# Working with Volunteers –

# Advanced Module

# Recruitment, Selection and Induction of Volunteers

# Participant’s Workbook

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## Context

This training module helps to meet

* Headline KPI: Volunteers strongly agreeing that they would recommend volunteering for the NT – target of 65% by 2011/12. “Given that support and management [of volunteers] is a key driver of engagement, there is … potential for improving the Recommendation KPI by improving these results” Volunteer Survey 2008, Pulse Check Ltd
* Headline KPI: Visitors rating their visit as very enjoyable - target of 75% by 2011/12. **“The 2008 survey shows that our top enjoyment scores happen where visitors report the friendliest staff and volunteers”**

NT intranet “What makes a very enjoyable and engaging visit? (Latest research results Feb09)

* Essential Volunteering Standard 3: Recruit and Select Volunteers using Recommended Procedures
* parts of Essential Volunteering Standards 2: Uphold the Distinctiveness of Volunteering
* parts of Essential Volunteering Standards 4: Enable Opportunities for Learning and Development of Volunteers and their Managers

## Learning Objectives

By the end of the course, participants will:

* Understand the importance of good recruitment, selection and induction
* Understand the importance of the recruitment and selection process being fair, non-discriminatory, open and timely
* Be able to link the process for planning volunteering with the recruitment of new volunteers
* Understand the importance of role descriptions
* Have developed a plan to promote volunteering opportunities to potential volunteers
* Know a variety of ways to promote volunteering opportunities, specifically to reach out to new audiences
* Have an awareness of the issues to be considered when recruiting from within an existing volunteer team
* Have identified and practiced ways to select volunteers using a variety of tools/ approaches
* Have identified approaches to saying ‘no’ to potential volunteers
* Understand the checks and administration that should be undertaken when recruiting a volunteer
* Know how to design and deliver effective induction for volunteers
* Have explored volunteers’ potential role in recruiting, selecting and inducting other volunteers
* Know how to monitor and evaluate their processes for recruitment, selection and induction

## New Volunteer’s Journey

### ACTIVITY

On a large piece of paper, draw a new volunteer’s journey at your property / your department: from first enquiry to end of settling in period.

***Step 1 – Establish ‘axes’***

Horizontal axis - timeline – First Contact on the left and Week 1, Week 2, along bottom – establish what is the realistic maximum from First Contact to completion of settling in period and then divide up evenly

Vertical axis – write on Post Its all departments / people that your new volunteer may have come into contact with throughout their Recruit-Select-Induct (R-S-I) journey – cluster these into groups of same / similar – agree a format that will work for all in your group – divide your vertical axis into wide rows with one person / department in each row

***Step 2 – The stages of the volunteer’s journey***

Talk about the stages of a new volunteer’s R-S-I journey – Who is their first contact with? What happens next? How long does it take? Put each ‘stage’ on a Post It and place it along the timeline in the relevant ‘row’ – the picture may be different for different people in your group and this is fine – connect Post Its with lines on flipchart to show ‘process’. Assume that the volunteer wants to join asap – ignore events where the volunteer’s circumstances mean delay. Once all in your group have contributed / are happy that their volunteers’ journey is represented on the chart move on to...

***Step 3 – How is the volunteer feeling?***

This may have come up during your conversations in step 2: Consider how the new volunteer is feeling as they go through this process. Highlight the times when they are feeling particularly happy / satisfied or particularly sad / cross / frustrated by drawing happy faces (on green) or sad faces (on red) on Post Its and adding these to the picture. Notice the points where they are ‘sad’ – is there a risk that they might give up here?

***Step 4 – What works well? What doesn’t?***

Finally add to your picture more red and green Post Its – green for internal processes / systems that work well – red for those that are not so good and need improving. Keep it brief – don’t try to solve them now!

MAPS WILL LOOK MESSY – this is fine! So long as you can still ‘see’ what you need to see about your own property / department.

Once complete, step back and look at your picture. Focus on the journey for new volunteers at your property and note the red flags & what you need to do about them.

Keep this picture – we will be coming back to it!

