

## MANAGING FORMALITIES

Churches vary enormously in how formally they work with volunteers and some flourishing churches will have almost everyone in the congregation involved without anything needing to be committed to paper. Putting things on paper is not virtuous in itself but can sometimes help with clarity and consistency and is sometimes a legal or church requirement.

The table below offers an explanation of some key documents and processes that represent fairly standard 'good practice' when working formally with volunteers. These may be useful to you in the form suggested or you may simply use the principles behind them to inform what you do. Whatever you choose to do has to fit your situation and help you achieve your aims, whether that is offering hospitality to the lonely or sharing Bible stories with children.

The sample documents suggested are a starting point or guide rather a finished product. In all documents relating to volunteers it is important to avoid the language of employment as that can cause legal difficulties. For suggestions of language to use or avoid see *Volunteer-friendly vocabulary*

Volunteer Role Description	Volunteer Expenses	Problem Solving Procedure
Mutual Expectations	Volunteer Enquiry Form	Health and Safety (H&S)
Recruitment Process	Confidentiality and Data Protection	Safeguarding
Induction	Emergency contact information	Insurance
Volunteer Policy		

WHAT	WHY	HOW & HELP
<p><b>Volunteer Role Description</b></p> <p>An outline of what the role involves, avoiding language like Job Description, which could imply employment</p>	<p>To give clarity to both the volunteer and organisation about what they are being asked to do</p> <p>Clarifying what a role involves makes it easier to think about who it might suit and where to find them</p> <p>Clarifying a role can help identify what equipment, training or support might be needed to make it work</p>	<ul style="list-style-type: none"> <li>■ Decide a clear description of what you are asking a volunteer to do (in whatever format)</li> <li>■ Ensure that anything necessary to do the role is available for a volunteer if they start</li> <li>■ Use the role description to discuss the role with potential volunteers and identify things that they will enjoy or find easy and anything that might bore or challenge them</li> </ul> <p><b>Guidance available</b></p> <ul style="list-style-type: none"> <li>■ Guidance on <i>Clarifying the task</i></li> <li>■ Guidance on <i>Volunteer friendly language</i>, to avoid implying a contract</li> <li>■ <i>Clarifying tasks</i> checklist</li> <li>■ <i>Sample Role Description</i></li> <li>■ Sample <i>role welcome card for new volunteers</i></li> </ul>
<p><b>Mutual Expectations</b></p> <p>A statement of things like cooperation, support, cover with insurance etc. Not a contract as this can imply employment and cause legal problems</p>	<p>Clarity that it is right for volunteers to have certain expectations of you and vice versa</p> <p>Because it's easy to assume that everyone shares the same expectations and this is not always true so it can be useful to have a way of discussing what the expectations actually are</p> <p>As a reference point if things begin to go wrong, as the organisation and the volunteer can be brought back to what was explicitly agreed at the outset</p>	<p>Mutual expectations are ideally addressed when first discussing a particular role and/or when a volunteer has an induction or similar. It is much harder to begin to raise the topic when a lack of shared expectations becomes apparent</p> <p><b>Guidance available</b></p> <ul style="list-style-type: none"> <li>■ Sample <i>Mutual Expectations</i> document that can be adapted</li> <li>■ Sample <i>role and mutual expectations welcome card</i> for new volunteers</li> </ul>

