Volunteers good practice guidance

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A huge proportion of the projects we fund involve volunteers – we want to ensure they have a positive experience when working with your heritage project.

By reading this guidance, you'll learn about the types of activities volunteers can do and how to plan and develop volunteering opportunities. It also includes information on motivating people to get involved and recruitment, volunteer management, support, training and costing and sources of further information.

About volunteering

Volunteering is when someone spends time, unpaid, doing something to benefit society, the environment or someone they're not closely related to. Volunteering must be a choice freely made by each individual.

Social action is another term used to describe voluntary activity. It's defined as people coming together to help improve their lives and solve problems in their communities. It is not-for-profit, not mandated and designed to bring about social change. It includes activities such as fundraising, community asset ownership and running groups or organisations with a social mission.

Employment law sets out a clear difference between volunteers and paid workers or employees (including apprentices). NCVO has guidance about working with volunteers and the UK Government provides information about employment status, volunteering (including rights and expenses) and employment rights for interns.

Considerations

There can be a wide range of reasons to use volunteers, including that they give their time freely and are excellent value for money. But they are not cost-free and shouldn't be involved in projects just to save money. Balance the level of voluntary activity against the cost of managing it. It **might be more effective to employ a new salaried member of staff** than to recruit, train and manage a number of volunteers.

Consider if the tasks you have in mind are appropriate for volunteer roles and look at the other options. We encourage you to **build paid training placements or other opportunities into your project** if this is likely to bring new people into the sector who can't afford to volunteer.

Factors that might lead you to create a paid role include:

- expected, regular working days
- commitment to contribute over a long, fixed period
- a high number of hours per week (eg: above 0.4 FTE)
- a promise to provide a contract or further paid work
- duties that were previously carried out by paid staff

Bear in mind:

- **We do not support unpaid internships**. If your project includes unpaid work experience opportunities, they should last no more than two weeks and include expenses.
- you should always **ensure your volunteers aren't out of pocket**
- If you're involving people with lived experience, eg: through experience of a disability or another protected characteristic, **these people should be paid for their expertise**. Your volunteering principles may differ if you are an organisation led by people with lived experience.

What kind of activities can volunteers do?

Volunteers play important roles in many of the projects we fund and have contributed to all sorts of activities. Volunteers can:

- be involved in running or managing a project, for example, making decisions as a trustee, member of a friends' group or project management team, or forming a trust and applying to us to rescue and give a sustainable purpose to a heritage asset
- bring specific expertise or connections, such as professionals offering fundraising, learning or IT skills, or people joining a youth or community panel to help engage new visitors
- deliver any part of your project, such as outreach or family activities, guided tours, recording species or oral histories, researching and sharing local history, conserving historic sites and habitats or cataloguing or displaying collections
- Take part in activities at a heritage site or volunteer remotely supported by technology. Your project could create opportunities for individuals or groups, including families, businesses or community networks.

Planning your volunteer activity

If you involve volunteers in your project, you will need a **volunteering policy**. This should have clear and inclusive aims to promote volunteering. It should be endorsed by the head of your organisation and your governors or trustees. Make sure your staff know about the policy and that it's regularly reviewed and updated.

You should **carry out a needs-assessment of your project**. Why do you need volunteers? What kind of roles or tasks will they carry out? Who does and doesn't volunteer with you at the moment? Which groups of people will you recruit as part of this project? How will this increase the diversity of volunteers in your organisation?

Detailed planning will improve the quality of your project and volunteering opportunities. We will ask you to **be clear about the volunteer roles and related budgets** in your project plan for grants between £10,000 and £250,000 or activity plan for grants between £250,000 and £10million. This should include: the kinds of people you will recruit, the training they will receive, the tasks they will complete and the outcomes you are aiming to achieve.

Make sure you **consider data collection and evaluation from the start**. We will expect you to collect data on the number of volunteers involved in your project, who they are, and the number of hours they contribute to your project. We will expect the views of any volunteers about their experience to be included in your project evaluation reports.

Once you have identified what volunteers might do as part of your project, and which people you would like to involve, there are five key areas to address:

- developing the right opportunities to suit potential volunteers

- recruitment that involves new people
- management and support for volunteers
- training volunteers to increase skills and knowledge
- costing your volunteer activity to produce a realistic budget

Developing opportunities

Once you've created a plan for who you could involve and what they could do, you will need to develop accessible and inviting opportunities for these volunteers.

Talk to the groups and organisations you want to work with as well as current volunteers. Find out why people might want to volunteer, what kind of opportunities would suit them and what might stop them from getting involved.

Motivating people to get involved

Think about what motivates people to volunteer and tailor your opportunities accordingly. People may want to, for example, build transferable skills and experience to add to their CV, try new things and meet new people, share their skills, keep active for wellbeing, confidence and health or put something back into an organisation that has inspired them.

