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What Paperwork Do I Need?

There's a danger of overwhelming both volunteers and yourself with forms, policies and procedures. For just about any type of formal volunteering (as opposed to informal volunteering, which describes the ad hoc helping out that goes on in the community) you are going to need some form of paperwork. The trick is to keep it practical, useable and readable.

One key thing to remember for all volunteer documents is accessibility. Make sure they don't exclude people with sight problems, learning difficulties, English as a second language, poor literacy skills and so on.

Key things to remember here are to use a clear sans serif font such as Arial, at 12 point or above, and to always bear in mind plain English. You're writing documents for volunteers, not case studies for law students. The easier they are to read, the more likely people are to read them.

What follows is a list of the sort of documents and policies that are going to be of use to most organisations involving volunteers. It's neither exhaustive nor a minimum standard - some small, informal organisations might not need everything here, and organisations working in fields might require specific forms or procedures not mentioned here, such as child protection policies and so on. It also assumes that you have some policies/procedures already in place for your organisation, such as health and safety, equal opportunities and so on.

Task description

A role or task description gives a prospective volunteer a good idea of the what will be expected of them, and clear guidelines once they are involved in the organisation. Drawing one up helps concentrate the mind and ensure that you do have a viable role to offer the volunteer. Don't consider them to be written in stone, though.

Application form

One document that you might be able to do without, or at least slim down, is the application form. Many organisations use application forms that resemble ones you'd expect as an applicant for a paid job. Often this involves asking for information that they don't really need, or worse, that is intrusive. Asking people about previous paid/voluntary experience is likely to put off those wanting to volunteer as a step to entering or re-entering employment, which is a large percentage of potential volunteers. And asking them to write about why they want to volunteer

with you is putting people without confidence in their written English at a disadvantage. Generally if there's information you need to know, you can ask it at the interview stage.

Volunteer record file

You're going to need to keep some details about volunteers on file, such as their contact details and who to call in case of an accident. But there's little more you need in terms of personal information. Lots of organisations like to ask about, for example, volunteers' health. All you really need to know in this case is whether there's something you should be aware of in case of an emergency or in terms of making it easier for the person to volunteer.

Apart from anything else, one of the key principles of the Data Protection Act is that only relevant personal information should be held.

The two questions - is it necessary? is it relevant? - are also ones to bear in mind when considering adding anything to the volunteer's file at a later date.

Expenses form

You're going to need to keep a record somewhere of the expenses volunteers are paid. In terms of finance you might only be concerned with the overall amount, but you need to be able to show that you are reimbursing out of pocket expenses only. This will help to avoid problems for volunteers in receipt of benefits, and lessen the chance of it looking like you have intended to create a contract with your volunteers.

Induction checklist

It can be very useful to make a checklist to ensure that volunteers are fully inducted. It doesn't have to be complicated; simply something you or the volunteer can tick off as things are completed.

Volunteer policy

A volunteer policy is a framework for the volunteer programme. It summarises and signposts on to other policies and procedures. It can place your use of volunteers in context, by explaining their role within your organisation, and their distinctiveness from paid staff.

Volunteer agreement

Volunteer agreements set out what volunteers and the organisation can expect from each other. In a sense they are describing the volunteer's rights and responsibilities. The agreement is not and should not be a contract as they describe expectations rather than obligations.

Volunteer Handbook

It might be worth considering putting together a volunteer handbook as a kind of reference guide backing up the sort of information you give volunteers as part of their induction. While a volunteer policy might include issues such as equal opportunities, health and safety and so on, the handbook is a more informal guide to life as a volunteer in your organisation. That's the place to explain where to get a cup of tea, the procedure for booking tools out and so on.

The handbook is also a good place to collect any full policies and procedures that you think volunteers should be in possession of.

Problem solving procedures

Its good to be prepared for any problems that might arise from the volunteer or organisation's point of view. While many matters may be dealt with easily in an informal way, it makes sense to have procedures in place to deal with those that can't be. This means that volunteers will be dealt with consistently, and will know where they stand at every step of the way. As always, it is important that the language in the procedures is as clear as possible.

Exit interview

One way of finding out how to improve your volunteer programme and keep your volunteers for longer is to find out why they leave.

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