

**LGBT+ Futures Programme Workbook**

**Volunteers**

**Recruitment, Induction and Retention**

As part of the LGBT+ Futures Fund Programme, Consortium and its partners are delivering a range of learning and skills development opportunities.

These online toolkits are designed for LGBT+ Groups and organisations to work through with key volunteers, staff or Trustees to develop key policies, procedures, plans and management techniques.

As you work through the toolkit you will see a range of **icons** which are designed to alert you to additional information and support at the appropriate time.

**Additional Resources Available:** Click on the icon to find more information on the topic

**Group Activity:** Get your volunteers, colleagues or Trustees involved in this part of the toolkit



**Webinar Available**. Click on the icon to find a recorded webinar on the topic

**Additional Support Available:** Email us if you need more support or information on a topic

**External Link or Resource:** clicking on this icon or a link by it will take you to an external resource or webpage

**Important Information:** don’t be tempted to skip a section with this icon next to it.

This Toolkit is not intended to be a definitive guide or template.
It is designed for LGBT+ groups to work through a series of activities and information in order to build a better understanding of the subject matter.

All the information provided was up to date at the time of creation.

This Toolkit was created by Consortium for the LGBT+ Futures Fund Skills Development and Training Programme 2019.

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We have recorded a short webinar to summarise the information you will be working through in this toolkit, which may wish to view before you commence.

**Volunteer programme planning**

**For organisations planning to develop a volunteer programme or those wishing to update their current systems**



It is important to think about your organisation’s needs as well as your resources and capacity in order to ensure your volunteer programme is manageable and effective. People choose to volunteer for a wide range or reasons from wanting to learn new skills to build their CV, getting back into work following a career break, wanting to give something back to the community and so on.

It is therefore important to consider how many of these different needs you want to appeal to in order to plan your approach. For example, if your organisation has limited capacity, you may wish to target your volunteer programme towards those with existing skills and experience. Larger organisations may be able to offer a volunteer development programme which includes training for people seeking to develop their skills.

**Diversity**

Just because we work in the LGBT+ sector doesn’t mean we automatically address diversity. Make sure that equality and diversity are included in all the stages of your volunteer programme.

**Aims**

Note down your organisation’s aims with regards to developing a volunteer programme. Consider your capacity and keep it realistic.

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**Resources**

Talk through and record what resources your organisation will require in order to realise your aims. Ensure you consider staff time to recruit and provide ongoing support to volunteers, as well as factors such as budget - for example, if equipment or uniforms will be required, reimbursement of expenses and so on.

You will also need to contact your insurance company to establish any impact on your policy and premium.

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**Volunteer policy**

A policy should include information on

* Organisational values
* Recruitment
* Volunteer agreements
* Out of pocket expenses
* Induction and Training
* Support
* Insurance
* Confidentiality
* Health & Safety
* Equal Opportunities
* Complaints and Grievances

Download the template policy [here](https://www.consortium.lgbt/wp-content/uploads/2019/07/Volunteer-Policy-1.docx) **(ctrl+click)** and adapt to suit your organisation’s aims. Ensure information is appropriately detailed to avoid any potential misinterpretations.

For example, state explicitly how much out of pocket expenses can be claimed if there is an upper limit or journey catchment area.

You can also download a template [volunteer timesheet](https://www.consortium.lgbt/wp-content/uploads/2019/07/Volunteer-Timesheet-Template-1.docx) (ctrl+click) and [expenses claim](https://www.consortium.lgbt/wp-content/uploads/2019/07/Volunteer-Expense-Claim-Form-Template-1.docx) form (ctrl+click), which can be useful appendices to the policy.

**Recruitment**



It is essential to think about the specific needs of your organisation and how volunteers may be able to help. Whether you decide to use a formal role description or an informal approach to recruitment, you will need to have a clear overview of the tasks required. If a new volunteer joins your organisation and doesn’t have a clear idea of what they should be doing, they won’t stick around for long!

