



Guide for engaging and managing volunteers 2020

Background

1. Southwark has a great history of people volunteering their time for the benefit of the Southwark communities; from the early days of the Settlements and the Boys Clubs youth provision, to more recent volunteering during the London Olympics in 2012, and the mushrooming of mutual support as communities responded to local need during the COVID19 pandemic and lockdown. Southwark residents have always been supportive of volunteering.
2. There are many reasons why people want to volunteer, from using their skills to learning new ones. Some people want to have more activity and social engagement in their lives and volunteer to bring a new experience into their life. People volunteer from all age groups some informally and others in a more formal and structured way.
3. While many people volunteer for charities and in community groups Southwark also has about 500 people who volunteer each year in a range of roles at the council. It is important that both the volunteer and the organisation using volunteers needs are fulfilled during the volunteering period
4. Southwark Council is made up of many different teams and departments all doing fabulous work in keeping services going for the residents of Southwark. Volunteers are involved in providing services for the council, and their role is an important part of providing high quality experience for residents.
5. Many people come to volunteer to expand their skills and gain experience and we should help them to achieve their aims. We also require the benefit of their volunteering to help us achieve our goals. The process should be mutually beneficial and the systems set out below should support us to achieve this.
6. It is important to note the key role volunteering has in supporting people build their confidence and grow their wellbeing and Southwark can play a key role in this for residents through the way in which we construct and develop our volunteering opportunities.

Content

7. This guidance note will cover the following areas:
 - Our commitments to volunteers
 - Developing a volunteer role
 - Recruiting volunteers
 - Supporting volunteers

Our commitment to volunteers

8. It is important that every volunteer has a similar positive experience of volunteering and supporting the delivery of services in Southwark no matter

which department, the length of their role, or frequency of their engagement. While there are a huge variety of roles on offer across the council there are some key commitments that will apply to all roles. These are as follows:

- Our recruitment will be open, transparent and fair so that all residents have equal access to the opportunities available
 - All volunteers will be provided with a volunteer agreement which will set out the purpose of the role, describe the tasks and hours and days of the role and any learning and development goals for the volunteer
 - The volunteer will have a named supervisor and be supported to deliver their role and provided with an induction to the organisation and a volunteers handbook
 - The volunteer will be reimbursed for travel and provided with expenses for lunch where they are required to volunteer for more than 4 hours a day.
9. The way in which we develop the volunteer role, recruit our volunteers, and support our volunteers in their role will all contribute to our successful delivery of these commitments. We have compiled this booklet for all those who want to engage volunteers. Please ensure that you follow the advice and guidelines during the process of setting up a volunteer role, engaging volunteers and during the period that they are carrying out a volunteering role, noting that you must deliver the four commitments set out in paragraph 7 above.

Developing the volunteer role

10. The first step is creating a role for volunteers or identifying a gap in what you do, that could be ideally supported through the use of volunteers remembering that volunteers must never be used for a paid officer role. The questions you will need to answer to decide on whether creating a volunteer role is the right move for your team are:

- Does the role fit the criteria for volunteering?
Some examples of the roles volunteers have done are people to support events such as Fireworks night or Bermondsey Carnival, young people test purchasing cigarettes and other restricted purchases, people supporting the summer reading programme in our libraries, a photographer for engagement activities, community champions
- **Criteria for volunteering** is work that is a short term project or initiative to carry out a specific task or time limited exercise, a new idea being tested, some additional research for a team, or additional service that staff are unable to deliver, or bringing an additional skill to the service. Volunteers can also act as independent advocates or support individual members of the community. This is not an exhaustive list of the roles a volunteer can carry out but a volunteer must never be engaged to carry out the role of a paid member of staff
- Do you or your team have the **capacity to manage** a volunteer?

A volunteer will need to be recruited, and have a dedicated supervisor to oversee and manage their role. Is there someone in the team who can provide this support an additional member of the team will require?

