum seekers, doctor's surgeries, community centres and local retirement groups. Remember to find out about your audience and tailor the talk to them. Try using visual images

and taking 'real life' volunteers to talk about their experience of volunteering. Be clear about how people can get involved.

There are standard presentations loaded onto the communications coordination section of RedRoom (go to 'shortcuts' on the right-hand side). These cover both the UK and the international work of the Red Cross as well as the history of the organisation.

"We contact different clubs about doing talks for their members. These approaches have resulted in a 25 per cent increase in self referrals from volunteers."

Gabby Beddows, home from hospital manager

Leaflets, fliers and posters

Your promotional materials should be inspiring and eye catching, with a simple and clear message. Try avoiding the word 'volunteer' in the title. Maybe you could try asking people to 'get involved', 'make a difference' or something more activity specific such as 'drive people happy' for transport and escort.

Try distributing them to schools, colleges, shops, cafés, public buildings, town halls, hospitals, libraries, job centres, dentists and doctors. As the Red Cross' window to the world, the shops are also a great place to promote volunteering opportunities.

Make sure you consider which places are best to reach the people who will be interested in your opportunity. For further guidance please see sections 2.5.3 and 2.5.4.

Exhibitions and promotional materials

The latest catalogue of exhibition materials available for loan can be found on RedRoom where you can also find details of how to book these materials.

For any other exhibitions enquiries please contact the Exhibitions Officer on 020 7877 7031.

For smaller events or promotion, it's usually best to try and create your own posters or ask a group of volunteers to produce a display. Maybe you

could work with other service managers on this to share the costs. Posters need to explain what you need volunteers for and what you need them to do. It is best not to use generic 'volunteers required' posters. If you need help, contact your volunteering specialist.

Local media

Create interest in volunteering opportunities by using local newspapers, the free press, professional or trade journals, school, college and university newspapers, local buses, community newsletters, parish magazines and the ethnic press.

You can either use advertising (which you usually pay for) or try and get editorial coverage (which is free). Look out for human interest stories and send them to your local paper as a press release. Include a photo and an appeal for volunteers. If you are not sure what sort of stories the papers want, give them a call and ask.

Getting a local radio or TV station interested can also be a great way of attracting new volunteers. Try sending out press releases to local radio and TV stations, explaining about the service and the help you need from volunteers. BBC local radio stations have action desks which take down details of volunteering opportunities and put them on air for you. Hospital radio can also be used to recruit volunteers for certain services, such as home from hospital, skin camouflage, therapeutic care and transport and escort.

Contact your territory communications specialist if you need help with writing press releases and adverts or arranging and conducting media interviews.

"We normally advertise in *The Guardian* in the Society section – which is heavily subsidised. With just a simple advert we attract huge numbers of people. After we've filtered the responses we normally end up with about 120 people attending an information session."

Keefa Kiwanuka, from the refugee and international tracing service

“Paid advertisements seem to work really well – we will often get about 20 potential volunteers expressing an interest from an advert in the local paper.”

Norma Grove, therapeutic care coordinator

Special events/initiatives

- > Promote opportunities during Volunteers’ Week in June to generate media interest. Press coverage can also be used to publicly recognise volunteers’ work.
- > Attend events such as volunteering fairs, community events or graduate recruitment forums.
- > Consider organising a ‘volunteer for the day’ promotion, inviting high profile local personalities or Red Cross personalities and the press.

Volunteer agencies

You can also try developing a relationship with local volunteer agencies, also known as Volunteer Bureaux, Volunteer Centres, Councils for Voluntary Service, Voluntary Action and Volunteer Development Agencies. They are a brilliant source of information and advice that can help people choose the right type of voluntary work for them. They also refer potential volunteers to charities, give advice on managing volunteers and provide promotional resources.

For details of your nearest volunteer agency contact:

- > Volunteering England on 0845 305 6979 or www.volunteering.org.uk
- > Volunteer Development Scotland on 01786 479593 or www.vds.org.uk
- > Wales Council for Voluntary Action on 0870 607 1666 or www.wcva.org.uk
- > Volunteer Development Agency (Northern Ireland) on 028 9023 6100 or www.volunteering-ni.org

Other sources

- > **Social Services** may have a volunteer liaison worker or placement service.
- > **Local colleges and universities** are a potential source of student work placements. See if they have a volunteer coordinator at the college to help. Alternatively try speaking to lecturers, student unions and use notice boards.

> **Back to work initiatives** such as the New Deal or NVQ Schemes are another useful source.

> **Community service placements** have proved very beneficial to Red Cross shops in the past.

> **Web communities** such as relevant message boards, volunteer websites (such as www.do-it.org.uk) and other organisations’ websites (universities, colleges, companies) can be a good way of contacting young people.

2.5.3 Targeted recruitment

Rather than broadcasting the message to the whole community, a targeted recruitment campaign is designed to track down a specific group. This approach involves going direct to the types of people who are really suitable to do the role.

Targeted recruitment is effective when the volunteer role is only suitable for certain types of people or if you want to recruit a specific section of the community (e.g. young people or the Chinese community).

Although many of the techniques used for warm body recruitment can also be used in targeted recruitment, be aware that this process can be more labour intensive. Ask yourself the following questions:

- > What are the skills and attitudes required for the role?
- > Where can we find people with these skills and attitudes?
- > What motivates these people and how can we appeal to them?

Companies

There may be opportunities to approach local companies and see if they will support Employee Volunteering. You will need a planned project for this – seek advice from your volunteering specialist and corporate fundraisers.

2.5.4 Attracting young people

When promoting volunteering opportunities to young people, emphasise that it can be a way to develop or test skills, improve CVs and explore

potential careers. Consider enlisting the help of younger volunteers to help recruit other young people and be careful to explain that out-of-pocket expenses are paid. Think about the following 'wish list' of what young people might want from volunteering:

- > Flexibility and variety in terms of work, time and commitment
- > Legitimacy of volunteering placement
- > Ease of access – many young people do not know how to find out about opportunities
- > Relevant, useful experience and the chance to learn new skills
- > Tangible outcomes such as an improved CV
- > An efficient but informal and fun environment²

To reach this group, try approaching local schools, colleges and universities. Schools often run Duke of Edinburgh's Award schemes, which require a voluntary placement in the community. Arrange to attend college and university freshers' fairs and recruitment days and target students studying related subjects.

For example, if you are recruiting for home from hospital you could try people studying occupational therapy, care or social work. For fundraising, people studying subjects such as media, advertising, fundraising or PR may be keen to gain some work experience. If you are recruiting for first aid services it may be worthwhile approaching students studying subjects such as health, medicine and nursing. Asylum seekers and refugees may be learning English so local colleges can also be a useful gateway to reaching these groups.

Remember that you will need to coordinate approaches to schools and companies with other Red Cross managers. Contact Area and Territory youth specialists for advice and support.

"I've had a lot of luck with universities. I got in touch with the careers departments who have been keen to display posters in common areas and advertise for us on their intranet. We've had several students wanting marketing and voluntary sector experience through this route, which has been particularly fruitful during the summer months."

Dan Powell, senior fundraiser

Case study

Wendy Solesbury, senior service manager, worked in partnership with youth volunteering organisations to recruit young people for the Kent Asylum Project. Working with Millennium Volunteers (who deal with young people aged 16 to 24), she recruited 12 new volunteers for the service. The volunteers are provided with training such as befriending, child protection and first aid and receive their expenses directly from Millennium Volunteers. One really positive outcome was that having gone to university, five of the volunteers wanted to stay involved with the Red Cross because they had such a good experience. Once volunteers have had a taster from the youth projects, they often grow into volunteering for other Red Cross services.

2.5.5 Attracting volunteers from diverse groups

Volunteering should be open to all, no matter what their age, background, race and sexual orientation. Having a diverse volunteer base is important for the Red Cross. It is important in helping the organisation maintain impartiality and in pursuing equal opportunities. Diversity is also necessary in order for the Red Cross to reflect the composition of the local community and client groups.

Although word of mouth is by far the most effective recruitment method, it runs the risk of recruiting more of the same. To recruit a more diverse range of volunteers, you will need to target them specifically.

Case study

Attracting volunteers from different ethnic groups

Pat Smith, service manager, secured Home Office funding to recruit volunteers specifically from refugee and asylum seeker groups. A series of talks was organised at a range of venues, including local colleges, to target refugees and asylum seekers studying English. The project was closely coordinated with other agencies working with refugees and asylum seekers in the area. In total 80 volunteers were recruited for a range of different Red Cross services and activities over six months.

2.6 Designing adverts, posters and leaflets

Before you start writing your advert you will need to have developed a clear role description and thought about why someone would want to do the role and who you want to attract. Keep the advert short and punchy and try following the plan below:

Communicate the need. Convince your audience that the voluntary work is worthwhile and genuinely needed. For example, a transport and escort advert could start by saying: “Some people may not have been able to leave their home for months”. You could try using a quote from a service user here. For example: “Seeing the Red Cross volunteer made my entire year”.

Explain how they can help. Once you have grabbed your audience’s attention and enabled them to see the need, tell them how they can make a difference. People are more likely to volunteer if they can picture themselves in the role, so be clear about what it involves.

Dispel any fears. Ensure that people feel able to do what you ask. This may mean including information about the amount of experience required. For example: “No previous experience is required, all you need is enthusiasm”. You should also explain the support they will receive.

Be inclusive. Try and include a phrase expressing the Red Cross’ commitment to diversity. For example: “We welcome applications from all sections of the community”.

What they will get out of volunteering. Include some incentives for volunteering. Everyone will have their own motivations for getting involved and these will vary, so try and include a few different benefits. For example: “You will meet new people, have fun and develop your skills”.

Contact details. Make sure you include a name and phone number!

Finally, make sure you are telling the truth! If you have said volunteers will have fun, when opportunities are really dull and limited,

they will leave and you will need to start recruiting again.

“We have found that it’s a good idea to cover lots of different aspects at the same time when you’re trying to recruit. Articles in the local press, radio and community papers, with a personal story from a volunteer about the difference that they make, can be really successful. One small tip. Don’t try and recruit in the middle of summer as people are often away. Autumn is a much more successful time of year, as is January, when people often make New Year’s resolutions!
Patricia Edwards, service manager

2.6.1 Example advert

Figure 2.3 shows an advert that was placed in the *Huddersfield Examiner*. It attracted 43 enquiries, resulting in 18 new volunteers.

2.7 Dealing with enquiries

All enquiries about volunteering opportunities need to be dealt with professionally. Normally people will call, so make sure that the person answering the phone knows how to deal with enquiries well. Avoid asking potential volunteers to call back. Instead take their number and phone them back. Thank people for calling and sound enthusiastic and pleased that they have made the effort.

Respond promptly to potential volunteers. Although you may not be able to see them immediately, they will appreciate knowing you intend to meet them. When people make the effort to call, it is very disheartening if no-one gets back to them.

Give accurate information to the potential volunteer, to help them decide if volunteering for the Red Cross is right for them. Prepare a pack, including information about the Red Cross, Fundamental Principles, volunteering role, etc. Be aware that this may not be suitable for everyone. If someone cannot speak English well, for example, you will need to give your information in a different way.

Talk through the range of opportunities available. If you are not sure what these are, talk to your colleagues and find out. Although it is tempting to hang onto volunteers for your service, remember that it is important to make sure the role suits the volunteer as well as us.

Arrange informal visits to the service or activity the volunteer is interested in. You could create opportunities for them to come along for a couple of hours to see what it's all about.

Arrange interviews at a time to suit the potential volunteer. See page 50 for more information.



Figure 2.3: Example advert

2.8 Key messages

- > Plan your recruitment initiatives using a range of methods
- > Research the population make-up in your local area. Remember to think about diversity, and targeting specific groups that will broaden the team's skills.
- > Experiment with new ideas and monitor the results.
- > Ask your current volunteers to help you.
- > Think about the image of the Red Cross in your area.
- > Have a clear role description and know how it can be broken down or adapted.
- > Structure adverts carefully to appeal, dispel fears and sell the benefits.
- > Develop relationships with other agencies who specialise in recruiting volunteers.
- > Respond promptly and enthusiastically to potential volunteers and signpost them where necessary

2.9 Review and improve

1. During the annual budgeting times spend time planning a recruitment strategy for the following year. Find another manager doing a similar role and work with them to create a plan. Remember to include details such as who is going to do it, how, when, and how much it will cost. Then ask your line manager or volunteering specialist to review your plan and offer advice.
2. Contact your local volunteer recruitment agency (see page 40) and talk to them about how they could help you. Remember that the better relationship you develop with them, the more likely they are to be of use.
3. Review what happens when a volunteer gets in contact. Who do they speak to? What information are they given? How quickly are they responded to? Is the service they receive encouraging and professional? Once you have reviewed what happens try setting some minimum standards and then make sure the knowledge, systems and resources are in place to ensure they can be delivered.

2.10 Resources

- > See Chapter 3 for more details on managing the recruitment process.
- > British Red Cross Equal Opportunities Policy.
- > Susan J. Ellis, The Volunteer Recruitment Book, 2002. ISBN 0940576252.
- > Office of National Statistics, www.statistics.gov.uk
- > Institute for Volunteering Research Bulletin, 'What young people want from volunteering'.
- > Look at the publications and free resources on the volunteer agency sites (see page 40 for addresses).

3 Recruiting and selecting volunteers

3.1 Introduction

Recruitment and selection are the start of the volunteer relationship, the time when a solid foundation for real success can be laid. Effective recruitment means moving swiftly, capturing the interest of those wanting to volunteer. Effective selection means ensuring that the volunteer is the right sort of person to become involved, that their expectations and those of the organisation are well matched. Recruit and select effectively and you will have the right number of volunteers with the right skills – people who are motivated, committed and clear what they are there to achieve. In return they will have the satisfying feeling that both their time and skills are being put to good use.

Good recruitment and selection are core management competencies. They help protect the vulnerable people the Red Cross works with and helps uphold the Fundamental Principles by being fair and consistent. The process means remembering that Red Cross volunteers should reflect the diversity of the communities in which the organisation works.

This section complements the Volunteer Recruitment and Selection manual. It provides additional guidance in key areas to enable you to:

- > ensure that the recruitment and selection process is fair, non-discriminatory, open and timely and that the potential volunteer understands the process and is kept informed
- > ensure that potential volunteers are clear about what the role involves, what is expected of them and what they can expect from the Red Cross
- > explain the Fundamental Principles and make sure potential volunteers agree to work within them
- > enable potential volunteers to complete necessary paperwork
- > ensure that any previous skills, experience and knowledge are taken into account when selecting and placing using APEL (Accreditation of Prior Experience and Learning)
- > ensure that volunteers not placed understand the reasons and where appropriate are referred to other opportunities or organisations
- > obtain satisfactory references and complete other necessary checks before the volunteer starts.

3.2 Who is responsible?

Recruiting and selecting individuals is an important role of the manager. Accepting or rejecting a volunteer is a big responsibility and needs to be done in a fair way. Recruiting the wrong person means problems in the future. Resist the urge to get just anyone to do the role.

Leaders and managers are the perfect people to speak to potential volunteers. They know what skills are needed and can explain the roles fully. This is the first opportunity a recruiter has to start building a relationship with a volunteer.

“I appreciated having the chance to talk in depth with the coordinator during my interview and ask lots of questions. I knew that I had been carefully selected for the role and this was important to me. It showed how seriously the Red Cross takes its work and confirmed that I was going to be making an important contribution.”

Jamie Henry, volunteer

3.3 Principles of recruitment and selection

In most cases, interviewing volunteers is different from interviewing for paid posts in that you will not be selecting from a number of people to fill one vacancy. If the process is a selective one and not all volunteers will be taken on, this should be made clear from the start. Interviewing volunteers is also more informal and relaxed – indeed extra care should be taken to put people at their ease.

The recruitment and selection process should be:

- > friendly and appropriate for the volunteer
- > transparent, easy to understand and honest
- > fair, non-discriminatory, consistent and confidential, with policies and processes to safeguard this
- > a two-way process where volunteers select us as much as we select them
- > flexible.

3.3.1 Volunteer recruitment and selection manual

This guide will help you through the process from when someone first offers to help to when they start giving their time. It covers who is involved in the process, where recruiters can get support, what steps should be taken and the forms that should be used. You can get a copy from your volunteering specialist or from RedRoom.

3.3.2 Policies to help you get it right

Policies can seem a bit dry but they are very useful to refer to and see what the Red Cross' line is on a whole range of issues. Figure 3.1 sets out the main points that you need to be aware of. Please see Appendix VI for a full list of policies.

Policy	What is it about?	Why read it?	Where can you find it?
Equal opportunities policy	States the Red Cross belief in not discriminating on any grounds	Makes clear how people can discriminate and the types of discrimination	Volunteers' Handbook and on RedRoom
Volunteers ex-offender policy	Outlines a fair and non-discriminatory process for recruiting ex-offenders	The Red Cross is committed to involving ex-offenders and basing decisions on relevant facts	On RedRoom or ask your volunteering specialist for advice
Volunteers' age policy	States what the Red Cross policy is on age	Details the age limits and the process for assessing if a volunteer is able to undertake a role	Volunteers' Handbook and on RedRoom. You can also speak to your volunteering specialist
Criminal record checks	States why the Red Cross does checks, how and what the process is	Lists what roles require a Disclosure and how it is done	On RedRoom or speak to your manager or volunteering specialist
APEL policy	States that we want to give people credit for what they have already learnt and can prove they are competent in	Stops someone from re-learning something they already know and wasting everyone's time	See RedRoom or speak to your manager or training and development specialist

Figure 3.1: Key policies

Correct at time of going to press January 2005.

3.3.3. Recruitment and the law

There are several laws which you should be aware of when recruiting volunteers. Please see page 138 for more details.

3.4 The interview process

3.4.1 Why interview?

Anyone wanting to volunteer for the British Red Cross must be interviewed. This should be a two way process, and be friendly and open. It is just as important for the potential volunteer to find out about the Red Cross and the role, as it is for you to find out about them.

The purpose of an interview is to find out whether a person is suitable for the Red Cross and the role(s) in question. This is particularly relevant where the volunteering involves working with children and vulnerable adults. The potential volunteer must also decide if the Red Cross and the role are right for them.

If they aren't suitable for volunteering for the Red Cross, you should explain this. See page 52 for more details.

No matter how hard we try not to discriminate we all have certain things that make us uncomfortable. It can be very easy to make sweeping assumptions based on a particular piece of information, which are very often wrong. During the recruitment and selection process be aware of your prejudices, make every effort to keep an open mind and apply the principles of equal opportunities. Identify anything a potential volunteer would like to have taken into consideration, such as any special needs and personal circumstances.

As a recruiter, think about the importance of what you do, be professional and enjoy meeting some really interesting people who want to help.

3.4.2 Planning interviews

Good preparation is essential. You will need to take the time to prepare for the interview. This will include:

- > deciding where to hold the interview – it should be a relaxed, quiet environment that is accessible to potential volunteers
- > making sure you have a role description and ensuring you know which tasks are optional/flexible and how the role can be adapted if necessary
- > preparing questions and being ready to answer the ones put to you
- > ensuring you have any forms you need at hand such as the interview record form
- > having a copy of the Fundamental Principles and the Volunteer, Staff and Delegate Charter so that you can explain them
- > being confident in explaining the process and what checks are relevant to the roles you recruit for, for example, knowing if a disclosure is needed for the role
- > considering cultural issues. For example, orthodox Jewish and Muslim men may refuse physical contact with a woman, so will not shake hands with one. Women in some cultures are not meant to be alone in a room with a man
- > making sure you have a copy of the volunteer interview record form available to help you structure the interview and record details throughout.

Interviewers should be:³

- > knowledgeable about the organisation and its work
- > able to relate to all types of people and be comfortable talking to strangers
- > able to listen attentively to what is said and be perceptive about what is left unsaid (interviewers should only do 20 percent of the talking)
- > able to ask logical follow-up questions
- > able to follow the agenda, but not be dominating
- > knowledgeable about interviewing techniques
- > able to turn someone down when necessary.

3.4.3 Opening the interview

- > Make the potential volunteer feel welcome, thank them for coming, make sure they are comfortable and offer them a drink. Introduce yourself and explain your role.
- > Explain what will happen during the interview and the process afterwards, including the fact that notes will be taken and that it is a chance for both you and them to ask questions.
- > Explain that the aim of the meeting is also to establish if the opportunities available suit their interests, skills or potential and availability.
- > Ask what they know already about the Red Cross and its local services. This will help you to gauge how much detail you need to go into.

It is important to consider APEL (Accreditation of Prior Experience and Learning) when interviewing volunteers. Make sure you understand the policy, which is available on RedRoom. See page 67 or talk to the training and development team or your volunteering specialist for further guidance.

3.4.4 Conducting the interview

The volunteer interview record is designed to lead you through the interview in a structured but informal way. The majority of the interview should be devoted to exploring the potential volunteer's interests, skills and experience:

- > Give an overview of the Red Cross's volunteering opportunities. Explain that there are a variety of opportunities and list the one(s) for which you are interviewing
- > Use the role description to highlight the qualities and abilities required and typical tasks they will perform
- > Read through the volunteering enquiry form (included in the Volunteer Recruitment and Selection manual). Obtain consent to hold the volunteer's details under the Data Protection Act, by asking them to sign the last page
- > Complete the interview record sheet (included in the Volunteer Recruitment and Selection manual)
- > Explain the work involved and be clear so that the volunteer has realistic expectations. There is no point making a role seem more glamorous

than it really is. If the work is repetitive say so, but also explain how it contributes to the overall success of the service or activity

- > Ask the potential volunteer to complete the British Red Cross confidential declaration. Explain if the role requires a disclosure, what the process is and that having a criminal record does not automatically stop someone from volunteering
- > Check that the volunteer understands the Fundamental Principles and will be comfortable applying them in their day-to-day volunteering (see page 124)
- > Prepare your questions before the interview. Allow the interviewee to do at least 70 per cent of the talking
- > Remember that although it is an interview, it should be friendly and chatty, and not an interrogation

Use open questions to prompt informative responses:

- > Why did you...?
- > How did you feel about...?
- > Tell me about...?

