

# **Volunteering Development Resources**

## **Volunteering Partnership 2003**

## Acknowledgements

With thanks to the many federation Members who provided examples of their own materials and the following Volunteering Partnership members and their organisations for the extensive time and commitment they have contributed in this production.

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With acknowledgement to the National Centre for Volunteering for permission to link this manual with '*The Good Practice Guide. For everyone who works with volunteers*'. 2<sup>nd</sup> edition 2002.

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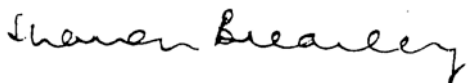
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## Foreword

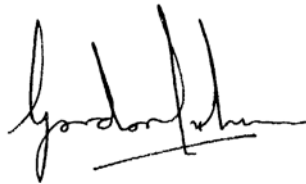
Volunteers and volunteering are fundamental to everything that we do in our work with and for all older people. Volunteering Development Resources is a means of sharing information gathered by federation Members to support the development of Age Concern volunteering systems.

In Age Concern, consistent and good quality management and support of volunteers has always been important. We have an excellent track record in attracting and retaining volunteers and this has allowed us to undertake our work in a great variety of ways. But we are working in a period of considerable change. As we develop and adapt to meet the changing needs and aspirations of older people, so must we further develop the ways in which we manage volunteering. The expectations of people who give their time as volunteers are also changing. Competition is growing for the people with the skills and experience which we need. Many Age Concerns are beginning to feel the impact of this change.

Volunteering Development Resources is an important tool to help support federation Members in that process of change.

A handwritten signature in black ink, appearing to read 'Sharon Brearley'.

Sharon Brearley  
Chair, Volunteering Partnership

A handwritten signature in black ink, appearing to read 'Gordon Lishman'.

Gordon Lishman  
Director General, Age Concern England


The Volunteering Partnership is the body with responsibility for the development of a federation wide volunteering strategy. This strategy has three aims:

- To improve practice in Age Concern volunteering
- To improve the status of volunteering in Age Concern
- To raise the profile of Age Concern as a federation which involves volunteers.




## Introduction

This selection of Resources has been compiled by the Volunteering Partnership for Members of Age Concern, the federation, in response to demand by Age Concerns large and small, for examples of documentation to support good volunteering policy and practice. Much of the content has been provided by federation Members.

This is not a comprehensive guide to volunteer management. Others already exist. To help readers who seek more detailed information and guidance, the format of Volunteering Development Resources loosely follows that of one such guide – ‘*The Good Practice Guide for everyone who works with volunteers*’ National Centre for Volunteering 2<sup>nd</sup> edition 2002. References to corresponding sections of the ‘Guide’ are made throughout ‘*Volunteering Development Resources*’ and are marked with the following symbol: . See the Useful contacts section for more information on this and other materials.

## Relationship to Volunteering Development Recommended Practice and Quality Counts

‘*Volunteering Development Recommended Practice*’ VP002 Age Concern England 2002 states the minimum levels of good practice which every federation Member should seek to achieve in the involvement of volunteers. It forms part of the Federation Foundation Standard in Quality Counts. Reference to the relevant expectations of ‘*Volunteering Development Recommended Practice*’ are included to help the reader use this manual as a tool in improving volunteering practice. They are marked with the following symbol: . Copies of ‘*Volunteering Development Recommended Practice*’ are available from Age Concern England. See the Useful contacts section for details.

The Age Concern Assembly approved a *Statement of Expectation on volunteering* in May 2002.

*Volunteering - The Age Concern Expectation.*

*The Age Concern Assembly accepts that the involvement of volunteers in all the activities of the federation is fundamental to the fulfilment of its mission.*

*Volunteers, in their diversity of age, experience, cultural background, and involvement with their communities bring to Age Concern’s work a value which adds to our understanding of and response to older people’s needs.*

*Volunteering offers opportunities to enhance the quality of life of those who volunteer and those who benefit from their talent, expertise and commitment to the common good. Age Concern, the federation will promote best practice in volunteering.*



## **Extension of Volunteering Development Resources**

Production of *Volunteering Development Resources* is ongoing. The Resources binder has been designed to enable the inclusion of additional Resources as they are developed. The Volunteering Partnership will add to this manual as examples of other materials are collected. The aim is to form a comprehensive set of good practice materials which cover all areas of '*Volunteering Development Recommended Practice*' (VP002). The involvement of federation Members in extending this range of resources is encouraged. Contributions can be sent to the Volunteering Partnership correspondent. See the Useful contacts section for details.

## **Accuracy and updating**

Every effort has been made to ensure the materials are accurate, up to date and correct statements of the law from time to time. However as the guidance given is necessarily general and the law is subject to change, specific advice should be taken on particular cases in the event of difficulty or doubt.

## **I Starting a volunteer programme**

- IA Why involve volunteers?
- IB Developing a volunteering policy
- IC Developing a volunteer agreement
- ID Volunteer agreement example
- IE Volunteers and employment status

## Why involve volunteers?

The first step in planning a volunteer programme is to determine the reasons why the organisation involves volunteers. It is important to agree and articulate the reasons, as they underpin the policies and procedures which need to be put into place in order to support successful volunteering.

The Volunteering Partnership has worked with federation Members to produce a statement which explains why we involve volunteers in Age Concern, the federation. Members were widely consulted on the draft during 2002, prior to its finalisation. The *'Rationale for volunteer involvement in Age Concern, the federation'* is offered to all Members as a starting point for the development of their volunteering programmes. It is reproduced at Appendix B. Individual copies are available from Age Concern England. See Useful contacts section.



### **Volunteering Development Recommended Practice link**

*Expectation 1* There is an agreed policy framework for volunteer Involvement.



### **Good Practice Guide link**

Why use volunteers? *page 8.*

## Developing a volunteering policy

All Age Concerns meeting the Federation Foundation Standard are expected to have a volunteering policy which is appropriate to their stage of development.

The Volunteering Partnership has produced a Model Volunteering Policy which includes guidance on how to use the model to draw up a new policy from scratch and how to review an existing policy. The model policy is reproduced at Appendix B. Individual copies are available from Age Concern England. See Useful contacts section.

The model is based upon the reasons for volunteer involvement which are expressed in the '*Rationale for volunteer involvement in Age Concern, the federation*' see previous pages and Appendix B.



### **Volunteering Development Recommended Practice link**

*Expectation 1* There is an agreed policy framework for volunteer Involvement.



### **Good Practice Guide link**

Developing a volunteer policy *page 12*.

## Developing a volunteer agreement

Some organisations use a written volunteer agreement to set out the respective expectations of the volunteer and the organisation regarding the treatment, support and behaviour of the volunteer. A written agreement acts as a declaration of intent. It should not be viewed nor described as a legally binding document. It should not be viewed in the same way as a contract of employment is with paid staff. It is important to avoid inadvertently creating a contract of employment.

It is not necessary to use a written agreement, but it is important that the relationship between the volunteer and the organisation is clearly understood by all parties. Other ways of achieving this include an acceptance or welcome letter, a volunteer handbook, a formal induction process and other written materials on policy and procedure which are given to the volunteer.

If a formal agreement document is used, it is worth noting that there is no need for the agreement to be signed as it is not intended to be a legal document. It could be helpful to add a disclaimer to make it clear that the agreement is not intended to be legally binding. However, this could be ignored by an employment tribunal if it is considered that the actual relationship between the organisation and volunteer to be one of employment. See the next section on Volunteers and Employment status. Advice can be sought from the National Centre for Volunteering Information Service 0800 028 3304 (see also Useful contacts section).

An example of a volunteer agreement follows.



### **Volunteering Development Recommended Practice link**

- Expectation 4* Effective volunteer recruitment process which is applied consistently.
- Expectation 6* Volunteer induction programme.
- Expectation 9* Clear terms of involvement for volunteers which are fair and considerate to all.
- Expectation 10* Agreed management practices to ensure volunteer effectiveness and support.



### **Good Practice Guide link**

Developing a volunteer agreement *page 24*.

***Example***

## Volunteer agreement

### Volunteer Agreement

This Agreement is intended to indicate the seriousness with which we treat our volunteers. The intention of the agreement is to assure you both of our deep appreciation of your services and to indicate our commitment to do the very best we can to make your volunteer experience here a productive and rewarding one.

#### The Organisation

We, ..... (the organisation), agree to accept the services of ..... (volunteer) beginning ....., and commit to the following:

- 1 To provide adequate information, training, and assistance for the volunteer to be able to meet the responsibilities of their volunteer job.
- 2 To ensure satisfactory supervisory support to the volunteer and to provide feedback on performance.
- 3 To respect the skills, dignity and individual needs of the volunteer, and to do our best to adjust to these individual requirements.
- 4 To be receptive to any comment from the volunteer regarding ways in which we might mutually better accomplish our respective tasks.
- 5 To treat the volunteer as an equal partner with the organisation's staff, jointly responsible for completion of the organisation's goals and the fulfilment of its mission.

**The Volunteer**

Agrees to serve as a volunteer and commits to the following:

- 1 To perform my volunteer duties to the best of my ability.
- 2 To adhere to the organisation's rules and procedures, including record-keeping requirements and confidentiality of organisation and client information.
- 3 To meet time and duty commitments, except in exceptional circumstances, or to provide adequate notice so that alternative arrangements can be made.

**Agreed by:** .....

**Date:** .....

This agreement may be cancelled at any time at the discretion of either of the parties, but will expire automatically on ..... unless renewed by both parties.

*Reproduced from Essential Volunteer Management 2<sup>nd</sup> edition by Steve McCurley and Rick Lynch, by kind permission of the publishers, The Directory of Social Change, 24 Stephenson Way, London NW1 2DP. Tel: 020 7209 5151, from whom copies may be purchased by post, price £14.95 (+ p&p: £2.50 for orders up to £20 value, and single CD-ROMs; £3.50 for orders of £20–£30 value; £4.50 for orders of £30–£40 value; £5.50 for orders over £40 value).*

*Discount available for federation Members if ordered through Age Concern England. See Useful contacts section for details.*

## Volunteers and employment status

At the time of writing, there is no legal definition of a volunteer in the UK. It is possible, in some circumstances, for the relationship between a volunteer and an organisation to be interpreted in law as one of employment. This could have significant consequences for the organisation, requiring it to fulfil a range of obligations such as providing a minimum wage.