- Is a Data Barring Service (**DBS**) check required?
Some types of work e.g. working with vulnerable (with mental and physical health problems or young people may require a DBS, if the role requires this you will need to liaise with HR to arrange
- Would this role be better suited to a council intern or apprentice or offered as work experience to a school leaver or work experience for a Southwark Scholar? If you want to talk about these opportunities there are a number of staff around the council who can help.
 - a) Lorna Fraser Apprenticeships and Pathways Manager
 - b) Caroline Kandaya Internships manager
 - c) Osmani Lulzim, Education and Business Alliance Manager
- Work experience is best suited for someone who is training in a field that they need practical experience in or a school aged person who is required to attend a work place to gain experience of a working environment and skills needed.

11. The next task is to devise the role for the volunteer. To do this you will need to

- Set out what you would like the volunteer to do, the vision and purpose of the role and team
- Identify what skills are required to carry out the role e.g. good knowledge of excel, photography, knitting.
- Identify the time commitment required and how this might be delivered across the working week. Is this a new piece of work or project that is time limited?
- This information can be used as the basis for the volunteer agreement.
- If volunteering remotely, do they have equipment in order for them to do so. Will they need to be trained to use certain online apps
- Remember that volunteering is not the same commitment as it is in a paid position and you will need to have some flexibility in the hours that they attend. It needs to fit in with their life, college, university, caring and child care.
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12. When devising the role thought should also be given to how the role might support the development of the volunteer, build their confidence, support their wellbeing and contribute to their growth and the training that may be needed to make this a reality.

13. When drafting the role description think about where the volunteer will be based, in an office or out in the community; what tools do they need to carry out their role; what support do they need from a staff member. The answers to these questions will help you decide what skills your volunteer will need and also help in designing the questions that you ask at interview.

14. There is a volunteer **role description template** (1) that you can use attached at the end of this document. The role description can also help you prepare your advertising and promotion of the role.
15. As part of this early preparation work you will also need to prepare a Risk Assessment. This will help you to identify any particular skills or conditions that you might need to add to the role description or to raise during the interview to ensure that the role is suitable for the volunteer candidate. There is a **risk assessment template** (2) that you can use attached at the end of this document.
16. Every volunteer will need a **named supervisor**. It would be useful if this person was identified at this early stage so they are able to be involved in the planning and preparation of the opportunity, and the recruitment of the volunteers. Think about whom in your team has the capacity and skills to be that person. This can also be a learning opportunity for a team member. Agree what is expected of a named supervisor and ensure that you have someone who is involved or has knowledge of the work the volunteer will be doing..
17. Southwark Council teams cover a broad spectrum of services and the voluntary roles vary from one team to another. Where the use of volunteers is for a one off activity such as trading standards mystery shoppers or events team's stewards/helpers, the preparation of this information should be proportionate but it is still important to set out clearly tasks you would like the volunteer to do, the skills they will need, and the time commitment required.

Recruiting Volunteers

18. Volunteering can have a huge impact on someone's life course, health and well being and open up a significant range of pathways for their future working and social life. For these reasons it is very important that access to council volunteering opportunities is open and we facilitate access, and don't unwittingly create pathways that compound disadvantage.
19. Where and how we advertise these opportunities is important to addressing concerns about who volunteers. We work in partnership with Communities Southwark who we commission to work with us on the Southwark Volunteering Strategy and also to find placement for volunteers, supporting some of our more vulnerable residents. All volunteering roles should be advertised with Communities Southwark. In addition:
 - Southwark Works also supports some of our most furthest from work residents and it is important to ensure that they are aware of any opportunities.
 - Do-it.org lists volunteering opportunities
 - Southwark website and the Source.
 - The internship, schools and business partnership and OD apprenticeship teams should also be notified.