Use probing questions to get more information and analysis:

- > Tell me more about...?
- > Give me an example of...?
- > You said you have experience of... what was it like?
- > In what ways was the work satisfying/difficult?

Use closed questions to find out specific information, prompting "yes" or "no" answers:

- > Did you...?
- > Are you....?
- > Can you....?

- > Make sure you listen to the interviewee's answers and check if you are not sure what they meant. You can do this by either paraphrasing (e.g. "So what you're saying is...?") or simply say: "I'm not sure what you mean, can you explain?"

- > At the end of the interview, allow time for them to ask you questions
- > You may need to obtain further information. For example, if you don't fully understand the severity of a person's criminal conviction or the implications of a health problem you may need to get more information (see page 54)
- > Continue the interview with the individual and explain if you need a second opinion. At the end re-state what will happen next and when you will get back to them. You may want to speak to your manager or volunteering specialist

"I've been interviewing volunteers for many years. I always take the time to explain the Fundamental Principles, what the Red Cross is all about and find out why volunteers want to join us. I also talk to them about the different types of things they could get involved in. Since I've been interviewing volunteers, I've kept people for longer. We've been able to find a common ground at the interview stage and be clear about expectations."

Chris Ambler, volunteer centre organiser

The Volunteer, Staff and Delegate Charter sets out the Red Cross commitment to its volunteers and states what is expected from them in return. Volunteers should sign the charter when they start helping us and a copy should be kept on file. Mutual expectations should also be discussed at interview. Please see page 139 for a full version of the charter.

Case study

Explaining the Fundamental Principles John, who used to be a retained fire officer, was keen to join the fire victim support service. When Sue, service manager, interviewed him, he came across as a caring person, able to put others at their ease. References and checks were also very good.

John started his training with the other new volunteers. On the second day, the trainer was talking about how the clients might be feeling and asked the group for some practical suggestions. John suggested he would lead them in prayer. When the rest of the group reacted with surprise, John repeated his suggestion, getting quite upset that no one agreed with him.

If Sue had talked to John during the interview about the Fundamental Principles, he would have discovered that the British Red Cross is a non-religious organisation and that volunteers are asked not to promote their religious beliefs while doing Red Cross work. It could have helped avoid an embarrassing situation for both John and the other volunteers on the course.

3.5 Selecting or rejecting applicants

The process for deciding should be fair, transparent and within the Red Cross equal opportunities policy. The recruiter must decide if a potential volunteer is suitable for the role in question. If they are not, establish if there is anything else they could do.

Sometimes recruiters will have to tell a person that they are not able to volunteer in the role they are interested in or perhaps for the Red Cross at all. Everyone finds this difficult, and it's probably the toughest task a manager has to do, but putting it off will make it harder. You need to be clear about the reasons and be honest and tactful. It is also important to give constructive advice or suggest alternative opportunities if possible.

Case study

Saying no

Dave phoned Barbara, a therapeutic care service coordinator because he wanted to volunteer for the service. Barbara thought he sounded very keen and invited him to a Red Cross World induction course that weekend.

When she met Dave on the course, she discovered that he was a very unkempt man and had a strong body odour. She felt he wasn't suitable for the service, which involves working in close proximity with other people, but was reluctant to tell him. She decided to ignore him in the hope that he would go elsewhere.

Following several phone calls from Dave, Barbara decided to tell him that there were no vacancies. Dave was very annoyed to discover that, several weeks later, the Red Cross was recruiting for therapeutic care volunteers.

He phoned Barbara again, and she apologised, saying his application could not be processed. He accused her of sex discrimination and threatened to contact the local paper. Barbara finally referred to the role description and explained that he had severe personal hygiene problems, which made him unsuitable for a role working so closely with others.

"It is important to ensure that potential volunteers are interviewed and given the opportunity to learn about the options available to them. If a suitable placement cannot be found it is better not to accept the volunteer. There are applicants who we have referred elsewhere following the initial discussion with the project coordinator."

Pat Smith, service manager

Tips

- > Always carry out an interview first
- > Make use of the role description, refer to key points
- > If the potential volunteer is not suitable say so and be as honest as you can about the reason

- > The manager is the gatekeeper. They have a responsibility to ensure only suitable volunteers deliver Red Cross services

3.6 Checks and references

The next step is for the recruiter to ensure that the potential volunteer is suitable for the role they are considering. The Red Cross has a responsibility to the vulnerable people it works with to take this part of the selection process seriously. Of course such checks do not provide a cast-iron guarantee, but careful checking means vulnerable people will be better protected.

Part of this process involves obtaining references from people who know the individual well. A criminal record check or disclosure is also required for some roles. New legislation has made it much easier for organisations to check if an individual has a criminal record if they are hoping to volunteer with vulnerable adults or children.

3.6.1 Principles of references and checks

Volunteering specialists are there to support recruiters to make sound and fair decisions. It is the responsibility of the recruiter to perform these checks.

Consent must be given to obtain references, health checks and disclosures. In fact volunteers have to complete most of the form in order for the Red Cross to receive a disclosure.

References should be obtained for everyone wishing to volunteer, regardless of who they already know. Disclosures are required for certain roles without exception. Check with your manager or volunteering specialist for the latest position.

Be clear about why we need them. It shows how seriously we take our work, but you should also explain to individuals why you are doing it.

Flexibility isn't a contradiction to being consistent. We must ensure that references do not become a barrier to volunteering. (For example if a volunteer's referees have only known them for 18 months and not two years, this should be considered with all the other factors.)

Confidentiality – the information we are given should be treated as confidential at all times. Access to the information is strictly on a ‘need to know’ basis.

We must ensure the relevance of the information in relation to the role applied for.

3.6.2 Parental consent

Parental/guardian consent should be obtained before a young person under the age of 18 (16 in Scotland) starts volunteering.

On contacting the Red Cross, the young person should be encouraged to talk to the person who has parental responsibility for them about their application. Parental consent should be sought once the volunteering activity has been identified. The manager has a duty of care to ensure that consent has been given before the activity starts.

If the volunteer changes their volunteering activity, if tasks change radically from their role description or if the volunteer is involved in a higher risk activity such as travelling to a different location, a new consent form should be signed.

3.6.3 Health checks

In some instances a manager may want to seek confirmation that a volunteer’s health or fitness levels are okay. For example, if the potential volunteer has just recovered from a serious operation, you could ask them to take the role description to their doctor. The volunteer could then ask the doctor to give them a letter stating their opinion on what physical tasks the volunteer can undertake.

3.6.4 References

Ideally, two references should be provided. They should not be the potential volunteer’s close friends or family and should be provided by someone who is over 18 and has known the volunteer for at least two years (such as a teacher or former employer). If a volunteer is finding it difficult to provide references, for example, if they have been a long-term carer or are a job seeker, alternatives should be discussed with them.

The alternatives may be only getting one reference or getting a reference from someone who has known them for less than two years. It is crucial that a recruiter uses their discretion and is flexible, to ensure diversity among Red Cross volunteers. A risk assessment should be undertaken and all options considered.

If a person has never had to provide a reference before, it may seem scary and off-putting. Explain to volunteers why you take references, what you ask and what you do with them. You also need to explain who would be a suitable referee.

Occasionally someone will want to volunteer for you who is unable to provide a reference (for example an asylum seeker who has not been in the country very long). You will need to make a balanced assessment of the risks involved and decide whether there is a safe way of involving them. You might include them in group activities only for the first few months while you get to know them. If you do this you will have to explain to the volunteer why they are being treated differently so that they do not feel singled out.

The information given in references is directly relevant to what motivates an individual to volunteer, what their skills are and what support they may need. Any manager interested in getting the best from their volunteers will read references very carefully.

“I recruited a volunteer for home from hospital. She’d been employed for years in a care home. I took up references and she started. After a while a client complained about the level of care they were getting. I spoke to the volunteer and went back to the care home. It transpired she had worked in the kitchens. It was awful. I should have been more thorough. Now I send a role description and if the reference just gives the basic facts I call the referee and have a chat.”

Home from hospital coordinator

Case study

Solomon seemed like the perfect candidate to volunteer for the international tracing and message service. He had given details of two referees to Bharti, the service coordinator. These proved to be problematic, but he was restricted in who he could suggest, as he has only been living in the UK a year and has lost touch with his contacts from back home. One of the referees was impossible to reach and the other sent back the reference in Swahili.

Bharti found someone to translate the reference, which was very good. When Bharti talked to Solomon again about who else he might consider, she discovered that he had been part of a community group and the leader had known him for six months. The leader was away for six weeks, but Bharti spoke to the volunteering adviser and decided that Solomon could start volunteering straight away, but should pair up with a more experienced volunteer until the second reference was obtained and checked.

Bharti explained to Solomon the reason why he was being paired up and that this was standard practice until the second reference had been checked. Solomon understood that his volunteering depended on the content of the second reference and was pleased that Bharti looked so glad that he was going to help. He was also grateful to have a 'buddy' to learn from.

3.6.5 Disclosures

The Criminal Records Bureau (CRB) in England and Wales and the Central Registered Body in Scotland (CRBS) provide a one-stop shop for those seeking access to criminal record checks, called 'disclosures'. The British Red Cross is registered with both, to enable it to obtain Disclosures without going through another body. Northern Ireland also has a system for checking for criminal records through the CRB.

There are two levels of Disclosure – Standard and Enhanced. Standard Disclosures are for roles that include regular contact with children or vulnerable adults. Enhanced are for roles that involve regular caring for, supervising, training or being in sole charge of children or vulnerable adults.

The British Red Cross has identified which roles require a Disclosure and to which level. Volunteering specialists can give you further details.

How to obtain a Disclosure

A Disclosure is obtained by sending the CRB or CRBS a Disclosure application form. Volunteers complete the first part of the form. The person recruiting the volunteer must then check their identification. The recruiter then completes a section of the form to confirm they have done this. Volunteering specialists then check the form, add their counter-signatory number and send it to the CRB or CRBS. The returned Disclosure is sent to the individual and a copy to the volunteering specialist. In some instances a confidential letter is also sent from the local police directly to the counter-signatory. Legally this must remain confidential and the potential volunteer does not get a copy and should not know of its existence.

3.6.6 Considering the relevance of a criminal record

It would be very sad if organisations shied away from taking on individuals with any kind of criminal record at all. The British Red Cross needs to help break down the prejudices that many people have against ex-offenders, particularly since discrimination could infringe an individual's rights under the Human Rights Act. Volunteering specialists are available to give advice to help recruiters make a fair and sound decision without discriminating.

In England and Wales under the Protection of Children Act 1999 and Court Services Act 2000

it is an offence to knowingly employ anyone with a conviction for murder, manslaughter, rape, grievous bodily harm and certain sexual offences to work with people under the age of 18. There are no set guidelines on which other offences would make an individual unsuitable to work with vulnerable people.

The CRB have issued a list of factors to take into account when considering someone's criminal record. Discuss with your volunteering specialist:

- > whether the conviction is relevant to the position
- > the seriousness of the offence
- > length of time since the offence occurred
- > whether the applicant has a pattern of offending behaviour
- > whether the applicant's circumstances have changed
- > the circumstances surrounding the offence and explanation offered by the applicant.

A balance has to be struck between the need to protect vulnerable individuals and the need to allow everybody to have a place within the community. At the Red Cross, it is also crucial that we put our Fundamental Principles into practice and carefully consider facts that are relevant to the role. Also ensure you understand what a conviction really means. Someone may have a conviction for Indecent Exposure because they were caught short on the way home from the pub and prosecuted for peeing against someone's wall!

Case study

A Red Cross shop manager recruited a volunteer who was doing community service following a conviction for theft. After discussing the background of the crime with the probation worker and volunteering specialist, it was agreed that the volunteer would help sort clothes and deal with customers but would not help on the till. The shop's standard security policy was also in use.

Some of the names of a conviction are misleading and mean different things in England and Scotland. If you are unsure what a particular conviction means, you should telephone APEX (an organisation that works with ex-offenders) on 01382 525032. The National Association for the Care and Resettlement of Offenders (NACRO) can also give advice on working with ex-offenders. They can talk you through issues such as the legal aspects of offenders working with vulnerable people and give advice on assessing the relevance of convictions and the risks involved. You can contact them on 020 7582 6500.

Case study

Dennis wanted to be a first aider. However, when volunteering specialist Terry received Dennis' CRB disclosure, he discovered that it contained a conviction. He double-checked this by calling a helpline run by the National Association for the Care and Resettlement of Offenders (NACRO). Terry then contacted Almir, the service manager who had interviewed Dennis, and together they decided that the nature of the conviction was directly relevant to the role, and that he would not be able to volunteer. When Almir discussed the conviction with Dennis, he realised that first aid was no longer an option. He appreciated Almir's tact and the fact that he had thanked him for his interest. Almir put Dennis in touch with his local Volunteer Bureau, as no other current Red Cross opportunities were appropriate.

3.7 Processing the paperwork

The system for processing the paperwork may seem tiresome but does need following carefully so that accurate records are kept and we know how to contact volunteers. A new volunteer's details must end up on Peoplesoft so they will get information from the Red Cross, will be able to vote in volunteers' elections, receive awards and get an ID card. The data on Peoplesoft is improving all the time and the Red Cross needs to know who its volunteers are.

3.8 Recruiting irregular volunteers

An irregular volunteer can be defined as "a volunteer who doesn't join the regular active volunteer workforce, but gives occasional, time limited help which is irregular over a year. This may include those volunteering for Red Cross Week, Open Gardens or a Duke of Edinburgh's Award candidate who helps for a short time".

The British Red Cross has always been very fortunate to have help from people on an ad hoc basis. It is important that we are flexible, where appropriate, so that we don't create barriers to such volunteers, while also managing the risk.

People managing an activity or service, or those recruiting for it, may want to be flexible with the full recruitment process. It is really about using your common sense and getting advice or a second opinion if you are unsure. The application process is simple and straightforward and should be followed when recruiting irregular volunteers.

Some examples

- > You are organising a fundraising event and a friend of an existing volunteer offers to help for the day. She doesn't want to become a 'full' volunteer but is happy to give her time at the event.
- > You're a shop manager and a member of staff from John Lewis, whose work you have seen, has offered to come in for two hours a week for three months to dress the window for you.
- > You're running a refugee service and a friend of one of your volunteers has offered to

come in for the day to work directly with you to translate some references and help write a leaflet.

- > You're a service manager and a local journalist offers their help to interview some volunteers for you over a couple of Saturdays so that you have some case studies to use in your projects' information pamphlets.

3.9 Recruiting existing volunteers

When recruiting people already volunteering for the Red Cross, consider if they need a full or brief interview for the new role. For example a fantastic fundraiser will not necessarily be able to cope with the emotions involved in a fire victim support role. Their original interview will not have covered these skills and the new role also requires a Standard Level Disclosure.

The Red Cross has a responsibility to its service users and donors to ensure volunteers have the ability to undertake a role and that they have been carefully screened. However, there is no point making the process more complicated than it needs to be. For example a medical loan volunteer might only need a short interview to take on a second role as a shop volunteer. The shop manager would need to double check the references on file and have a brief chat with the medical loan coordinator.

3.10 Referring a volunteer to another role

After agreeing with the volunteer that they should be referred to another recruiter:

- > give the new recruiter feedback on the conversations that you have had with the volunteer
- > pass over any paperwork or forms that have been completed after explaining to the volunteer that you will do this and ensuring confidential information is only seen by the recruiter
- > ensure the potential volunteer knows who is going to be contacting them and when
- > make sure that the volunteer understands enough about the new volunteering opportunity to be sure this is worth their while.

3.11 Key messages

- > Make sure you interview potential volunteers and take time to prepare.
- > Don't rush the process, be thorough but don't hold things up.
- > Carefully consider the information you obtain during checks.
- > Ensure that the information you are considering really is relevant to the role.
- > Adapt the role where you can and where it is appropriate in the light of what you learn from your checks. Be flexible where you can.
- > References are a very important part of recruitment and not an 'admin' task.
- > Don't assume that having a criminal record is a bar to volunteering.
- > Keep a log of where you are in the recruitment process with each individual.
- > Don't forget to process ALL the paperwork.
- > Make it easy.

3.12 Review and improve

We all have prejudices. Sometimes we are not even aware of them as they are deeply buried in our subconscious and sneak out without us realising.

1. Make a list of those you may potentially discriminate against. Consider any particular groups of people you are not comfortable with or physical characteristics you are not keen on. Once you have made your list, be brave and ask someone close to you if they feel you have missed anything off your list.
2. Now spend some time considering what you can do to make sure you do not let your prejudices influence your actions. This might include:
 - > dealing with all potential volunteers using the same process
 - > not making up your mind immediately after an interview
 - > involving someone else in the process who you know does not share your views
 - > using the role description to help you identify if the person is suitable.

3.13 Resources

- > Volunteer Recruitment and Selection – managing the business process.
- > APEL Policy and Guidance.
- > Criminal Record Checks Guidance.
- > Volunteer Age Policy.
- > Fundamental Principles – see Appendix I.
- > Volunteer, Staff and Delegate Charter – see Appendix V.
- > NACRO – call 020 7582 6500 or visit www.nacro.org.uk
- > APEX – call 01382 525032 or visit www.apextrust.com
- > Volunteering England – www.volunteering.org.uk
- > Criminal Justice and Court Service Act 2000 – www.legislation.hmsso.gov.uk
- > Criminal Records Bureau – call 0870 90 90 811 or visit www.crb.gov.uk

4 Inducting and preparing for volunteers

4.1 Introduction

First impressions are important – never more so than in the task of managing volunteers. Taking the time to welcome new arrivals properly, introducing them into the team via a well-planned effective induction programme is vital both for them and for the organisation. It could well impact on their performance throughout their time with the Red Cross and quite easily decide whether or not they stay.

Inducting and preparing for volunteers are core management competencies. This section looks at how you can lay out the welcome mat effectively for new arrivals ensuring they receive the necessary information and support and become effective as quickly as possible. It explores how to:

- > make arrangements to welcome new volunteers
- > identify and meet volunteers induction requirements, including attendance at Red Cross World
- > identify any skills or knowledge gaps (making use of APEL evidence from the selection process) and ensure any training and development needs are met
- > ensure volunteers are clear about what is expected of them and what they can expect from the Red Cross
- > provide the necessary equipment, workwear and other resources for volunteers to effectively undertake their roles.

4.2 Why induct volunteers?

Imagine you're a new volunteer, about to start your first day with the British Red Cross. How would you feel? A little bit excited maybe? You may also feel a bit unsure about what is going to happen, whether you're going to be able to do the job, whether you'll get on with everyone and whether volunteering for the Red Cross is going to meet your expectations.

Imagine how you might feel if there was nothing prepared for you and nobody took the time to introduce you to people and help you to settle in. Maybe you'd feel a bit disappointed and unimportant. You may also have doubts about whether you had done the right thing.

Now imagine how you might feel if you arrived on your first day, were met by a familiar face and were made to feel welcome. Then you were shown around the place, introduced to other people and talked through some of the tasks you'd be doing and given the chance to have a go. You would probably feel excited, interested and important to the Red Cross.

A good induction programme makes volunteers feel welcome. It also generates enthusiasm, helps build a commitment to the Red Cross and enables the volunteers to understand the organisation's culture.

As a manager you need to decide the right level and amount of information that is needed – based on the complexity of the volunteering role.

Case study

Christine's first day as a transport and escort volunteer went OK, but she was really just left to it. She picked up a service user from their home and took them to the local hospital, waited for them to finish their appointment and drove them back home.

Christine felt a bit disappointed as she was hoping to meet some other volunteers, or at least Mark, the service coordinator. She wasn't sure whether she needed to fill up from a particular petrol station to be able to claim her expenses back and eked out the petrol in the tank rather than get it wrong.

On her second day of volunteering, the service user she collected asked her what else the Red Cross did in the community and Christine felt really embarrassed that she didn't know the answer. When she spoke to Mark about her knowledge of the British Red Cross he told her not to worry and that it would all be explained on the Red Cross World course.

4.3 What does inducting and preparing involve?

Inducting is welcoming the volunteer into the Red Cross and making sure they are aware of what is expected of them and what they can expect of the organisation.

Preparing is getting the volunteer ready to start their role by making sure they understand the service or activity and providing them with the skills, equipment and information they need.

A good induction programme should be:

- > a way of making people feel welcome
- > a planned programme to help introduce the new starter to the team, their role and the Red Cross
- > a time to set standards and agree expectations
- > a way to recognise the new volunteer's importance to the Red Cross
- > motivational and hopefully good fun!

During the induction process the manager should:

- > ensure that the newcomer understands the Volunteer, Staff and Delegate charter
- > explain relevant policies, procedures and best practice
- > build an understanding of the role and how it contributes to making a difference to people in crisis
- > introduce the volunteer to people they will be working with.

4.4 Who is responsible?

Responsibility for the induction programme rests with the line manager who may delegate some of this – the key is to ensure it is done! The manager knows the role and should be aware of exactly what the volunteer needs to know. If you are not sure how to plan an induction, read on. For extra support, do speak to your line manager or a member of the HR team in your Territory.

There are likely to be tasks that the volunteer will not be authorised to do until they have been signed off as being competent (e.g. driving vehicles, administering first aid, issuing a wheelchair or pricing shop goods).