## Volunteer Enquiry to Appointment Check List

|  |
| --- |
| **Volunteer’s Name:**  **Telephone no:**  **Address:**  **Email:**  **Date / method of enquiry:**  **Areas of interest:** |

|  |  |  |
| --- | --- | --- |
| **Activity** | **Owner** | **Date** |
| **Initial enquiry:**  Send Enquiry Response Letter, Enquiry / Registration Form, Role Descriptions, National Trust / Property Information / Equal Opportunities Monitoring Form. |  |  |
| **Follow-up call:** (to encourage completion of Application Form / Equal Opportunities Monitoring Form, and answer any questions) |  |  |
| **Enquiry / Registration Form received** |  |  |
| **Equal Opportunities Monitoring Form received** |  |  |
| **Interview arranged on [date]** |  |  |
| **Paper file created** |  |  |
| **Interview held** |  |  |
| **Acceptance letter issued with Welcome Pack subject to references** (and CRB if applicable) |  |  |
| **CRB form sent** |  |  |
| **References requested** |  |  |
| **References received** |  |  |
| **CRB disclosure received** |  |  |
| **Volunteer formally approved / rejected by telephone / letter** |  |  |
| **Induction planned:**  Volunteer sent invitation to induction, Induction Checklist and other appropriate information |  |  |

## Recruitment plan

### ACTIVITY - Writing a promotion plan for recruitment

Two aspects that need to be brought together:

* 1. Your volunteering task
  2. Your audience

1) Your volunteering task

* Choose the **best way** to get this work done – individual or group? Regular or one-off? Think about the availability of those you want to attract.
* **Role / task descriptions** – confirm that you are happy with how to write these (don’t write it now), NB these should include the qualities / competencies that are sought – see next bullet
* Knowledge, skills, experience and qualities sought – write a list of **essentials** – NB should be a very short list for volunteers so that we can be flexible. Of these, which can potential volunteers assess themselves against (include in recruitment messages and save everyone’s time) and which will you leave until selection stage?
* Write a list of the **benefits** of this role that you will be ‘selling’?

2) Your audience:

Get creative and write down your ideas for:

* **who** may want to do this volunteering? (small groups could brainstorm) –challenge people to think beyond the stereotypes and look at new audiences
* what might be their **motivations**? (encourage all to visualise their target audience for this and 2 points below)
* How, where and when might you make **contact** with them? Could you recruit through networks with other organisations? What links can you make with other community engagement work at the property and contacts already made? Do you need a once-a-year campaign or an on-going drip-feed throughout the year?
* What are the **key messages / images** for you to communicate? See next page for notes on the advertiser’s acronym: AIDA – Awareness, Interest, Desire, Action
* Don’t be afraid to experiment! And review and evaluate new methods.

1. Prepare to present to the group very brief feedback in the form of:

* Description of volunteer role / task you are recruiting for – 1 sentence
* List of essential requirements
* Who you are trying to attract and how you plan to make contact – 2 sentences
* Your recruitment message e.g. 2 or 3 sentences for poster

## Recruitment Plan - NOTES

Using the example of a restaurant advert:

If the banner in the window of a restaurant reads, in broad, bright letters:

**“We have This Food We Have To Sell!”**

Your first thoughts are “Why? What’s wrong with it?”

The banner in the charity shop’s window reads:

**“Volunteer Desperately Needed!”**

They think: “Why? What’s wrong with what they want volunteers to do?”

1. **Why are restaurants in business?** If you said something about providing good food for customers, you need to dig deeper. Restaurants are in business to make money. The food is just how they make it.
2. **If the restaurateurs wrote their ads based on their need to make money alone,** these ads might read “We Have Food To Sell!” and it would no doubt scare people away. Equally, if you write your ads based on your need for volunteers, it will not be attractive.
3. **What do diners value about a favourite restaurant?** Good food; cheerful, attentive service; pleasant atmosphere; good prices. You need to know what your volunteers value about volunteering with you.
4. **What other information do you find on a good restaurant ad?** Type of cuisine offered; location; family-friendly; specialities; opening hours; home delivery available. You need to include the practical information that potential volunteers need.

Advertiser’s use an acronym: **AIDA** which is designed to provide a logical sequence of thinking that consumers are taken through, starting with getting their attention and ending with them rushing out to buy the product.

**Awareness** – the advert presents a problem with which consumers can identify and makes them aware that a new product is on the market which will solve this problem

“Looking for child-friendly venue for a delicious meal to celebrate?”

**Interest** – here’s what’s interesting about our new product “Wow!”

“We provide fantastic home-cooked food, with children’s portions of everything at reasonable prices plus we have a children’s play area to keep them entertained whilst you enjoy your meal”

**Desire** – This is the bit where the consumer is shown the results of using the new product, to motivate them to use it

“Now you can take the whole family for a great meal out!”

**Action** – The advertiser tells the consumer what they should do next.

“Come to ‘Yummies’ for your next family meal out”

The same formula can be equally effective when recruiting volunteers. Try and write your recruitment message following the AIDA acronym.