A few employment cases have centred on ‘volunteer’ employment status. The key is whether there appears to be ‘intention’ to create legally enforceable rights and whether there is ‘consideration’ (i.e. some kind of benefit, though not necessarily in money).

In general, if an organisation reimburses only actual out-of-pocket expenses, states on documents that there is no intention to create a contract, and stresses the distinctive contribution that volunteers make, problems should not arise. Training can still be offered, so long as it is related to the role performed by the volunteer. Avoid the language of the rights and obligations of volunteers or the obligations that the organisation has to them. Instead, use phrases such as “we hope that” or “we expect that”.

You might wish to seek legal advice on your position. You can contact the National Centre for Volunteering Information Line for general guidance, telephone 0800 028 3304.



## **2 Recruiting volunteers**

2A Developing task/role descriptions

2B Task description template

2C Task descriptions examples

2D The application process

2E Application form example

2F Interviews

2G Equality & diversity monitoring form example

2H References

2I Reference request letter and response form example

2J Screening volunteers

2K Volunteer recruitment pathway example

## Developing task/role descriptions

A volunteer task/role description is a useful tool. It specifies the role and the work of the volunteer. It forms the basis for your recruitment effort because it defines the assignment, skills, abilities and interests necessary to perform the role successfully. If you have not clearly defined the role then it is difficult to decide whether a prospective volunteer has the skills you are looking for.

In assessing the skills needed, be realistic; it may not be possible to achieve the ideal range of skills and experience required. Consider which of the skills and experience you have identified are essential, and which are desirable. If a potential volunteer does not have all of the required skills, consider breaking a role down into smaller tasks. For example, a lunch club assistant role description may include collecting money, record keeping, cooking, meeting and greeting. Not all of these tasks will relate to the aptitude and experience of every prospective volunteer, but a number of volunteers with different but complementary skills may fulfil all the requirements.

In order to draw up a role description the following questions need to be considered.

- 1 What tasks need to be done?
- 2 How can these tasks be combined to create a role?
- 3 What particular knowledge/skills/experience/qualities are required?
  - Are there any specific requirements (e.g. driving licence, ability to lift heavy objects, climb stairs etc)?
  - Which of these are essential?
  - Which of these are desirable?
- 4 What time commitment is required?
- 5 Where will the tasks be performed?
  - What is the location?
  - Does the volunteer need his/her own transport?
- 6 In what practical ways will the volunteer need support?
- 7 What level of support and supervision can you offer?

- 8 To whom will the volunteer report?
- 9 What could the benefits be for the volunteer?
- new friends
  - leisure interests
  - being useful
  - a chance to get involved
  - enhanced employment chances
  - updating/learning new skills

See the template and example role descriptions on the following pages.

**Volunteering Development Recommended Practice link**

*Expectation 2* Planning processes take volunteering into account.

*Expectation 4* Effective volunteer recruitment process which is applied consistently.

*Expectation 5* Fair selection processes.

*Expectation 10* Agreed management practices to ensure volunteer effectiveness and support.

**Good Practice Guide link**

Developing Task Descriptions *page 34*.

## Example

# Task description template

There are a number of ways of preparing role/task descriptions. A basic role description could include the items listed below. Consider who will use the role description. For example, an external agency such as a Volunteer Bureau or someone who has little knowledge of your Age Concern may need additional background information about your organisation and a description of the relevant project or service.

### Basic Role/Task Description

- Role title
- Summary of tasks/activities
- Time Commitment
  - How many hours and how often will the volunteer be needed?
  - Frequency (daily/weekly etc) or period of involvement for short term assignments
- Location
- Who will the volunteer work with?
- Accountability
  - Who will supervise the volunteer?
  - To whom will the volunteer be accountable?
- What training will be necessary and available?
- Recognition and support
  - Expenses
  - Details of support available to a volunteer e.g. Volunteer Co-ordinator, support groups, named support worker etc
- Person Specification
  - List qualities, skills and experience you require
  - Indicate essential and desirable

### Role/Task description for external use

At the beginning, also include:

- Background information about your Age Concern
- Information about the service or project

## **Task descriptions examples provided by federation Members**

Shop assistant

Bereavement and loss visitor

Day centre helper

Transport escort

Information and advice worker

Trading assistant

Lunch/day club helper

Voluntary visitor

Mobile Internet Taster Session (MITS) Assistant

Volunteer car driver

Minibus driver

The following role descriptions are taken from current examples provided by federation Members. If you have examples of other role descriptions which you would like to share, please send them to the Volunteering Partnership. See Useful contacts section for details.

**Example****Volunteer Role Description  
and Person Specification****SHOP ASSISTANT****Introduction**

(Insert information about your Age Concern)

**Role Description****Main Duties:**

- To help run a charity shop raising funds to support services for older people

**Specific Responsibilities:**

- To serve customers and record purchases on the cash register
- To sort, hang, ticket and size donated clothing for sale in the shop
- To use a steam press to prepare clothing for sale (full training given)
- To sort, wash, polish and in other ways prepare books and bric-a-brac for resale
- To contribute to keeping the shop clean and tidy by vacuuming, dusting/polishing, tidying stock
- To inform the Shop Manager, or other person in charge, of any complaints or difficulties from members of the public
- To undertake any other tasks to assist the Shop Manager as and when necessary

**Person Specification:**

- Good communication skills
- Reliability and trustworthiness
- Willingness to undertake training where necessary
- Basic numeracy
- Commitment to working within a team

**Hours of Work:** One half-day per week

**Responsible to:** Shop Manager

**Example****Volunteer Role Description  
and Person Specification****BEREAVEMENT AND LOSS VISITOR****Introduction**

(Insert information about your Age Concern)

**Role Description****Main Duties:**

- To support an older person experiencing a loss or bereavement

**Specific Responsibilities:**

- To complete an 8 week Basic Counselling Skills training course
- To regularly visit a service user in their own home and support them on a one to one basis, as directed by the Service Manager and the Bereavement Supervisor
- To attend monthly support and training meetings
- To report any concerns/worries to the Service Manager
- To complete a Visitor's Report every 6 weeks

**Person Specification:**

- Good communication skills
- Patience and tact
- Reliability
- Understanding of confidentiality
- Understanding of the needs and aspirations of older people recently bereaved
- Ability to complete Basic Counselling Skills training course
- Ability to work with minimum supervision
- Ability to attend monthly supervision sessions held on the last Friday of each month from 11.00am to 12.30pm.

**Hours of Work:** Flexible – to be arranged

**Responsible to:**

**Example****Volunteer Role Description  
and Person Specification****DAY CENTRE HELPER****Introduction**

(Insert information about your Age Concern)

**Role Description****Main Duties:**

- To help older people maintain their dignity and independence by assisting in a community based day centre

**Specific Responsibilities:**

- To establish, maintain and develop relationships with users within the Day Centre
- To provide assistance with self care tasks, nail care, hygiene, hair care, etc
- To provide assistance with domestic tasks including serving meals, dish washing, etc
- To work with individuals to maintain their levels of mobility and independence
- To be involved with the planning and implementation of activities in the Day Centre
- To adhere to the policies and practices of Age Concern relating to health and safety, food hygiene and moving and handling

**Person Specification:**

- A liking for and empathy with older people
- Ability to work as part of a team
- Reliability and trustworthiness
- An interest in developing activities for older people

**Hours of Work:** Morning, afternoon or full day sessions

**Responsible to:**



**Example****Volunteer Role Description  
and Person Specification****TRANSPORT ESCORT****Introduction**

(Insert information about your Age Concern)

**Role Description****Main Duties:**

- To ensure the health, safety and comfort of service users during their journey to and from their home to day centres, lunch clubs and whilst on outings

**Specific Responsibilities:**

- To supervise the safe transfer of users:
  - from home to the vehicle
  - from the vehicle into the appropriate venue
  - from the venue back onto the vehicle
  - from the vehicle into their own home
- To operate the vehicle tail lift – only after appropriate training and under the supervision of the driver
- To offer assistance to the user to ensure that their home is safe and secure on leaving
- To ensure that users are comfortably and securely fastened in their seats: gangways are clear of obstructions and that the driver is not distracted during the journey
- To maintain the security of the vehicle and supervise the users in the absence of the driver
- To undertake appropriate training as required, including mandatory Moving and Handling training
- To provide assistance to the Day Care service as required
- To adhere to the policies and practices of Age Concern

### **Person Specification:**

- A liking for and an empathy with older people
- The ability to work as part of a team
- A reasonable level of fitness
- Good listening skills and an understanding of safety issues
- An understanding of the need for confidentiality
- Good timekeeping skills
- Reliability and trustworthiness

**Hours of Work:** Usually between 9.00am and 4.30pm, days to be arranged

**Responsible to:** Transport Co-ordinator

**Example****Volunteer Role Description  
and Person Specification****INFORMATION AND ADVICE WORKER**

Taken from 'Meeting the Quality Mark: a guide to complying with Community Legal service Requirements' Age Concern England GPG 54.

**Job Purpose:**

To provide information and advice to older people and their carers by telephone and personal contact at the Age Concern office, outreach sessions and home visits.

**Main Duties:**

- 1 Interview clients in person or by telephone
- 2 Explore the nature of the problem raised by the person and, where appropriate, their wider circumstances
- 3 Identify and research information relevant to the users' situation, drawing on information resources available
- 4 Present and discuss information with the client in an accessible form, enabling them to identify a suitable solution
- 5 Where appropriate and at the client's request, to act on their behalf and represent their interests with third parties by letter, telephone or in person
- 6 Inform people about services that may be available to them and how to access them, including Age Concern services; and where appropriate to refer people to other agencies and sources of help
- 7 Give help with letter writing and completing forms
- 8 Maintain statistical and case records using manual and electronic systems
- 9 Liaise closely with the Information and Advice Manager and other advisers, seeking advice, guidance and support where required
- 10 Where appropriate, to work with other relevant local agencies in developing information and advice services
- 11 Participate in training sessions and meetings as necessary
- 12 Develop a working knowledge of the information and office systems supporting the service; use them effectively and contribute to their improvement

- 13 Keep up-to-date with relevant laws, policies and procedures – locally and nationally
- 14 Carry out tasks according to Age Concern policies and standards, in particular on confidentiality, anti-discriminatory policies and health and safety
- 15 Work as part of a team with other Age Concern staff.

### **Person Specification:**

This is a list of skills and abilities required from an Information and Advice worker.