It is also not fair to put the volunteer in a position where they are unable to cope or ask them to do tasks that they have not been trained to perform. Equally it is not fair on Red Cross clients who should be confident that the service they receive is of the highest standard. As the manager you have responsibility for ensuring that the service or task is delivered to an agreed standard and that those delivering it are capable of doing so.

4.4.1 Why can't I just tell them to get on with it?

No one who joins your team will know everything they need to about their role, workplace and the organisation. Allowing them time to get up to speed is vital for the relationship to be productive. There are also basic issues which must be dealt with early on such as health and safety.

4.4.2 How long should the induction last?

Think back to when you started with the Red Cross. How long did it take you to understand your role and what was expected of you? Can you remember how long it took you to feel confident and comfortable? Certainly more than a couple of days; it may have taken six months or longer.

Although there is no fixed length of time, as a basic guide allow a formal induction period of **three months**. By the end of this time your new volunteer should be reasonably effective in carrying out their role. But it is important to be flexible.

For example if you have a volunteer who is only able to give one day a month, their induction may take longer. On the other hand, if you were planning an induction for Red Cross Week volunteers, three months would seem rather excessive. As the manager of the new volunteer, the decision and the responsibility rests with you but refer to the induction guides produced by the Red Cross.

You need to work this out with the new volunteer, depending on their role, their learning needs and their availability. It is also worth noting that during the induction period you or the volunteer may decide that it is just not working out.

4.5 Preparing an induction

Induction should be a planned process that allows the volunteer time to understand all the information they are given. You will need to plan and manage the induction with care, giving the volunteer sufficient time and support. They will also need to be committed to gaining the knowledge and understanding required for the role. As the manager you need to get the balance right, not expecting too much too soon, but ensuring they are making the most out of volunteering.

- > Read the Red Cross induction guidance materials
- > Make a list of what they need to know.
If you're not sure, ask an existing volunteer

what they think should be on the list, or your counterpart in another Area, or your volunteering specialist. Some examples are given later in this section

- > Agree who will help them to gain the knowledge required. Remember that although you are responsible for making sure the induction happens you don't have to deliver it all yourself and should involve other members of the team
- > Arrange a starting time and chat to the volunteer about how their induction can best be achieved, finding out about their availability and their ideas on what they want to learn
- > Be realistic about timescales. One volunteer may need to spend longer on a particular topic than another. It is your responsibility to plan this to ensure the volunteer feels comfortable with their role and is able to carry it out to expected British Red Cross standards of behaviour and performance

4.6 The induction process

4.6.1 Welcoming your new volunteer

The first day in any new role can be daunting. It can have a lasting impact on your views of an organisation and your loyalty to it. As a manager, therefore, you need to be sure that every new volunteer gets a warm welcome.

First of all fix a starting time and date to suit the volunteer and once that date is in your diary start preparing for the induction. If they're keen to get going, but their references haven't come back yet, try and organise a taster session.

Make sure that you're there to welcome them on that first day and let them know how pleased you are that they're joining the team. Emphasise the difference they will be making to people in crisis. Even if your schedule is horrendous, take time out to have a cup of tea or coffee with them so you can start getting to know them straight away.

Don't forget to tell the rest of the team about the new arrival and make sure they welcome them too. Introduce them to other volunteers early on, and make sure they know who to go to for the sort of information and support which will make

them useful and productive in their role and at home in it. Ensure that the atmosphere is positive and friendly at all times but particularly in those first few important days.

"I was really well looked after by everybody I met. The other volunteers were very friendly and I was made to feel that I was part of a big happy family. I was paired up with a very helpful volunteer. She showed me what to do and told me loads about the Red Cross. It was a great introduction. I went home after my first day feeling really happy and as if I was going to be doing something valuable. That feeling has never left and I still love volunteering for the Red Cross."

Medical loan volunteer

4.6.2 Creating the right balance

Be realistic about the amount of information the volunteer can take on board. Think about what it is a new volunteer **needs** to know in order to be productive in their role. This should be the focus for the induction period; simply handing over a pile of policies, leaflets and forms is not helpful.

"On the first day, keep it short and simple and try to avoid overloading a new volunteer. Any more than a brief introduction is liable to put them off staying around."

First aid volunteer

4.6.3 Asking the right questions

When you start a new job, you know that you don't know certain things but you don't know what they are! So until someone tells you that the Red Cross does not take donations of blankets to send overseas you are not aware of this. A neat tip is to write a list of 50 questions that the volunteer should be able to answer by the end of their induction. Think about what they might need to know as well as what you need them to know. Get the rest of the team to come up with the questions. After all they are the ones doing the role.

Here are some to start you off:

- > Where is the toilet?
- > Where do we gather in the event of a fire?
- > Where are the exits in this building?
- > How do you answer and transfer a telephone call?

- > What is RedRoom?
- > How do you claim your expenses?
- > Who do you contact if you are unable to do your shift?
- > What are the three components of the International Red Cross and Red Crescent Movement?
- > What do you do with donations?

4.6.4 Buddying

Buddying is a really useful and popular way of giving information to a new volunteer in a relaxed manner. It can also be a great experience for the new volunteer to get to know someone who has been with the service or activity for some time. A new volunteer may feel more comfortable about asking questions of another volunteer than of their manager. As social networks are important in volunteering, buddying can be a great way to help the new volunteer build relationships.

Whomever you select needs to be prepared for buddying a new volunteer. Take time to talk to the buddy and discuss with them the sort of things they might want to cover. It is also worth remembering that a new buddy might have some training and development needs themselves so talk about this during the discussion. It is a great way to recognise the skills and experience an existing volunteer has.

Who could be a buddy?

It is important to select the right person to welcome and introduce the new volunteer to the Red Cross and their chosen service or activity. Think about your current volunteers. Who would have the appropriate skills and knowledge? Is there anyone on the team who would relish the challenge and be keen to develop their volunteering role further?

A buddy should:

- > be knowledgeable about the organisation and the service or activity they are involved in
- > be competent in their volunteering role
- > be willing to spend time with the new volunteer
- > have a welcoming manner and a good listening ear to help the new volunteer settle in and overcome any initial worries.

Case study

On Stephanie's first day as a medical loan volunteer, she was met by the service coordinator, Jenny, who spent some time finding out a bit more about her personal interests and aspirations. Jenny also gave Stephanie some information about the Red Cross and they discussed her going on the Red Cross World course.

Stephanie was then introduced to another volunteer, Sylvia, who had been volunteering for several years. During the next few weeks, Sylvia introduced Jenny to all the other volunteers involved in the service and explained how the service worked, what administration needed to be carried out and how equipment should be cleaned and stored.

Sylvia also talked a lot about the Red Cross, about some of their past service users and the difference the equipment had made to them.

Sylvia was really friendly and helpful and was happy to answer any of Stephanie's questions. Consequently she soon became very knowledgeable about her role and quickly felt part of the team.

4.6.5 What should be covered during an induction?

Below are some of the things that should be included in any volunteer induction:

General

- > Who the volunteer's colleagues are and the team structure
- > Specifics about where they are going to be volunteering (e.g. tea and coffee making, toilets)
- > Health and safety
- > Security procedures
- > Any relevant policies and procedures (e.g. equal opportunities, disciplinary and grievance policies)
- > Contact arrangements

Red Cross knowledge

- > Fundamental Principles
- > Vision and mission
- > The structure and history of the British Red Cross and the Movement
- > What the organisation does in the UK and internationally

Volunteer issues

- > Support structures
- > What the organisation expects of volunteers
- > What volunteers can expect from the organisation
- > Expenses policy and details of how to claim
- > Further training and development
- > Details of volunteer meetings and events
- > Communication mechanisms
- > How their views are represented in the organisation
- > How to raise issues and concerns

Activity specific

- > Role description
- > Hours
- > How to use any equipment and resources
- > Standards and procedures
- > Dealing with customers/donors/service users
- > Record keeping systems

You will need to create the remainder of this section yourself. It should include details of what a volunteer will need to know for your particular service or activity, bearing in mind the role they will be performing.

For example if the new volunteer works in a shop they will need to know about stock sorting, customer service and using the till. If the new volunteer is going to be involved in transport and escort they would need to know about vehicle maintenance, insurance and accident procedures.

If you are not sure exactly what should be included, talk to other managers performing similar roles or discuss it with your line manager.

“Of course induction starts before their first day. As soon as I know someone is interested in volunteering, I arrange to meet them. As the majority of my volunteers work, it's either lunchtime or the evening and if necessary I go to their house.

“Tell them about the service and what it's like in reality. I talk to them about what we expect and what they can expect of us and show them the ‘Your Red Cross’ video. I double-check that they understand what they are taking on (that they will be on call and can expect the pager to go off at 3am!).

On their first day they come down to the Fire Station and meet the fire crew, the other volunteers and start to get involved. I want to make new volunteers feel welcome and part of the team as soon as possible.

Once the new starter has completed the essential parts of their induction (things like safety on the fire ground, vehicle operation and basic first aid) they come out to observe an experienced crew in action. It's a great way for them to learn.”
Roger James, service manager,
fire victim support service

4.6.6 Communication and involvement

People give their time for many different reasons, but having fun and getting to know others is important to all volunteers. Volunteers have consistently expressed the importance of being part of a team and so make sure they are integrated into their new team as quickly as possible. Spend time talking to them about the ways they can get involved.

Make sure new volunteers are aware of what meetings the team has and where and how regularly they are held. Also let them know about any social events you tend to run during the course of the year, encouraging them to join in as they arise (don't forget dates of forthcoming Branch forums).

Newsletters and area yearbooks form part of the induction process as they give volunteers valuable information about what is going on. You should give volunteers the latest copy of

'Red Cross Life', your local area newsletter and a copy of anything that is designed specifically for the service or activity the volunteer will be involved in. Talk to them about these publications and ask if they want to receive future issues.

4.6.7 Follow-up meetings

Although you may have delegated parts of the induction process, it remains your responsibility to ensure that the volunteer has achieved the expected levels of knowledge and understanding. It is equally important to observe whether the learning has been applied. Make sure you schedule in a time to sit and review the induction process with the new volunteer. You should also discuss any further training and development needs and decide when you are next going to meet to check progress.

4.7 Volunteer induction packs

Why not make up a volunteer induction pack? You could put in copies of important work instructions, policies, forms and background information. The exact contents will vary depending on the nature of the volunteer's role. If you are recruiting a number of volunteers into similar roles over the course of year, it could really save you time in the long run. Do take care not to overload the new volunteer with several trees worth of paper as they may be a little overwhelmed. It is also important to make the time to talk through the information and to answer any questions or concerns that they may have.

You might want to include:

- > a copy of the Volunteer Handbook
- > a copy of the Fundamental Principles and leaflets explaining them in greater detail
- > the Volunteer, Staff and Delegate Charter
- > information about what the Red Cross does in the UK and internationally
- > the structure of the British Red Cross and the Movement
- > volunteer role description
- > local contacts for the service/activity
- > service standards or work instructions
- > how to claim expenses
- > copies of any other relevant policies

(e.g. equal opportunities, grievance procedure)
> newsletters and Red Cross Life.

4.8 Accreditation of Prior Experience and Learning (APEL)

It is a waste of time training a person in something they can already do! So rather than just sending your volunteer on every course you can find, take time to identify those that are appropriate. Many volunteers come with skills and knowledge relevant to their Red Cross role, and we want to recognise this.

Doing APEL is actually quite simple. Here is a three-step guide:

Three steps to APEL

1. Identify the skills and knowledge needed for the role (service standard)
2. Identify what the volunteer can already do (APEL)
3. Provide the volunteer with the opportunity to gain the skills or knowledge they don't have (an individual training plan)

For example, if somebody is already competent in manual handling and is able to demonstrate this, it would be a waste of time and resources sending them on a manual handling course.

It is down to you, as the manager, to make a judgement about what can be 'accredited' by matching the evidence provided by the volunteer against the service or activity requirements. Any gaps in skills or knowledge should then be discussed with them in order to create a training and development plan. Remember that development needs can be met in a variety of ways. It is not all about going on training courses. Other methods include mentoring, coaching and shadowing. Talk to your line manager, a training and development specialist or your volunteering specialist for more information.

4.9 Inducting irregular volunteers, returnees and role changers

4.9.1 Irregular volunteers

Clearly a three-month induction plan might be considered to be a little excessive for a new volunteer who is coming in solely to collect money for Red Cross Week or a one-off event.

For irregular volunteers such as new collectors, the coordinator will need to establish whether or not the collector already has a good knowledge of the Red Cross. If they have, they will probably just need some basic information, such as helpful hints for collectors. However, if the collector is new to the organisation, you may need to spend half an hour with them, ensuring that they have a basic understanding about what the Red Cross does. You should show them the 'Your Red Cross' induction video to give them some understanding of the Fundamental Principles and the services and activities we are involved in.

It is the responsibility of the local fundraiser and the Red Cross Week coordinator to decide how they are going to induct Red Cross Week collectors. It is also worth remembering that if they are a new collector, they are probably quite interested in the Red Cross and a bit of time spent explaining what the organisation does may motivate them to volunteer again in the future.

4.9.2 Returnees and role changers

If someone has already been giving their time to the Red Cross, either as a volunteer or a member of staff, then clearly their induction would be organised differently. The manager would need to use the APEL process to find out their current knowledge and skills, and identify any gaps.

Don't assume that just because the volunteer has been involved with the Red Cross before, they don't need any sort of induction. They will still need an induction to the role and the activity or service. They will still need to meet the team and get to know how things function in their new area. Therefore an induction still

needs to be organised to ensure that their needs are taken into account.

4.10 Preparing equipment and resources

Part of welcoming a new volunteer into their role is ensuring that they feel adequately prepared and equipped to undertake it. The last thing they want is to be faced with a situation that they do not know how to respond to or are surprised by. So think about what type of environment they are going to enter and then prepare them for it.

For example, if you are inducting a fire victim support volunteer make sure that they are told about what it is like to be at the scene of a fire, that they are clear about child protection practices and know what type of clothing to wear.

4.10.1 Obtaining relevant resources

Any equipment or resources required for volunteers will need to be budgeted for in advance and will vary according to the role. This should be discussed with your line manager. For example, a first aid volunteer will need specific items of workwear and an administration volunteer would probably need access to a computer and telephone.

4.10.2 Workwear

It is the policy of the Red Cross to approve suitable clothing for registered volunteers and staff to wear in the performance of their duties, to make such items available for purchase and, where possible and appropriate, to issue them for events without cost to the volunteer or staff member.

All our interactions with the public and our clients must reflect well on the Red Cross. Appearance is important and what is appropriate varies with each situation, ranging from a simple identity card to full ceremonial dress. What is important is to present ourselves in a consistent way that will give confidence and convey competence and authority.

Decisions on what workwear should be worn for any particular activity is the responsibility of the operations director in consultation with the Branch chairman other relevant personnel. Decisions on bulk purchase also rest with operations director. Standard workwear can be ordered from the purchasing and supply department.

Categories of workwear

There are four standard categories of workwear:

1. **Standard workwear**
Including identity cards, white polo shirts, navy sweatshirts, navy trousers and skirts
2. **Standard protective workwear:**
Including wet weather gear, tabards, navy body warmers and boiler suits
3. **Personal protective equipment**
Including emergency tabards, safety helmets and high visibility waistcoats and jackets
4. **Ceremonial and semi-formal wear**
Including dress jackets, blazers, formal skirts, trousers and hats

4.11 Key messages

- > You never get to make a second chance to make a first impression, so make a good one.
- > A new volunteer's induction is the responsibility of the manager, leader or coordinator.
- > An effective induction may take up to three months to complete.
- > Buddying is a very popular and effective method for inducting new volunteers.
- > All volunteers should attend Red Cross World in their first three months.
- > Take time to plan an induction for a new volunteer.
- > Ensure you consider what other equipment or resources the new volunteer will require.
- > Make the induction fit for purpose.

4.12 Review and improve

1. Find a volunteer who joined in the last six months and ask them about their induction. What did they expect to happen? What actually happened? Was it well organised? Did it meet their needs? How did they feel? What are the things that they think a new volunteer would need to know? See what you can learn from this.
2. Referring to the plan in section 4.6.5, make a list, which is specific to your activity or service, to add to the example included. Talk to existing volunteers about your list and see if they can think of anything you might have missed. Next time a new volunteer joins the team, use this as the basis for creating an induction plan.
3. Get hold of a copy of the 'Your Red Cross' video and the Red Cross induction guide. Have a look at them and keep them ready for your next new starter.

4.13 Resources

- > APEL Policy and Guidance.

> Videos + DVDs

There are several videos which could be used as part of the induction programme. All volunteers should watch 'Your Red Cross', a ten-minute video/DVD which introduces the organisation, in their first week. If you do not have a copy, speak to your line manager straight away and find out how you can get one.

> Training courses

There are various courses which all new volunteers should attend, unless they can be accredited with prior experience and learning. These include Red Cross World, Ideals in Action, Health and Safety and Diversity training. In addition, new starters should be encouraged to attend a basic first aid course. Training courses can form part of a new volunteer's induction, but don't rely on them as the only method of learning. To find out how to book these courses, contact your training and development specialist.

5. Motivating, recognising and retaining volunteers (tabbed page)

5. Motivating, recognising and retaining volunteers (back of tabbed page)

5 Motivating, recognising and retaining volunteers

5.1 Introduction

Any good volunteer manager knows that recruitment and selection is just the start. Then comes the business of holding on to volunteers, encouraging and motivating them so they stay keen and enthusiastic and committed to the organisation. This requires a wide range of people skills. It means developing a real instinct for an individual's capacity. It means learning to spot areas of weakness as well as strength, knowing when to sympathise and when to reward. It means creating the right environment so that volunteers don't feel over-burdened, but have a sense of satisfaction that the time and effort they're putting in is recognised and appreciated by their manager.

This section of the Good Practice Guide explores all the issues involved in the core management competencies of motivating, recognising and retaining volunteers. It offers advice on how to:

- > recognise individual motivations for volunteering, accommodate them where appropriate and understand that they may change over time
- > give volunteers appropriate acknowledgement and recognition for the contribution they make
- > ensure that volunteer recognition and reward is applied fairly and effectively
- > encourage volunteers to continue volunteering and provide the necessary support.

5.2 What motivates volunteers?

The British Red Cross has thousands of volunteers giving their time for free, contributing around five million hours each year between them. So why do they do it – why do volunteers give their time week after week to the Red Cross?

The reality is that everyone is different and what motivates each volunteer depends on their experiences, their personality and their needs. For example, one volunteer may be motivated to give their time because they or someone they know has been helped by the Red Cross, while another may be motivated because they want to learn new skills or meet new people. Everyone is different. The skill of a manager of volunteers is to appeal to each individual's particular motivation. This may sound like an impossible task but essentially it's about talking to people and finding out what they want.

Here are just some of the reasons why people volunteer:

- > Altruism – wanting to help others in need or a belief in the work of the Red Cross
- > Social – wanting to meet new people and make friends
- > Development – aiming to learn more and develop new skills
- > Career – wanting to gain experience in order to improve career opportunities
- > Esteem – wanting to feel useful and gain personal confidence
- > Protective – needing to cope with personal issues such as loneliness

A motivated volunteer is one who wants to do the job that needs to be done in the spirit and within the guidelines of the organisation.

"I joined the Red Cross when I was working as a nurse and became involved with various welfare services. I have done lots of different things for the Red Cross and I like the fact that I can use my qualifications and my knowledge. I like to think that I am being of some use. I also enjoy meeting people and feeling as if I am helping in some small way."
Connie Harraghan, tracing and message volunteer

5.2.1 Changing motivations

It is essential for managers to understand that an individual's motivations will change over time. Leaders and managers of volunteers must keep checking how volunteers feel about their role in order to be able to pick up on shifts in motivation and react accordingly.

5.3 Create the right environment for volunteering

Although you can't actually make someone be motivated, as a manager of volunteers you can create the environment in which volunteers will be motivated.

Frederick Herzberg researched motivation and found that there were key 'motivators' and 'hygiene factors'. He explained motivators as things that have the potential to create long-term satisfaction and hygiene factors as things that annoy or cause a sense of grievance if they are not right. He also concluded that some factors are more powerful than others. They are listed below in order of their potential to motivate or cause grievance.

Motivators

Sense of achievement
Recognition of ability
Interesting work
Responsibility
Promotion

Hygiene factors

Policies, administration and communication
Manager's attitude
Work conditions
Manager's technical skills
Reward

As a manager of volunteers you can influence all these factors. You can give volunteers responsibility and a sense of achievement. You can ensure volunteers are able to use their skills and have interesting work. You can make sure communication is good and that volunteers are not overburdened by administration. In this way, you can create an environment in which volunteers can flourish.

5.3.1 Communicate regularly

In order to understand the specific needs of individual volunteers, you need to talk to them on a one-to-one basis. Find out how they feel about the role, what they are enjoying and what they would like to be different. By making some time to talk to volunteers, you will be in a good position to maintain motivation, notice any changes and check that they find the work productive and enjoyable. However, sometimes you may have to accept that you can't always meet volunteers' needs. Where this is the case, make sure the volunteer understands why and, where possible, try and refer them to someone who can help. For more information on communicating with volunteers, please see sections 6.4 - 6.7.

5.3.2 Encourage teamwork

Volunteers have consistently expressed strong preferences for group-based volunteering. If they are part of a team, they are much more likely to be reliable and continue volunteering in the long term.

As well as getting satisfaction from being part of a team, people working together can often achieve more than if they work alone. Encourage volunteers to get to know each other, work together, share ideas and support each other. Many managers organise team meetings, peer support networks and social activities to help volunteers make this happen. This is also what volunteer Forums are all about.