*taken from Recruiting Volunteers by Fraser Dyer & Ursula Jost – chapter 4*

## Diversifying your volunteer base

### Barriers that stop people volunteering

#### Perceived barriers

* Time commitment
* Volunteering not valued
* Lack of skills
* Expectation of traditional roles
* Over-formality

#### Practical barriers

* Expenses
* Childcare or other caring responsibilities
* Transport
* Physical access
* Communication barriers (illiteracy / language / sensory impairment / learning difficulty)

#### Barriers affecting certain groups

* Entitlement to benefits
* People seeking asylum
* Criminal records
* People with disabilities – lack of understanding of what people with disabilities can contribute; concerns that disabled people’s health could adversely impact on their reliability; lack of reasonable adjustments

### What you can do to increase diversity:

1. **Review your current volunteer diversity** – Think about your current volunteers and map them in terms of age, gender, ethnicity etc. see new Selection & Induction guidance on use of EO monitoring form
2. **Examine the demographics of the area** – c.f. Community Engagement work & mapping
3. **Design roles that welcome difference** –For example if you are keen to welcome volunteers with disabilities then you may need to be flexible about the role so that you don’t prohibit their inclusion.
4. **Advertise in specific places/ press** – For example there are a number of specific newspapers for different community groups
5. **Translate adverts into different languages; use inclusive images**
6. **Use methods other than word of mouth** – as this tends to recruit ‘clones’ to a certain extent! Recruit volunteers through your CE work.
7. **Create a welcoming atmosphere for diverse volunteers** – for example you may want to start a process of building positive attitudes towards disabled people, including workshops & training, planning together how to involve disabled people, using case studies & positive images and facilitating contact with organisations of disabled people in the local community (see CE work also)

### For further information see:

*Volunteering England’s Good Practice Bank – Equal Opportunities and Diversity*

*Recruiting Volunteers by Fraser Dyer & Ursula Jost – chapter 7*

*Recruiting, Retaining and Developing Disabled Volunteers - Guidance for Volunteer Opportunity Providers by Disability Rights Commission (now absorbed by the Equality and Human Rights Commission) [available from NT’s Head of Access for All]*

## Diversifying your volunteer base

Equal opportunities monitoring form

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| The Trust is committed to developing and promoting equality of opportunity and inclusion in all that it does, and we aim to attract and recruit a diverse community of volunteers. To help us achieve this, we ask all volunteers to answer the questions below. You don’t have to complete this form, but in doing so you will help us understand who our volunteers are. The information you give is anonymous and treated as strictly confidential – used only for monitoring purposes and not used or referred to as part of the interview process. Please do not identify yourself anywhere on the form. The form will be destroyed after six months. If you prefer not to disclose any of this information, please leave the section(s) blank. | | | | | | | | |
| **Volunteer role applied for:** | | | | | | | | |
| **Volunteering Location:** | | | | |  | | | |
| **How would you describe your ethnic origin: (please tick relevant box)** | | | | | | | | |
| White English  Irish  Scottish  Welsh  Other White background  ……………………………………… | | | Black Black Caribbean  Black African  Other Black background  ………………………………. | | | | **Chinese** | |
| **Mixed**  White and Black Caribbean  White and Black African  White and Asian  Other Mixed background  ……………………………….…… | | | **Asian**  Indian  Pakistani  Bangladeshi  Other Asian background  ……………………………….. | | | | **Any other background (please state)**  ……………………………….  Rather not say | |
| **Date of birth** | | | | | | | | |
| …………………………………… Rather not say | | | | | | | | |
| **Sex** | | | | | | | | |
| Male  Female  Transgender F to M  M to F  Prefer not to say | | | | | | | | |
| **Please describe your religious group** | | | | | | | | |
| Christian | | | Buddhist | | | | Hindu | |
| Jewish | | | Muslim | | | | Sikh | |
| Baha’I | | | Jain | | | |  | |
| Other religion  ………………… | | | No religion | | | | Rather not say | |
| **NORTHERN IRELAND ONLY –** in accordance with the Fair Employment (Northern Ireland) Act 1989 | | | | | | | | |
| Regardless of whether you practice a religion, most people in Northern Ireland are seen as either Catholic or Protestant. We are therefore asking you to indicate your community background by ticking the appropriate box below: | | | | | | | | |
| I am a member of the Roman Catholic Community |  | I am a member of the Protestant Community | |  | | I am neither a member of the Roman Catholic or Protestant Community | |  |
| If you do not complete the above section, we are encouraged to use the “residuary” method, which means that we have to make a determination on the basis of personal information provided in the application form. | | | | | | | | |

