

Managing volunteers

Supervision and reviews

Volunteer reviews are often shied away from and seen as too formal and similar to a paid role. This perception can be avoided. Reviews can be an excellent opportunity for both volunteer and Volunteer Manager to see how they are getting on and if any further support, training or information would help.

'Informal' reviews

Reviews can and should be an ongoing feature of the relationship between a volunteer and a Manager, the kind of interaction that often happens naturally. This might include:

- Phone calls
- Email exchanges
- Other online communication
- A quick chat at the end of the volunteering session.

Reviews allow Volunteer Managers to maintain a positive relationship and to check if volunteers have any worries, concerns or questions. The Supervision form included in this booklet can be used by both volunteer and Manager to record any issues they want to discuss the next time there is an opportunity. It does not need to be a long-term record that replaces informally catching up, but some people may find it gives a helpful structure to discussions. Make the atmosphere relaxed and in a calm environment if possible. Adapt the template printed overleaf to include some key questions to ask them.

'Formal' reviews

This could be done once a year or as felt appropriate and is a more formal opportunity to reflect properly on what's happened – and to identify any skills, training or information that is needed. They don't need to be 'formal' in a business sense and are a defined opportunity to discuss things away from the normal busy schedules. Use the template to structure volunteer reviews.

Depending on the role and your organisation, the review may be a way to decide if someone is still suitable for the voluntary role they have and to make a recommendation for their future volunteering. Some suggested options might be:

- To stay with the same role (e.g. with a new set of goals and targets, or training to look forward to).

- To move on to a new role.
- To leave the role entirely (e.g. for a break and to consider whether to return).

This is not always an easy process to complete but it often means that long-term volunteers are given new challenges and options, rather than remain doing a role they have long since stopped enjoying.

Training, learning and development

Voluntary roles can change over time and you may ask volunteers to do new and different tasks. This is generally good and is likely to keep people interested. There shouldn't be an expectation that they will want to.

Having an accessible training calendar (e.g. on your website) makes it easier for staff and volunteers to prepare for and consider new training opportunities. It is important to make sure that a volunteer continues to have the skills to do the role (and any new tasks). It is important to retain existing skills and gain new ones. Whilst you may not always have the resources to put volunteers on expensive training courses, you can assist their learning in other ways. Consider:

- 'Buddying' newer volunteers with more experienced volunteers.
- Running internal training courses or information sharing sessions.
- Linking up with established training sessions where possible.
- Asking departing volunteers to share their learning experiences with you and pass that on to volunteers when needed.

Training needs

Use a Training Needs Analysis template to try and identify the learning needs of a volunteer. Training Needs Analysis documents can take many forms but the main aim is to work out which parts of their role need extra learning and what training can be done to help.

Communication

Communicating with volunteers is a key component of dealing with volunteers. Picking an appropriate communication method is important. Volunteers are unlikely to respond well to formal or business-like communications. Try instead to find out their communication preferences (e.g. email, letter, phone calls, in person etc.) and use them where possible.

Performance management

Volunteers are not paid members of staff and so issues of performance must be seen and considered differently. With volunteers it is often forgotten that training, information or support might be the factors that need addressing. Agreeing a procedure in advance can help to avoid disputes or complaints becoming complicated to deal with. Managing volunteers may

lead to dealing with difficult situations that need to be addressed – e.g. disagreements between volunteers and issues of performance. Think about these things in advance and try to stop issues from developing beyond the initial problem or situation.

Expenses

Agree an expenses policy for volunteers and make it available to a volunteer when they apply for the role. Make it flexible to take into account the different activities for different roles – e.g. travelling to different parts of the country for expeditions. Whilst volunteers ideally should not be out of pocket for volunteering, many organisations find it difficult to pay them. Having a clear policy allows potential and new volunteers to understand the position before they start the role. Some things to consider:

- Only out of pocket expenses are normally reimbursed.
- Define in advance what an acceptable expense is.
- Be very clear if you have a limit on the amount/type of expense claim that volunteers can make.
- Not paying expenses limits the type and number of potential volunteers.
- Some people will be reluctant to claim expenses. There shouldn't be any expectation that they will decline to claim for them.