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WHAT	WHY	HOW & HELP
<p><b>Recruitment Process</b></p> <p>Especially for church based projects - how you get from having identified a task that needs doing to a suitable person taking on the role (<i>the level of formality varies enormously depending on the situation</i>)</p>	<p>It pays to think about processes for recruiting volunteers because if it doesn't work it can be time consuming and a drain on an organisation</p> <p>Part of recruitment is selection. It's helpful to consider in advance what you can do if someone is not suitable for a particular role</p> <p>A considered process, even if informal, can make saying no easier to do well</p>	<ul style="list-style-type: none"> <li>■ Clarify what you would like a volunteer to help with or do</li> <li>■ Think imaginatively about where to find suitable people</li> <li>■ Decide what needs doing to let people know about the role, enable them to express an interest and enable them to take it on if you agree it will work (Don't be afraid to explore whether the role is right for the person and redirect them to something else if it isn't)</li> </ul> <p><b>Guidance available</b></p> <ul style="list-style-type: none"> <li>■ Guidance on <i>Taking On Volunteers who can help</i></li> <li>■ Checklist for <i>Taking On Volunteers</i></li> <li>■ <i>Suggestions for places to advertise for volunteers</i></li> </ul>
<p><b>Induction</b></p> <p>Starting someone off in a new role in a way that gives everyone confidence</p>	<p>So that whoever volunteers understands what they are going to do, why it matters and has information that will help them flourish in the role and provide the best support possible to those they serve</p>	<p>Requires some time to be set aside when the volunteer starts, to:</p> <ul style="list-style-type: none"> <li>■ Ensure they understand purpose of the organisation, any key relationships etc</li> <li>■ Ensure they understand their role, how it fits in with the bigger picture and can ask questions as necessary</li> <li>■ Cover any essential policies or procedures</li> <li>■ Cover things like expenses, contacts, making hot drinks and any practicalities that they will need to know for their role and happiness</li> </ul> <p>An induction doesn't necessarily need to be one session; it can be an introductory period. Inductions can be done individually or in groups, whichever is most practical</p>

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<p><b>Volunteer Policy</b></p> <p>A statement of your agreed principles and practice when working with volunteers</p>	<p>To be clear about why and how you involve volunteers</p> <p>It offers consistency and transparency and gives the answers to standard questions that will need answering</p>	<p>It is important that any policy or statement is a true reflection of your culture and intentions when working with volunteers. All other documents should then be consistent with the policy. It can be useful to use a policy template to facilitate a discussion and then finalise the policy, ensuring that it is agreed by any governing body</p> <p><b>Information available</b></p> <ul style="list-style-type: none"> <li>■ <i>Agreeing Principles</i> guidance</li> <li>■ <i>Volunteer policy template</i></li> </ul>
<p><b>Volunteer Expenses</b></p> <p>Any out of pocket expenses that you agree to reimburse</p>	<p>Avoids excluding people who can't afford expenses like travel costs</p>	<ul style="list-style-type: none"> <li>■ Need to decide whether expenses are available for all roles and if there is a cap on expenses</li> <li>■ You may only reimburse actual out of pocket expenses that are related to a volunteer's specific role. You may not pay an allowance or pay for things that do not clearly relate to the role</li> <li>■ A simple expenses form can help with clarity and administration</li> </ul> <p><b>Guidance available</b></p> <ul style="list-style-type: none"> <li>■ <i>Expenses form template</i> to adapt</li> </ul>

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<p><b>Volunteer Enquiry Form</b></p> <p>Only necessary for more formal volunteering roles.</p> <p>Similar to an application form but should be as simple as possible and you should be prepared to substitute it with a chat</p>	<p>Can be an efficient way of getting basic information from prospective volunteers</p> <p>Some people prefer a more impersonal route to get in touch initially</p>	<ul style="list-style-type: none"> <li>■ It should never be the only way of expressing an interest. Some people struggle with forms and some people are bored by them</li> <li>■ Include things like contact details, why they are interested in getting involved, what their availability is</li> <li>■ If you have a website then have it available to download as well as paper copies – including one that they can fill in and e-mail rather than just a pdf</li> </ul> <p><b>Guidance available</b></p> <ul style="list-style-type: none"> <li>■ <i>Enquiry form template</i> to adapt</li> </ul>
<p><b>Confidentiality and Data Protection</b></p>	<p>Both for the sake of good relationships with people with whom you work and to ensure that you meet your legal responsibilities with regard to data protection</p> <p>The meaning and limits of confidentiality are differently understood in different contexts so it is important to clarify what it means in your context</p>	<p>People will need explanations of why confidentiality and data protection matter and how to act. [Real examples are more likely to be memorable]</p> <p>Churches and other groups may need to discuss, with volunteers, approaches and limits to confidentiality in specific contexts – e.g. in safeguarding situations</p> <p>In a formal situation, if volunteers will have access to confidential information, a confidentiality agreement can be covered at induction, including an explanation of why you are asking them to sign it, why it matters, what sort of information is confidential and who to ask if they are unsure</p> <p><b>Guidance available</b></p> <ul style="list-style-type: none"> <li>■ The Information Commissioners Office has excellent information about the principles of data protection – including useful examples – <i>Data protection principles</i></li> </ul>