20. Critical to encourage active participation in the opportunities on offer is the way in which teams are able to make clear the role, the tasks, the skills required and the time commitment needed to fulfil the role. Although some roles will allow for the volunteer to be trained into the role.
21. In addition to including the information about the role the advertisement should also include the following information:
- If the volunteer is required to have a DBS
 - Southwark is an Equal Opportunities and Diversity employer and this also applies to volunteers
 - Explain how this role will help the department or team achieve its goals
 - The skills and experience that the volunteer can gain in the role
 - The volunteers will be asked to provide ID at the point that they are offered the role, this could be their passport, ID card or visa. This will be copied prior to the start date.
 - Make clear the recoverable expenses e.g. travel to and from work, lunches, role specific expenses
 - References will be needed
22. Try to be flexible in your requirements and consider inclusion and equality in the writing of the role description, and use plain English.
23. All volunteer role **advertising should be checked** by the departments HR business contact before publication.
24. You will also need to decide how you intend to run the recruitment process. This will very much depend the nature of the opportunity
- Is it a fixed period or one off event or project such as supporting summer engagement activities?
 - Is it a repeated activity such as helping out the events team
 - Is it an ongoing task such as running an activity in a library
25. To reflect these different types of volunteer opportunities the team could have continuous recruitment open at all times with recruitment either straight into an activity or to a bank of helpers or it could recruit in similar ways to an employee with deadlines for advertising, response and engagement on the project. Your team will need to decide what best fits the activity and the team capacity and how you can manage the interest your volunteer opportunity might generate.
26. Anyone who contacts you in relation to a volunteer opportunity should receive a response even if we feel that they are unsuitable for the role. The response should be simple, thanking them for their interest, stating that unfortunately at this time not able to consider for the role and suggesting that they continue to look on Southwark website for opportunities. Where you are interested in someone who has put themselves forward they should be interviewed.
27. The application process should be less formal than for a paid role or placement. The form you ask people to complete or cover letter you ask people to send in

should be simple and straight forward but you will need to find out about the following:

- Does the person have the appropriate skills or knowledge to carry out the tasks you require
- Their basic contact information
- Referees you can contact
- Ask people to complete the **monitoring data form (3)** (one is attached to this document)
- Volunteers who require a DBS check to carry out their role will be asked to complete the appropriate forms, this may include a declaration about previous convictions along with information if they are spent or outstanding. All roles will be offered to those that fit the criteria and previous convictions will be considered by the person who will be taking you on. See Rehabilitation of Offenders advice and speak to HR for further guidance.
- There is a template **form** that you can use for **recruitment (5)**

28. Sometimes people will contact your service to request to volunteer. If you do not have a volunteer vacancy please refer the individual to one of the organisations or websites listed in paragraph 17.

29. Sometimes an individual will approach you with an idea about how they could volunteer in your service. If this should happen meet to discuss the idea and then consider if you can accommodate a volunteer in this way and draft an agreement, and check the skills and engage the volunteer as described below.

30. Interviewing volunteers is a much less formal process than interviewing for staff. It is recommended that it is carried out by 1 or 2 people. One of them ideally to be the named supervisor, that has been identified as the volunteers primary point of contact for the duration of the volunteer role.

- Try to arrange an informal and comfortable venue for the interview to take place.
- Keep the interviews short and informative, asking only the essential questions.
- Remember that some people may suffer from nerves and anxiety at interviews, try to make them feel comfortable and relaxed.
- Ask what they would like to learn or experiences they would like to gain as well as what they would like to bring to the role. The information gathered here can be used to prepare the volunteer agreement.
- Make it known to the volunteer that references will be taken up prior to confirmation if you intend to offer the individual the role. Ideally this should be a professional referee such as a previous employer/college tutor/teacher and a personal referee such as someone who has known them for more than 5 years. However you need to be mindful that not everyone will be able to provide this e.g. someone who has been unwell for a period of time or someone who has been caring, and we should ensure that the processes we put in place does not prevent people from giving back to their communities or gaining new skills and experience

and recognise that this may be the first step on a journey to transform their lives.