5.3.3 Top tips

It is always worth drawing on other people's experience. Here are a few tips gleaned from experienced volunteer managers. You might want to make a note of any that strike you as particularly useful:

- > Get to know your volunteers
- > Be a good listener and make time for them (even when you haven't got it)
- > Be interested in what they say and feel. Ask them for their views and ideas
- > Work to gain their respect
- > Don't just give feedback – encourage them to give feedback too
- > Always take time to say thank you

- > Let them know that you trust them to do the job
- > Let them try something new to develop their skills
- > Ensure they always have a purpose
- > Pick up on any changes in behaviour. Explore why it's happening
- > Never dictate. Always ask and give them the chance to say no
- > Get volunteers together regularly to encourage a positive team spirit
- > Be sure at all times to let them know they're making a real difference

5.4 What is recognition for volunteers?

Most people volunteer because they want to and the only reward they want is pleasure from doing the job. They will often say "I don't need recognition" and sometimes that might be true. But imagine if nobody ever noticed what you did, thanked you for your contribution or praised you, you would probably feel that you weren't appreciated and would become dissatisfied. Whatever volunteers might say, recognition is important.

You might not realise it but as leaders and managers of volunteers, you can do a number of things on a daily basis to recognise volunteers. Recognition can be anything from asking about someone's weekend to giving feedback or saying thank you, to nominating someone for an award. There are many different things you can do to recognise the contribution that volunteers make.

But remember that people are different. One volunteer might love getting publicly praised at a volunteer Forum, while another might be embarrassed by this and prefer a more personal approach.

5.5 How to recognise volunteers

5.5.1 Top tips

Here are some top tips offered by other Red Cross volunteer managers on how to recognise volunteers:

- > Write personal letters or thank you cards
- > Say thank you at group meetings and mention any special achievements

- > Ask volunteers to represent their service or activity at meetings, including Forums
- > Put forward stories about what volunteers have achieved to newsletters, Red Cross Life or local papers
- > Hold social events
- > Give volunteers the opportunity to take on responsibility if they want it
- > Buy a birthday card or a cake
- > Gather feedback from service users and pass it on to volunteers
- > Praise volunteers individually or in front of the group
- > Hold events to highlight volunteers' good work during the national Volunteers' Week
- > Involve volunteers in decision making
- > Nominate volunteers for awards or commendations (see below for more details)
- > Give them feedback on how they are doing and what that means to the Red Cross
- > Ask for their ideas
- > Support their personal development

5.5.2 Give recognition fairly

When giving recognition to volunteers, it's important to ensure you're not always recognising the same people or just the 'major' contributions that are worthy of awards. Clearly there should be an obvious link between accomplishment and recognition but you can give recognition for a whole range of things. What may be an everyday task to one volunteer might be a major accomplishment for another. Make sure you recognise improvements as well. It's not always about being the best or doing the most. For example, you could recognise someone for giving a great service or for doing a particular task for the first time.

5.5.3 Legal issues

It is important to be aware of the legalities surrounding incentives or payment of volunteers. Certain 'benefits' may have income tax implications or the potential to create an employment contract. For example, if you gave a home from hospital volunteer computer training when they didn't use a computer for their role this could be seen as a benefit. Similarly if you gave a shop volunteer some clothing to say

thank you for a special effort, this could be seen as a benefit. If you are unsure, please consult your volunteering specialist.

For more information on policies and legislation, please see page 138.

"We wanted to try and do something special for Volunteers' Week to say thank you to our volunteers for everything they have done during the year. We organised a 'thank you evening' and invited all volunteers in the Area by personal invitation. The hall-hire was donated to us, a volunteer offered their services as DJ and all the managers brought food for the buffet. Over 190 people attended the evening and each volunteer was recognised with a personal certificate, saying thank you for their contribution to the Red Cross. The atmosphere was great – it felt like one huge celebration as if we were all part of one big Red Cross family."

Susan Ratcliffe, Area retail manager

"I try and recognise volunteers in lots of different ways. I always make sure I thank them personally and I do use the service awards and recognise outstanding contributions. It can be quite a careful balancing act to be sure you're being fair and recognising what's important and what people do rather than just the time they give. I also try and make sure that I publicise good work – in newsletters and in the local media.

We've had some great media coverage and all the volunteers were invited to come along and talk to the reporter, which they seemed to really enjoy. It's also a really good idea to pass on any comments or praise given by service users."

Mary Campbell, skin camouflage service coordinator

5.6 British Red Cross honours and awards

The Red Cross awards system is a great way to recognise major contributions made by volunteers and staff. There are a number of different awards and it's up to the volunteer's manager to know what is available and to nominate a volunteer for an award where appropriate. Below is a list of the different

Red Cross awards available. The application process varies depending on the type of award. For example, some awards are processed locally while others are processed centrally. If you do think a volunteer deserves a particular award, contact your volunteering specialist to find out more.

5.6.1 Types of awards

Service Award

Awarded to any volunteer who has completed five years' service and then for every subsequent five years. For example, a volunteer could get a service award after five years, ten years, 15 years and so on.

Branch Certificate of Commendation (meritorious service)

Awarded to volunteers or staff who have given sustained effort in a particular place or activity or for a noteworthy contribution.

Branch Certificate of Appreciation (services rendered)

Awarded to volunteers, staff and external organisations in recognition of outstanding help at a specific event or exceptional support for the Red Cross. It is also appropriate to award this to groups, organisations or companies who have given outstanding support.

Voluntary Medical Service Medal and Clasp

Awarded on completion of 15 years' service in a medically related field such as first aid, skin camouflage or therapeutic care. A clasp is awarded for every subsequent five years.

Special Service Cross

Awarded to volunteers who have carried out an act of bravery, distinction or gallantry or a single act worthy of national recognition such as saving a life.

Badges of Honour

There are three Badges of Honour for Devoted, Outstanding and Distinguished service. These awards recognise quality rather than length of service. A volunteer's contribution is written in a citation and sent to a local awards panel.

National Honours: The Queen's Medal of Honour, OBE and MBE

Honours are awarded for all types of service but by far the largest number of awards go to volunteers who have made a difference by providing services to their local communities. Volunteers should be recognised within the Red Cross before being considered for a National Honour.

For more information, please read the volunteering department's Guidance on Awards.

Case study

Badge of Honour – distinguished service

An example of an application submitted by a volunteer's manager (the volunteer had previously received a Branch Certificate of Commendation):

Sarah took over running Open Gardens in 1996 and for seven years, with a strong team of volunteers, she has continued to organise this very successful form of fundraising. She has managed at least 100 garden openings each summer and the income from this has increased annually. As Open Gardens organiser, Sarah has not only guided her team of volunteers but has also continued to find new gardens, which is not as easy as it might seem. There are many other charities that now do this sort of fundraising and many garden owners need constant encouragement to open each year for the Red Cross. Sarah has been excellent in this public relations role.

In the last few years, the Red Cross has undergone much change but thanks to the strength of Sarah's leadership, she has kept her volunteer team and has achieved an extremely successful fundraising income each year. Through her hard work and devotion, she has been responsible for raising over £150,000.

5.7 The importance of retention

Recently, the Red Cross, like many other charities, has focused on how to attract new volunteers. Clearly this is essential but we must also remember to pay attention to keeping existing volunteers.

Problems of volunteer retention can usually be traced back to problems of motivation. To reduce de-motivation, managers need to watch for the signs and keep measuring their volunteers' morale. Volunteers need to be able to honestly express how they feel and know that any concerns they raise will be dealt with. Essentially, it isn't simple – there is no magic solution to retaining volunteers as every individual is different. But one of the questions you need to ask yourself is: do you know why volunteers have left and could you have done something about it?

It is worth remembering that it would be unrealistic to expect everyone to stay with the Red Cross indefinitely. People move on and need different things at different times in their lives and that's fine. However what we can do, as leaders and managers of volunteers, is try and ensure that they don't leave for the wrong reasons. Leaders and managers can create an environment in which volunteers want to stay and continue volunteering for the Red Cross.

5.8 Why do volunteers leave?

It's really important that managers take time to find out why volunteers are leaving. You need to know in order to make things better in the future.

Here are some of the most common reasons volunteers have given for leaving in recent years:

- > Change in personal circumstances, e.g. new job, illness, moved house
- > Not enough to do or not enough interesting tasks
- > Not wanting to comply with national decisions, e.g. non emergency driving, gaining NVQs to be a trainer
- > Poor communication
- > Too much bureaucracy
- > Wanting more free time to spend with family
- > Not feeling appreciated
- > Personality clashes/difficulties with other volunteers

For more information on exit interviews, please see section 8.6.1.

National Survey of Volunteering:
reasons for leaving

The National Survey of Volunteering, researched, among other things, reasons why volunteers stopped volunteering. In 1997, out of the 1,486 volunteers surveyed:

- > 34% blamed poor management
- > 23% said they were getting bored or losing interest
- > 15% said they didn't get asked to do the things they liked
- > 49% said it was getting too much for them
- > 24% said their efforts weren't appreciated

5.9 How to retain volunteers

5.9.1 Volunteer life cycle

There are lots of different factors that will have an impact on whether volunteers will stay with the Red Cross. Over the length of a volunteer's relationship with the organisation there will be a number of critical points at which the volunteer will review their decision to stay. These are not always predictable, occurring at different times for different volunteers.

It can be useful to look at the typical life cycle of a volunteer (Figure 5.1) to help determine when a volunteer may need additional support.

There are three stages of the life cycle and the motivations and needs of volunteers will change throughout this time.

Stage 1: Exploratory

This is when the volunteer is finding out about the organisation, what they have to offer and whether or not they think they would like to stay. This is when the volunteer is most likely to have second thoughts. Giving assurance is crucial at this stage. Make sure you communicate directly and often with the volunteer, and take the time to sit down and explore their expectations and uncertainties.

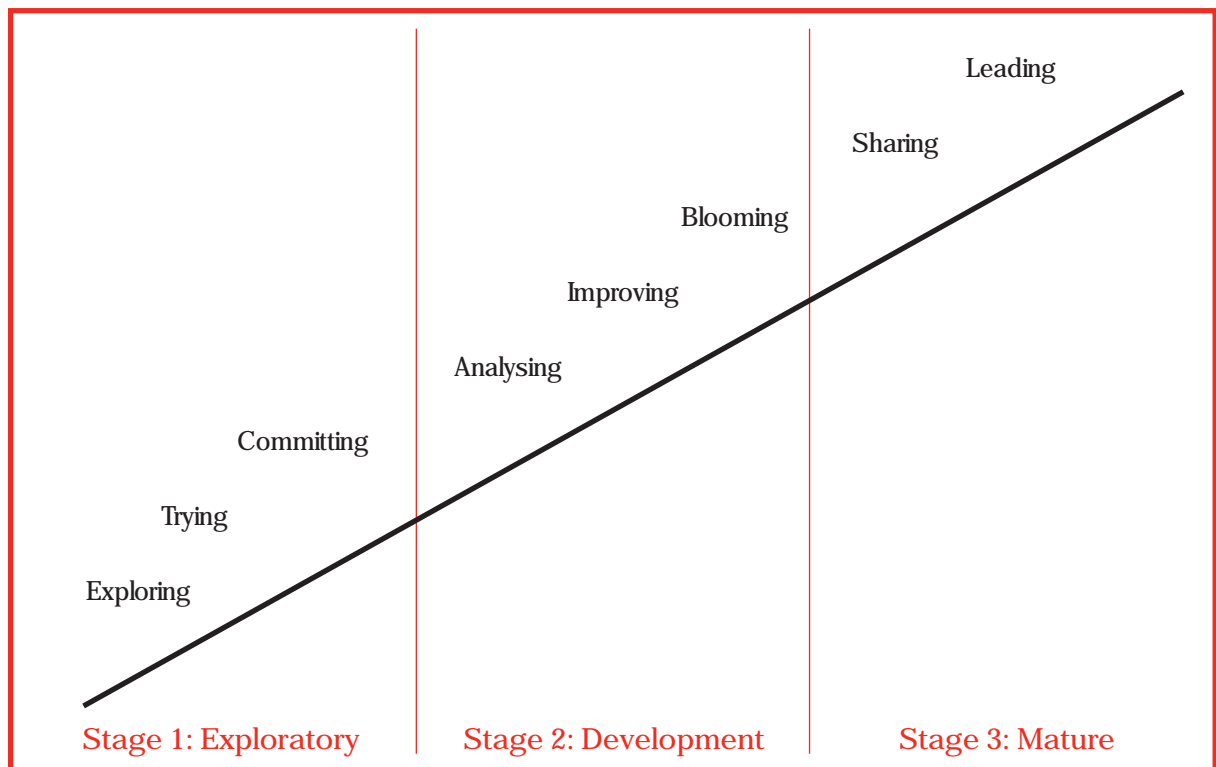


Figure 5.1: Supporting the volunteer life cycle, Voluntary Action Leadership, 1985

Stage 2: Developmental

This is where the volunteer has decided to stay and is now being given opportunities to demonstrate their skills and qualities. Towards the end of this stage is when a volunteer may begin to feel under-valued or unappreciated. Listening and responding to the volunteer's personal aspirations and affirming the part they play can go a long way in influencing them to stay.

Stage 3: Mature

The volunteer feels part of the organisation, is comfortable with their role and is perhaps looking to enhance their volunteering experience. They may be ready to take on additional responsibilities or they may be willing to become a 'buddy' to new volunteers or a trainer.

The volunteer manager needs to ensure that they are aware what stage each of their volunteers are at and that they communicate with them to work out their next step. Otherwise the volunteer is likely to lose interest and become demotivated.

5.9.2 Critical change points

Everyone's life and circumstances change

over time and, therefore, their needs also change. We all want different things at different points in our life and volunteers are no exception. Critical change points include the arrival of a child, a change in paid work, marriage, the death of a partner and retirement. A manager of volunteers needs to stay in tune with what is going on in the volunteer's life as major changes in circumstances may cause them to rethink their involvement with the Red Cross. It is also important to talk to volunteers during these changes, as it is likely they may need support. For example, if someone is made redundant they will need a boost to their self-esteem. Alternatively, if a volunteer's children leave home, they may want to get more involved as their primary caring outlet has been lost. They may want to make new friends and get involved in new social networks.

5.9.3 Ten simple steps to retaining volunteers

1. Encourage volunteers to feel a sense of personal responsibility for and ownership of their service.
2. Do what you say you can do. Volunteers will leave if they feel forgotten, excluded or that nothing is happening.

3. Make volunteers feel valued, emphasise their strengths and contributions and celebrate their accomplishments.
4. Create an environment which is friendly and supportive.
5. Provide interesting opportunities.
6. Communicate well with volunteers.
7. Don't overload them – ensure they are not in danger of over-commitment.
8. But don't under-utilise them either – they need to know their role is useful.
9. Show them the results of their work so they know they are making a difference.
10. Provide feedback in a way that shows respect for the volunteer's preferences.

"I was thinking about leaving the Red Cross as I found that I was getting bored with the role and felt that my skills weren't being fully used. However, I had a chat with my line manager and she was really helpful. She helped me to work out what it was that I wanted to do and got me involved in new and interesting things. Three years later I'm still here and really enjoying volunteering."

Anonymous volunteer

5.10 What motivates Red Cross volunteers and makes them stay?

We spoke to 200 Red Cross volunteers and this is what they told us:

1. Reasons for choosing the Red Cross

The top five reasons for choosing to volunteer:

1. To help people in the community
2. To have a positive purpose in life
3. A belief in the work and principles of the Red Cross
4. The Red Cross has a good reputation
5. Social aspect of meeting and being with people

2. What volunteers want to achieve from volunteering

The top five things volunteers wanted to achieve from volunteering:

1. Feeling they are helping others or making a positive contribution

2. A sense of personal achievement
3. The chance to do things they are good at
4. Gain new skills
5. Meet people

3. What volunteers found rewarding

The top ten things volunteers found rewarding:

1. Managers or clients saying thank you
2. Managers trusting you to get on with the job
3. Managers taking the time to stop and talk
4. Getting supported when needed
5. Being involved with decision-making
6. Getting positive feedback
7. Receiving a special mention
8. Receiving an award
9. Being offered training and development
10. Attending a volunteer social event

4. What makes volunteers stay

The top five reasons volunteers gave for staying with the Red Cross:

1. Enjoying helping others/feeling I am making a difference
2. Relationship with colleagues
3. Appreciation from service users/customers
4. Dedication to the Red Cross
5. Learning new skills

5. What causes volunteer dissatisfaction

The top five demotivators given by volunteers:

1. Poor communication/lack of organisation
2. Too much bureaucracy
3. Not having enough support
4. Not being asked to do the things I would like
5. Volunteering taking up too much time

5.11 Key messages

- > Know your volunteers
- > Ask volunteers what they think, how they feel and what they want
- > Remember everyone is different, embrace variety and support them
- > Adapt as motivations change over time, encourage personal growth and development
- > Build a strong team spirit
- > Pay attention to what volunteers do – people crave meaning in their work and want to be in charge of what they do
- > Give volunteers new challenges
- > Appreciate volunteers and seize every opportunity to recognise volunteers for what they do
Experiment: try different methods
- > Communicate with and involve volunteers
- > Ensure volunteers have time to talk to you

5.12 Review and improve

1. Ask volunteers what they want and how they feel about their volunteering. You don't necessarily need to do this in a structured way. Next time you see your volunteers, talk to them about how they are enjoying things, what sort of things they like doing and what aspects of their role and the Red Cross they like or dislike. You may learn something useful.
2. Have a look at the tips from managers in this section. Assess your own management style and practice – which of these do you do or not do? Once you have assessed yourself – decide what things you would like to do more of, less of or differently.
3. Write down what you currently do to recognise volunteers. Looking through this section – what else could you do to recognise volunteers?
4. Read through the ten simple steps to retaining volunteers. Which of these do you do or not do? Is there anything that you might want to do differently?

5.13 Resources

There are many other competencies that relate to motivation. Refer to Chapter 6 'Leading, communicating with and involving volunteers' and Chapter 7 'Supporting, supervising and developing volunteers' for further information.

6 Leading, communicating with and involving volunteers

6.1 Introduction

Central to the skills and knowledge required of a volunteer manager is to be 'a good leader'. However, the phrase is deceptively simple. Good leadership is not one-dimensional. In fact it comes in many shapes and sizes, because the situations in which a volunteer manager finds him or herself involve as many different styles and aspects of leadership.

This section of the Good Practice Guide details some of those styles and aspects and explores the situations in which they are applicable. It also deals with that essence of good leadership – communication. It offers advice on how to communicate effectively at all levels to ensure that volunteers feel both involved and empowered.

Leading, communicating with and involving volunteers is a core management competency.

To do it well you should:

- > promote a shared commitment to the Red Cross
- > set an example
- > encourage volunteers to adapt and innovate
- > give volunteers access to the information they need
- > provide volunteers with regular feedback on developments in their area of activity, the British Red Cross and the International Red Cross and Red Crescent Movement
- > seek and take into account volunteers' views
- > promote and encourage volunteer views and interests to be listened to.

6.2 What is leadership?

Everyone you ask will have a slightly different definition. But in general, leadership means to guide, influence and persuade others in a way they are drawn to accept. A leader is one who shows the way.

Who would you consider to be a 'good' leader? Well-known examples often cited are Martin Luther King, Nelson Mandela and Winston Churchill. These leaders brought people along with them, led their countries through difficult times and inspired people with their vision. Good leadership is about 'taking people with you' rather than pressurising people to do what you want.

In the Red Cross, leadership is not just about running a team, but also about dealing with and progressing the core issues that face the team and the organisation. Being a successful leader in the Red Cross will also depend on what that person does outside the group (i.e. networking).

6.2.1 The difference between leadership and management

Leadership is one of the skills of management. Managers tend to focus their attention and energy on how to get things done, whereas leaders give a sense of vision and direction.

"Leaders aim at winning hearts and minds. Managers aim at optimising the use of resources." (Peters & Austin, 1985)

A leader needs to consider:

- > **the vision** – what the group is aiming for and where there are opportunities or risks
- > **how to get there** – the road map
- > **how to maintain good relationships** within the group.

It is possible for a group to have more than one leader. For example, one person may take on the strategic leadership while another takes on the role of maintaining group morale and commitment.

"A good leader to me is someone who makes me want to do things for them. I need to be able to trust and respect them."

Therapeutic care volunteer

"Leadership can sometimes be about trial and error. It's important to do what you say, lead by example and ask people what they want. I always try and give as many opportunities as possible for volunteers to become involved in decisions, such as about equipment or changes. Sometimes, though, you need to keep control, particularly if things are starting to go off at a tangent."

Dale McLean, volunteer first aid group leader

6.3 How to be a good leader

6.3.1 Choose a leadership style

Leadership styles will vary according to context. For example, in an urgent situation, people are more likely to accept a directive style of leadership: "Mary, get the first aid kit; Brenda, call for an ambulance". In these situations, this style of leadership is essential. However, in a less urgent situation, people may find this style unacceptable. It is the role of the leader to adopt the most appropriate style for the job being done and the needs of others. So how do you go about taking people with you?

You will need to be able to employ all of the above styles at different times (see Figure 6.1). It is worth remembering that the key reason volunteers give their time is because they want to. The more you are able to consult, share and delegate, the more you will be able to get buy-in and develop members of the team. But be aware that sometimes it isn't appropriate to consult, share or delegate and you may need to give direction instead.

Probably the most important thing to think about is: what is your 'preferred' style? If you tend to stick to one or two styles, try experimenting and adapting your approach and see what results you get.