|  |  |  |
| --- | --- | --- |
| **How would you describe your sexual orientation?** | | |
| Heterosexual | | Lesbian |
| Gay Man | | Bisexual |
| Other. Please specify: | | Rather not say |
| **Disability**  The Disability Discrimination Act 1995 (DDA) defines a person as disabled if they have a physical or mental impairment which has a substantial and long term (i.e. has lasted or is expected to last at least 12 months) adverse effect on one’s ability to carry out normal day-to-day activities. This definition includes conditions such as cancer, HIV, mental illness and learning disabilities.  Do you consider yourself to have a disability according to the above definition?  🞎 Yes (please tick one of the boxes below) 🞎 No 🞎 Rather not say | | |
| * Learning disability | | * Physical disability | |
| * Long term or life-limiting illness | | * Sensory disability | |
| * Mental Health Issue | | * Prefer not to say | |
| * Multiple disabilities | |  | |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Where did you hear about this volunteering role?** | | | | | |
| Advert. Where? |  | Recruitment day |  | TV/Radio |  |
| Volunteer Centre |  | Word of mouth |  | Website |  |
| University/college |  | Workplace |  | National Trust Property |  |
| Newspaper article |  | Presentation to community group |  |  |  |
| Other  Please specify: | | | | | |

**Today’s date:** ………………………………………………………

**Additional information**

There are other categories of information that you might like to ask your volunteers, or which might be required by those funding special community projects you are running. These are not standard equality monitoring questions.

|  |  |  |  |
| --- | --- | --- | --- |
| **What is your employment training and education status?** | | | |
| * Employed | | | * Self-employed |
| * Not employed | | | * Other |
| * In education / learning | | | * Prefer not to say |
| * In training | | |  |
| **Can you tell us about any qualifications you have? (Please tick the highest you hold)** | | | |
| * No Qualifications | * Degree | | |
| * NVQ or Equivalent | * Post Graduate | | |
| * GCSE | * Other | | |
| * A Level | * Prefer not to say | | |
| **Do any of the following apply to you?** | | | |
| * Low income | | * Refugee | |
| * Homeless | | * Lone Parent | |
| * At risk of exclusion | | * Young Carer | |
| * Offender or Ex-offender | | * Asylum Seeker | |
| * In or leaving care | | * Prefer not to say | |

*See also Stonewall’s excellent plain-English guide on why you should fill in those boxes:*

[**http://www.stonewall.org.uk/documents/whats\_it\_got\_to\_do\_with\_you.pdf**](http://www.stonewall.org.uk/documents/whats_it_got_to_do_with_you.pdf)

Diversifying your volunteer base - Examples of good practice

### Within the NT

* Talk to Sajida Aslam, Audience Development Manager in the West Mids region about the ‘Whose Story?’ project.
* Talk to Ruth Clarke about ‘London Voices’.
* Talk to Heather Smith for examples of disabled people volunteering individually or in groups to support property activity
* Talk to Annabel Hunt to get examples of designing roles for inclusion
* Properties in the North West have been working with Mencap and have now got volunteers with learning disabilities as part of their core team – Quarry Bank Mill is one example.

### Outside the NT

A women’s refuge recruits a visually impaired support worker. The refuge provides induction to all new volunteers and prior to the event the trainer contacts the volunteer and discusses what adjustments might be needed to overcome any potential barriers. Consequently, all training materials are provided in advance by e-mail so the volunteer can familiarise herself with them. The volunteer also discusses with her manager whether there are any training needs for her colleagues. It is decided that no specific training is likely to be needed but the volunteer asks for the opportunity to brief her colleagues about her visual impairment and its implications at the first team meeting she attends.

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A woman working in a local branch of Age Concern walks past a local community centre and sees a whole bunch of older people leaving that she has never seen before. First time – she says hello. Second time, she introduces herself and passes on information leaflets. She discovers that there is a bit of a communication problem as they are new migrants from Eritrea. Then a daughter of one of the Eritrean people comes to the office asking how Age Concern could help her father. The worker talks and listens and gives her information. The next day, the daughter phones and invites the worker to join the Eritrean Elders for lunch. The worker is delighted and plans to do a presentation and recruit them all as members and anticipates her monitoring stats looking much-improved! The worker goes to the feast but ….. they don’t want her to talk, they don’t want leaflets, guide books or membership forms – they want to host the worker as their guest – to enjoy their food and stories from home. So the worker eats (delicious!), listens and laughs. She is invited again. From conversations, a need arises (for learning English) that the worker feels Age Concern could help with. She has younger volunteers who are interested in being language support workers. She sets up learning partnerships which are a great success. An additional unexpected outcome arises – the adult children of the Eritrean Elders want to know how they can help Age Concern – the worker recruits some new volunteers.