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WHAT	WHY	HOW & HELP
<p><b>Emergency contact information</b></p> <p>In situations where people are not well known, this gives a note of who to contact if your volunteer has an accident</p>	<p>As part of your care for your volunteers – you are unlikely to need it but it’s no good waiting until an emergency happens before you realise you don’t know who to contact</p>	<p>A simple form can be completed at induction, although it can be better to send it in advance and ask them to bring it in so that they can check details for their emergency contact</p> <p><b>Guidance available</b></p> <ul style="list-style-type: none"> <li>■ <i>Emergency Contact form template</i> to adapt</li> </ul>
<p><b>Problem Solving Procedure</b></p> <p>Similar to a staff Grievance &amp; Disciplinary procedure but must be different, to avoid implying that volunteers are employees and to respect the distinctive contribution of volunteers</p>	<p>So that if problems occur there is a fair and transparent process for dealing with them – whether the problem is perceived by you or the volunteer</p> <p>It will hopefully never be used but having it in place gives clarity to all and acknowledges that problems occur and need resolving</p>	<p>It needs to be simple and clear, as protracted procedures are really stressful for everyone. The basic idea is to acknowledge that you try to tackle most things informally but that if that doesn’t work, more formal solutions are available</p> <p>Make volunteers aware of this procedure at induction. Not as a threat but as an open acknowledgment that sometimes things go wrong – for both sides – and that you are committed to finding solutions when that happens</p> <p><b>Guidance available</b></p> <ul style="list-style-type: none"> <li>■ Guidance on <i>Tackling Difficulties</i></li> <li>■ <i>Problem Solving Procedure template</i> to adapt. This is suitable for more formal situations or larger organisations</li> </ul>

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WHAT	WHY	HOW & HELP
<p><b>Health and Safety (H&amp;S)</b></p> <p>Thinking about what volunteers are doing and ensuring that they (and others) should be able to stay safe and healthy. This is about care not about paranoia or box-ticking</p>	<p>It is <b>morally</b> right</p> <p>All people are important, and you need to care for them, whether they are volunteers, staff or anyone else involved</p> <p>It is <b>legally</b> necessary</p> <p>You need to exercise a duty of care to all and to assess and manage risk</p> <p>It is a legal requirement to have written H&amp;S policies and assessments of risk if you have 5 or more employees. It is also best practice to do so irrespective of the number of people involved in your activities</p> <p>Your insurance policy may also require that you assess risks for your volunteers</p> <p>It is <b>practically</b> important</p> <p>Any accidents will affect both the volunteer and the organisation's ability to function, and could damage your reputation</p>	<ul style="list-style-type: none"> <li>■ Consider any risks involved in particular tasks and how to reduce the risks, especially on risks that are highly likely to happen or would have a really serious outcome</li> <li>■ Make sure that when you introduce someone to a new role you make them aware of Health and Safety issues, how to avoid problems and who to talk to if there is a problem</li> <li>■ If you already have an H&amp;S policy, make sure it includes your volunteers</li> <li>■ If you don't have an H&amp;S policy, write one, even if you are technically exempt, because you still have a duty in law to operate in a safe manner</li> </ul> <p><b>Guidance available</b></p> <ul style="list-style-type: none"> <li>■ The Health and Safety Executive website (<a href="http://www.hse.gov.uk">www.hse.gov.uk</a>) has clear information, specifically aimed at voluntary organisations</li> <li>■ <i>Doing a Risk Assessment flowchart</i> (with links to examples and templates)</li> <li>■ <i>Risk Assessment Template based on HSE</i> sample risk assessments</li> <li>■ <i>Risk Assessment Template using a scoring system</i> to give a risk rating combining severity and likelihood</li> </ul>