Tannebaum and Schmidt describe the range of styles a leader or manager can adopt

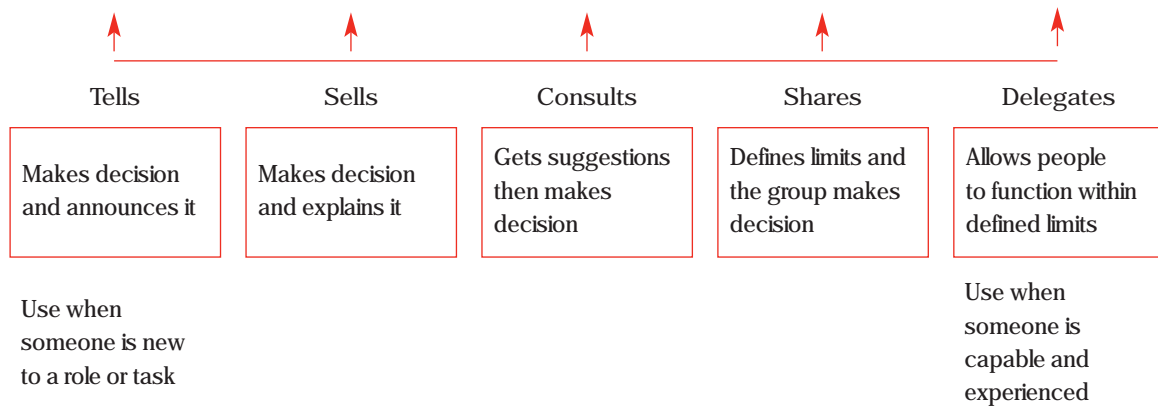


Figure 6.1: Leadership styles (Tannebaum and Schmidt)

Case study

Leadership style: tell

Sue wants to introduce a new set of standards for the team to adhere to. She spends some time thinking this through before writing up what she feels are the right standards. At the next team meeting, she gives everyone a copy and tells the group how important it is that everyone follows them and that they need to be implemented immediately.

The group members feel that it's yet another thing they have to do. They haven't been consulted so they don't feel involved. Some members decide they don't want to bother to adhere to the new standards.

Case study

Leadership style: share

James feels that the way first aid duties are covered could be improved. At the next team meeting, James sits down with the volunteers and asks them for their views. The group reviews what has gone well and what has gone less well and comes up with a number of ideas and suggestions. A decision is reached by the group regarding the best course of action.

The group members feel that they have been consulted and have had an opportunity to contribute to the decision-making. Consequently, they are supportive of the proposed changes and implement them quickly, willingly and effectively.

6.3.2 Maintain volunteer morale

Anxiety or tension will occur at times within any team. It is part of the leader's role to absorb some of that anxiety and maintain enthusiasm and humour to help the group cope positively. The leader can also help by creating an environment in which tensions can be handled constructively. This helps the group to remain cohesive and committed.

6.3.3 Be a role model

Being a role model is another important part of leadership. Whether you are aware of it or not, you will lead by example. By acting in a particular way, you will encourage the same behaviour in others. Leadership includes focusing people's attention on important issues. You are more likely to do this effectively if what you do matches what you say. For example, if you want to improve the customer service in a Red Cross shop, volunteers and staff are more likely to do that if you set an example by giving outstanding customer service yourself.

Being a role model is about establishing some shared values and standards of behaviour.

6.4 What is good communication?

Have you ever thought to yourself: why didn't I hear about that or why didn't someone tell me what was happening? If you have, you're not alone and it's not unique to the Red Cross. Recently when we asked volunteers: 'what would you most like to change in the Red Cross?', the most common reply was communication. But getting it right is no easy task.

Communicating with your team is an essential part of the role of a manager. You can't achieve the group's objectives unless you communicate these goals and invite feedback from the group.

Communication isn't just about giving people information or telling people things. Among other things, it is also about listening, sharing and discussing ideas, and giving and receiving feedback.

"If information is sketchy or continually changing, it makes you feel like giving up."

Fire victim support volunteer

"I don't think things should be hidden from volunteers. Volunteers need honesty and communication."

Volunteer first aid group leader

6.5 Why do we need to communicate?

The benefits of good communication are:

- > improved trust and confidence through receiving more accurate and consistent information
- > a greater sense of involvement, motivation and commitment
- > a better-informed team will result in reduced reliance on gossip
- > greater cooperation and understanding
- > shared expectations and views about what is happening in the Red Cross
- > a free-flowing exchange of information and ideas
- > more informed choices and decisions made
- > barriers between staff and volunteers removed.

As a manager in the Red Cross, you need to be able to communicate with a wide range of different audiences: your team, your manager, your peers and other teams. You may also need to communicate externally – with service users, donors, the public and other organisations. Good communication is fundamental to effective management and is one of the factors that can cause the most dissatisfaction among volunteers and staff if it is not right.

"When you communicate openly, you open the possibility of getting the best out of people – their energy, creativity. If you don't they just feel like cogs in a machine, trapped and unhappy."

Mark Loehr, Worldwide Learning – Connecting, 2002

6.6 Plan your communications

Communication tends to be one of those things you don't necessarily think about and just 'do'. But it's worth taking the time to review how effectively you are communicating with your team. Do you always choose the most effective method? Do you always get the right message across? By planning your communication in advance, you can make sure you do get it right in the future.

What needs to be considered?

1. Purpose

Do you want to request or give information, obtain feedback, influence a decision or consult people?

Karen is concerned about Red Cross Week fundraising results. She needs to find out why income fell and try and get things back on track. She needs to explain the problem, ask for feedback, explore why it has happened and agree a way forward.

2. Audience

Who should your audience be and how will that affect what you say? Put yourself in their shoes. How much background information do they have? Will they understand any jargon? What method of communication is most appropriate for them?

Karen's audience includes representatives from different services, members of the Area management team, commercial training, shops, the fundraising group, an administrator and the Area media volunteer.

3. Message

What are you going to include in your message? Think about the key points you want to get across.

Karen decides that the initial part of her message is to inform the group of her concerns. Her main message however is that she needs to find out why the problems have arisen and how Red Cross Week fundraising income can be increased.

4. Method

Sometimes we get into a habit of using certain methods, without really considering what is best.

Verbal communication

Whether individually or in a group environment,

verbal communication gives the most potential for sharing ideas and opinions, as well as getting feedback. It can be carried out face-to-face or by telephone although the phone is more limited as you can't see people's body language. Verbal communication is not as good for conveying detailed information.

Written communication

You can do this by newsletter, email, fax, letter, memo or even text message. Written communications are suitable when a record is needed, a lot of information has to be conveyed or you want to give the audience some time to reflect on the message and consider their response. Written communication is not so good for introducing major changes as there is no opportunity to consult people or discuss the issues.

Karen decides to hold a face-to-face meeting. First, she decides to inform people about the meeting by email. Karen also prepares written communication in advance detailing budgets, income generated last year and numbers of volunteers involved.

5. Timing

When will the best time to communicate be? You may need to consider when your audience is likely to be most receptive, other priorities and things that are going on which could detract from your communication.

Karen calls the meeting for November in order to avoid the summer holiday season, and the peak budgeting and planning time. This still gives Karen plenty of time to put in place any actions before next year's Red Cross Week.

6.7 How to be a good communicator

6.7.1 Know what's going on

There are many different ways of finding out what's going on. Newspapers, professional magazines, Red Cross Life, newsletters, meetings,

the internet and RedRoom are all important sources of information.

For example, if you are a fundraiser you will need to keep abreast of legislation, fundraising developments in other charities and factors that might influence the behaviour of donors. If you are a first aider you will need to know about current best practice, new training opportunities and equipment updates. Regardless of where you work in the Red Cross, keeping up to date with changes within and outside the organisation is important too.

It is partly the responsibility of the Red Cross to inform you but it is also your responsibility to try and find out. Are you missing out on information? If you are, try and ascertain why and develop a plan to do something about it.

6.7.2 Make meetings work

The purpose of a meeting is to:

- > impart information
- > gather information
- > generate new ideas
- > motivate a team
- > reach decisions.

“We get together and talk about anything that’s happening and discuss any information that people want to share. We also take the time to review duties, discuss casualties, feedback any issues, say thank you and share experiences as well as keeping up to date with first aid.”

Vera Reed, first aid group leader, Manchester

The agenda could include:

- > what’s happening in the service or activity, including progress and developments
- > news from the local, national and international Red Cross: (if you have trouble accessing information, try RedRoom, the British Red Cross website, the weekly email update, Red Cross This Month team briefing or ask your line manager)
- > a chance to share experiences, ideas and problems
- > a thank you to the volunteers for their efforts
- > external or internal speakers suggested by the volunteers – don’t forget some of your own

volunteers may have interesting knowledge they could share with the rest of the group

- > any changes in policy or procedure, personal safety issues
- > training and development activities.

It is a good idea either to type up some brief notes of the meeting to circulate afterwards or nominate someone to ring any volunteers who were unable to attend.

“We use the notice board to communicate what we’re doing and I talk to the volunteers at the start of their shift about anything relevant. We also have volunteer meetings in the shop three times a year. The volunteers enjoy it and it’s nice for the people who don’t regularly work together to catch up. It’s also a great opportunity to talk about progress, discuss common issues and thank volunteers for the money they raise.”

Clare Ross, shop manager

Case study

Sandra is preparing for the home from hospital group meeting. While preparing the agenda, she checks the action points from the previous meeting and goes through the latest Red Cross This Month team briefing and Red Cross Life to see if there are any matters that need discussion. On the agenda, she includes time for sharing experiences and concerns, as well as a break to help encourage people to chat. She has also arranged for someone from the Alzheimer’s Society to give a talk – something the volunteers had requested earlier in the year.

6.7.3 Listen well

People sometimes think listening is easy.

You just sit there and let the other person talk.

However there can be a lot more to it. Listening well involves giving your full attention and identifying with the other person’s point of view.

To listen well you need to:

- > ignore or remove distractions
- > give the person your full attention
- > try and see things from their point of view

- > occasionally summarise what they've said
- > use questions to clarify things
- > not interrupt.

6.7.4 Ask questions

When you're listening, there are opportunities for you to ask many different types of questions depending on what you want to know. Here are some examples:

Open questions allow open and honest responses, which give you the information you want. For example

- > Why did you...?
- > How did you feel about...?
- > Tell me about...?

Probing questions give you more information.

- > Tell me more about...?
- > Give me an example of...?
- > You said you have experience of...what was it like?
- > In what ways was the work satisfying/difficult?

Closed questions are best for finding out specific information and the answer is often 'yes' or 'no'.

- > Did you...?
- > Are you....?
- > Can you....?

Unhelpful questions

The following types of questions are generally unhelpful and may well create conflict.

Leading questions

Leading questions indicate the answer that is expected. Examples are:

- > 'I suppose you did that because...?'
- > 'I assume you'll have no difficulty in...?'

Multiple questions

Multiple questions leave the responder not knowing where to start and feeling confused. For example:

- > 'Where did this happen? Who was there? What did they do?'

'Why' questions

'Why' questions can feel quite threatening. They are often asked out of curiosity rather than a genuine need to know.

6.8 Why involve volunteers?

The more volunteers are allowed to make decisions, the more control they will have over what they do. This can help create a greater sense of satisfaction. Volunteers need to know the limits of their control but be given a certain amount of autonomy to act within these limits. Being involved in decision-making will help to ensure volunteers feel valued and their ideas will benefit the Red Cross.

The types of involvement that volunteers would like include:

- > a voice in the way the Red Cross is run
- > to be able to make their own decisions within defined limits
- > to be able to achieve their own purposes
- > involvement in decision-making

Please bear in mind that everyone is different and some people will want more involvement than others. Involvement is about giving people opportunities and empowering them, not forcing them to do things they don't want to do.

"Every year, we hold an annual meeting to discuss issues, have a look at what has been good and bad over the year and consider what can be done differently in the future. Volunteers give feedback about what they want and put forward their ideas. We also use the opportunity to ask for volunteers for duty officer positions."

Steve Coppenhall,
volunteer training officer

6.9 How to involve volunteers

6.9.1 Empower them

Empowerment means helping people achieve their own purpose by increasing their confidence and capacity. What do 'empowering managers' do that's different? Lynda Gratton and Jill Pearson (1994) reviewed previous research and gathered the characteristics of empowering managers into six categories:

1. **Management style:** using an open and collaborative approach, fostering opportunities for people to be involved in decision-making, developing teams with a common purpose and ensuring

everyone has the necessary understanding to contribute.

2. **Delegation and involvement:** enabling people rather than simply delegating, giving autonomy and freedom from unnecessary constraints.
3. **Giving recognition and feedback:** expressing confidence in the team, helping people feel that they make a difference and recognising their contribution.
4. **Interpersonal empathy:** building relationships, dealing with emotions and feelings.
5. **Communication:** networking and establishing clear communication channels.
6. **Vision:** having a vision, being able to articulate it and create meaningful and aspirational goals.

6.9.2 Volunteer representation and governance

As a manager of volunteers, you should encourage and support your team to get involved in decision-making and consultation processes in the Red Cross, such as the Volunteers Councils and Branch Forums.

Branch Forums

Branch Forums are a great opportunity for volunteers and staff to come together to discuss current topics. You should invite all your volunteers to attend the Forums as they are an ideal opportunity for them to meet other volunteers, learn about what's happening in the Red Cross, celebrate successes and discuss plans. They also provide an opportunity for volunteers to give their opinions and make their voices heard.

As a manager, you should:

- > ensure that your team knows in advance when the next Branch Forum is being held
- > encourage your team to attend
- > ensure that you (or a member of the team who attended) feed back the highlights of the Forum
- > find out why individuals don't want to attend and see what you can do to remove any barriers.

Volunteers Councils

Volunteers Councils are the elected representative body and voice of volunteers in a particular Branch. They are a direct link to the Board of Trustees to improve two-way communication between volunteers and the Board. They have an important role to play in influencing decisions made within the Red Cross and ensuring that the views of volunteers are heard. As a manager you should:

- > encourage volunteers to stand for election to the Volunteers Council
- > ensure that your volunteers know who their elected representative is and how to contact them
- > encourage volunteers to raise appropriate issues or ideas with their elected representative.

It's important that both you and your team understand what should be raised through the line management structure and what should be raised via the elected representative. For example you may want to raise ideas about improving the Red Cross's profile in the local area or concerns about health and safety with your elected representative. However it wouldn't be appropriate to raise issues about the way your manager supports you with your elected representative as this should be done through a different channel.

Working with your Volunteers Council

The Volunteers Council is more than a group who plan Forums, important as that is. They have many other roles, including

- > helping to 'problem solve' issues raised by volunteers and managers
- > commenting on proposed policy/strategy to assist operations directors and their teams
- > raise issues that need clarification to improve the volunteer/staff partnership.

Don't forget – any volunteer can also be elected as a Trustee to sit on the Board of Trustees, which is the governing body of the British Red Cross.

For more information on volunteer representation and governance, contact your volunteering specialist or look on RedRoom.

“Recently I went to the Avon volunteers Forum. It was a great meeting. There were about 70 people there in total, including volunteers from many different bits of the Red Cross. It was really nice to feel the enthusiasm and there was a real buzz in the discussion groups. Everyone was contributing and our opinions were valued.”
Marie Davis, first aid group leader

6.9.3 Manage change well

Change can be upsetting. It has the potential to cause distress and a drop in performance (see figure 6.2 – reactions to change) and yet it is important to the survival of the Red Cross. The Red Cross has gone through a number of changes in recent years, both locally and nationally, and will undoubtedly go through many more. Change is inevitable. Only by having change can you progress and develop. As leaders and managers of volunteers you need to be able to manage change well in order to retain the

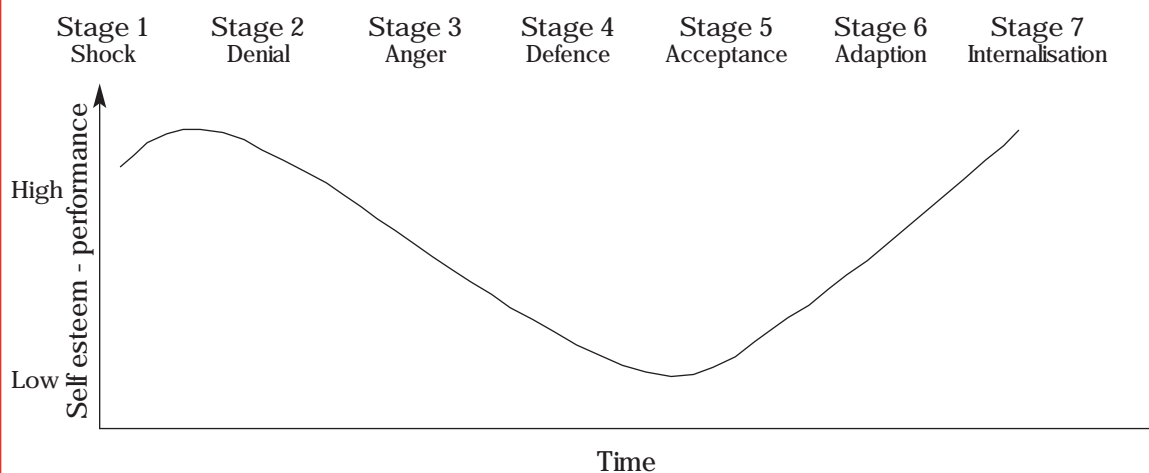
commitment and motivation of volunteers through these periods.

Reactions to change will vary from person to person. However, there is a common pattern of behaviour which can be seen in the diagram below. When introducing major change, both an individual's performance and self-esteem are likely to fall during the early stages. In a successful change programme, as the change progresses and begins to show benefits, a rise in self-esteem is likely to be accompanied by improved performance.

Six simple steps to introducing change well:

1. Provide background information and then explain the reason a change is necessary.
2. Describe the change and how it will affect the team, both the positive and negative effects.
3. Give the team the opportunity to ask questions about the change.
4. Listen and respond with empathy.

Reactions to change



Shock – “People may take time to come to terms with it”

Denial – “It doesn’t relate to me”, “It won’t affect me”

Anger – “Why do we need to change, we’ve always done it this way”

Defence – “That’s fine, but it won’t work in my Area”

Acceptance – “We might as well get on with it”

Adaption – “We are still trying to get the new way to work”

Internalisation – What was a change is now just the normal way of working

Figure 6.2: Reactions to change

5. Explain that you will provide information requested and set a date for doing that (where appropriate).
6. Ask the team for help and a commitment to make the change work.

Case study

Valerie leads a group of first aid volunteers. The Red Cross has made the decision to change the qualifications required of trainers. Valerie talks to her service manager about the changes and gets as much background information as possible. At the next team meeting, Valerie explains what's happening and why this decision has been made. She describes how this will affect the team, spends time discussing the new system and answers any questions the volunteers have. There are one or two she is unable to answer so she promises to find out the answers before the next group meeting. Valerie also takes the time to ask the volunteers how they feel about the changes being made and for their support in making the new system work.

"If we don't have change, we don't have progress. Change is vital and change can be a great thing. However, consultation must take place with all the volunteers involved – not just a selected few. People must not feel neglected or isolated. If the change management process isn't good, volunteers can feel ignored and thus any motivation they have may well be sapped. Volunteers should be asked for their viewpoint and not be made to feel stupid when they put forward suggestions. If volunteers are not involved in decision-making, motivation will start to suffer."

Margaret Dixon, tracing and message volunteer

Did you feel...	Yes	No	If no, what would have made this better for you?
you were updated with information relevant to your role?			
you had opportunities to contribute?			
your views were listened to and considered?			
previous action points had been followed up effectively?			
you had been thanked for your contribution?			
comfortable with any agreements reached?			

Figure 6.3: Meeting review checklist

6.10 Key messages

- > Adapt your leadership style.
- > Communicate well and take people along with you
- > Set an example and help to maintain morale.
- > Network effectively.
- > Have clear goals and vision.
- > Plan your communication. Don't overload people – focus on what's important rather than trying to cover everything.
- > Use questioning to draw out ideas and opinions.
- > Involve volunteers in decision-making.
- > Encourage volunteers to be involved in Volunteers Councils and Branch Forums.
- > Take time to explain and discuss change in a way that encourages buy-in.

6.11 Review and improve

1. Consider how you could improve the way you run a meeting and facilitate a discussion. You may want to try using a form like the one on the facing page to ask for feedback (see figure 6.3: Meeting review checklist).
2. Are there any new standards or behaviours you would like to develop among people with whom you work? If there are, how do you think you could set an example?
3. Which contacts or networks have been particularly useful to your group? Are there any others in which you would like to get involved?
4. Next time you have a change to introduce – whether it is small or large – work through the six-point guide in advance of meeting your team and plan how you are going to introduce this change to them. Afterwards, take the time to review how it went. Is there anything you can learn from this exercise?

6.12 Resources

As a manager of volunteers, part of your role will be to promote and communicate the Fundamental Principles and the work of the Red Cross, both to volunteers and externally to other audiences.

- > Please see Appendix I Fundamental Principles and Appendix IV Management behaviours, for further information.

7 Supporting, supervising and developing volunteers

7.1 Introduction

The Volunteer, Staff and Delegate Charter details what volunteers can expect from the British Red Cross and what the organisation expects from them (a full version of the charter can be found on page 139). You will need to take both of these sets of expectations into account when you are supporting and supervising volunteers.

This section explores all aspects of the core management competency of supporting and supervising volunteers and advises on how best to do it. It deals with everything from encouraging motivation and development to handling those difficult situations concerned with performance and/or disciplinary issues. It will enable you to:

- > give regular, balanced feedback, appropriate to the volunteer and situation
- > obtain feedback from volunteers and address any concerns they have
- > empower volunteers to undertake their role and delegate responsibilities appropriately
- > consult with others to clarify individual support and supervision requirements and share good practice in volunteer management
- > maintain necessary records and ensure volunteers' expenses are promptly processed and reimbursed
- > discuss and address each volunteer's training and development needs
- > identify and take action to resolve problems arising during volunteering activities, using Red Cross policies and procedures as relevant
- > promptly address any situations where a volunteer's behaviour is not in line with organisational objectives, policies or the Fundamental Principles.