Lessons learnt:

* building relationships through shared food works (even if it does affect the waistline!);
* in the time it took the worker to eat 3 meals, she had created 8 new volunteering opportunities and recruited 5 new volunteers;
* volunteer recruitment is ongoing with more than one approach – seize the opportunities!!

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## Selecting and Inducting Volunteers - Complying with legislation, National Trust policy and best practice

The following table summarises key actions that should be taken when selecting and inducting volunteers. Particular attention should be paid to items highlighted with a red box as these actions are mandatory either because they are a requirement of a Trust policy and/or by legislation.

|  |  |  |
| --- | --- | --- |
| **When** | **Activity** | **Nature of Guidance** |
| Throughout | **Ensure children, young people and vulnerable adults are protected by risk assessing the role and putting appropriate safeguards in place** | **Mandatory** |
|  | **Safeguard all information in line with the data protection act and ensure volunteers understand how we will look after their data** | **Mandatory** |
|  | **Ensure our Equality and Diversity Policy is followed** | **Mandatory** |
|  | Be clear that there is a selection process | Good practice |
|  | Ensure you maintain the distinctiveness of volunteering and that volunteers are aware of the distinction | Good practice |
| Before recruiting | **If appropriate highlight a CRB check is needed in any adverts and the role description** | **Mandatory** |
|  | **If appropriate check any local bye-laws on children volunteering** | **Mandatory** |
|  | Have a role description in place | Good practice |
|  | Read the ‘Complying with legislation, Trust Policy and best practice’ section of this guidance. | Good practice |
| On enquiry | **Highlight to enquiries that anyone who normally resides outside the EAA or EU can only volunteer with us if they have the appropriate visa. Refer the volunteer to UK Border Agency for advice.** | **Mandatory** |
|  | Log the enquiry and respond within 7 days | Good practice |
|  | Do not turn people down at this stage unless there is clear evidence they aren’t suitable for a role | Good practice |
| At any point between enquiry and the end of the first induction day | **Volunteers under 18 must provide a completed parent/guardian consent form** | **Mandatory** |
|  | **A confidentiality agreement is signed by the volunteer where appropriate to the role** | **Mandatory** |
|  | **An assignment of copyright agreement is signed by the volunteer where appropriate to the role** | **Mandatory** |
|  | If you have systems in place to use the data ask volunteers to complete an Equal Opportunities Monitoring Form | Good practice |
|  | Ensure volunteers over 81 understand the insurance cover | Good practice |
|  | Ask the volunteer to complete the health questionnaire including emergency contact details | Good practice |
| Invite to interview | Inform people they can claim expenses to and from the interview | Good practice |
|  | Prepare – ensure you have an appropriate space, identify who will be involved, link questions to the role description | Good practice |
| Interview | **Confirm the identity of the person and whether they have an appropriate visa to enable them to volunteer if they are usually resident outside the EAA or EU** | **Mandatory** |
|  | **All interviewees in NI require at least two interviewers** | **Mandatory** |
|  | **Suitability for the role must be based on the requirements of the role only** | **Mandatory** |
|  | Should be tailored to meet the volunteers needs and requirements of the role | Good practice |
|  | Let people know your decision within 7 days | Good practice |
| Before confirming appointment | **Take up two references (this becomes mandatory if they are working with children/ young people. A Working with young children and young people should also be completed if this is the case)** | **Mandatory** |
|  | **Let the referee know that a volunteer has a right to see information held on them including that provided by referees** | **Mandatory** |
|  | **Take up CRB check if appropriate** | **Mandatory** |
| Induction | **Ensure the volunteer understands how Health and Safety legislation applies to them** | **Mandatory** |
|  | Must be carried out before a volunteer formally starts unless they will be supervised at all times. | Good practice |
|  | Should be tailored to meet the volunteers needs | Good practice |
|  | The volunteer and their line manager should sign, on completion, the induction checklist. | Good practice |
|  | Ensure volunteers working with children and young people read and understand the policy on working with children and young people | Good practice |
|  | Set a review date | Good practice |

*Taken from NT’s Selecting & Inducting Volunteers Guidance, 2009*

A stitch in time - The results of bad selection or induction

With the gift of hindsight, what could you have done at the recruitment, selection or induction stage that may have helped prevent the following situations from occurring?