- 1 Ability to assimilate and understand information by listening and reading; and to use the telephone
- 2 Ability to write legible and intelligible notes and records; to write letters and fill in forms; and to carry out basic calculations
- 3 Willingness to work according to guidelines and standards and to take a flexible approach to work requirements
- 4 An open-minded approach to individuals, avoiding judgement and stereotyping
- 5 Ability to listen to others and to explain things clearly without jargon or being patronising
- 6 Knowledge or experience of the lives of older people and their carers
- 7 Ability to identify problems and solutions in meeting the needs of users
- 8 Awareness of discriminatory practices and equal opportunity issues; and a commitment to social justice and equity
- 9 Ability to work as part of a team and to work with other Age Concern staff and other agencies; and to seek and offer support
- 10 Willingness and interest in learning
- 11 Willingness to attend training and other events and to work a minimum of 1 day a week

**Example****Volunteer Role Description  
and Person Specification****TRADING ASSISTANT****Introduction**

(Insert information about your Age Concern)

**Role Description****Main Duties:**

- To deal with queries, give out information and transact business related to ACEnt's products and services to the general public
- To carry out other administrative tasks in connection with trading activities

**Specific Responsibilities:**

- To process new business and where appropriate renewal premiums for ACEnt's core products
- To assist clients when necessary by completing application/claim forms on their behalf and offering best advice
- To liaise with Product providers and internal ACEnt staff to resolve queries or complaints
- To maintain the necessary records to monitor business performance
- To attend any appropriate training
- To maintain confidentiality at all times
- To participate in any promotional activity or events if required
- To undertake administrative duties related to the processes of ACEnt products and services and other tasks to assist the Trading Officer as and when necessary
- To deal with telephone enquiries
- To attend support groups and contribute to developments in the service as appropriate

## **Person Specification:**

- Good communication skills
- Tact and patience
- Understanding of and empathy with older people
- Experience of working in an administrative/finance/insurance environment is desirable
- Basic numeracy
- Basic keyboard/computing skills
- Commitment to working within a team

## **Hours of Work:**

**Responsible to:** Trading Officer

**Example****Volunteer Role Description  
and Person Specification****LUNCH/DAY CLUB HELPER****Introduction**

(Insert information about your Age Concern)

**Role Description****Main Duties:**

- To provide a friendly atmosphere for older people to meet together and enjoy lunch and each other's company

**Specific Responsibilities:**

- To provide assistance with domestic tasks including serving and/or preparing meals, dish washing, etc
- To provide a friendly face and helping hand to users
- To assist other volunteer assistants in preparing the club for the day and leaving it clean and orderly at the completion of the day
- To verbally report any concerns about users to (insert title of person to whom the volunteer will report)
- To attend an induction session for new volunteers
- To attend further training as required, e.g. food hygiene
- To participate in gatherings for the support and benefit of volunteers

**Person Specification:**

- The ability to work as part of a team
- Liking for and empathy with older people
- Reliability and trustworthiness

**Hours of Work:** Hours vary between clubs and their needs  
Normally 11.30am - 2.00pm

**Responsible to:**





**Example****Volunteer Role Description  
and Person Specification****VOLUNTARY VISITOR****Introduction**

(Insert information about your Age Concern)

**Role Description****Main Duties:**

- To visit an older person in their own home on a regular basis and form an ongoing relationship

**Specific Responsibilities:**

- Tasks vary according to individual need but may include:
  - making a cup of tea and having a chat
  - escorting someone into town to do some shopping
  - providing company to alleviate isolation
- To complete visitor's report form every 6 weeks

**Person Specification:**

- Good communication skills essential
- Understanding of confidentiality
- Sense of humour
- Understanding of and empathy with the needs of older people
- Patience and sensitivity
- Reliability
- Ability to deal with emergencies
- Requirement to undertake induction training, work to guidelines and policies on Health & Safety, confidentiality, equal opportunities etc

**Hours of Work:** 2-3 hours per week, times to be arranged

**Responsible to:**

**Example****Volunteer Role Description  
and Person Specification****MOBILE INTERNET TASTER SESSION  
(MITS) ASSISTANT**

**Responsible to:** MITS Project Manager

**Purpose of Role:**

- To provide taster sessions, using portable equipment at a selection of venues such as local day centres, sheltered and residential housing schemes and other appropriate premises, in order to introduce the World Wide Web and email to less mobile older people who do not have access to IT

**Objective:**

- Giving older people the skills and equipment to overcome isolation

**Main Duties:**

- Gain experience in delivery of computer training
- To give older people who may have never seen a computer before, the choice of learning something new
- To assist older people who already know the basics to learn something specific, i.e. researching topics of interest, emailing friends and family
- To raise awareness of the Internet and technology generally
- To raise awareness of how to access information around the world and also local services and information
- To explore the need for social contact with family and friends
- Ensure that a visit report is completed after each visit, to include interesting case studies of volunteers and clients participating
- To ensure that the relevant Age Concern policies and procedures, such as Confidentiality, Health & Safety and Equal Opportunities are adhered to

Full training will be provided to all volunteers and will include computers skills: presentation skills and training on how older people learn; and working with older people.

A telephone helpline will ensure that staff and volunteers can contact Age Resource for technical help if required.

## **Person Specification:**

### **Essential:**

- Commitment to the value of older people in our society
- Ability to work on own initiative without close supervision
- Commitment to Equal Opportunities
- Confidence, enthusiasm and ability to deal sympathetically and sensitively with a wide range of people
- Good oral and communication skills
- Understanding of issues affecting older people
- Willingness to travel and work away from home or office environment.  
(Out of pocket expenses will be reimbursed)

### **Desirable:**

- Ability to drive and have use of a vehicle
- Appropriate social skills in formal and informal settings
- Enjoy working alone and alongside others
- Experience of working with or for other organisations, particularly the voluntary sector

### **Application Details**

All applicants need to complete a volunteer application form. The MITS Project Manager will interview all successful applicants.

For further information please contact:

**Example****Volunteer Role Description  
and Person Specification****VOLUNTEER CAR DRIVER****Purpose of Role:**

To provide, using your own car, essential door-to-door transport for passengers, identified by Age Concern who have difficulties using public or other forms of transport.

**Location:**

Drivers will be based at home. The journeys will usually be within the driver's local community area.

**Reporting to:**

The volunteer will be supported by and accountable to

**Hours of Work:****Duties and Responsibilities:**

- To collect passengers and drive them to/from their destination
- Assist passengers to get into/out of your car when required
- Ensure any shopping, walking aids, wheelchairs are safely stowed
- Wait, if required, for passengers attending medical/health appointments
- Collect passenger fares at the rates set
- Issue receipts for all fares collected
- Keep accurate records of all journeys undertaken on behalf of Age Concern and account for all monies received
- Inform Age Concern immediately of any changes to your health or changes (e.g. endorsements) that affect your driving licence, insurance or ability to drive
- Ensure that your car is correctly taxed, insured, is roadworthy and has a valid MOT at all times
- Ensure that you have told your insurance company that your car is being used for voluntary work and that this is covered by your insurance policy

- Work in a helpful, caring, confidential manner, within the aims and objectives of Age Concern
- Be self motivated and sensitive to the needs and wishes of your passengers and colleagues
- Notify Age Concern as soon as possible of any incidents or accidents affecting passenger safety whilst on duty
- Work within Age Concern's Health and Safety guidelines

## **Training**

Drivers may need to attend the Community Transport Association accredited Driver Training Scheme course and other courses, as identified by and agreed with the co-ordinator/supervisor.

## **Expenses**

Age Concern will repay any agreed expenses (parking fees, etc) on production of receipts paid out in the course of journeys, so that you are not out of pocket.

Travel expenses will be paid on a mileage basis for all journeys undertaken.

**Example****Volunteer Role Description  
and Person Specification****MINIBUS DRIVER****Purpose of Role:**

To drive Age Concern's accessible minibus in a responsible and competent manner, ensuring the safety and comfort of your passengers.

**Location:****Reporting to:****Hours of Work:****Duties and Responsibilities:**

- Carry out driver's daily checks as per Age Concern's guidelines before taking the vehicle on the road
- Report any vehicle defects and faults as per Age Concern's guidelines and procedures
- Ensure the vehicle is in a clean condition (inside and out) before and after use
- Refuel vehicle as requested by the Transport Co-ordinator
- Be responsible for the safety and comfort of your passengers and be aware of relevant minibus legislation
- Be able to use the passenger's lift/ramp in a safe and responsible manner
- Ensure the correct use of the appropriate wheelchair tie-downs and passenger restraint systems
- When necessary, assist passengers when entering and leaving the vehicle
- Maintain simple vehicle and driver's records

- Work in a helpful, caring, confidential manner, within the aims and objectives of Age Concern
- Be self-motivated and sensitive to the needs and wishes of your passengers and colleagues
- Inform Age Concern immediately of any changes to your health or occurrences (e.g. endorsements) that affect your driving licence or ability to drive
- Notify Age Concern as soon as possible of any incidents or accidents affecting passenger safety whilst on duty
- Work within Age Concern's Health & Safety guidelines

## **Training**

Be willing to attend relevant training courses as identified and agreed with the Transport Co-ordinator, to include MiDAS (Minibus Driver Awareness Scheme) prior to carrying passengers.

## **Expenses**

Age Concern will repay any agreed expenses (parking charges, telephone calls, etc) on production of receipts, incurred in the course of a journey, so that you are not out of pocket.

## The application process

All organisations need to develop a system for volunteer recruitment which suits their needs but that does not put off potential volunteers or place unnecessary barriers in people's way. The actual process depends upon the organisation and the roles performed by volunteers within it. The application process is as much about the volunteer determining whether the organisation and the role offered are appropriate for him/her as the organisation making a decision about the suitability of the applicant.

A very formal process may initially put people off, yet it is important that sufficient information is given and collected in order for both parties to make their decision. An application form can be an effective means of collecting information in a standard format, though care needs to be taken to ensure that it is not off putting to a prospective volunteer. It is possible that some people may not have had much experience of completing an application form, or may have difficulty for other reasons. You need to consider the different ways in which the information you need can be collected to ensure that this part of the selection process does not put people off or discriminate against them. Some organisations arrange an initial interview and explain the purpose of the application form before it is sent out. Some help the applicant complete the form during the interview; others send the form out in advance prior to interview.