7.2 What is support and supervision?

Volunteers need to be supported in order to sustain their commitment and ensure they continue to deliver the quality of service the Red Cross requires. Support and supervision means setting aside time to exchange information with volunteers and keeping in touch with their progress. The level of support and supervision required by each volunteer will be different. Sometimes it will involve coaching while at other times it may simply be a matter of catching up and showing appreciation for the work undertaken.

7.2.1 Types of supervision

Supervision takes many different forms and it is up to you as manager to decide on which one is appropriate depending to the volunteer's task, his or her characteristics, experience and skills. Forms of supervision include:

- > one-to-one, either in person or over the telephone
- > in a group of volunteers, who are all undertaking similar roles
- > in smaller groups of two or three
- > while performing a duty or other service delivery (for example, accompanying a volunteer during a home from hospital visit)
- > assisting a volunteer at a traumatic scene where, for example, a volunteer may require special assistance and support.

7.3 How to support and supervise

7.3.1 What to discuss

Although there is no need to have a formal agenda, as it's often best to make sure you don't over-formalise volunteer support and supervision, here are some suggestions for what you might want to ask or discuss:

Questions to ask:

- > How are things going?
- > How do you feel about volunteering?
- > What is going well/less well?
- > Are there any concerns you would like to raise?
- > How are things going with other volunteers and staff?

- > Does the support you get meet your needs?

Other discussion points:

- > Training and development needs and opportunities
- > Goals, expectations or specific responsibilities
- > Changes, developments or information that will be of interest to them

Make sure you give the volunteer feedback from your perspective about how they are doing and take the time to thank them formally for the difference they are making.

"My support and supervision sessions are great. I say 'my', but it's really the group in the shop. Once a month, Paul closes the shop for the first hour or so. We call it shop training but it's a time to hear about the Red Cross, how we're doing, and our performance in contrast to other shops in the Area. Everyone takes a turn to highlight any issues they've got. Last week when it was so hot, we had to find some way of keeping cool when using the steamer. At Christmas last year, we talked about celebrating Christmas and neutrality, as often the newspapers make comments about the Red Cross and they tend to get the facts a bit wrong! Anyway, Paul gets us all talking, sharing ideas and helping each other out. I think it's all part of the fun of being a volunteer."

Shop volunteer, South Eastern Territory

7.3.2 Monitor performance

This is not an easy concept for leaders and managers of volunteers, as volunteers do not necessarily expect the quality of their work to be examined in the same way it would if they were in paid employment. However, failing to evaluate a volunteer could send a message that you don't care about the volunteer or their quality of work. Think of evaluation as giving feedback to volunteers and recognising what they do in order to be able to improve performance in the future. Their strengths should be emphasised. The goal in evaluation is not to criticise or lay blame, but to help volunteers consider how they may be able to do things better in the future. Evaluation is a two-way process, getting input from the volunteer as well as giving feedback.

Evaluation can be done informally with the manager acting as an observer and asking questions while the volunteer carries out their work. It can also be a more formal process, such as in first aid assessments.

Case study

Jane is a university student. She started volunteering for the refugee unit in response to a Red Cross stall during Freshers' Week. She started with straightforward tasks – answering the phone, receiving refugees and asylum seekers looking for assistance, preparing information sheets. Recently, her manager Raja asked if she would like to undertake additional training with a view to acting as a support volunteer, helping refugees and asylum seekers become accustomed to their new lives in the UK. Raja had never formally supervised Jane but had observed her behaviour and noted her helpful manner and willingness to solve problems. After training and some case experience, Raja invited Jane for a one-to-one so he could hear from Jane how she was coping with the new demands and seek reassurance that her volunteering was not interfering with her studies. Jane appreciated this concern and described how she keeps a balance in all her interests. They agreed to meet again in six weeks – a crucial time as she was about to sit exams.

7.4 Colleague Support Scheme

The Colleague Support Scheme has been established to provide help and support to volunteers who may have volunteer work-related problems. It is aimed exclusively at volunteers. Colleague supporters are drawn from the entire spectrum of Red Cross staff, delegates and volunteers, at any grade or level within the organisation. The aim is that there will be 15 colleague supporters in each Territory. They are not professional counsellors.

The scheme:

- > provides confidential support to volunteers who may have volunteer work-related problems

- > helps volunteers explore ways of resolving or easing problems
- > suggests referral to another agency, if appropriate.

For more details on the Colleague Support Scheme, please contact your line manager or volunteering specialist.

7.5 How to respond to difficult situations

Managing difficult situations is something most managers face at some point. In the examples given below, volunteers make the initial comments and you need to think about what your response might be if you were their manager. See if this matches any of the possible responses listed.

7.5.1 Fire victim support

Volunteer – “It was nearly midnight, the fire was almost out and the house gutted. The only solution for the children was for me to take them home.”

Your response:

- > Recognise the good intention
- > Explain the boundaries and risks, and the reasons why this is not appropriate, referring to child protection procedures
- > Be clear that this is something they must not do again
- > Speak to other members of the FVS crew to check they are aware of the boundaries

7.5.2 Medical loan

Volunteer – “I knew what she needed as soon as I saw her, my sister had the same problem. No messing about, I gave her the wheelchair and off she went – no problem...”

Your response:

- > Reinforce that they must meet the needs of the service user, rather than doing what they think is right
- > Show them the right way of doing it – by completing the medical loan agreement form, which will give vital information about the referral source, weight and length of loan.

Then they can give the service user a copy of the agreement

- > Ask the volunteer to make sure they demonstrate how to use equipment and give out any relevant instructional leaflets

7.5.3 Home from hospital

Volunteer – “I was livid, I made special arrangements, all that way, not an easy journey and he wasn’t there – I mean is he housebound or what?”

Supervisor’s response:

- > Acknowledge that the volunteer had made special arrangements to go and visit the service user and that it wasn’t an easy journey and thank them for this
- > Listen to how they are feeling
- > Explain that you are concerned about the service user and that you are keen to establish that they are OK (actually out of the house, rather than lying injured, for example)
- > Explain that although it’s frustrating, these things happen sometimes and that we need to find out the reasons before jumping to conclusions

7.5.4 Transport and escort

Volunteer – “We build real friendship and relationships taking patients for chemotherapy. It’s not just driving. I was choked when she died, only 17 years old...”

Supervisor’s response:

- > Offer the volunteer an opportunity to talk to you and others (e.g. their peers) about how they feel
- > If you feel the volunteer needs additional support, speak to your line manager or volunteering specialist

7.5.5 Retail – “It’s only second-hand!”

Volunteer – “I gave it to her for 50p. She was poor and we are the Red Cross after all.”

Supervisor’s response:

- > Explain that we need to raise as much money as possible for Red Cross projects and that we have a responsibility to people who donate goods to raise as much as possible from their donation

- > Although you understand their motives and you think it’s great that they care, reinforce that prices are not negotiable

7.5.6 Fundraising

Volunteer – “I don’t see why you need my details. I’m only coming to collect for Red Cross Week.”

Supervisor’s response:

- > Explain that we need to know who is collecting for the Red Cross for security and health and safety reasons. We also have a responsibility to our donors to know who is collecting their money. Explain that we only collect the absolute minimum information required

Tips

- > Do not make judgements
- > Find out for yourself rather than listen to others
- > Use information you already have about the volunteer to help plan your approach
- > Ask open questions that contain who, what when and how, to try and determine why any behaviour is taking place
- > Be assertive, not aggressive
- > Give examples to help the volunteer understand what you mean
- > Be clear about the behaviour you do expect
- > Ensure you communicate the benefits of any change in behaviour

7.6 Keep records

All leaders and managers of volunteers should have record-keeping procedures. Although record-keeping requirements and needs vary between services and activities, as a bare minimum, every manager should maintain some basic volunteer files.

Volunteer files should be established and maintained for each individual volunteer.

These files should be:

- > secured in a locked filing cabinet and/or in secure computer databases
- > current and accurate

- > confidential and only shared with those individuals who need the information to perform Red Cross duties
- > available for a volunteer to view if it is their own.

Please see page 138 for details about the Data Protection Act.

“It took me a while to see the point of keeping records. What with all the volunteers I had, I thought it was unrealistic. Then one day, John, a young first aider, collapsed on duty. It turned out he was a diabetic and had just gone on to a new system for taking his insulin. Problem was he told me about this but I did not make a note. When I asked him to do the duty, I quickly scanned his records and could not see any difficulties. If I had noted the treatment change, I could have informed the team leader.”

First aid team leader, Wales and Western

The volunteer file should contain at least:

- > the volunteer application, including the waiver to verify information
- > descriptions of roles performed by the volunteer
- > reference and background checks
- > the appointment and/or reappointment letter
- > details of how to contact them, their next of kin, etc.

The following additional information could also be included:

- > Record of interviews
- > Letters of commendation and copies of certificates, awards, and nominations
- > Performance review forms
- > Details of when a volunteer has taken on greater responsibility
- > APEL records
- > Training and development records
- > Documentation of any work performance problems

7.7 What is development?

Development can be very important to volunteers. It can help to maintain motivation at key stages in a volunteer's relationship with the Red Cross and make them more likely to stay. It is also important to the organisation as it

encourages learning, commitment and allows volunteers to progress. Developing volunteers is about helping them acquire a new skill, build on an existing skill or move themselves forward. It is important to take the time to review and discuss development needs with your volunteers.

7.8 Why develop volunteers?

The benefits of developing volunteers:

- > They will become more skilled and competent
- > They are more motivated and have better 'job' satisfaction
- > Increases their confidence in themselves and their abilities
- > They feel valued and are more likely to stay
- > The team will perform more effectively
- > Targets and standards will be achieved
- > They will have greater ownership of organisational objectives
- > They become more self-reliant
- > Fewer crises
- > Volunteers can take on some of their manager's tasks leaving the manager time to concentrate on other things

7.9 How to develop volunteers

7.9.1 Identify development needs

Your first task is to identify and agree development needs with the volunteer. Use information gathered at the interview by observation, discussion etc.

7.9.2 Examples of developing volunteers

- > Jenny joined the Red Cross as a first aider. Over time, her group leader encouraged her to take on event leadership roles. She developed her skills in leading and supporting others through coaching from her group leader and by gaining hands-on experience.
- > Mike wanted to learn more about the International Red Cross and Red Crescent Movement. He attended Ideals in Action (IIA) training and expressed an interest in becoming an IIA trainer. He was coached in developing his training skills by an experienced IIA trainer and worked hard to develop his own knowledge of the Movement.

> David volunteered in fundraising, supporting the local fundraiser with basic administration. Over time, he became keen to develop his skills further. He sat down with the local fundraiser and discussed a plan for him to gradually develop the skills required to take over certain aspects of Red Cross Week, such as recruiting, organising and briefing volunteers. David shadowed the local fundraiser and attended meetings and workshops in order to develop the skills required.

7.9.3 Ways of developing volunteers

There are many different methods you can use to develop volunteers. Although most managers are aware of the potential range of development methods, in practice the majority still tends to be carried out by traditional training courses. Managers should bear in mind that people learn in different ways. What works for one volunteer will not necessarily work for another. It's important that the methods you select take into account preferred learning styles. Don't just decide on a course without considering other options. These include:

1. Learning on the job – this is a common method used for developing new skills. It is essential in this instance that the learning is planned and that the feedback is given at regular intervals.
2. Shadowing – simply observing someone else is an excellent way of developing new skills.
3. Delegating new tasks – effective delegation is crucial to continuing the development of individual volunteers.
4. Coaching – this method can be used to help transfer learning to the workplace, to help improve performance and to prepare individuals for the next stage in their volunteering. The most important element is selecting the right coach. To be really successful the coach not only needs to be knowledgeable about their subject, but to be able to pass this on and build a trust and rapport effectively.

5. Mentoring – this method allows inexperienced people to benefit from the skills, knowledge and guidance of someone more experienced. Again, the selection of a mentor is key. They should guide and advise, act as a role model and be actively interested in the individual's development.
6. Online learning – this method offers great flexibility and can be very time efficient.
7. Developing others – although this can sometimes be seen as time-consuming and a chore by some managers, in reality it offers many opportunities for self-development.
8. Training courses – clearly on occasions, it will be entirely relevant for volunteers to learn and develop new skills through attending a workshop or training course.
9. Books, journals and websites – these resources can also assist in a person's development.

If you would like any help in identifying or meeting training and development needs, please contact your training and development specialist.

7.10 Solve performance issues

When performance issues arise ask yourself the following questions:

- > Is there a role description?
- > Has the role been explained to the volunteer?
- > Has the volunteer undertaken an induction?
- > Could this problem be resolved by the volunteer revisiting the induction programme?
- > Has the problem been previously documented and discussed with the volunteer?
- > Have you created an action plan?
- > Have specialist people been involved?
- > Have you explored the implications of taking the matter a stage further, e.g. using formal procedures?
- > Have you exhausted all the possibilities?
- > What additional help do you need to solve this problem?

Your aim should be to improve performance. Remember, two heads are better than one at

solving problems so talk to the volunteer openly about the problems you're trying to deal with.

7.10.1 Formal procedures

Procedures are there to protect you, the volunteer and the organisation. Read them thoroughly at an early stage of a problem and get advice from your line manager or volunteer specialist.

You can't shy away from dealing with difficult volunteers or problem situations. You have to face up to them, find out what the problem is, explore the solutions, reach a conclusion and move on.

Only use the procedures after consultation with your line manager and volunteering specialist. For more information on disciplinary policy, see section 8.5.2.

7.11 Processing expenses

Volunteers have many different views about claiming expenses. Some volunteers can feel guilty that they are taking money from those in crisis. Others may be deeply offended if there is any delay in getting the expenses back, saying it shows a lack of respect. The only way around this is to talk to volunteers individually and check what they want and need.

Out-of-pocket expenses incurred during volunteering activities should be reimbursed in full on provision of valid receipts. It is worth being aware that for some volunteers, it's really important that they get the money back as soon as possible. Even a few pounds can make quite a difference. If you find that the system you have in place isn't quick enough, talk to your line manager and find out what can be done to change this. Please refer to the Red Cross expenses policy for further information.

	Agree	Unsure	Disagree
My work with the Red Cross offers opportunities to use my abilities			
I have a clear understanding of what is expected of me			
Morale in my team is generally high			
My performance and achievements are recognised and appreciated			
The support and supervision I receive is appropriate and meets my needs			
I am happy with involvement in decisions that affect my work			
I am satisfied with the opportunities available			
I am satisfied with communication about areas that affect my work			
I am kept informed about matters relevant to me			
My volunteering gives me a sense of personal achievement			

Figure 7.1: Volunteer satisfaction survey

7.12 Key messages

- > Every volunteer needs a named 'supervisor'.
- > Support and supervision is essential for sustaining the motivation of volunteers and achieving high standards.
- > You don't have to be formal about it. Support and supervision can be practised individually (face-to-face or via the telephone), or in groups.
- > Requirements will vary. It can be brief or extended depending on the volunteering role and individual's needs.
- > Deal with issues and problems as they arise. They don't go away.
- > Process expenses promptly for volunteers.
- > Use the support and supervision process to get feedback from volunteers on how they feel about their role.
- > Once a year, you should ideally have a review of the volunteer's role with them.

7.14 Resources

Motivating volunteers and communicating with them effectively are integral to providing effective support and supervision. For further information please read Chapter 5 'Motivating, recognising and retaining volunteers' and Chapter 6, 'Leading, communicating with and involving volunteers'.

- > See Appendix V for the Volunteer, Staff and Delegate Charter. It is also available on RedRoom.
- > Disciplinary procedures. Search on RedRoom.
- > Expenses policy. Search on RedRoom.

7.13 Review and improve

1. Draw up a satisfaction questionnaire and ask all your volunteers to fill it out. Some won't reply, but those who do will help you to improve your skills as a volunteer manager.
- 2 Ask your volunteers the ten questions to assess their satisfaction (see Figure 7.1: Volunteer satisfaction survey).

8 Evaluating relationships and making changes

8.1 Introduction

Change is inevitable in any large organisation, certainly in one including thousands of volunteers and staff. Changes in volunteering can occur for any number of reasons – a loss of motivation, for instance, or an alteration in circumstances. Equally the necessity for change may come from the Red Cross itself, again for widely differing reasons. All this means that as a manager of volunteers, you will need to be flexible and open-minded, alert to the need to deal with constantly changing situations, not least when it affects your volunteer or volunteers and means they need your support.

This section deals with the management competency of evaluating relationships and making changes in the context of volunteering. It will help you to:

- > enable volunteers to change their volunteering activity, increase, decrease or cease commitments with ease, signposting to other Red Cross roles or organisations as appropriate
- > ensure that appropriate action is taken where volunteers are no longer able to effectively carry out their role,
- > explore reasons for volunteers wishing to change their volunteering activities and make any relevant adjustments
- > continually review and learn from the volunteering relationship.

8.2 Why do changes occur?

Changes in volunteering are caused by three main factors.

1. Volunteer's motivation changes

After a long time in the same role, the volunteer may not find it as interesting as it was initially. They may previously have thrived on solving problems, filling rotas, etc. but now they may want to develop new skills.

2. Volunteer is unable to meet expectations

Employment or family circumstances may mean that their availability changes. Health problems may affect their fitness or they may find keeping up with revised standards too demanding.

3. Organisational changes

Sometimes services or activities become less relevant due to environment or population changes. There may be a more pressing need in other services or activities. Legislation changes can also affect the organisation's ability to run services or particular activities.

In most of the above cases a good manager will actively try to transfer volunteers to more appropriate roles, making it easier for them to settle into different activities or locations. However, this is not the only solution. It may be more appropriate for the volunteer to 'retire' to the Link Group, and they may need support to do this, both in making new contacts and in making sure that they don't feel guilty about the workload they are leaving.

8.3 Identifying the need for change

Volunteers may find it difficult to let their managers know they want a change in their role. They may feel guilty, out of their depth or be unaware of alternatives. So it's up to you as a manager to pick up on this. Here are some questions you can ask yourself to identify if a change is needed:

- > Has the volunteer reduced the number of times that they offer to help?
- > Do they avoid giving a clear answer on whether they are available?

- > Have they become less reliable?
- > Have they mentioned a family member's illness?
- > Do they often tell you that work commitments are growing?
- > Do they complain about or avoid meetings that they previously found useful?

If you think a volunteer does need a change of role, talk to them about it. You don't have to wait until your next planned meeting with them. Make extra time to talk to the volunteer and arrange for it to be a private chat (maybe over a cup of tea). At this meeting, ask questions to help you identify what the volunteer is looking for:

- > Would it help to change your days/reduce your volunteering time?
- > What has been the best thing about volunteering? Do you still feel that way?
- > Has anything changed the way you feel about volunteering in this role?
- > Would you be interested in doing other activities?

The more effort you put into finding out as much as possible about what the volunteer wants, the more you are likely to find the best solution for everyone in the circumstances. This should not mean being intrusive but does require you to really listen to what they are saying, encouraging them to expand on it rather than jumping in too early with your suggestions.

Case study

Lost sheep

It is surprising how often you hear a manager say "Oh, I haven't seen them for ages, I think they decided to leave." If this is the case with any of your volunteers, give them a call and find out why they haven't been around. Even if they have decided to leave for good, it will be on a much better note than if they thought no one had noticed or valued them. Be brave, pick up that phone!

8.4 How to make the changes

Discuss honestly with the volunteer why changes are needed. Ask them what their ideal solutions would be and consider how far these could be achieved. It is worth thinking about the way a role operates. Sometimes, when things have been done a particular way for a while, it's easy for the volunteer or manager to think this is the only way when it's not.

8.4.1 Offer the opportunity to learn new skills but stay put

Many Red Cross activities need volunteers in more than one type of role. Ask your volunteer if they would like to do other things within your team. Would they be able to learn new skills and, for example, become a trainer in your activity? If they would like to do this, you'll need to identify alternative ways of doing the things that volunteer does at the moment or a replacement for them.

8.4.2 Transfer them to another activity

What other activities are available in the Area that they would like to volunteer for? Talk to other managers and group leaders about this. Don't forget to consider less familiar activities. For example, if you are in services, you could consider shops or fundraising. You can't expect to be an expert in all activities. Once you have found a role that is of interest to your volunteer, arrange for them to meet someone in that activity to learn more. If you need further advice, please contact your volunteering specialist.

8.4.3 Transfer them to the Link Group

The Link Group is for those volunteers who are no longer able to take part in activities or need to take a break due to family commitments, going away to college, etc. Its purpose is to keep people in touch rather than requiring them to leave, particularly if they have given many years of service. If they are able and want to, they can occasionally volunteer. If this is the most appropriate option, talk to the Link Group coordinator in your Branch or your volunteering specialist.

"Our Link Group was formed in 1997 and meets regularly. We go on outings together and support local fundraising events. Our members have a wealth of knowledge about the work of the Red Cross and often have useful contacts. When a volunteer stops giving 'active service' a part of their heart stays with the Red Cross and the Link Group is a fun way of staying involved."

Sheila Maynard, Link Group Co-ordinator

8.4.4 Help them find alternatives outside the organisation

This is particularly important if the changes to their role have come about because the Red Cross has decided to change or stop the service or activity they were volunteering for. While transferring within the Red Cross would normally be the best solution, this is not always possible. Information on alternatives within the wider community may be available through partner organisations known to service managers or volunteer placement organisations with which the volunteering specialist will have relationships. The volunteer will feel much more positive about their volunteering experience if you are able to arrange appropriate introductions.