Use the volunteer role development template which you can download [here](https://www.consortium.lgbt/wp-content/uploads/2019/07/Volunteer-Role-Development-Template-1.docx) **(ctrl+click)** to record the role and tasks required, including any requirements for relevant qualifications, skills or experience. The template also includes other important information, such as the number of hours you are seeking (and can accommodate). The template information can then be used to create your opportunity advertisement and for your internal information to guide the recruitment process.

**Advertising your opportunities**

Let your local networks and existing team know that you are recruiting and make use of your social media to promote your opportunities. A number of organisations can also help you to recruit; contact your local Volunteer Centre, universities and colleges’ careers and volunteer centres. Some job recruitment sites allow volunteer role adverts for free, such as Charity Jobs.

Consider organisations who work with particular communities who may be able to share your opportunity information, in order to address diversity.

****And don’t forget, Consortium members can advertise via our website. If you are not already a Consortium member, please get in touch to find out about joining:

<http://www.lgbtconsortium.org.uk/membership>

**Finding the right people**

All of the background preparation you have carried out will be invaluable in ensuring you find the right person/people.

If you would find it helpful to use a basic volunteer application form, download our template [here](https://www.consortium.lgbt/wp-content/uploads/2019/07/Volunteer-Application-Form-Template-1.docx) **(ctrl+click)** and adapt it to suit your needs. Or you may prefer a more informal approach inviting potential volunteers to get in touch by email or phone if they are interested.

It’s important to meet prospective volunteers but try to keep meetings informal - remember it is not a ‘job interview’.

Chat through their areas of interest, skills and qualifications (if relevant), their reasons for wanting to volunteer, what they are hoping to gain etc. Keep in mind your volunteer programme aims that you recorded in Section 1 of this toolkit and ensure you are able to meet their needs. If there is a mismatch it is important to be open and honest about this and be clear on what you can and cannot offer.

Carry out all relevant checks, such as taking up references and a DBS check if they will be working with children and / or vulnerable adults.

If you are unsure what type of DBS to process use the DBS tool or call their helpline (as not all roles are detailed in the checker tool).

<https://www.gov.uk/find-out-dbs-check> **(ctrl+click)**

**DBS customer services**
customerservices@dbs.gov.uk **(ctrl+click)**
Telephone: 0300 0200 190

There is specialist support available for transgender candidates who may have ID in different names. Access the Sensitive Applications Team for guidance:

<https://www.gov.uk/guidance/transgender-applications> **(ctrl+click)**

You may wish to offer the opportunity for a potential volunteer to visit your organisation or a specific project, shadow another member of staff or carry out some form of trial day to give the person a chance to see if the role is a good fit.

**Induction**

An induction doesn’t have to be complicated or too time consuming, but it is essential to ensure volunteers are welcomed into your organisation and their new role.

Introduce new volunteers to the team and members and show them around the premises. If it is an operational role working from home, an e-introduction provides a nice welcome. Consider welcoming the new volunteer(s) via a social media post and / or a blog on your website.

Different volunteers need different levels of training, depending on the role they are carrying out and their existing skills and experience. Individual inductions will therefore be tailored to the person and their role.

Address practicalities such as providing an ID badge, explaining IT systems and providing access / passwords etc, provide any relevant equipment or uniform required for their role.



Use the box below to note down a checklist of any such practicalities that you can use to run through as part of your induction.

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**Volunteer agreement**

As part of the induction process it is important to put in place an agreement document to ensure commitments and expectations from both parties are clear.

Agreements should ideally include:

* Volunteer’s name
* Role
* Location of work
* Days and times if applicable
* Name of their supervisor and contact details
* Summary of your organisations commitment to the volunteer
* Summary of the volunteers commitment to your organisation

Download our volunteer agreement template [here](https://www.consortium.lgbt/wp-content/uploads/2019/07/Volunteer-Agreement-template-1.docx) **(ctrl+click)** and adapt to suit your organisation’s needs. Agreements should be signed and dated and kept on file. Volunteers may also like to keep their own copy.

**Retention**

Volunteers are a great asset to your organisation so you will want to keep them engaged and happy!