### Equality & Diversity issues

A useful tool in identifying how successful you are at attracting a wide range of people from your local community is an equality and diversity monitoring questionnaire. You may already use such a form when recruiting paid staff. An example follows the example application form.

Information which you gather from application forms and the equality and diversity monitoring questionnaire can be collated and used to shape your future volunteer recruitment strategies. For example it can:

- Identify any groups of people whom you do not ordinarily attract as volunteers. For example, people of Asian or Afro-Caribbean background, or older men in general. If you routinely appoint older people, consider how you might attract younger people as well.
- Highlight people's motivation in volunteering with your Age Concern, which can help you to decide on your future recruitment methods. For example if some volunteers have identified their wish for work experience, then you may wish to stress that you can provide references to facilitate subsequent employment.



- Identify the success of different recruitment tools for the audiences you are trying to reach e.g. posters, leaflets, talks and presentations. This can influence your future recruitment strategies and prevent money being wasted on materials which are not effective.

Such information can also inform specific equality strategies such as on age or race.

### **Age equality**

An unjustifiable example of age discrimination in volunteering is the use of mandatory retirement ages for volunteers. See the Useful contacts section for information about the Age Concern Age Discrimination campaign and toolkit which contains helpful information on age discrimination and volunteering plus an age discrimination audit tool.

### **Race equality**

The Race Relations (Amendment) Act 2000 places a statutory general duty on listed public bodies to promote race equality in carrying out their functions. In preparing their 'Race Equality Scheme', public authorities must review their public functions, including any services they have contracted to an outside organisation, which could be a voluntary organisation. Voluntary organisations could find that, in practice, in order to continue working with the public authority, they will need to look at how they themselves promote racial equality.

The types of organisations that are likely to be affected are those that:

- provide services for authorities
- are funded by authorities
- work in partnership with authorities.

The onus will be on the public authority to ensure that organisations that they contract with, whether or not they are in the voluntary sector, comply with the requirements of the Act. If these organisations do **not** comply, liability will rest with the public authority and not the organisation. Many Age Concerns will be affected. Public authorities may review all their service contracts that are already up and running, they may amend the contracts to ensure that they do not breach the terms of the Act. They may require the organisation that they are in contract with to provide details of how they promote racial equality. They may also require that the organisation produce a 'Race Equality Scheme'. If, for example, an organisation provides a day care scheme the public authority may require evidence that the scheme is accessible to all members of the community.

The Commission for Racial Equality (CRE) has produced good practice guidance for public authorities on how to develop a Race Equality Scheme, and on Ethnic Monitoring, both of which are underpinning ‘Specific Duties’ under the Act. There is also guidance on how public authorities should ensure compliance with the provisions of the Act in areas where they work jointly with other organisations. Age Concern England has produced a Good Practice Briefing on the Race Relations Amendment Act 2000. GPB001.

See Useful contacts section for more information.

At whatever the stage in the volunteer recruitment process that equality and diversity information is collected, it is important that it is not used in the selection of the volunteer. As with paid staff, the criteria used to select a volunteer should be only those which relate to their skills, experience and abilities for the role they will have.



**Volunteering Development Recommended Practice link**

*Expectation 4* Effective volunteer recruitment process which is applied consistently.



**Good Practice Guide link**

The application process *page 50*.

**Example**

### Application form

Section/Service (e.g. Lunch club etc):

<b>Title:</b>		<b>Name:</b>	
<b>Address:</b>			
<b>Postal Code:</b>			
<b>Telephone - Home:</b>		<b>Work:</b>	
<b>Mobile:</b>		<b>Email address:</b>	
		<b>Car driver: Y/N</b>	<b>Have own car: Y/N</b>

<b>Status (Please Tick)</b>					
Unemployed	<input type="checkbox"/>	Student	<input type="checkbox"/>	Retired	<input type="checkbox"/>
Working Part-Time	<input type="checkbox"/>	Working Full-Time	<input type="checkbox"/>	Long Term Sick/Disabled	<input type="checkbox"/>
Other (please specify)					

**Outline any skills, interests, hobbies, previous experience**

**How much time do you have available for volunteering?**  
(Please indicate times/days which are convenient for you)

**Days?** **Times?**

**For Office Use Only**

<b>Accepted Y/N</b>	<b>References taken:</b>	<b>References received:</b>
<b>CRB:</b>	<b>Start date:</b>	<b>Welcome letter:</b>



**How did you find out about voluntary work with us?**

(Please tick any boxes below)

Press Advert	<input type="checkbox"/>	Leaflet	<input type="checkbox"/>
Article in Newspaper	<input type="checkbox"/>	Referred by a friend	<input type="checkbox"/>
TV/Radio	<input type="checkbox"/>	Volunteer Bureau	<input type="checkbox"/>
Exhibition	<input type="checkbox"/>	From a user of Age Concern	<input type="checkbox"/>
Poster	<input type="checkbox"/>	Talk/Presentation	<input type="checkbox"/>
Other (please give details)			

**What are your reasons for volunteering?** (Please tick any of the boxes below)

To gain work experience	<input type="checkbox"/>	To get involved in the community	<input type="checkbox"/>
To develop new skills	<input type="checkbox"/>	To make new friends	<input type="checkbox"/>
To build up my confidence	<input type="checkbox"/>	To maintain existing skills	<input type="checkbox"/>
Additional reasons or comments			

When will you be able to start volunteering?

In order that we may offer you appropriate support in your volunteer role, please advise us of any health problems or medical conditions that you think may affect the type of volunteer duties that you can do.

In both the interests of yourself and the people with whom you will be working, we require a reference from two referees **who have known you for at least 2 years**. These referees *MUST NOT BE FAMILY MEMBERS*.

**If your circumstances mean that you are unable to provide current references, we will be happy to discuss this further with you.**



Name: Address:	Name: Address:
Postcode: Tel No:	Postcode: Tel No:
Relationship to you:	Relationship to you:

As an agency working with vulnerable people, certain volunteer roles are considered exempt from the provisions of the Rehabilitation of Offenders Act 1974 and any convictions must be declared. You must disclose all previous convictions; none of these may be considered spent.

Have you ever been convicted, warned, reprimanded or cautioned for a criminal offence, or liable in a civil case? **YES/NO**

If yes, details will be required from you on a separate sheet (in strict confidence).

We may require a criminal records check. Do you give your permission for us to carry out a check? **YES/NO**

**Data Protection Act 1998**

Information on our database is **strictly confidential** and we do not pass on any personal data about you to outside organisations and/or individuals without your express personal consent. Please indicate if you agree that we may:

Keep basic information from this form on computer? **YES/NO**

Send you updates and more information about Age Concern? **YES/NO**

**Emergency Contact:**

Name:

Address:

Postcode:

Tel No:

Relationship to you:

Has this person agreed to be your emergency contact? **YES/NO**

I certify that all of the information given on this form is correct

Signature:

Date:

Thank you for your interest in volunteering with Age Concern.

Please return this form to:



## Interviews

Interviewing is an important part of the volunteer recruitment process. The interview is a two way process. It enables the organisation and the potential volunteer to match skills and abilities to the roles available and to determine whether a relationship can be established which meets the needs of both parties. It is a selection process and it is important that the interviewer and the potential volunteer understand that they can both say no.

The interview should be structured without being over formal. It is important that the person conducting the interview has the skills and experience necessary to make a fair assessment.

### **Desirable abilities of an interviewer include:**

- Broad knowledge of the organisation and its work
- Personal knowledge of the staff who will work alongside the volunteer
- Ability to relate to all types of people and to make them feel at ease
- Ability to listen and understand what is said (and perhaps unsaid!)
- Ability to ask follow up questions
- Ability to say “no“

### **Conducting the Interview**

Choose a location that is accessible, welcoming and offers privacy. Set aside enough time so that there will not be any interruptions that may give the volunteer the impression that they are less important than your other work. If possible, offer the volunteer refreshments and make them feel at ease.

Open the interview by thanking the person for their interest in volunteering and outline the process. Give them background information about the organisation and explain that they can ask questions at any time. During the course of the interview you will need to find out about the volunteer’s skills, experience, time they have available and what type of role they are interested in.

## Sample questions

- 1 Tell me about yourself
- 2 What attracted you to volunteer for Age Concern .....
- 3 Have you any previous experience of voluntary work?
- 4 How do you feel about working with older people?
- 5 What would you like to get out of volunteering here?
- 6 Would you rather work on your own or in a group?
- 7 What skills do you feel you have to offer?
- 8 Do you have your own transport and are you able to travel?
- 9 Do you have any questions?

## What to look for

- Ability to communicate
- Level of enthusiasm and commitment
- Any sense of hidden agenda
- Reasons for volunteering
- General attitudes and emotional reactions
- Level of self confidence

At the end of the interview the interviewer and the volunteer should be in a position to decide whether to carry on any further. If it is not certain that the volunteer has the required skills and experience, explain this to them. However, do think carefully about the role description and whether it is possible to adapt the role if a volunteer has some of the attributes required.

It is normal practice to agree a trial period. If a volunteer is to be accepted (subject to references) explain what will happen next and give an idea of the time frame. If it is not possible to accept them, explain why and offer alternative contacts (e.g. Volunteer Bureau) as appropriate.

## Recording Information

Record factual information only and assure the interviewee that all information disclosed by them is confidential.



### **Volunteering Development Recommended Practice link**

*Expectation 4* Effective volunteer recruitment process which is applied consistently.



### **Good Practice Guide link**

Interviews *page 53*.

## Example

# Equality and diversity monitoring form

## Confidential

*Insert your Age Concern's Equal Opportunities Policy Statement. An example is below*

“We are committed to the principle of equal opportunity for all our employees and volunteers regardless of their age, race, gender, marital status, sexual orientation, religious belief, ethnic origin, nationality, national origin or disability.”

To help us to develop positive policies to promote equal opportunities in Age Concern for all our volunteers, would you please fill in this monitoring form and return it with your completed application form.

- 1 Date of birth: .....
- 2 Gender:            Male             Female

The following question will help us identify a picture of the ethnic diversity of those applying for vacancies within the organisation. Recommended by the Commission for Racial Equality, these classifications are those used in the 2001 census.

- 3 Ethnicity – please tick the most appropriate box below to describe your ethnic group or origin.