Supporting Volunteers

31. Nearly everyone who volunteers for Southwark will have a really strong connection with the borough and nearly all will be resident. The experiences the volunteer has while engaged with us will have an impact on what they think and feel about the council and also the feelings of those they are connected to and impact on our reputation.

32. How we support our volunteers will make a huge difference to how effective they will be in the role, the benefits they bring to and the benefits they gain from this relationship. There are some key activities we must put in place to build the right support so the volunteering is mutually successful. By generally adopting the same policies and practices you would for staff this will help contribute to positive outcomes e.g. Southwark ways of working.

33. Organising for your **volunteers start day** is one way of getting everything off to a good start, and you should think about the following:

- Ensure that you have a prepared Volunteer Agreement to go through with your volunteer
- Set aside time in your calendar so that you have enough time to go through all the documents and induction process with the volunteer
- Prepare to get the Southwark Council Security badge and IT access (where applicable)
- Send out information with clear instructions about start date and time, where to meet and what to expect on arrival and who to contact.

34. The induction process should follow the 7 Ps and be about

- 1. **People** (who they will be working with)
- 2. **Premise** (where they will be volunteering)
- 3. **Practicalities** (where do they go to the bathroom, who do they call if they are sick),
- 4. **Policies and Procedures** (volunteer policy with all info)
- 5. **Problem solving** (who do they go to if they have a problem and how will that be resolved)
- 6. **Purpose of organisation** (who you are and what you do)
- 7. **Position**, (where the volunteer fits in)

35. All volunteers will have a named supervisor who will conduct an **induction** session with them beginning the day that they start their volunteer role and to be completed as soon as possible. The induction could be a mixture of face to face learning and self learning activities and is the key way you have of making the individual feel a part of the team. The induction as a minimum should cover the following:

- Go through the **volunteer agreement** and agree hours and days that they will attend to carry out the volunteer role. Sign and copy the agreement. Attached at the end of this document is a **volunteer agreement template (4)**.
- **Ask your volunteer to complete an Equality Analysis Form**
- Introduce the volunteer to the team they will be working with, equipment and information that they will need to use to do the role
- Show and train (where necessary) what you will be asking your volunteer to do
- Tell them how their role will help the department meet its aims
- Introduce them to work colleagues
- Give them the volunteer handbook for guidance and information
- Advise them of any health and safety needs such as evacuation (fire alarm) procedure
- Advise them how to claim travel expenses and set out the circumstances they would be entitled to any other expenses such as lunch
- Allow the volunteer to also set some of their personal goals for the time they will be volunteering and set out any agreed training that will support the volunteer meet these personal goals e.g. may wish to improve their presentation skills and a combination of in work experience and training through my learning may support them do this.

36. You may also want to cover, especially if the volunteer will be supporting the team deliver over a number of sessions or the tasks and responsibilities are project based:

- Confirm and record the learning goals in the volunteer agreement
- Confirm that they agree to **confidentiality** policy using **template (6)**
- Inform them on the procedure for reporting non-attendance i.e. sickness and holiday leave
- Show how you would like them to log their hours (and explain why we do this)
- Identify health and safety policy and local risk assessment
- Identify what information or training is required for the volunteer that they will be asked to be familiar with or undertake; i.e. safeguarding/confidentiality/health and safety
- Inform the volunteer about regular meetings with the named supervisor (1-2-1s) and team meetings
- Give a tour of the building and facilities

37. One off days of volunteering would not need to carry out all of the above but will need to provide the necessary information on Safeguarding and Health and Safety and the named person whom they will report any potential issues to.