1. One of the main reasons Jane wanted to volunteer was as an opportunity to meet new people.  After a period of ill health and giving up full time work she had time on her hands to volunteer and had always had an interest in local history.  On a visit to the property, she decided to enquire about volunteering.  She couldn't find anyone to speak to in the house and so began chatting with a gardener.  She started volunteering in the garden the following day and after two months of coming in once a week, she is thinking about giving up.  She barely has any contact with any other volunteers or staff and finds the work tiring and uninspiring.
2. Jim saw an advertisement in the local paper for a new Volunteer Recruiter role at a local property.  Having worked in HR, he thought this would be a good way for him to utilise his skills.  The role asked for a rough commitment of two days a week.  He went through a thorough selection process and several weeks of induction.  As he got started in the role, he realised that it needed much more commitment than two days a week and that the role included a whole number of things not in the original role profile.  Staff at the property were also asking him to support some of their other work.  He is now volunteering at the property four days a week but cannot continue to give this sort of commitment.
3. Clare has been volunteering as a room guide for four months.  Other volunteers have noticed that she has a very abrupt manner and is often rude to visitors and other volunteers.  She will also only volunteer in the Drawing Room and Library and will object when asked to room guide in any of the other rooms.  The Day Leader for Clare's day has commented that some of the other Room Guides have moved to a different day because they don't like volunteering with her.
4. Penny volunteers as an Education volunteer and works with school groups that come to visit the property.  As with all Education volunteers, Penny had a CRB check and two references were followed up but for some reason she didn't complete the standard volunteer registration form.  A couple of the teachers on visits have commented that some of the children find Penny overpowering and intimidating. Penny's supervisor has recently found out that she used to volunteer at another property for a couple of years and had been asked to leave.

*continued over*….

1. Tim saw a poster at his local library asking for people to volunteer at his local Trust property and stating in return all volunteers would get free membership and be able to visit other Trust properties for free. This appealed to Tim, as he was hoping to spend his days visiting historic properties. Tim has since started volunteering at the property on an ad hoc basis and so far has volunteered about ten hours over the last two months and keeps asking for his volunteer card that will enable him free entry to the properties.  He intends to leave once he gets it.
2. Simon has just left college and has aspirations to work as a warden.  He has been volunteering with the Warden team for several months and saw this volunteering opportunity as a stepping stone to future work in this area.  During the recruitment and induction phase, his supervisor had implied that the property would support Simon in getting some training related to his role but he hasn't received any training other than basic health and safety.  In reality the volunteer role is also quite different from the one Simon thought he would be doing and Simon doesn't feel that he is building up his experience
3. A House Manager has recently introduced day leader roles at their property to help with the day-to-day support of Room Guides.  The House Manager asked the Room Guides who would be interested in the role and five people came forward.  They were each allocated a different day and given a role profile.  The Day Leaders have been in place for a month now and the House Manager, some of the Day Leaders and some volunteers have expressed concerns about how it is working.  All the Day Leaders are doing their role differently and appear to have different ideas about what they should be doing.  Other Room Guides have questioned some of the Day Leaders competency to do the role and are querying how the Day Leaders were selected.

Selection & Induction new guidance

Available on the intranet: <http://intranet1/intranet/supporters/supporters_volunteering/i-clv-volunteering-volunteer_management_guidance/i-clv-volunteering-selecting_inducting_volunteers.htm>

The guidance includes good practice notes plus templates for:

* Volunteer Enquiry to Appointment Checklist
* Letter of response to an enquiry about volunteering
* Letter of invitation to interview
* Equal Opportunities Monitoring Form
* Volunteer Health Questionnaire
* Interview Checklist
* Volunteer Interview Evaluation Form
* Volunteer Rejection Letter
* Volunteer Appointment Letter
* Volunteer Reference Request Letter
* Reference Questionnaire for NT Volunteer Applicants
* Recruitment Process Evaluation Questionnaire
* Volunteer Induction Checklist
* Induction Checklist for volunteer teams / groups
* Induction Evaluation Form
* Volunteer Review Form

Interview Checklist

The following check-list will help guide you through the interview. You should decide in advance which aspects you wish to cover as appropriate to the volunteer and the role. Following this recommended format, you should be able to conduct the interview in under 30 minutes. The timings assume that you will be re-capping on information the volunteer will already have received or offered. You should try and let the volunteer do most of the talking. Take detailed notes on what the volunteer says using the Volunteer Interview Evaluation Form.