### White:

British

Irish

Other White

### Mixed:

White and Black Caribbean

White and Black African

White and Asian

Other Mixed

### Asian or Asian British:

Indian

Pakistani

Bangladeshi

Other Asian

### Black or Black British:

Black Caribbean

Black African

Other Black

**Chinese or other Ethnic Group:**

Chinese

Other Ethnic Group

Do you consider yourself to have a disability?

Yes

No

If you wish to provide any additional details please do so below:

.....

.....

.....

.....

**THANK YOU FOR YOUR HELP**

## References

It is good practice to take up two written references for every new volunteer before their position is confirmed. Allow enough time to take up references in the recruitment timetable. It is helpful to take them up immediately after the satisfactory completion of an interview in order to enable the new volunteer to start within a reasonable period. If a prospective volunteer is unable to give the names of two referees, find out why. It could be that there are good reasons and a more flexible approach is needed. For example, a person who has only recently entered the UK from another country, like an asylum seeker or refugee, may have valuable skills and time to offer, but have no access to a referee in this country. (See 'Working with volunteers who are refugees or asylum seekers'. Age Concern England VP003).

Examples of documents to send to referees follow:



### **Volunteering Development Recommended Practice link**

*Expectation 4* Effective volunteer recruitment process which is applied consistently.



### **Good Practice Guide link**

References *page 56*.



*Example*

## Reference request letter and response form

Dear

Re: (Insert full name and address of potential volunteer)

The above named person has approached Age Concern and offered to help in a voluntary capacity.

Your name has been given as someone who could provide a reference. I should be grateful if you would kindly complete and return the enclosed form, bearing in mind the requirements of the enclosed role description.

Thank you for your help.

Yours sincerely

Enc:  
Referee response form  
Role/Task Description  
Stamped addressed envelope



**Example**

**Volunteer referee response form**

Name of volunteer:	
Address:	
How long have you known this person?	
In what capacity have you known this person (e.g. friend, employer)?	
To the best of your knowledge has this person a criminal record?	<b>Yes/No</b>

Here is a list of skills and qualities that are desirable when working with older people.

	<i>Please circle as appropriate:</i>				
	Excellent			Poor	
Trustworthiness	5	4	3	2	1
Reliability	5	4	3	2	1
Punctuality	5	4	3	2	1
Flexibility	5	4	3	2	1
Tact and Patience	5	4	3	2	1
Listening skills	5	4	3	2	1
Ability to work in a team	5	4	3	2	1
Ability to work unsupervised	5	4	3	2	1
Suitability to work with older people	5	4	3	2	1
Ability to handle confidential information	5	4	3	2	1
Any further comments?					

Name of referee:	
Address:	
Signature:	Date:

Your comments will be used to determine this person's suitability to work with older people who may be vulnerable.

All the information on this form is strictly confidential.

Thank you for your help. Please return in the enclosed SAE.

## Screening volunteers

Some volunteer roles and the groups of people with whom they work may lead an organisation to put a screening process in place as well as effective processes for the recruitment, training (if required) and supervision of volunteers. Checking whether a person has a criminal record is a common method of screening in order to help reduce the risk of recruiting volunteers who may be unsuitable to work with children or vulnerable adults.

There is no specific legal requirement except, at the time of writing, for certain activities and groups of people specified in the National Care Standards Act and related Regulations (to screen volunteers). Every organisation has a 'duty of care' for the people it works with. The 'duty of care' requires one to do everything 'reasonable' within their power to protect others from harm. Screening can include asking the prospective volunteer to disclose information about any previous criminal convictions (see the example application form in this manual) and/or using the Criminal Records Bureau.

It is important that the volunteer roles and the user or client groups with which they will be working are carefully considered as part of a risk assessment to decide whether the clients or users would be at risk if volunteers were not screened. Not all roles will require screening.

### Criminal Record Disclosures

The Criminal Records Bureau (CRB) makes available to registered individuals and bodies, details of the criminal records of prospective employees and volunteers, who will be working with children and vulnerable adults. There is no obligation on organisations to register with the CRB and seek disclosures, but if their staff or volunteers are working with children or vulnerable adults, they are encouraged to do so.

Information about an individual's criminal record is intended "to help organisations make safer recruitment decisions to protect the vulnerable". Criminal Records Disclosures simply provide additional information: they do not absolve organisations from making judgements about the relevance of that information. A briefing is available from Age Concern to provide initial guidance about when to seek a Disclosure; and about what use can legitimately be made of the information it contains. It should be read in conjunction with the Code of Practice and the Guidance issued by the CRB: all organisations using Disclosures must abide by these documents. The briefing is called '*Criminal Record Disclosures: making judgements*'. *Age Concern England GPG 149*.

The example application form in this manual includes reference to criminal record disclosures.

Age Concern England is registered as an Umbrella Body with the CRB, which enables Members of the federation to save the £300 registration fee. See the Useful contacts section for more information.



**Volunteering Development Recommended Practice link**

*Expectation 4* Effective volunteer recruitment process which is applied consistently.



**Good Practice Guide link**

Screening volunteers *page 60*.

**Example**

## Volunteer recruitment pathway

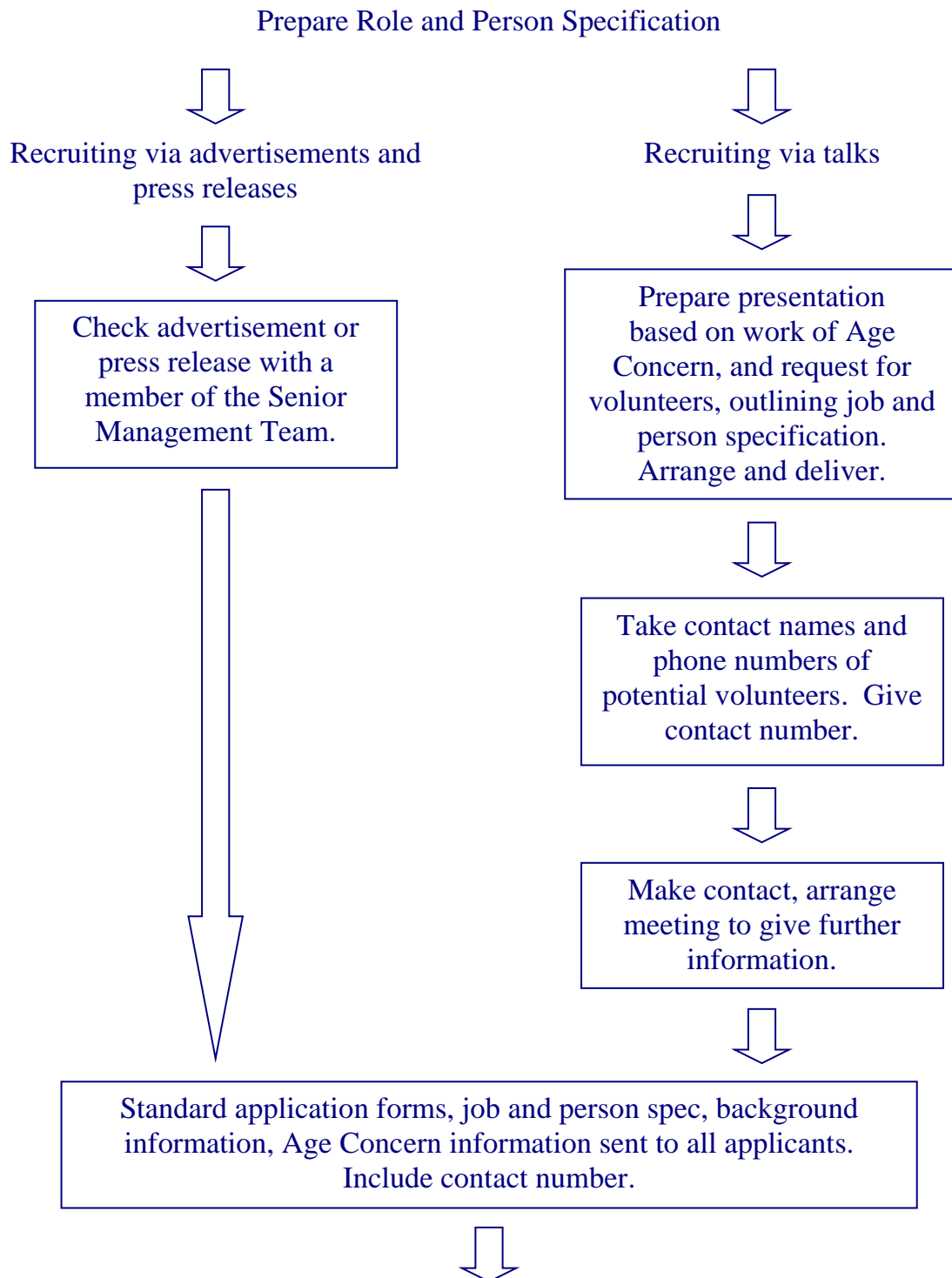
The process of recruiting volunteers needs to be carefully planned and implemented. The following pathway is an example used by one Age Concern to help all those involved in the process to plan effectively.