38. The volunteer agreement should form the basis of supervision and performance management of the volunteer.

39. We do not expect any volunteer to be out of pocket for **expenses** to travel to the location of the volunteer role or for lunch expenses (dependant on the hours that

they are volunteering). The volunteer supervisor will need to receive receipts for travel and lunch expenses each week. the expenses should be applied at the following rate:

- **Travel**; the cost of a one day bus pass or for a return train journey from the home address (within Southwark) to the agreed Southwark Council building (all other travel outside of this area must be agreed)
- The **lunch allowance** of £5.00 is for those volunteers who are committing to carry out the role for more than 4 hours in one day. This will be discussed and agreed with the volunteer at the time of agreeing the volunteer role and signing of the volunteer agreement.
- Other **out of pocket** expenses agreed with the service prior to expenditure

40. For steps to reimburse volunteers please see the attached **expense claim guidance (7)**;

- A copy of the signed volunteer agreement, identity document and application form is provided to HR for setting up the volunteer on SAP
- Inform the volunteer of what they need to do and give them a copy of the expense claim form along with requirement of proof of expenses, receipts.
- If all the information is correct, the claim is deemed valid and the expense claim form is countersigned by the volunteer supervisor.
- The volunteer supervisor then submit the expense claim on behalf of the volunteer using SAP and the supporting documents (completed expense claim form and receipts) are uploaded to SAP.
- An email will be sent by SAP to the volunteer supervisor when the claim is successfully submitted along with a reference number.
- A claim is authorised for payment by payroll when it is submitted by the volunteer supervisor – no secondary authorisation is required.
- A copy of all submitted claims are retained by the volunteer supervisor for auditing purposes

41. All volunteers will be covered by Southwark Council's insurance while they are engaged in any voluntary role on our behalf. Volunteers should be provided with a paper copy or a link to our Health and Safety policy. [Southwark Safety Reference Manual](#). Identify the areas that are relevant to your volunteer and refer those who have I.T access to the Source. Ask the volunteer to report any Health and Safety concerns immediately to you.

42. Training for the new volunteer role will need to be undertaken as soon as possible, following the induction. The named supervisor or a delegated person will need to undertake any information sharing and training needed to carry out the role.
43. The volunteer must have access to 121 support during the first days of their role to ensure that they are confident in carrying out the task.
44. Some volunteers may be in a role where they come across confidential information relating to residents of the borough or to other sensitive material. It is very important to us as a council to ensure that the information that we have on individuals, projects or in conversations is kept confidential. We will ask that those volunteers that may be exposed to anything confidential take an online training course on GDPR and confidentiality.
45. The named supervisor will be the main point of contact to answer any questions that a volunteer may have and will check in with volunteers regularly to make sure the volunteering experience is going well. This is the person who has responsibility for dealing with any complaints, problems or concerns about the volunteering role. All endeavours should be made to resolve any concerns promptly. If the volunteer is not satisfied with the resolution provided by the named supervisor they will have the ability to escalate the matter to a higher manager within the team/department. Please see attached a form that the volunteer should complete to begin the **formal complaints** process. Complaints should be resolved within 20 days by the appropriate team manager.
46. A volunteer is part of the team and will be contributing to the services that the council is delivering to the Southwark community. They should be invited to participate in team meetings; their views should be valued and recognised as a contribution to team efforts.
47. Southwark Council complies with equal opportunities and anti-discrimination legislation. We welcome volunteers from all backgrounds and are committed to promoting equality, inclusion and creating an environment where everyone is treated with respect and dignity.
48. After completion of an agreed period of volunteering, the named supervisor will be able to give volunteers a reference for future employers. This can be requested in writing or by email to your named supervisor. If the named supervisor is no longer in the employ of Southwark Council a project lead/manager will be able to take the place of the named supervisor in supporting you with a reference. For a period of 3 years after the end of the volunteering period.
49. Before they leave the volunteering role please ask that they complete a volunteer feedback form. This will help us to assess what has worked well in the role and also areas that we can learn from and adjust to improve the experience. Please see attached **volunteer leavers** feedback form

We ask that you give a very big thank you for the time that the volunteer has given to Southwark Council and wish them all the best for their future, you should consider nominating your volunteer for an award either through the civic awards run by the Council or Southwark Stars programme run by Community Southwark. .