It is important that volunteers feel supported in their roles, but this does not have to involve endless appraisals, one-to-ones or forms to complete, just regularly check-in for a catch up.

Whilst this can be kept informal, it is still important to schedule sufficient time and a quiet space to meet or for a call if they volunteer from home / offsite.

It can be beneficial to keep a brief written record of catch-up meetings, to enable you to review progress as well as having any actions recorded.

We have provided two volunteer guidance form templates you can consider for use and adapt to suit your needs.

Download the brief guidance template [here](https://www.consortium.lgbt/wp-content/uploads/2019/07/Volunteer-Guidance-Brief-format-Template-1.docx) **(ctrl+click)**

Download the full guidance template [here](https://www.consortium.lgbt/wp-content/uploads/2019/07/Volunteer-Guidance-Record-Form-Template-1-1.docx) **(ctrl+click)**

As with the volunteer agreement, a copy should be kept on file and the volunteer may wish to keep their own copy.

During your regular catch-up meetings explore the volunteer’s development needs (always keeping in mind your volunteer programme aims and capacity to support development). Remember skills development doesn’t necessarily require individuals to attend expensive training courses, they may be able to shadow a colleague or try out a new task with support from a team member.

It is important that any actions agreed during catch-up meetings are carried out and followed up to ensure the volunteer knows they are valued. If an action has not been possible to achieve, communicate this and agree a new action.

**Conflict management**

Sometimes issues arise or a volunteer may not be right for the role and it’s important to address any such issues as soon as they become apparent. Talk things through with the volunteer with sensitivity and an approach focused on finding solutions. Often it may be a miscommunication that can be easily rectified.

If there is a conflict between your organisation’s needs and the volunteer’s expectations, try to explore compromises. For example, if a volunteer is unable to commit to a weekly rota, is it viable for them to volunteer once a month?

If the issue is too significant or cannot be resolved, consider if there are other volunteer roles within your organisation that they would be better suited to. Ultimately, you may need to let the volunteer go from their role, which requires sensitivity.

Organisations may find this difficult and often unsuitable volunteers are kept on in order to avoid conflict and through a sense of gratitude that the individual is giving up their time. However, it is important to consider the needs of your members and your organisation and accept that a volunteer may not be suitable.

Thank them for all the time they have given and if possible and appropriate, direct them to other more suitable volunteer opportunities in the area, such as helping them to arrange an appointment with their local Volunteer Centre.

**Showing volunteers that they are valued**

Happy, fulfilled volunteers will stay longer, do better, and help you more.

You don’t need to put on lavish events to show volunteers your appreciation – simple steps, like celebrating volunteers’ birthdays, or recognising great work and dedication in a mail-out can be nice. If your organisation has a website or newsletter consider having a regular ‘volunteers feature’ to shine a spotlight on each volunteer team member, this could include a brief bio, Q&A, reasons they enjoy volunteering with your organisation etc.

Talk through with your colleagues’ viable ways in which your organisation can celebrate and recognise volunteer contributions. Further examples include an annual thank you event or adapting an existing annual event to incorporate a volunteer element, awards, accreditation and so on.

Record a brief summary of your plans in the box below.

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**Moving on**



When a volunteer decides it is time for them to move on from their role, it can be helpful to your organisation’s ongoing volunteer programme, to undertake an exit interview. You can download the volunteer exit interview template provided [here](https://www.consortium.lgbt/wp-content/uploads/2019/07/Volunteer-Exit-Interview-Form-Template-1.docx) **(ctrl+click)** and adapt to suit your organisation’s needs. As part of the process of valuing volunteers, if possible, provide an opportunity for a ‘goodbye’ send off such as a leaving card from the team.

As you have worked through this Toolkit you will have gathered all the information you need to create your own plan, policy or information pack. Most Toolkits have templates which you can download and transfer the relevant information from the Toolkit across to, so that you have your own bespoke piece of work for your group.

If your group needs any further support around the topic covered in this workbook please get in touch with our Engagement Team via email admin@lgbtconsortium.org.uk.

To find out more about Joining Consortium, visit our website for more information.