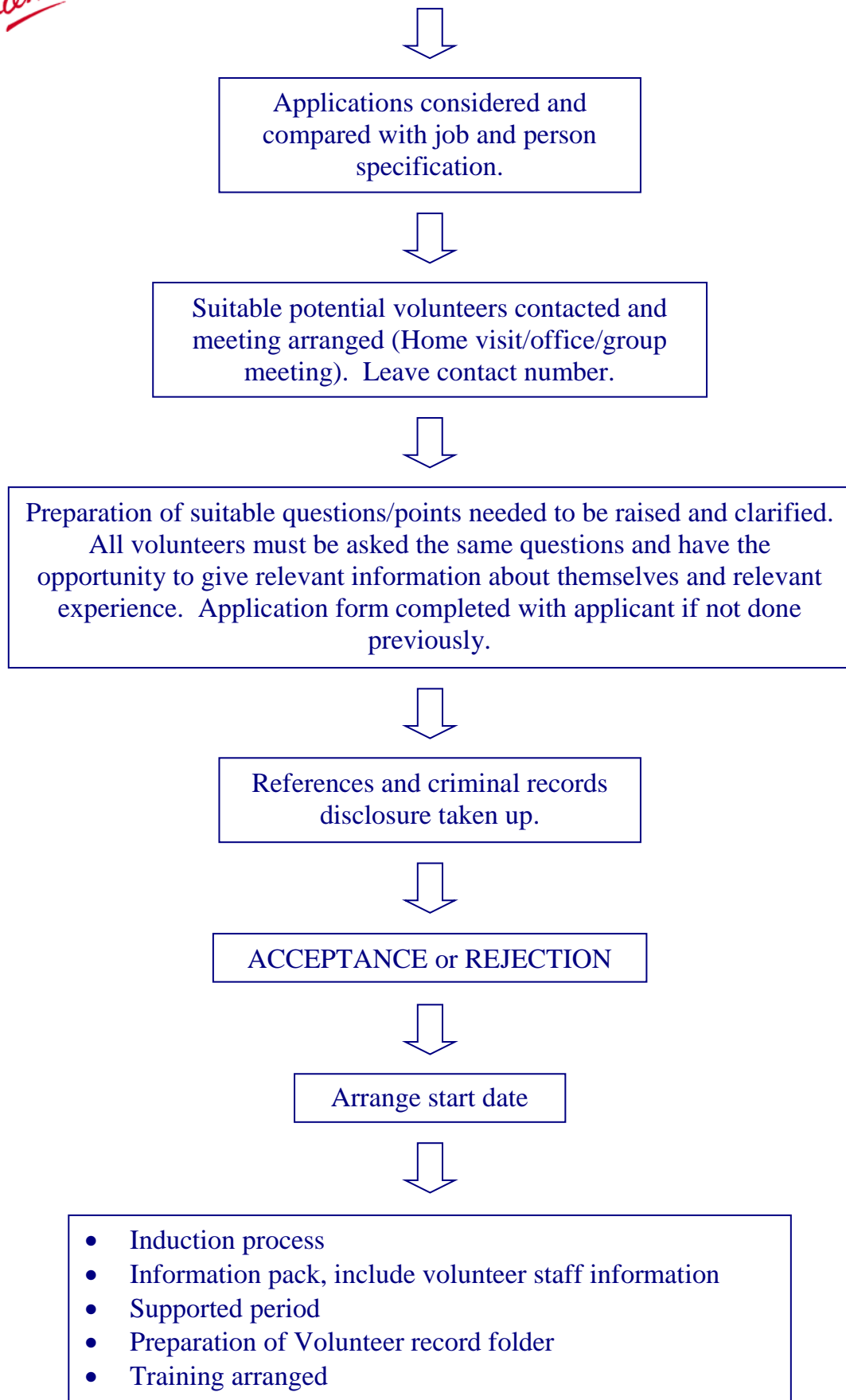
This pathway would be suitable following a decision to recruit through advertisements and press releases.

- 1 Prepare role description and person specification.
- 2 Draft advertisement. (Must contain positive message re role of volunteers in Age Concern and current need)
- 3 Role and person spec plus background information re Age Concern and service and standard application forms, if used at this stage sent to all applicants. Include contact number.
- 4 Applications considered and compared with role and person specification.
- 5 Suitable potential volunteers contacted and meeting arranged. (Home visit? In office? Group meeting?) Leave contact number.
- 6 Preparation of questions/points needed to be raised and clarified. All volunteers must be asked the same questions and have the opportunity to give relevant information about themselves and relevant experience. Application form completed with applicant if not done previously.
- 7 References and police checks taken up.
- 8 Acceptance or rejection.
- 9 Arrange start date.
  - Induction process
  - Information pack. To include volunteer staff information
  - Supported period
  - Preparation of Volunteer record folder
  - Training arranged

**Example**

**Volunteer recruitment pathway**









## 3 Support and supervision

3A Induction

3B Welcome letter example



See the **Good Practice Guide** section ‘Support and Supervision’ *pages 78-97* for comprehensive guidance on other aspects of Support and Supervision which are not currently included in this manual



## Induction

Once the recruitment process is completed, volunteers need to be given information and support to enable them to appropriately perform their roles.

This can be achieved by a variety of means. Some Age Concerns have a formal induction process which might include information sessions, visits to different activities and sites, meeting other staff/volunteers. Training on policy and procedures such as health & safety, lifting and handling, customer and elder abuse (depending upon the volunteer's role) can be gradually introduced as the volunteer's work progresses. In order to monitor a new volunteer's progress or to check that they are happy in their new role it is recommended that regular meetings are arranged with the Volunteer Co-ordinator or Manager during the settling in period.

A welcome letter signed by the Chair or Chief Officer is a useful way of starting the induction process. An example of a welcome letter follows. In this example, the Age Concern provides a volunteer handbook as part of the induction. Provision is also made for the volunteer to confirm their receipt of the handbook and other supporting information.

Many Age Concerns provide a volunteer handbook which gives introductory information about Age Concern and the expectations of the relationship between the Age Concern and the volunteer.

A generic handbook is being produced for use by Members of the federation. See Useful contacts for ordering details.

**Volunteering Development Recommended Practice link**

*Expectation 6* Volunteer induction programme.

**Good Practice Guide link**

Induction page 78.



**Example****Welcome letter**

Dear

We welcome you to Age Concern as a volunteer and are delighted that you will be joining us as a member of our team.

The enclosed volunteer handbook outlines the way we work and the rules we follow, in order to make things run smoothly. Please read it carefully and let us know if there is anything in it that you feel needs further explanation. We aim to use your individual skills to the best advantage and need to make sure that your activities with us are based on a clear understanding of your and our expectations and responsibilities. *(Enclose/or refer to other supporting documentation relating specifically to your Age Concern. If necessary request signed acknowledgement of enclosures and confirmation that they have been read.)*

The commitment, time and talents of our helpers make a major contribution to all our work done with and for older people. We believe you deserve, and should expect to be provided with, as much information, training and support as any paid member of staff, and should be valued, involved and respected in order that you can carry out your role successfully.

Your contribution will help to improve the quality of life for older people in Age Concern. This contribution includes your own ideas or views on the work we do. If at any time you would like to share any ideas with us or make suggestions about improvements that you feel we might make to our service, we would be very pleased to hear from you. We hope that you will find your involvement with us interesting and rewarding.

Yours sincerely

Enclosure: Receipt acknowledgement form

*Example*

# Receipt acknowledgement form

The Office Manager, Age Concern.....

I acknowledge receipt of the Volunteer Handbook and other procedural notes and confirm that I have read and understood them.

.....  
(Signature)

.....  
(Date)

.....  
(Full name in block capitals)

.....  
(Area of work in Age Concern)

## 4 Practicalities

4A Expenses

4B Volunteer expenses claim form example

4C Volunteer drivers

4D Letter to insurance company for use by volunteer drivers example

4E Guidelines for volunteer drivers example

4F Policies and procedures

## Expenses

It is a requirement of Volunteering Development Recommended Practice that reimbursement of out of pocket expenses is offered to all volunteers.

The following expenses are usually covered:

- travel to and from the place of volunteering
- travel undertaken in the course of volunteering
- postage and telephone costs (if working from home).

In addition some Age Concerns reimburse:

- the cost of meals taken during the course of volunteering if they have volunteered for a minimum period in a day (e.g. four hours).

In certain circumstances, subject to needs of the task, the following are reimbursed:

- cost of protective clothing or other essential equipment;
- cost of care of dependents, such as children, during the course of volunteering.

It is good practice to encourage all volunteers to take up expenses, so that those who need to, do not feel stigmatised. Those who do not wish to keep their expenses can be offered the chance to repay them as a donation.

If out-of-pocket expenses are not routinely and consistently offered to all volunteers, some people might be prevented from volunteering. This has serious equal opportunities implications and it will also make recruitment more difficult. It is good practice to request and keep receipts of expenditure.

It is essential only to pay the actual expenses that have been incurred.

Problems can arise if volunteers are paid more than actual out-of-pocket expenses, for example sessional payments, honoraria or lump sums. The Benefits and Tax authorities may treat them as income. Each has different rules on expenses and income, which need to be understood by the person receiving payments over and above any expenses actually incurred. For example, Jobseekers' Allowance will be reduced for any week in which a person receives more than the published "earnings disregard". Paying more than actual expenses also increases the possibility that a volunteer's relationship with an organisation could be one of employment. In such a case, an organisation may be required to pay the National Minimum Wage.

'Perks' such as cut-price merchandise or reduced membership rates should not cause any problems with the Inland Revenue, provided volunteers are not given anything they could sell at a profit.



The National Centre for Volunteering provides detailed guidance on volunteer expenses, including current tax and benefit implications. See the Useful contacts section.

**Volunteering Development Recommended Practice link**

*Expectation 9* Clear terms of involvement which are fair and considerate to all.

**Good Practice Guide link**

Expenses, benefits and the national Minimum Wage *page 106*.

*Example*

## Volunteer expenses claim form

Name: \_\_\_\_\_ Month: \_\_\_\_\_

Address: \_\_\_\_\_

Postcode: \_\_\_\_\_

Details of journey						Other expenses		
Date	From	To	Purpose	Mileage	Public Transport	Telephone	Postage	Other

Claimant's Signature: .....

Approved: ..... (Line Manager)

Total mileage \_\_\_\_\_ @ \_\_\_\_\_ p per mile = £

Other expenses = £ \_\_\_\_\_

**Total:**

= £

Paid: ..... (*Finance Manager*)

## Volunteer drivers

There are many issues that should be considered before using volunteer drivers. The potential volunteer must have a valid driving licence and, when using their own vehicle, one that is roadworthy. The comfort of service users needs to be considered and the training needs of the volunteer, particularly when assisting frailer service users. (An example of areas to be considered can be found in the example guidelines for volunteer drivers 4E).

The guidelines for volunteer drivers (4E) are designed for car drivers. Further advice should be sought regarding volunteer minibus drivers. Vehicles with a seating capacity of more than nine are, in law, minibuses and are not subject to car-sharing legislation. They operate under a section 19 permit. For more information contact the Community Transport Association. See the Useful contacts section.

### Insurance

Check that the Age Concern has public liability and/or employer's liability insurance policies which cover volunteer driving. Before commencing duties, volunteer drivers must make sure that they have adequate insurance cover. In order to remove any doubt it is good practice to ask potential drivers to contact their own insurance company, both for confirmation that they have suitable cover, and that they are driving as a volunteer for Age Concern (Letter 4B gives an example letter for volunteers to use, which includes a slip for the insurance company to return, confirming cover).

A range of information and advice leaflets, one of which is mentioned below, can be obtained from the Community Transport Association. See the Useful contacts section.