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WHAT	WHY	HOW & HELP
<p><b>Safeguarding</b></p> <p>Having systems in place to make sure that children and vulnerable adults are safe from harm</p>	<p>It is <b>morally</b> right</p> <p>It is a Christian responsibility to care for those who are vulnerable</p> <p>It is <b>legally</b> necessary</p> <p>Safeguarding children and vulnerable adults is a statutory duty. The church also has policies that must be complied with</p> <p>It is <b>practically</b> important</p> <p>Children and vulnerable adults are kept safe from harm</p> <p>Safeguarding guidelines also help volunteers and staff protect themselves from damaging accusations</p> <p>People can be made aware how to raise concerns</p>	<ul style="list-style-type: none"> <li>■ If you have regular contact with children (under 18) or vulnerable adults you need to consider safeguarding and have a statement of how you safeguard people</li> <li>■ This statement needs to be backed up by ways of operating that are realistic and embedded within a culture that encourages people to raise concerns.</li> <li>■ Ensure that volunteers are aware of the importance of safeguarding right from the start and communicate this as part of your ethos rather than just as a requirement of law.</li> <li>■ Some roles may require DBS checks (previously CRB checks) but it is illegal to do checks for roles that are not eligible so it is important to be sure which roles are eligible. Checks for volunteers are free but if you use an organisation to do them for you, you may have to pay an administration charge. It is worth checking whether your diocese is able to process checks for you</li> </ul> <p><b>Guidance available</b></p> <ul style="list-style-type: none"> <li>■ Contact your diocesan safeguarding officer who will be up to date with legalities, so that you can ensure that your safeguarding is in line with diocesan policies. They may well have templates to offer</li> <li>■ Current guidance on safeguarding is available from the House of Bishops (follow this <a href="#">link</a>)</li> <li>■ Your local volunteer centre should be able to give you up to date guidance</li> <li>■ To clarify about the eligibility of roles for DBS checks                         <ul style="list-style-type: none"> <li>■ NCVO have some excellent flowcharts for working out which roles are eligible for a check. For the flow chart on regulated activity relating to children and young people click here (with this link - <a href="https://knowhownonprofit.org/people/volunteers/keeping-ra20children20and20young20people20flowchart20v21.pdf">https://knowhownonprofit.org/people/volunteers/keeping-ra20children20and20young20people20flowchart20v21.pdf</a>)</li> <li>■ You can contact DBS with an eligibility query. E-mail them at <a href="mailto:customerservices@dbsgsi.gov.uk">customerservices@dbsgsi.gov.uk</a>, giving them details of the role</li> </ul> </li> <li>■ The Safe Network (<a href="http://www.safenetwork.org.uk/">www.safenetwork.org.uk/</a>) provides safeguarding information for activities involving children. It is jointly managed by the NSPCC and Children England</li> </ul>

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<p><b>Insurance</b></p> <p>This can cover a range of potential risks where volunteers may be involved in activities of churches or projects</p> <p>These include:</p> <ul style="list-style-type: none"> <li>■ Employers' liability insurance</li> <li>■ Public liability insurance</li> <li>■ Pastoral care indemnity (<i>Free unstructured care is included in 'EIG Parishguard Policies' but extra cover is needed for more formal counselling or advice</i>)</li> <li>■ Church council and trustee indemnity (<i>check if extra cover is needed if you are handling large grants or projects</i>)</li> </ul>	<p>As part of your care for volunteers and those with whom they come into contact</p> <p>The Association of British Insurers state that voluntary organisations need to have <i>Employers' liability insurance</i> to cover all volunteers and employees who are not family members. Churches with no employees should therefore have this to cover activity undertaken on their behalf. (<i>EIG parishguard policies include this for all authorised volunteers, including churchwardens</i>)</p>	<ul style="list-style-type: none"> <li>■ Make sure that you have followed good practice guidelines relating to <b>Health and Safety, risk assessments</b> and <b>Safeguarding</b>. (<i>see sections above</i>)</li> <li>■ Let your insurer know that you involve volunteers and in what roles and activities. Many roles do not incur additional charges (but some may – e.g. night shelters, debt advice or formal counselling)</li> <li>■ Ensure that it is clearly defined what the volunteer is doing on behalf of the church / project. (Volunteers should know that only these activities are covered by insurance unless there is formal agreement otherwise). The agreed tasks should be described in a written role description or recorded in minutes of the PCC / project. See <i>Clarifying Tasks</i></li> </ul> <p><b>Guidance Available</b></p> <ul style="list-style-type: none"> <li>■ EIG offers useful guidance – including an <i>FAQ section</i></li> <li>■ The Association of British Insurers has produced a guide to insurance products for individuals and organisations and has a dedicated area of their website on <i>voluntary organisations</i></li> </ul>