8.4.5 Let volunteers leave on a positive note!

It is hard to say goodbye to a good volunteer but begging them to stay does not usually lead to a good long-term result. Check whether any of the above alternatives would be better but, if not, make sure that you hold an 'exit interview' when they leave, give them a thank you card and, in the case of long service volunteers, perhaps even throw a party! If you keep in touch with them, they may come back. If they've moved on to the Link Group, don't forget to let them know how their 'old patch' is getting on.

Case study

Ken had been centre organiser for a number of years. He really enjoyed giving his time to the Red Cross, organising the activities of the volunteers. A team of two volunteer leaders supported him and things worked reasonably well between the three of them.

However when one of the leaders became ill and the other moved away, Ken was left managing the centre alone.

Ken didn't want to put pressure on the other volunteers and a lot of the things that needed doing were quite complex and he felt it was easier to do them himself. He didn't want to let the other volunteers and the Red Cross down, even though he found he was working longer hours than before and continually had too much to do. Unfortunately, his wife then fell ill and it became clear that he needed to spend more time at home taking care of her.

He tried talking to his manager about this issue, but she couldn't help him, as there was really nobody else available. Ken struggled on for a few more weeks trying to manage everything and then, after a demand from the Area office for some statistics, he decided enough was enough and threw in the towel.

What should have been done differently?

- > The manager should have helped Ken to recruit new volunteer leaders as soon as the others resigned.
- > More responsibility and workload could have been delegated to other volunteers.
- > Ken should have been appreciated, supported and supervised regularly.
- > All volunteers have the right to time out if they need it and therefore Ken should have been offered a 'break' for a couple of months or a reduction in his duties.

8.5 Asking a volunteer to leave

8.5.1 When should you ask a volunteer to leave?

One of the most difficult situations any manager may face is when a volunteer is required to leave by the organisation. Even where the decision has been made by a senior manager following an investigation, the volunteer's direct line manager will be involved.

There are three main scenarios where this may happen:

- > **We are unable to agree on an alternative.** Sometimes volunteers find it hard to accept new policies or ways of working and refuse all alternatives that are offered. They may wish to stay solely on their own terms. This isn't possible.
- > **A volunteer is unable to meet expectations in spite of every effort.** These issues can normally be resolved by agreeing alternatives in a positive way. Where a volunteer's standards of work or behaviour are not acceptable to the Red Cross, every effort will be made to change this through explanation, training and supportive supervision. If change cannot be achieved within a reasonable time, the volunteer may be asked to leave.
- > **Serious misconduct has undermined the relationship.** There is a general expectation that all volunteers will act in the best interests of the Red Cross and in accordance with the Volunteer, Staff and Delegate Charter (see page 135). Some actions do not comply. For example, activities that damage the Red Cross or that are incompatible with volunteering for the Red Cross.

Requiring a volunteer to leave the Red Cross is a very serious matter for the individual concerned, for their colleagues and for the organisation. It is for this reason that every effort should be made to resolve problems as informally as possible. Unless very serious misconduct is involved, you can avoid this scenario by clearly communicating to a volunteer your expectations of them.

But equally, if there is a problem you should not ignore it. Every time problems are ignored, it can give the impression:

- > to an individual that the way they are behaving is acceptable
- > to their colleagues that you do not care
- > to service users, customers or donors that the Red Cross has low standards.

The longer the behaviour continues, the harder it is to tackle and it may lead to much more serious action having to be taken than would have been needed if it had been done earlier. Remember that there is always someone with more experience to help you. Ask for support from your line manager and/or volunteering specialist.

8.5.2 Serious misconduct

Disciplinary policies and procedures for most organisations appear quite vague about what constitutes serious misconduct, often stating that action may be taken in various circumstances. This is because you need to take into account several factors before deciding whether it is a serious misconduct or not. For example, if a volunteer took an item of rag clothing from a shop believing it was a perk (as this was the case in the previous charity shop she worked in), you may treat them differently to a home from hospital volunteer who took property from a service user's home – though you could call both theft.

The main factors you need to take into account are:

Risk

Your first consideration must be safety. Ask yourself if it is possible that injury, real distress, legal action or serious loss of reputation would result if the volunteer continues doing what they are doing. If the answer is yes, the volunteer should be suspended from relevant activities until this risk is removed. This is not a punishment. It is a safety measure for all concerned, including the volunteer, who may also be distressed and need your support.

Should they have known better?

Might any reasonable person have done/not done this? Were they aware of and trained in rules and procedures that should have prevented

this? Did you take into account their experience, any learning difficulties or other disadvantages including any known stress problems?

Was there intention?

Does the volunteer's reaction suggest a mistake (prompt reporting, regret etc.) or deliberate action/inaction (expressed purpose, defiance etc)?

No initial conclusions on these factors must prejudice any investigation, but will help in assessing a course of action.

Case study

Paul, a long-standing volunteer, had done a variety of different things during his time with the Red Cross. Jean, his manager, noticed that he was a bit down and was more tetchy than normal. She tried to talk to him about what the problem was, but he wasn't very forthcoming. A few days later Jean heard that Paul had been arrested for a violent assault.

Jean decided that the situation could put service users and other volunteers at risk. She wrote to Paul informing him that he was suspended pending the outcome of the police investigation. After a period of time she learned that Paul's case has gone before the courts and after checking found that the court records showed Paul had been convicted. Consequently Jean terminated Paul's volunteering, as he was not suitable for volunteering for Red Cross services.

When Paul received the letter from Jean he was very upset and decided to appeal against his termination. His appeal stated that even the judge said it was uncharacteristic and that he had been provoked into landing just one punch on his wife's new boyfriend. His fellow volunteers were similarly outraged at the injustice of the situation and felt that Paul should have been treated better. After the appeal was heard, it was decided that Paul did not pose a risk to service users or volunteers and his membership was reinstated.

What should have been done differently?

- > Jean should have contacted the volunteering specialist for advice.
- > Jean should have called Paul to arrange a time to talk about the situation and find out the facts before acting.
- > Any suspension should be considered on the basis of risk – will any potential risk be alleviated through a suspension. If the manager does make the decision to suspend a volunteer this must be done in person. It is really not acceptable to suspend a volunteer via letter.

Case study

Shirley is a first aid volunteer who has been with the Red Cross for a number of years. She is pivotal in her local area, leading other volunteers, getting involved in fundraising and providing first aid at public events most weekends.

Shirley is known for being quite outspoken and this was certainly the case when she made a comment to fellow volunteers about the state of asylum in the UK and how she was tired of asylum seekers being entitled to benefits and housing in the UK. Jane, her service manager, overheard the comment and decided to make some time that day for them to have a private conversation about what Shirley had said.

During the conversation Jane clearly explained the Red Cross' Fundamental Principles and expectations about how volunteers need to behave while representing the organisation. Shirley said that she was not prepared to keep silent about her beliefs and so, after a robust discussion, they agreed with sadness on both sides that it was not appropriate for Shirley to continue as a Red Cross volunteer.

What was done well?

- > Jane, the manager, raised the issue as soon as it came to her attention. It is always best to raise these sorts of issues as early as possible, rather than letting them linger.

- > Jane raised the issues very openly, initiating a discussion about the Fundamental Principles and the expectations the Red Cross has of its volunteers.
- > Jane was prepared to part company if Shirley felt that her beliefs and attitudes could not allow her to fully support the Fundamental Principles.

8.5.3 Support those involved

Formal procedures necessitate professionalism in our approach. However, it is perfectly possible to act in a caring way without compromising this professionalism. Often there may be a fear of saying anything to those affected in case it is damaging to the situation or in case you get an adverse reaction. Here is what you can do to support those involved:

The volunteer concerned

He or she needs to be kept informed of their position and how the procedures work. They may be hurt, angry, fearful or concerned about their social standing. It is appropriate to try to establish whether they have a support network (such as family and friends) available to draw on. It may also be appropriate to offer to find someone completely unrelated that they can talk to.

Complainants

Whether they are service users, donors, customers, fellow volunteers or staff, they can commonly feel guilty about the trouble they have got someone into and/or angry to have been put in that position. They can be reassured that they were right to raise their concerns. Research on victims of crime has shown that they find it helpful to be kept in touch with a case's progress (what stage it has reached, what is being done) without being given details of the investigation itself. The same principle can be applied here.

Colleagues

Their reactions should not be ignored. The complainant and volunteer concerned are entitled to confidentiality on details of the case including their identity as far as possible. Gossip and rumour should be challenged as

inappropriate while recognising that some colleagues may have genuine concerns. They may arise from shock that a volunteer can be in this position, a desire to see fairness as they could find themselves in that position, or fear of people complaining about them in a similar way. It is not appropriate to discuss the case but it may be helpful to explain the policy and procedures to reassure them.

8.5.4 Tricky situations

However, it may just come down to a decision about whether they can continue to volunteer. This is when you need to be talking to your manager and volunteering specialist. Referred to at the beginning as 'can't agree an alternative', sometimes issues seem to reach stalemate, particularly when a volunteer opposes a change in operations or policy. Ideally such a change will have already been discussed at a Volunteers Council and/or a Forum and if not it may be appropriate to do so. The Council is not there to deal with individual grievances or disciplinary issues but can comment on wider issues. This should serve to reassure the volunteer that there are proper channels for their concerns.

8.5.5 When things go wrong

Procedures exist to ensure that volunteers are treated consistently and fairly.

The British Red Cross reserves the right to terminate membership of volunteers where appropriate and unfortunately, on occasions, this will become necessary. If you are about to be or are already involved in such a case ensure you obtain a copy of the procedure which can be found on RedRoom and contact your volunteering specialist to get their advice and support.

Note: All volunteers have the right to appeal against any termination of membership.

8.6 Learning and sharing

If you have to ask somebody to leave, it is important you keep records of what has happened. This will enable you to learn from

the experience in the future and share your learning with others who find themselves in similar situations.

8.6.1 Exit interviews

Volunteer leaders and managers usually put a lot of effort into recruiting and supporting volunteers, yet frequently pay little attention to what happens when a volunteer leaves.

Exit interviews do not have to be very formal – they can even be done over the phone – but should automatically take place when someone leaves. In an exit interview you should ask about the volunteer's future plans and about their volunteering experience with the Red Cross and whether there were things that could have made it better or easier. This shows them that their opinions matter and gives you an idea of what improvements need to be made. Sometimes a volunteer leaves because they are not happy. It may be more appropriate to suggest that the exit interview takes place with another manager or the volunteering specialist to enable them to speak more freely and provide them with 'closure'.

Exit interview questions can include:

- > Why did you originally volunteer for the Red Cross?
- > Did it fulfil your original hopes and expectations?
- > What did you most enjoy when volunteering with us?
- > What do you think you have gained from the experience?
- > What was difficult/irritating/less enjoyable?
- > What do you think we could do to improve that?
- > Why have you decided to leave now?
- > Is there anything the Red Cross could have done to prevent you leaving?
- > Would you consider volunteering for the Red Cross in the future/in your new location?
- > If not, why not (unless already stated)?
- > Don't forget to thank them again for all they have done and, where relevant, offer to provide a reference.

8.6.2 Capture learning

Make sure you record the exit interview and provide information on the leaver's form so that it can be captured centrally. This helps the Red Cross produce nationwide statistics to compare with others and to help identify trends.

Even if you have dealt with a situation many times before, it is difficult not to learn something new to consider for next time. It's good practice to take a little time to consider what you have learned, how it may change or enhance the way that you deal with things in future and find a way of recording that for reference.

8.6.3 Share your learning

It is often assumed that a training course is the best way to learn. But more recently there has been recognition that coaching and mentoring by others in similar or more senior roles can provide further development. People are surprisingly modest in their estimation of how much they can contribute to the learning of others. Yet we are all familiar with the feeling that we are reinventing the wheel when somebody else has that knowledge they can share.

Sharing should not include individuals' names or details that would easily identify them, but you can give an outline of the circumstances and the solution. It's really useful to develop links with other leaders and managers of volunteers who have similar interests and to discuss your experiences with them. You will see these happening all over the Red Cross – for example, on first aid posts where first aiders talk about particular incidents they have dealt with or in shops where volunteers talk about handling particular customers and their queries. Given an atmosphere of trust where everyone feels they can admit mistakes and is open to helpful suggestions, this can bring enormous benefits to all. You could develop these links in more than one group – for example, fellow Red Cross managers in a particular service, in a particular geographic area or even managers in other local voluntary organisations.

Given time and experience you may find that others come to you for help and advice. Think about whether you have skills, knowledge and experience that could be of

use to people who are new to volunteer management. If you think you do, discuss with your line manager or volunteering specialist whether there are opportunities to coach or mentor others.

8.6.4 Organisational learning, influencing policy and procedures

Over a number of years, the Red Cross has sought to increase its managers' skills through training, peer group meetings, specialist support and, more recently, RedRoom. Everyone needs to contribute to this shared knowledge. Working in your management teams, ensure you feed in any solutions you have found for problems. Remember, your volunteering specialist will be interested in using good ideas for the benefit of others. Volunteers Councils provide another vehicle for testing ideas and getting other people's views. Get to know the Volunteers Council member for your activity and involve them in your plans and ideas. The Volunteers Council will also be able to help spread good ideas and solutions in the Branch and through the Chairman, feed them to a wider group – at Area or Territory level.

8.7 Key messages

- > Accept that change is inevitable when dealing with people and that it can bring new opportunities.
- > Be vigilant – it is less stressful for everyone if you see changes coming in advance.
- > The best solutions are based on good information – listen, research and consider options with others, especially the volunteer.
- > Make people glad they volunteered for you. If they are leaving your activity or the Red Cross, make sure you recognise their contribution by giving them a thank you card or arranging a formal award if appropriate.
- > Don't assume problems will resolve themselves.
- > Seek advice and support on policy and procedure.
- > Keep records of conversations and actions as you go along – they may become important later.
- > Carefully review when things have not gone perfectly (and when they have). Mistakes are normal – learning from them will reduce them.
- > Share your learning – other managers can benefit and they'll be glad to know you're not perfect either.

8.9 Resources

- > Volunteer, Staff and Delegate Charter (see page 135). It is also available on RedRoom.

8.8 Review and improve

When a volunteer decides it's time to move on, you have a great opportunity to find out what they really think of their volunteering experience. Next time a volunteer leaves their role, conduct an exit interview using some of the questions included in this section.

Appendices

Appendix I

The Fundamental Principles of the International Red Cross and Red Crescent Movement

The International Red Cross and Red Crescent Movement is committed to the seven Fundamental Principles which inspire and guide all its actions. These Principles are binding on all parts of the Movement and on each individual employee and volunteer.

Thus, when a volunteer joins the British Red Cross and signs the volunteer form, he or she is also signing a commitment to uphold the Fundamental Principles. British Red Cross staff are similarly obliged to uphold the Fundamental Principles in all their work with the organisation, and wilful disregard of the Fundamental Principles may be regarded as gross misconduct and could result in disciplinary procedures and dismissal.

humanity	The International Red Cross and Red Crescent Movement, born of a desire to bring assistance without discrimination to the wounded on the battlefield, endeavours, in its international and national capacity, to prevent and alleviate human suffering wherever it may be found. Its purpose is to protect life and health and to ensure respect for the human being. It promotes mutual understanding, friendship, co-operation and lasting peace amongst all peoples.
impartiality	It makes no discrimination as to nationality, race, religious beliefs, class or political opinions. It endeavours to relieve the suffering of individuals, being guided solely by their needs, and to give priority to the most urgent cases of distress.
neutrality	In order to continue to enjoy the confidence of all, the Movement may not take sides in hostilities or engage at any time in controversies of a political, racial, religious or ideological nature.
independence	The movement is independent. The National Societies, whilst auxiliaries in the humanitarian services of their governments and subject to the laws of their respective countries, must always maintain their autonomy so that they may be able at all times to act in accordance with the principles of the Movement.
voluntary service	It is a voluntary relief movement not prompted in any manner by desire or gain.
unity	There can only be one Red Cross or Red Crescent Society in any one country. It must be open to all. It must carry on its humanitarian work throughout its territory.
universality	The International Red Cross and Red Crescent Movement, in which all Societies have equal status and share equal responsibilities and duties in helping each other, is world-wide.

Appendix II

Volunteer management competencies

Core competencies

Support, supervise and develop

1. Support and supervise the work of volunteers, appropriate to the volunteer and situation, giving regular, accurate and balanced feedback
2. Obtain feedback from volunteers and address any concerns or issues
3. Ensure volunteers are empowered to undertake their role and that responsibilities are delegated appropriately
4. Consult, share and liaise with others to clarify individual support and supervision requirements and share good practice in volunteer management
5. Maintain any necessary records and ensure volunteers' expenses are promptly processed and reimbursed
6. Discuss and address the training and development needs of each volunteer
7. Identify and take action to resolve problems arising during volunteering activities, using British Red Cross policies and procedures as relevant, including disciplinary and grievance policies
8. Promptly address any situations where volunteers' actions or behaviour are not in line with organisational objectives, policies or the Fundamental Principles

Motivate, recognise and retain

1. Recognise and accommodate individual motivations for volunteering, understanding that these may change over time
2. Acknowledge and give appropriate recognition for the contribution volunteers make
3. Apply volunteer recognition and reward equitably and effectively
4. Encourage and support volunteers to continue their volunteering

Lead, communicate and involve

1. Promote and communicate a shared commitment to the British Red Cross, including acting as a role model
2. Encourage volunteers to adapt and innovate in order to stimulate and support change
3. Use appropriate communication tools to give volunteers access to the information they need to carry out their role
4. Provide volunteers with regular feedback on developments in their area of activity, the British Red Cross nationally, and the International Movement
5. Seek and take into account volunteers' views and opinions
6. Promote opportunities for volunteers to be involved in representing the views and interests of volunteers and activities

Relevant as role dictates

Plan

1. Identify appropriate roles and activities for volunteer placements, taking into account the needs of the organisation, users, volunteers and other stakeholders
2. Ensure awareness of the differences between staff and volunteers, including the importance of not treating volunteers as staff
3. Agree role descriptions and person specifications
4. Complete appropriate risk assessments, refer to internal policies and good practice and proceed accordingly
5. Consult with and involve others, where appropriate
6. Identify appropriate support and supervision required for the volunteer and the task/role
7. Identify necessary resources to carry out plans and ensure they are available. Agree plans and timetables

Promote and attract

1. Use varied, cost effective and targeted methods and techniques to promote identified volunteering opportunities
2. Promote volunteering opportunities that are inclusive and accessible and use images and language that are positively tailored to reflect the communities we work in

3. Respond promptly and appropriately to potential volunteers
4. Assist potential volunteers to explore opportunities and make informed judgements about volunteering

Recruit and select

1. Ensure that the recruitment and selection process is fair, non-discriminatory, open and timely and that the potential volunteer understands the process and is kept informed
2. Ensure that potential volunteers are clear about what the role entails, what is expected of them and what they can expect from the Red Cross and agree to accept and work within the Fundamental Principles
3. Enable potential volunteers to complete necessary paperwork
4. Using the APEL (Accreditation of Prior Experience and Learning) policy, ensure that any previous skills, experience and knowledge are taken into account when selecting and placing
5. Ensure that unplaced volunteers understand the reasons and, where appropriate, are referred to other opportunities or organisations
6. Obtain satisfactory references and complete other necessary checks prior to the volunteer starting

Evaluate and adjust

1. Enable volunteers to change their volunteering activity, increase, decrease or cease their commitments with ease, signposting to other Red Cross roles or organisations as appropriate
2. Where volunteers are no longer able to effectively carry out their role, ensure appropriate action is taken
3. Explore reasons for volunteers wishing to change their volunteering activities and make any relevant adjustments
4. Continually review and learn from the volunteering relationship

Induct, prepare and orientate

1. Make arrangements to welcome new volunteers
2. Identify and meet volunteers' induction requirements, including attendance at Red Cross World
3. Identify any skills or knowledge gaps (making use of APEL evidence from the selection process) and ensure any training and development needs are met
4. Ensure volunteers are clear about what is expected of them and what they can expect from the organisation
5. Provide the necessary equipment, workwear and other resources for volunteers to effectively undertake their roles

Appendix III

A self-assessment tool for those involved in managing volunteers.

For individuals who manage, lead and co-ordinate volunteers in the Red Cross to be able to assess their competence and prioritise their development needs.

Words like ‘competencies’ can sometimes be off-putting. Basically, ‘competencies’ are about the skills and knowledge you need to do something well. They are designed to help people to think about what they do well and what else they need to be able to do well. You can have competencies for a whole range of different subjects from first aid to management.

The Red Cross has developed and agreed a set of competencies for anyone who leads, coordinates or manages volunteers. It doesn’t matter whether you are a volunteer or a paid member of staff, if volunteers look to you for support, for a lead or to

organise their work, then the competencies are relevant to you. Essentially they set out the standards the Red Cross wants to achieve in how volunteers are managed.

The volunteer management competencies have also been designed to be flexible. Not all managers will need to be competent in all areas, although there are certain core competencies, that are relevant to everyone who manages volunteers. For example, everyone needs to be able to communicate with and involve volunteers, but not everyone will need to be able to recruit volunteers.

Core competencies

- > Supervise, support and develop
- > Motivate, recognise and retain
- > Lead, communicate and involve

Relevant to everyone who leads, manages or co-ordinates volunteers

Role-specific competencies

- > Plan
- > Promote and attract
- > Recruit and select
- > Induct, prepare and orientate
- > Evaluate and adjust

May or may not be relevant to you depending on your role

By working through this tool you will be able to assess your own areas of strength in the way you manage and lead volunteers, and focus on areas requiring further development.