'**Social Car Schemes**' 3<sup>rd</sup> edition from the Community Transport Association (1999), a guide to organised lift-giving using voluntary drivers, £10 (£9 to CTA members).

### Mileage Allowances

Mileage allowance rates need to be set at a level which means that volunteers will not be out of pocket as a result of their voluntary work.

Some Age Concerns use the same rates for paid staff and volunteers. Some use Inland Revenue rates as a guide to help minimise the risk of drivers incurring a tax liability as a result of their driving for Age Concern. See also the note on volunteer expenses in this section of the manual.

The tax-free approved mileage allowance rates can be obtained from the Inland Revenue.

Inland Revenue booklet '**IR122 Volunteer Drivers**', a leaflet giving details of how to work out whether tax is due, is available free from Tax Enquiry Centres and Tax offices.

The Inland Revenue Enquiry Line can be contacted on 020 7667 4001, website at [www.inlandrevenue.gov.uk](http://www.inlandrevenue.gov.uk)

**Volunteering Development Recommended Practice link**

*Expectation 9* Clear terms of involvement which are fair and considerate to all.

**Good Practice Guide link**

Volunteer Drivers *page 122*.

*Example*

## Letter to insurance company for use by Volunteer Drivers

NAME: .....

ADDRESS: .....

.....

DATE: .....

To: (Insurance Company).....

Policy Number: .....

I intend to undertake occasional voluntary work, and from time to time I will use my vehicle to carry passengers or carry out other duties, as requested. I am entitled to a mileage allowance for these journeys to cover the running costs of my vehicle in accordance with Section 1 (4) of the Public Passenger Vehicles Act 1981, which exempts me from both Passenger Service Vehicle and Hackney Carriage/Private Hire car licensing laws. Such expenses will be claimed on a non-profit basis.

I should be grateful if you would confirm that my existing policy covers me for such volunteer driving – please use the tear off slip below. Please also confirm that my policy contains a clause indemnifying the agencies with which I am a volunteer against third party claims arising from the use of my vehicle for such voluntary work.

Yours faithfully

(Policy Holder)

FROM: (Insurance Company).....

RE: (Policy Number).....

POLICY HOLDER/DRIVER: .....

Issued by: ..... Date: .....

This is to confirm that your insurance policy covers voluntary driving (for which a mileage allowance may be received.) This also confirms that the above policy contains a clause indemnifying the agencies with which you are a volunteer against third party claims arising from the use of your vehicle to carry out such voluntary work.

*with thanks to the Community Transport Association for permission to use this example*

**Example**

## Guidelines for volunteer drivers

*We value the time and effort you give as a volunteer with Age Concern. The following guidelines are designed to be used in conjunction with our volunteer handbook to give you a better understanding of your role and to ensure the safety of you and your passengers.*

### A Drivers

#### 1 Licence

A full driving licence is required (not provisional). You will need to submit your driving licence for inspection in order to ensure that it is up to date. You cannot be accepted as a driver if you have any endorsements for any offence that implies suspect driving.

#### 2 Driving Experience

You must have held a full driving licence and been driving for a minimum of three years.

#### 3 Vision

The Highway Code states that a driver must be able to read a number plate from a distance of 20.5m (67ft or about 5 car lengths). If you require glasses or contact lenses in order to do this, please ensure that you wear them whilst driving.

#### 4 Disability/Illness

Please report any illness or disability, which may affect your ability to drive. (The DVLA can supply information about notifiable illnesses.)

#### 5 Fitness to drive

Please remember that many factors can affect your ability to drive, in particular:

##### i Alcohol

Drinking alcohol slows down your reactions, affects your judgement of speed and distance and can give you a false sense of confidence.

Your driving can be badly affected even if you are below the legal limit.

Please note that alcohol can take up to 12 hours to be absorbed by the body



and can affect your driving the next morning. **YOU MUST NOT** drive if you have consumed alcohol within the last 12 hours.

ii *Medication*

Some medicines can make you feel drowsy. This will usually be indicated on the label or your pharmacist will be able to offer advice. When taking prescribed medicines, ask your doctor if it is safe to drive.

iii *Tiredness*

Driving can make you feel sleepy. If you begin to feel tired, open a window to let fresh air into the car and find a safe place to pull over. Do not continue to drive if you are feeling tired.

## 6 Training

If your role as a volunteer driver requires you to offer assistance to passengers getting in and out of your vehicle, you may be required to attend a session giving basic instruction in passenger assistance and disability awareness. This will protect both your passenger(s) and yourself.

## 7 Expenses

The procedure for claiming expenses is set out in our general volunteer guidelines and your support worker will discuss this with you.

If you drive as a volunteer for a voluntary organisation any mileage allowance that you receive is not liable for tax unless the amount you receive exceeds the expenses you incur in driving i.e. results in a profit. Age Concern pays mileage allowances within the tax free rates set by the Inland Revenue.

# B Your Vehicle

## 1 Checks on your vehicle

You must ensure that your vehicle is roadworthy. Section 28 of the Highway Code sets out the regular checks that drivers must carry out on the roadworthiness of their vehicle: brakes, lights, steering, tyres, indicators, mirrors etc.

## **2 MOT**

You must hold a valid MOT certificate.

## **3 Insurance**

You will need to inform your insurance company in writing that you are undertaking voluntary work to ensure that your policy will cover you.

The Community Transport Association has undertaken negotiations with the Association of British Insurers and has produced a specimen letter (attached) which can be sent to your insurance company. This includes a confirmation slip which your insurance company must return to confirm that you are covered for driving as part of your voluntary work.

There are some insurance companies which specialise in policies for people who undertake voluntary work and you may wish to obtain a quote.

As set out in our general volunteer guidelines Age Concern has an insurance policy to cover volunteers for personal accident and public liability, but it does not provide cover for car accidents.

## **4 Seat Belts**

You **MUST** wear a seat belt if one is available, unless you are exempt (see Highway Code).

# **C Passenger Comfort and Safety**

## **1 Seat Belts**

It will be made clear to our service users that they must wear a seat belt, unless they have an exemption certificate on medical grounds. If a passenger refuses to do so please inform your Age Concern contact.

## **2 Passenger Assistance**

Some service users will need some assistance getting in and out of the car. You **MUST NOT** attempt to assist someone without the appropriate training.

## **3 Passenger Protection**

Your passenger should not be left alone during your trip, except in an emergency. Please fill up with petrol, go to the toilet etc before starting out on your journey.

#### **4 Smoking**

If you are a smoker, and wish to smoke while carrying passengers please discuss this with them. However for the comfort and safety of your passenger(s) we would recommend that you refrain from smoking during the journey.

### **D Emergencies**

- 1** All accidents and incidents must be reported to Age Concern. Please report any emergencies as soon as possible.
- 2** In the case of a medical emergency, call an ambulance immediately and do not move your passenger. First Aid should be applied only if you have had the relevant training and only if there is a risk to life.
- 3** If you are involved in an accident with another vehicle, you will need to obtain details of the other driver - registration, insurance details, name and address etc. You also have a duty to provide these details to the other party.
- 4** If there is a risk of fire, evacuate the passenger(s) to a safe distance before attempting to use a fire extinguisher (if you have one). Your first priority should be the safety of your passenger(s) and yourself.
- 5** If your vehicle breaks down, please let Age Concern know as soon as possible so that we can offer you assistance and make alternative arrangements for your passenger(s).
- 6** A leaflet about personal safety, compiled by the police and giving details of what to do in a breakdown, will be provided.

If you have any questions about any points raised in these guidelines please contact us.

*Thank you for becoming a volunteer with Age Concern. We hope that you enjoy your work with us.*

## Policies and procedures

Volunteers need to be informed about the policies and procedures which relate to them. Some Age Concern policies and procedures will be the same for staff and volunteers. Others need to specifically reflect the different relationship with volunteers. See note 1E on volunteers and employment status.

All members of Age Concern, the federation must show evidence of commitment to equal opportunity and involving older people, and if services are provided, must have appropriate health and safety provisions in place.

If staff are employed there must be proper employment practices including compliance with legislation. A 'Model Volunteering Policy' (VP006) has been produced by the Volunteering Partnership. See section 1B.

If you use policies for volunteers which have been designed with paid staff in mind, check their applicability and ensure that they clearly state to whom they apply. You need to consider the ways in which you make volunteers aware of the policies and procedures which apply to them.

A careful balance is needed to ensure that you give sufficient information to equip volunteers for their role, but that you do not overload them with unnecessary information. Care is needed to ensure that information is given at appropriate stages in the recruitment and induction processes.

Some Age Concerns:

- give copies of every policy to each volunteer
- give copies of the policies most needed and used in the particular task which is undertaken
- provide a central file of all policies for all to read initially at the induction session and for later reference as and when required or requested
- provide a summary of policies, sometimes in a volunteer handbook.

## **Appendix A – Useful contacts**

A1 Volunteering Partnership

A2 Other useful contacts and resources

## Volunteering Partnership

The Volunteering Partnership is the federation body responsible for the development of the federation strategy on volunteering. Each Age Concern region has a representative on the Partnership (who may be a trustee, staff member or volunteer of a local Age Concern). Age Concern England has representatives and there is also provision for co-opted members. The secretariat is provided by Age Concern England.

Contact details for Partnership members can be obtained from the Volunteering Partnership correspondent.

## Other useful contacts and resources

### Age Concern England

Age Concern England supports good practice development in volunteering with a wide range of resources. Those with a direct relevance to volunteering are listed below. For information about the full range of good practice materials supplied by Age Concern England contact Elspeth Rodwell, Communications Officer, Age Concern England on 020 8765 7750 Email: [rodwele@ace.org.uk](mailto:rodwele@ace.org.uk).