Volunteers vary widely in the commitment they can give. Some volunteers are happy to join an organisation indefinitely and keep their contribution flexible, while others would prefer to volunteer on specific projects with a beginning and end. Some volunteers want to work outdoors and like physical labour, others might prefer to complete tasks from home.

Bite-size or micro-volunteering may encourage those who are less able to commit, including students, parents and professionals. Flexible roles could resolve issues around location and timing. This could include digital or other tasks, which can be done online, via drop-in sessions or through partnerships with organisations in other locations.

Occasional family volunteering opportunities might be interesting to some people. More intensive opportunities might be attractive to those who are keen to build skills and experience. People wanting to develop new social networks might prefer regular on-site activity working alongside others.

Removing barriers to volunteering

People might be prevented or deterred from volunteering for a variety of reasons, including:

- physical, cultural or financial barriers
- not understanding the value and purpose of volunteering
- not feeling welcome
- lack of time or transport
- lack of confidence
- not being aware of volunteering opportunities

Think about financial barriers to volunteering and create opportunities that don't involve costs for volunteers or where expenses can be reimbursed. Issues around confidence can be addressed through training as well as 'buddying' schemes between more and less experienced volunteers or mentoring from members of staff. Where people are

reluctant to volunteer in heritage for cultural reasons, you could follow the lead of some organisations that have engaged community champions to help break down barriers.

If you are a service provider, we expect you to meet your obligations under the Equality Act 2010 as part of your everyday business. We can consider the costs of reasonable adjustments for disabled people to volunteer (such as providing auxiliary aids and services) as part of a wider project.

Recruitment

You might be able to encourage different people to volunteer by dealing with recruitment in a different way.

Advertise volunteer vacancies with clear role descriptions that outline duties, structured development opportunities and the support that will be provided to volunteers. Include information that might motivate people or address potential concerns. For example, you could highlight training opportunities and explain that expenses will be paid.

You should create inclusive publicity materials that appeal to the people you would like to recruit, for example young people. Make sure materials are in the right format, language and places (including digital channels) to reach your target audience.

Think about how you could encourage a more diverse range of volunteers, such as:

- developing new partnerships with community organisations
- attending a local event with a stall providing the opportunity to ask questions and sign up
- offering taster sessions that give people a chance to have a go before making a commitment

There are a variety of online spaces to promote volunteering opportunities. These include:

- the Do-IT website
- the Reach website for volunteers with specific skills
- local volunteer websites, for example in England and Wales
- organisations specifically helping young people find opportunities to volunteer such as vInspired , Project Scotland and the National Citizen Service

Consider alternatives to formal applications and interviews. Lengthy application forms can be a barrier to potential volunteers so keep any forms simple. You could run friendly, participatory selection events, including the chance to meet staff and other volunteers and take part in group activities. An informal chat could also give applicants the chance to tell you about why they want to volunteer, what they want to do and the time they can give.

Management and support

Organisations need structures and systems to manage and support volunteers. There should be someone in your organisation with responsibility for volunteers. This could be a dedicated volunteer manager or it might be part of someone's wider duties. They could be an employee or a volunteer, but they need to have the right experience and support to fulfil this role. Responsibilities should be included in their role or job description. If you are recruiting a new salaried volunteer manager as part of your project application, you will need to provide a job description.

There are a range of issues you should consider:

Insurance cover

Volunteers of all ages must be covered either under employer's liability insurance or public liability insurance. Depending on the type of work involved your organisation may need professional indemnity insurance as well. Policies should explicitly mention volunteers because they may not automatically be covered.

Organisational policies

You should reference volunteers in all relevant organisational policies and documents, including but not limited to health and safety policy (for example, lone working procedures, driving at work, etc), safeguarding policy, data protection regulation policy, organisational risk assessments that are kept up to date and service level agreements regarding customer service.

Safeguarding

Disclosure and Barring Service (DBS) checks are free for volunteers but are usually only appropriate and available for those who have regular, sole charge of children or vulnerable adults. The DBS check process can take some time so plan ahead. Projects taking direct supervision of young or vulnerable volunteers have responsibility for safeguarding, appointing a designated person with safeguarding responsibility and ensuring that volunteers know who to talk to if they have any concerns.

Induction

You should provide a proper induction for volunteers, preferably with input from senior staff. A volunteer handbook can provide useful information for staff and volunteers on your organisation's policies and procedures, including for example health and safety. Volunteers will need information about expenses, including what items can be claimed, any limits or set amounts (such as mileage) and how claims should be made. You might need to be aware of benefit rules on volunteering and structure expense payments so entitlements are not compromised.

Structured roles and goals

You might want to enter into volunteering agreements with volunteers. These set out roles and responsibilities on both sides. It can be helpful to set measurable goals with volunteers and regularly review volunteer tasks and performance. There should be structured opportunities to develop individual volunteers' knowledge, skills and/or professional experience.