Each main competency has a number of specific criteria, called competency statements. Have a think about each of these statements and make a judgement about how well you perform in this area. If you find it hard to judge, or are unsure for any reason, you could try asking a colleague or your manager to help you.

Once you have identified areas where you feel you require further training and development, it is time to do something about them. Talk to your line manager about how best to meet your needs and, if you need further advice, you could get in touch with your volunteering specialist or the learning and development team.

Core competencies

Support, supervise and develop

1 = Don't do 2 = Not well 3 = Satisfactory 4 = Good

	Competency statements (abbreviated)	How well do you do this?
1	Support and supervise work of volunteers, giving feedback	
2	Obtain feedback from volunteers and address any concerns	
3	Empower volunteers and delegate responsibilities	
4	Consult, share and liaise with others	
5	Maintain records and process expenses	
6	Discuss and address training and development needs	
7	Identify and take action to resolve problems	
8	Address situations where behaviour is not appropriate	

Motivate, recognise and retain

1 = Don't do 2 = Not well 3 = Satisfactory 4 = Good

	Competency statements (abbreviated)	How well do you do this?
1	Recognise individual and changing motivations	
2	Give appropriate recognition	
3	Apply recognition and reward equitably and effectively	
4	Encourage and support volunteers to continue	

Lead, communicate and involve

1 = Don't do 2 = Not well 3 = Satisfactory 4 = Good

	Competency statements (abbreviated)	How well do you do this?
1	Promote commitment to the Red Cross, act as a role model	
2	Encourage volunteers to adapt and support change	
3	Use appropriate communication tools	
4	Provide volunteers with regular feedback	
5	Seek volunteers' views and opinions	
6	Promote opportunities for volunteers to be involved	

By carrying out this self-assessment process you will have highlighted areas of strength and areas where your skills need further development.

Now have a look back through your scores. Those that you scored '1' against will be the key areas requiring further development. Those you have scored '2' against will be your next priorities. Those you have scored '3' against will become priorities once you have tackled those you scored a '1' and '2' against. If you have scored yourself '4' no further action is required.

You will need to look at those competency statements you scored '1', '2' or '3' against and, where there are more than three areas requiring further skills development, decide which of these should be your priorities.

List below your three top development priorities for the core competencies:

1	
2	
3	

Role-specific competencies – relevant as role dictates

Have a look at the descriptions below and identify whether, in your role, you are responsible for this area of volunteer management:

	Are you responsible for this in your role?
Plan – planning for volunteering, including agreeing roles, ensuring the resources are in place and conducting relevant risk assessments	Yes/No
Promote and attract – including promoting volunteering opportunities using a variety of techniques and methods, embracing the diversity of the community, informing volunteers about the range of opportunities available and responding promptly to potential volunteers	Yes/ No
Recruit and select – including carrying out recruitment fairly, using a role description, being clear about expectations and ensuring APEL is applied, and ensuring references are taken up and business processes followed	Yes/No
Induct, prepare and orientate – ensuring volunteers feel welcome, have a planned induction into the Red Cross and their role, have their training and development needs met and have the resources to carry out their role	Yes/No
Evaluate and adjust – including keeping pace with the changing motivations and needs of volunteers, enabling volunteers to change or cease their volunteering activity, ensuring volunteers who are no longer able to effectively continue their role are supported to change/ leave, and learning from/ reviewing the volunteering relationship	Yes/ No

If you are not responsible for particular areas of volunteer management, please skip these sections. If you are responsible for them as part of your role, please assess your skills and knowledge against the specific competency statements.

Plan

1 = Don't do 2 = Not well 3 = Satisfactory 4 = Good

	Competency statements (abbreviated)	How well do you do this?
1	Identify appropriate roles and activities for volunteer placements	
2	Ensure awareness of the differences between staff and volunteers	
3	Agree role description	
4	Complete appropriate risk assessments	
5	Consult with and involve others	
6	Identify appropriate support and supervision	
7	Identify necessary resources. Agree plan and timetable	

Promote and attract

1 = Don't do 2 = Not well 3 = Satisfactory 4 = Good

	Competency statements (abbreviated)	How well do you do this?
1	Use varied methods to promote opportunities	
2	Promote opportunities that are inclusive and accessible	
3	Respond promptly to potential volunteers	
4	Assist volunteers to explore opportunities	

Recruit and select

1 = Don't do 2 = Not well 3 = Satisfactory 4 = Good

	Competency statements (abbreviated)	How well do you do this?
1	Ensure recruitment process is fair, open and timely	
2	Ensure clarity about role and agree to work within FPs	
3	Enable volunteers to complete paperwork	
4	Use APEL policy	
5	Ensure unplaced volunteers understand reasons and refer on	
6	Obtain references and complete checks	

Induct, prepare and orientate

1 = Don't do 2 = Not well 3 = Satisfactory 4 = Good

	Competency statements (abbreviated)	How well do you do this?
1	Welcome new volunteers	
2	Meet induction requirements	
3	Identify skills/knowledge gaps and meet training needs	
4	Ensure clarity about expectations	
5	Provide necessary equipment, workwear and resources	

Evaluate and adjust

1 = Don't do 2 = Not well 3 = Satisfactory 4 = Good

	Competency statements (abbreviated)	How well do you do this?
1	Enable volunteers to change or cease their activity and signpost	
2	Take action where volunteers cannot continue their role	
3	Explore reasons for changes in volunteering activity	
4	Review and learn from the volunteering relationship	

You will now have highlighted areas within the optional competencies that are both relevant to your role and where your skills need further development.

As before, have a look back through your scores. You will need to look at those competency statements you scored '1', '2' or '3' against and, where there are more than three areas requiring further skills development, decide which of these should be your priorities.

List below your three top development priorities for the optional competencies:

1	
2	
3	

Your development needs are more important to you than anyone else and therefore you need to take responsibility for meeting them. Arrange a time to talk to your line manager about how to do this. A good time to do this may be at your next one-to-one.

Remember to think about the range of different opportunities available – there are books, policies and websites you can read, you could shadow another manager, or you may want to attend a workshop or have a one-to-one discussion with your volunteering adviser.

Appendix IV

Management behaviours

The British Red Cross management behaviours specified in the management development framework are applicable to all leaders and managers of volunteers. The British Red Cross expects all managers, whether of volunteers or staff, to behave in the way defined in the management behaviours.

The British Red Cross expects and requires its managers to:

Uphold the Fundamental Principles and act with integrity and in accordance with our values and obligations, by:

1. Promoting the British Red Cross and the Movement's Fundamental Principles, internally and externally
2. Never compromising the Fundamental Principles; taking an active stance in upholding the Fundamental Principles and supporting others to do the same
3. Actively avoiding behaviours and statements which may damage perceptions of the British Red Cross and the organisation's reputation, e.g. statements which undermine our neutrality
4. Taking appropriate action when others violate the Fundamental Principles, including the use of disciplinary procedures when appropriate
5. Demonstrating an awareness of the British Red Cross' obligations in relation to the Movement, international humanitarian law, and national law, e.g. in relation to the use of the Red Cross emblem, and helping to ensure these obligations are upheld
6. Acting with integrity at all times

Recognise the implications of working within a charity and a voluntary organisation, by:

1. Acknowledging that working for a 'cause-led' organisation in the voluntary sector requires a commitment to the organisation's volunteers, donors and other stakeholders and to the principle of governance by Trustees who are themselves volunteers, and working to ensure that stakeholders' legitimate expectations are met

2. Recognising and helping to ensure that all volunteers, staff and managers recognise that they have an obligation to work towards achieving the British Red Cross' vision, mission and objectives and must ensure that all their actions promote its effectiveness
3. Ensuring that the high level of commitment of individual volunteers and members of staff to the organisation and the cause is welcomed and acknowledged, whilst also ensuring that committed individuals are not exploited in ways which may be damaging to them and/or affect their contribution to the organisation's work
4. Communicating the British Red Cross' message to internal and external audiences
5. Recognising the implications of the organisation's charitable status, accepting the legal and financial constraints this imposes, and avoiding extravagant or wasteful use of financial and other resources

Ensure equal opportunities and anti-discriminatory practice, and promote diversity, by:

1. Upholding the equal opportunities policy and acting as a role model to others, demonstrating a high level of commitment to anti-discriminatory behaviour and practice
2. Demonstrating respect for the rights and the dignity of all individuals, and treating people fairly and with understanding and sensitivity
3. Actively demonstrating an appreciation of the benefits of diversity, and working to ensure that British Red Cross becomes a genuinely inclusive organisation
4. Making reasonable adjustments to accommodate individual requirements, e.g. for people with disabilities
5. Recognising the discriminatory effects of stereotyping and prejudice, taking care to avoid stereotyping others, and demonstrating a willingness to examine one's own prejudices and to take action to address them
6. Actively avoiding inappropriate and unacceptable language and behaviours, e.g. language which is insulting or demeaning to others, racist 'jokes', etc
7. Challenging inappropriate and unacceptable language and behaviours and supporting and encouraging others to do the same

8. Responding positively and constructively when challenged by others, and actively seeking feedback which may help alter inappropriate or unacceptable language and behaviour
9. Actively encouraging and supporting individuals who wish to raise issues relating to discriminatory practice, and demonstrating a willingness to take appropriate action through the relevant procedures

Recognise and value the contribution of others, by:

1. Showing appreciation for all work done, including simple and routine work
2. Ensuring that the individual and/or team responsible receives credit for their contributions, achievements and ideas
3. Showing particular appreciation of work of a very high standard, innovative work, exceptional effort, and work requiring extra time and/or overcoming difficulties, etc
4. Rewarding such work in the most appropriate ways, whether private praise, public acknowledgement, performance-related pay, or just saying thank you
5. Promoting and encouraging participation in the formal and informal consultation forums adopted by the British Red Cross

Take responsibility for your own decisions and actions, and for your team, by:

1. Making decisions, including hard decisions, within your authority level, and accepting accountability for them
2. Taking personal responsibility for your own work and that of your team, including when something goes wrong or doesn't work out, and apologising when appropriate
3. Recognising that taking reasonable risks is an essential part of learning and development
4. Working to ensure that individuals are not 'set up to fail', e.g. through:
 - > Ensuring individuals and teams have the resources to do the job
 - > ensuring individuals have the skills or access to the training/development required to do the job
 - > ensuring they have access to the people they need to involve

- > ensuring that individuals receive personal as well as professional support when required, through supervision, stress management interventions, opportunities to socialise informally as well as meeting professionally, and appropriate implementation of such 'family friendly' policies or procedures as carer's and compassionate leave.

Demonstrate flexibility and open-mindedness, by:

1. Actively seeking and demonstrating a willingness to listen to all ideas, whoever they come from, while also listening to and supporting those who feel threatened by them
2. Encouraging and supporting others to develop new approaches that improve ways of working, achieve better outcomes, and/or improve working relationships within a team or with others, e.g. partners or clients, and demonstrating a willingness to implement good ideas
3. Welcoming and/or initiating change which will help to ensure that the British Red Cross becomes and remains more relevant to local and global crisis needs and expectations, and actively promoting flexibility and adaptability to others
4. Being willing to adopt flexible working arrangements to accommodate the needs or preferences of individuals, and working to accommodate individuals with a disability or special needs, in accordance with the requirements of relevant British Red Cross policies and procedures

Support and share, by:

1. Being responsive, approachable and supportive of colleagues
2. Contributing actively to teamwork, developing and encouraging good working relationships
3. Providing honest, constructive and timely feedback to others
4. Seeking feedback from others on all aspects of behaviour and work practices
5. Sharing information as widely and openly as possible, and inviting others to contribute towards and share in decision-making

Appendix V

Volunteer, Staff and Delegate Charter (2003)

Why the Red Cross and Red Crescent Movement exists

The British Red Cross is part of the world's largest humanitarian movement. Like other voluntary organisations, it is an integral part of health and social care provision in the UK and overseas, supporting people and communities coping with crisis. From this the organisation gains its charitable status.

But the Movement is, in many respects, unique. It operates and cooperates worldwide, mobilising “the power of humanity” through a network of national Red Cross and Red Crescent Societies, to help the world's most vulnerable people.

Our work and our values are underpinned, uniquely, by seven Fundamental Principles, which guide our individual and collective actions:

- > humanity
- > impartiality
- > neutrality
- > independence
- > voluntary service
- > unity
- > universality.

Our work is not limited to service provision. We have a special role to play in promoting humanitarianism, in developing understanding of and respect for the Geneva Conventions and other aspects of international humanitarian law, and in promoting cooperation and peace-building initiatives. The Movement has a worldwide reputation for the provision of high-quality service – a reputation which has been earned through the strengths and diversity of its people.

Who we need to help us

To maintain its reputation and continue to build its capacity to deliver service, the British Red Cross needs people from all walks of life, all communities, who can bring their different skills and experiences to its essential work. As volunteers,

as professional staff, as international delegates (the term used for overseas staff) and as supporters, the organisation needs a wide range of people who can commit themselves to its humanitarian cause.

Why we need volunteers, staff and delegates

We can only achieve our goals – in delivering services, in raising funds, in managing our resources – through skilled and committed volunteers, staff and delegates.

Volunteers

We have a long history of volunteering which we are committed to maintaining, because:

- > service participants place special value on the care which skilled and trained volunteers can give – care given willingly, in their own time, without expectation of material reward
- > volunteers enable us to draw on a very wide pool of skills, derived from professional and personal experience, which enriches the services we offer
- > volunteers provide an invaluable insight into the needs of the communities in which they live, thus better informing our work.

Professional staff

Our volunteers work together with paid professional staff, whose contributions are also needed, because:

- > as a major charity accountable to all our donors, we must meet the expectation that our resources are carefully managed and our legal responsibilities met, through a core of qualified professionals
- > in order to ensure our work is designed and organised as effectively as possible, we need the continuity and expertise that skilled, committed staff can provide
- > our volunteers and delegates have the right to expect the support and development that trained staff can provide.

Delegates

We second high-quality delegates to the International Federation of Red Cross and Red Crescent Societies and to the International Committee of the Red Cross (ICRC), to work in overseas disaster relief and development, because:

- > the provision of goods and funds alone is not enough – the Federation and ICRC need the specialist skills and commitment of our delegates to meet the needs of vulnerable people around the world, at times of natural or man-made disaster, and in times of conflict
- > sister National Societies work with and through our delegates to develop local capacity to deal with crises
- > specially trained delegates are needed to carry out the core work of the ICRC, offering protection to detainees and displaced people, and spreading knowledge of the principles of international humanitarian law.

Pulling together

The contribution of all our volunteers, staff and delegates is highly valued. Working in partnership, they constitute the main strength of the organisation. In different operational contexts, the balance of volunteers, staff and delegates implementing our work will change, according to what best meets the needs of service recipients. This flexibility helps us focus resources where they are most needed in the most appropriate way.

Teamwork: volunteers, staff and delegates meet crisis needs and promote humanitarian values.

What you can expect from us

All those who work with us, in whatever capacity, can expect to enter into a partnership, that has at its core a clear commitment to providing the highest-quality service to vulnerable people. We therefore have high expectations of our volunteers, staff and delegates, who in turn have high expectations of the British Red Cross. So, what does this partnership mean in practice? It means everyone can expect to:

- > be valued and respected by all those in the organisation
- > have their individual contribution and efforts appropriately recognised and rewarded
- > feel part of a team that makes a difference to people's lives
- > be provided with opportunities to expand their skills and experience
- > receive support when needed

- > have the opportunity to contribute to the future direction of the organisation
- > have access to channels and networks that allow their voice to be heard
- > receive appropriate resources to carry out their roles.

While there may be distinctive differences between volunteers, staff and delegates that must be respected, and which will be reflected in the different arrangements the Society enters into with each group, the concept of British Red Cross working in partnership binds the distinctive groups together, and the British Red Cross commits to meeting the expectations described above.

What we expect from you

Our service recipients, donors and supporters have the right to expect the highest standards from the British Red Cross. Therefore we expect our volunteers, staff and delegates to:

- > demonstrate commitment to the seven Fundamental Principles in their everyday behaviour
- > work within our equal opportunities policy
- > recognise the needs of our service recipients as our primary concern
- > work to the highest standard, giving the best of their skills and abilities
- > work in a positive and inclusive way with everyone they come into contact with
- > be accountable for their actions, within a supportive environment
- > take part in appropriate and relevant training and development activities.

Everyone who contributes to the work of the British Red Cross gives of himself or herself to a humanitarian cause. This deserves and receives respect.

Appendix VI

British Red Cross policies and procedures

There are a number of internal policies and procedures that managers and leaders of volunteers need to take into consideration. You can find these documents on RedRoom.

Although this list is not exhaustive, policies you might want to review and consider when planning for volunteering include:

Policy name
'The Volunteer, staff and delegate charter' – This sets out the organisation's commitment to its volunteers, staff and delegates and states what is expected from them in return
'Health and safety policy' – This outlines the responsibilities of managers and of volunteers in relation to health and safety
'Risk assessment guidance' – This provides guidance on how to assess risks and put into place safe working practices in order to minimise risks experienced by volunteers
'Volunteers age policy' – This details the age limits for different volunteer roles
'Volunteer recruitment and selection, managing the business process' – This document will take you through the process of recruiting and selecting volunteers step by step
'APEL (Accreditation of Prior Experience and Learning)' – This policy states that we should give volunteers and staff credit for what they can prove they have learnt/are skilled in
'Criminal records bureau checks' – This guidance outlines the roles requiring CRB checks and gives details on the procedure to be followed
'Reimbursement of expenses incurred on duty for the society by all staff and volunteers' – This details the policy and procedures for claiming and calculating expenses
'Equal opportunities policy' – This details the policy, includes details of relevant legislation and gives guidance on the recruitment, training and development and management of volunteers. It also gives examples of different types of discrimination, victimisation and harassment and outlines the responsibilities of volunteers and managers
'Disciplinary procedures for volunteers' – This details the disciplinary policy for volunteers. Managers need to be aware of the policies in place to protect both volunteers and the organisation
'Grievance procedures for volunteers' – This details the process volunteers need to follow should they want to raise a grievance
'Harassment policy' – This applies to both volunteers and staff and outlines the procedures to be followed where harassment is reported
'Procedures for booking travel' – Managers may need to be aware of the procedures as these apply to both volunteers and staff
'Public interest disclosure (whistleblowing) policy' – Managers should make volunteers aware of the existence of this policy if they have cause to raise any concerns
'Ex-offenders policy – volunteers' – Managers need to be aware of this policy, which outlines a fair and non-discriminatory procedure for recruiting ex-offenders

Appendix VII

UK legislation

National Minimum Wage Act

Any payment made to a volunteer must be a reimbursement of expenses and not a wage. Expenses should be paid only on the production of a receipt and, for auditing purposes, should be signed for by the volunteer. **The National Minimum Wage Act will apply to volunteers who receive payment above genuine reimbursement.** This includes lump sum expenses, sessional fees and one-off payments.

If volunteers are being paid out-of-pocket expenses only, do not receive any perks and do not have a contractual obligation toward the Red Cross, the National Minimum Wage Act does not apply to them. Problems can arise if a contract exists between the organisation and the volunteer. There does not have to be a written document or even a verbal agreement for the relationship to be seen as contractual.

If the Red Cross paid a flat rate for expenses this would also create a contract because the volunteer could be seen as working for a sum over their actual expenses, no matter how small. By creating a contract, volunteers could be seen as employees, entitling them to full employment rights including the National Minimum Wage Act. **Therefore, volunteers must only be paid out-of-pocket expenses.**

It is important that you take receipts and keep records so that you can prove, if necessary, that any money you have paid out is an actual reimbursement. It may seem like unnecessary paperwork to collect receipts and pay exact amounts, but this helps protect both the Red Cross and its volunteers.

Training can also be counted as a 'consideration' if you are providing training to a volunteer that is not relevant to their role. However, training necessary for the volunteer role is OK. It is important to make sure that any training is open to all volunteers and that being eligible for

training is not reliant on them having volunteered for a set period of time.

Data Protection Act 1998

Recruiters should be clear about the importance of confidentiality and how a potential volunteer's information will be stored and who it will be shared with. Particular care should be taken with people's contact details, references and criminal record checks. For example, British Red Cross confidential declarations, with details of any criminal records, should be put in a sealed envelope and kept with the volunteer enquiry form. On joining this should then go into the volunteer's personal file. If you aren't sure what to do, speak to your manager or volunteering adviser.

Disability Discrimination Act

The Red Cross has a responsibility to make volunteering and access to its buildings, services and employment as easy as possible for those with disabilities. This might include adapting roles so that they are suited to someone with a disability or doing interviews in buildings that are accessible. Regardless of the Act, this is something the Red Cross has taken on board as part of a commitment to having a diverse volunteer base. Remember that one in four people has a disability, so by ignoring them you are ignoring 25 per cent of potential volunteers.

It can be easy to set up a contract without knowing

The case of *Murray v Newham Citizen's Advice Bureau (CAB)* covered the issue of whether a prospective volunteer was an employee. Mr Murray suffered from paranoid schizophrenia. The CAB declined to appoint him as a volunteer after he had signed up for its training scheme, and subsequently he brought a claim for disability discrimination. The case went to appeal, at which it was held that Mr Murray did have a contract with the CAB. The documents he was provided with gave rise to a contract: commitment to working on two particular days a week, working at specific times and a commitment to complete the basic training within a specific period. This enabled Mr Murray to uphold a claim under the Disability Discrimination Act.

Age policy

The Red Cross has an age policy that sets out details of the **lower** age limits for various volunteering roles and tasks. There is **no upper age** limit although the policy requires managers to undertake a risk assessment to determine an individual volunteer's ability to carry out (or continue to carry out) specific tasks.

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