Name	Description	Contact	JANet ref.no
<i>ActivAge programmes to support the involvement of older people as volunteers</i>	Includes Ageing Well, the Intergenerational Programme and Age Resource with supporting networks	ActivAge Unit <b>Tel:</b> 0208 765 7231 <b>Email:</b> <a href="mailto:ribatav@ace.org.uk">ribatav@ace.org.uk</a>	
<i>Age Concern Board Builder Series</i>	Information packs and trainer guides for Board/ Committee development covering roles and responsibilities, planning, and working effectively as a board	Research & Development Unit <b>Tel:</b> 01604 234151 <b>Email:</b> <a href="mailto:leachs@ace.org.uk">leachs@ace.org.uk</a>	
<i>Age Discrimination and volunteering in Age Concern</i>	Age Concern England May 2002 Part of the Age Discrimination toolkit which includes a useful age discrimination audit tool	Maria McLarty <b>Tel:</b> 020 8765 7506 <b>Email:</b> <a href="mailto:mclartm@ace.org.uk">mclartm@ace.org.uk</a>	

<i>Criminal Record Disclosures: making judgements</i>	Community Care Partnership Briefing no.14 (to guide you through the issues about disclosure and vulnerable adults)	Mail order department <b>Tel:</b> 020 8765 7206 <b>Email:</b> <a href="mailto:boonp@ace.org.uk">boonp@ace.org.uk</a>	
<i>Developing Services with and for Minority Ethnic Older People</i>	Resource Pack 25 Age Concern England 1998	Mail order department <b>Tel:</b> 020 8765 7206 <b>Email:</b> <a href="mailto:boonp@ace.org.uk">boonp@ace.org.uk</a>	GPG 104
<i>Involving Older People</i>	Good Practice Guide Age Concern England Jan 2000	Mail order department <b>Tel:</b> 020 8765 7206 <b>Email:</b> <a href="mailto:boonp@ace.org.uk">boonp@ace.org.uk</a>	GPG 2
<i>Grant funds</i>	A range of funds administered by Age Concern England	Grants Unit <b>Tel:</b> 020 8765 7740 <b>Email:</b> <a href="mailto:hulmem@ace.org.uk">hulmem@ace.org.uk</a>	
<i>Guidance on Refugees and Asylum Seekers as volunteers</i>	Good Practice Guide Age Concern England March 2002	Mail order department <b>Tel:</b> 020 8765 7206 <b>Email:</b> <a href="mailto:boonp@ace.org.uk">boonp@ace.org.uk</a>	VP003
<i>Model Volunteering Policy</i>	Volunteering Partnership 2003	Mail order department <b>Tel:</b> 020 8765 7206 <b>Email:</b> <a href="mailto:boonp@ace.org.uk">boonp@ace.org.uk</a>	VP006
<i>Opening Doors – Lesbians and Gay Older Men</i>	Resource Pack 26 Age Concern England 2002	Mail order department <b>Tel:</b> 020 8765 7206 <b>Email:</b> <a href="mailto:boonp@ace.org.uk">boonp@ace.org.uk</a>	
<i>Race Relations (Amendment) Act 2000</i>	Good Practice Briefing Age Concern England	Mail order department <b>Tel:</b> 020 8765 7206 <b>Email:</b> <a href="mailto:boonp@ace.org.uk">boonp@ace.org.uk</a>	GPB001



<i>Registration with the Criminal Records Bureau</i>	Information about how to join the Age Concern umbrella scheme (open to all federation Members, which saves the £300 registration fee)	Human Resources <b>Tel:</b> 0208 765 7288 <b>Email:</b> <a href="mailto:hodginh@ace.org.uk">hodginh@ace.org.uk</a>	
<i>Running Information and Advice Services</i>	How To Guide Age Concern England 2001 Section on volunteer recruitment and management plus good practice examples	Mail order department <b>Tel:</b> 020 8765 7206 <b>Email:</b> <a href="mailto:boonp@ace.org.uk">boonp@ace.org.uk</a>	GPG 118
<i>Statement of Expectation on Volunteering</i>	Age Concern, the federation. May 2002	Federation Secretariat <b>Tel:</b> 020 8765 7484 <b>Email:</b> <a href="mailto:acfed@ace.org.uk">acfed@ace.org.uk</a>	VP001
<i>Trustee Welcome pack</i>	Promoting Age Concern Age Concern England April 1996 Available on disc or Word	Mail order department <b>Tel:</b> 020 8765 7206 <b>Email:</b> <a href="mailto:boonp@ace.org.uk">boonp@ace.org.uk</a>	GPG 43
<i>Volunteering Development Recommended Practice</i>	Volunteering Partnership. July 2002 Good practice/ standards tool on volunteering. Part of Federation Foundation Standard, Quality Counts	Mail order department <b>Tel:</b> 020 8765 7206 <b>Email:</b> <a href="mailto:boonp@ace.org.uk">boonp@ace.org.uk</a>	VP002

<i>Volunteering Partnership</i>	Federation Partnership responsible for the strategic development of volunteering	Volunteering Partnership correspondent ActivAge Unit Age Concern England <b>Tel:</b> 0208 765 7231 <b>Email:</b> <a href="mailto:volunteering@ace.org.uk">volunteering@ace.org.uk</a>	
<i>Volunteers Handbook</i>	Volunteering Partnership 2003	Order details to be confirmed. Available from Age Concern England from late 2003.	

## Other useful contacts:

<p>Active Community Unit</p>	<p>Part of the Home Office which promotes the development of the voluntary and community sector. Operates grants funds and provides information relevant to community development and volunteering</p>	<p>Horseferry House Dean Ryle Street London SW1P 2AW <b>Tel:</b> 020 7273 4000</p>
<p>Community Fund</p>	<p>Grants programmes which include volunteering development</p>	<p>St Vincent House 16 Suffok Street London SW1Y 4NL <b>Tel:</b> 020 7747 5300 <b>Email:</b> <a href="mailto:enquiries@community-fund.org.uk">enquiries@community-fund.org.uk</a> <b>Web:</b> <a href="http://www.community-fund.org.uk">www.community-fund.org.uk</a></p>
<p>Commission for Racial Equality</p>	<p>Publicly funded, non-governmental body set up under the Race Relations Act 1976 to tackle racial discrimination and promote racial equality. Range of resources to support good practice</p>	<p>St Dunstan's House 201-211 Borough High Street London SE1 1GZ <b>Tel:</b> 020 7939 0000 <b>Fax:</b> 020 7939 0001 <b>Email:</b> <a href="mailto:info@cre.gov.uk">info@cre.gov.uk</a> <b>Web:</b> <a href="http://www.cre.gov.uk">www.cre.gov.uk</a></p>
<p>Community Transport Association</p>	<p>The UK's biggest provider of training and information on accessible, voluntary and community transport</p>	<p>Highbank Halton Street Hyde, Cheshire SK14 2NY <b>Tel:</b> 0161 366 6685 or 0161 351 1475 <b>Fax:</b> 0161 351 7221 <b>Tel:</b> 0161 367 8780 (<i>Advice Service</i>) <b>Email:</b> <a href="mailto:CTAUK@CommunityTransport.com">CTAUK@CommunityTransport.com</a> <b>Web:</b> <a href="http://www.communitytransport.com">www.communitytransport.com</a></p>

Directory of Social Change	Publications and training for the not for profit sector, including volunteering. Orders via Age Concern England for federation Members can be obtained with a discount	24 Stephenson Way London NW1 2DP <b>Tel:</b> 020 7209 5151 <b>Email:</b> <a href="mailto:info@dsc.org.uk">info@dsc.org.uk</a>  Publications orders via Age Concern England – Elspeth Rodwell <b>Tel:</b> 020 8765 7750 <b>Email:</b> <a href="mailto:rodwele@ace.org.uk">rodwele@ace.org.uk</a>
Diversity Challenge	Website to promote diversity. Information and resources	<b>Web:</b> <a href="http://www.diversitychallenge.org">www.diversitychallenge.org</a>
Energize Inc.	US based training, consulting and publishing house with wide range of resources	<b>Web:</b> <a href="http://www.energize.com">www.energize.com</a>
National Centre for Volunteering	The national volunteering organisation in England with extensive resources, many of them free - publications, briefings, advice service, training and research. Networking opportunities for people who manage volunteers. Membership open to organisations and individuals with regular newsletter. Discounts on products and services available for federation Members	Regents Wharf 8 All Saints Street London N1 9RL <b>Tel:</b> 020 7520 8900 <b>Free phone advice line:</b> 0800 028 3304 <b>Email:</b> <a href="mailto:information@thecentre.org.uk">information@thecentre.org.uk</a> <b>Web:</b> <a href="http://www.volunteering.org.uk">www.volunteering.org.uk</a>  Information on discounts on products and services for federation Members from Age Concern England – Elspeth Rodwell <b>Tel:</b> 020 8765 7750 <b>Email:</b> <a href="mailto:rodwele@ace.org.uk">rodwele@ace.org.uk</a>
National Council for Voluntary Organisations	Information and resources for organisations in the UK charity sector	Regents Wharf 8 All Saints Street London N1 9RL <b>Helpdesk:</b> 0800 279 8798 <b>Web:</b> <a href="http://www.ncvo-vol.org.uk">www.ncvo-vol.org.uk</a>

REACH	Resource for voluntary organisations seeking mature volunteers with business, managerial and professional experience	89 Albert Embankment London SE1 7TP <b>Tel:</b> 020 7582 6543 <b>Web:</b> <a href="http://www.volwork.org.uk">www.volwork.org.uk</a>
Retired and Senior Volunteer Programme (RSVP)	50+ volunteering programme. Works with community partners. Part of Community Service Volunteers	c/o CSV, 237 Pentonville Road London N1 9NJ <b>Tel:</b> 020 7287 6601 <b>Web:</b> <a href="http://www.csv-rsvp.org.uk">www.csv-rsvp.org.uk</a>
Volunteer Development England	Membership organisation for volunteer bureaux, briefing and information papers for people who work with volunteers	New Oxford House 16 Waterloo Street Birmingham B2 5UG <b>Tel:</b> 0121 633 4555 <b>Web:</b> <a href="http://www.vde.org.uk">www.vde.org.uk</a>
<b>Volunteering websites</b>		
Do-it	<a href="http://www.do-it.org.uk">www.do-it.org.uk</a>	
Experience Corps	<a href="http://www.experiencecorps.co.uk">www.experiencecorps.co.uk</a>	
Timebank	<a href="http://www.timebank.org.uk">www.timebank.org.uk</a>	
UKVPMs	<a href="http://groups.yahoo.com/group/ukvpms">http://groups.yahoo.com/group/ukvpms</a>	<i>Web based networking resource for volunteer managers. Free membership.</i>
Volunteers Week	<a href="http://www.volunteersweek.org">www.volunteersweek.org</a>	



## **Appendix B – Other Volunteering Partnership materials**

Rationale for volunteer involvement in Age Concern, the federation

Model Volunteering Policy

Volunteering Development Recommended Practice