Volunteer feedback

Provide ways for volunteers to share their thoughts, ideas and experiences, not only with their supervisor but with other colleagues and the wider organisation. Some organisations have a volunteer forum so that volunteers can feed their perspectives into wider structures. It's a good idea to carry out exit interviews/evaluation with volunteers to help improve your work with volunteers in the future.

Reward and recognition

Don’t forget to reward volunteers and recognise the contribution they have made. This could include special events, visits, references, etc. Some organisations use ‘time banking’ schemes to enable volunteers to gain rewards, which could include visits to heritage sites and local discounts. The Young Scot card is one example.

Consider working towards the nationally recognised Investing in Volunteers standard so that your volunteers, as well as external stakeholders, will have confidence in your organisation’s ability to provide good management.

Training volunteers and volunteer managers

The training you offer volunteers will depend on the kinds of tasks they will be doing, the number of volunteers you need to train and the resources you have available. There are three main ways of delivering training and you should build in the appropriate costs into your budget:

On-the-job-training

Where a member of staff or another volunteer shows new volunteers how to do the task and supervises them as they do it. This is low cost and most appropriate when you have small numbers of volunteers or you are training one-to-one.

In-house training programmes

Where in-depth knowledge about issues or tasks is necessary. For example, volunteers working with vulnerable people might need detailed training on setting boundaries and protection. You will need resource to develop a course as well as people who are confident communicators and are up to date on the law and best practice. It is most appropriate when taking on new volunteers in groups and it is helpful to draw on specific examples relevant to your project.

External training

Where volunteers attend an open public course or you use a trainer to run a course for your organisation. While sometimes expensive, this can help volunteers learn specialist skills. You will need to source appropriate courses. Your local volunteer centre or further education college might be able to help, as might heritage organisations, such as your local Wildlife Trust or local authority voluntary sector support network. You might be able to share the costs of providing training with other organisations in your area or source suitable online learning packages or webinars.

Some volunteers might be interested in gaining formal recognition for their training in specific skills through accredited learning or completing vocational qualifications. You will need to work with a recognised training provider to deliver full qualifications or individual units. This can increase the likelihood of gaining paid work from voluntary experience.

The contribution of volunteers can also be given recognition through programmes such as the John Muir Award and the Volunteering Skills Award in Scotland.

There are also specific schemes available that encourage young people to volunteer such as the Youth Achievement Award in Wales, and the Saltire Award in Scotland.

We can help fund any **training that your volunteer coordinator needs**. Accredited awards for volunteer management training are available through a number of organisations.

Costing your volunteer activity

Volunteers are not cost free. Make sure they have a good experience as part of your project by developing a realistic budget, including:

- **Recruitment**: you will need appropriate publicity materials, adverts and/or events that are designed to reach and encourage the people you want to target.
- **Training**: volunteers will need a full induction to your organisation as well as any training linked to individual tasks.
- **The opportunity to claim expenses**: such as reasonable travel costs to and from the place of volunteering and any travelling required as part of the task they are involved with. Some organisations reimburse volunteers for basic meal costs. Some volunteers may need to claim childcare and other expenses.
- **Space and equipment**: depending on the role, volunteers may need a desk and access to a telephone and computer. They may need specialist clothing, tools or equipment. Depending on the role, for health and safety reasons you may be responsible for providing volunteers with personal protective equipment such as goggles, gloves or footwear. Disabled volunteers may need adjustments to the workplace, such as computer software.
- **Management**: you will need to allocate staff time and resources appropriately. This may include training staff to manage volunteers, carry out volunteer reviews, keep learning logs and hold exit interviews.
- **Recognising volunteers**: you may wish to recognise your volunteers' contribution and create opportunities for them to feel more connected to your organisation.
- **Evaluating volunteers' experience**: you may need to budget for an independent evaluator to document your volunteers' experience and any related impacts.
- You might also need to consider any costs related to **insurance**, **safeguarding** and **developing policies and procedures** if these are not already in place.

Developing a realistic budget is very important. The experience of volunteering can go badly wrong if organisations lack the resources to support and train volunteers properly.

Volunteer time as in-kind support: for grant applications above £250,000, you can use the hours that volunteers give to count against your match funding. You will need to keep a log of the activity that your volunteers do as your project progresses. More details can be found in our National Lottery Heritage Grants application guidance.

More information and resources

There are four volunteer development organisations in the UK working strategically across the voluntary, public and private sectors. They can help you develop volunteering policies, find training courses and link you with volunteers and volunteer centres in your area.

- National Council for Voluntary Organisations
- Volunteer Scotland
- Wales Council for Voluntary Action
- Northern Ireland's Volunteer Now

The UK government and devolved administrations also provide guidance and policies:

- UK Government

- Scottish Government
- Welsh Government

There are many other useful sources of information and guidance online, including:

- The Heritage Volunteering Group
- Institute for Volunteering Research
- Volunteer centre finder (England)