|  |  |
| --- | --- |
| **Interview check list** | **Check** |
|  |  |
| **Stage One** |  |
| * Meet at reception – explain fire drill, point out emergency exits and toilets on the way if possible |  |
| * Guided tour (optional) |  |
|  |  |
| **Stage Two (three minutes)** |  |
| * Welcome and introductions |  |
| * Setting the scene (informal, two-way exchange, format, duration) |  |
| * Check what information the volunteer has already received |  |
| * Confirm the volunteer’s interests / specific needs (refer to Enquiry Form) |  |
|  |  |
| **Stage Three (five minutes)** |  |
| * Confirm the volunteering relationship (the importance of volunteers, and outline the volunteering offer / benefits) |  |
| * Explain the nature of the volunteering relationship – mutually beneficial, volunteer’s gift of time, not a legal employment relationship |  |
| * Explain the property needs in relation to the Role Description: set the direction, the volunteer role within this, and the required skills and behaviours to help deliver it |  |
| * ***Volunteer’s questions so far?*** |  |
|  |  |
| **Stage Four (10 minutes)** |  |
| * Ask Interview Questions – generic and role specific |  |
|  |  |
| **Stage Five (5 minutes)** |  |
| * Explain the need to have the right people in the right roles – the ‘selection’ process and rationale. Explain that volunteers have a settling-in period and review to establish that the Trust and the volunteer are well-suited |  |
| * Explain the number of places and number of applicants (if appropriate) |  |
| * Explain how and by whom the volunteer would be managed |  |
| * Outline briefly the key policies to set volunteer expectations (e.g. Dealing with Difficult Situations; Health and Safety) |  |
| * Discuss the need for a CRB check if appropriate |  |
| * Discuss the need for references |  |

|  |  |
| --- | --- |
|  |  |
| **Stage Six (5 minutes)** |  |
| * Discuss whether there is a ‘fit’ between the volunteer’s needs, ability and potential and the requirements of the role, any reservations you and / or the volunteer may have, and decide whether or not the volunteer is appropriate, **or**, outline the process for appointment / rejection post-interview |  |
| * Ask how much time the volunteer can give and when they can start |  |
| * Encourage the completion of the Equal Opportunities Monitoring Form (if appropriate; explain that this does not influence the decision to appoint) |  |
| * Discuss any special requirements and review / complete the Health Questionnaire (explain that this does not influence the decision to appoint) |  |
| * Take referee and emergency contact details |  |
| * Complete CRB form if appropriate |  |
| * Ask to see confirmation of the volunteer’s ID |  |
| * Deal with travel expenses |  |
| * Ask how the volunteer heard about the opportunity (if not already noted) |  |
| * Thank the volunteer and re-cap on next steps |  |
| * Guided tour (optional) |  |

## *Taken from NT’s Selecting & Inducting Volunteers Guidance, 2009*

## Interview Questions

### Generic Interview Questions

Some of the questions you will want to ask the potential volunteer will relate to the role they are applying for. However, there are some generic questions that you might find useful. The questions are not too specific, but are prompts for more detailed discussion.

Always ask ‘open’ questions which require a detailed answer, not ‘closed’ questions which only require a ‘yes’ or a ‘no’ answer. Always read the potential volunteer’s application in advance so you can use the information when asking the questions to demonstrate you understand why they have applied.

* Can you tell me briefly what you know about the National Trust generally, and what we do at our property?
* What is it about us and what we do that attracts you?
* What would you like to achieve by volunteering with us?
* What do you think you could bring to the role (e.g. skills, work / volunteering experience, enthusiasm, willingness to learn, etc)?
* Are you comfortable taking direction from others?

*Taken from NT’s Selecting & Inducting Volunteers Guidance, 2009*

### ACTIVITY

What role-specific questions would you add to these questions?

What additional questions would you include if the potential volunteer:

* disclosed a criminal conviction?
* had a disability?
* had recently had a serious illness / operation?
* was under 18 years old?

Interviewing disabled applicants

When interviewing and assessing the potential of disabled applicants there are a number of specific points to bear in mind:

* Many disabled people may have had negative experiences of volunteering. The approach used needs to take this into account. For example, reassuring applicants and ensuring that you demonstrate a positive and understanding approach. This can be enhanced by asking if there are any requirements before the interview and subsequently providing them, during the discussions ask for the disabled person’s view on the potential barriers and likely adjustments which may overcome them, eg transport arrangements or specialist equipment, and flexible working arrangements. Approach the selection in a positive way and help the individual identify positive things they can bring to the role and provide neutral feedback if they are unsuccessful which will help them develop.
* Some young disabled people may have experienced relatively sheltered lives and consequently may have less developed social skills than for non-disabled people of the same age. Take this into account when interviewing and assessing suitability as it may mask the full potential of that individual. It may be appropriate to help develop their social skills as part of the placement and this might be done by using a mentor and ensuring effective feedback on performance as well as support encouragement to take part in any social activities with other volunteers.
* It is inappropriate to ask generalised personal questions about an individual’s disability or health condition, however, it is good practice to determine the effect of any impairment or health condition on the person’s ability to undertake the tasks involved eg would you need any adjustments to enable you to attend our regular board meetings?
* Appearance or behaviour may be misleading about the candidate’s actual potential and ability to fulfil the volunteering role effectively. For example, some impairments may affect a person’s body language, e.g. a partially sighted person not making eye contact or a person with a mental health problem appearing apprehensive. Those who are involved in the selection process should be aware that such issues can unconsciously adversely affect their assessments of people. These issues should be addressed in the training people are given in relation to the selection of volunteers and care taken that such issues do not affect assessments; the criteria should be about the person’s ability to carry out the role.

*Taken from Recruiting, Retaining and Developing Disabled Volunteers - Guidance for Volunteer Opportunity Providers by Disability Rights Commission (now absorbed by the Equality and Human Rights Commission) [available from NT’s Head of Access for All]*

Volunteer induction checklist

This checklist provides an outline of the range of information which can be included in the induction process, depending on the role. It is not exhaustive and can be tailored to meet the needs of the property and the new volunteer. The different induction activities can be spread over more than one day.

|  |  |
| --- | --- |
| **Volunteer’s Name:** |  |
| **Role Title:** |  |
| **Location:** |  |
| **Start Date:** |  |
| **Line Manager:** |  |
| **Line Manager’s Title:** |  |

|  |  |  |
| --- | --- | --- |
| Action | **Responsibility** | **Date Completed** |
| **Pre-induction:**   * Induction is explained in a letter to the volunteer and the Welcome Pack and other documents are issued in advance * All aspects of induction are planned in advance | Line Manager |  |
| **Welcome:**   * Line Manager introduction: volunteer / job title, location, contact details * Introduce and explain Buddy system (as appropriate and allocate buddies later) * If it’s a small group, volunteers can introduce themselves * Explain the induction programme and what the volunteer can expect * Explain the reasons for signing the Induction Checklist at the end of the programme (adherence to policies) | Line Manager |  |
| **Brief introduction to The National Trust** refer to documents issued in advance:   * Short Q&A on the information volunteers have already received * National Trust History * Our structure, i.e. territories, regions / countries, properties and central functions * The National Trust Strategic Plan Summary * Our Values * Our Ways of Working * The value of volunteering * Introduce e-induction / CD-Rom (optional if suits learning style of volunteer. Make sure you check understanding) | Line Manager |  |

|  |  |  |
| --- | --- | --- |
| **Brief introduction to the property** refer to documents issued in advance:   * Short, quick-fire quiz based on the information volunteers have already received * Introduction to the history, events, activities and other nearby NT properties * Numbers of staff, voluntary roles and volunteers * Local facilities, e.g. shops and travel | Line Manager  / Volunteer |  |
| **Question and Answer session** |  |  |
| **Volunteer-led tour of the property:**   * Introduction to staff / regular volunteers on the property * Storage of personal belongings * Line Manager’s Office * Toilets * Lunch / break facilities * Where to take expenses claims | Volunteer |  |
| **Return for tea / comfort break:**   * Introduce buddies * Buddies to answer any questions so far | Line Manager  Buddies |  |
| **Being a National Trust volunteer:**   * Explain that volunteering is different to employment, based on reasonable mutual expectations, with no contractual obligations or guarantees on either side * Explain benefits, rewards, recognition and the volunteer card * Trust Volunteering policies – refer to Welcome Pack / Volunteering Policy / additional info’ sheets:   + Equal Opportunities   + Confidentiality   + Copyright   + Data Protection   + Working with young people   + Dealing with difficult situations   + Who to go to if there are any problems * Explain that signing the Induction Checklist demonstrates volunteers understand policies * How to report absence * How to claim expenses * Up to three month settling-in period and review | Line Manager |  |
| **Health and Safety (30mins):**   * Name Badges * Signing-in * Fire and emergency procedures * Hazard areas * Location of fire fighting equipment (for use only after training) * Accident reporting * First aid * Insurance * Volunteer drivers * Personal safety and lone working procedures, where appropriate * Protective clothing, where appropriate | H&S Officer |  |
| **Coffee break (15 mins) / lunch break (1 hr)** |  |  |
| **Introduction to the team / department and any other people the volunteer will be in contact with or work alongside (especially other volunteers) (30 mins):**   * Short talk from an existing volunteer in the role, including:   + How volunteers are recruited   + Daily management of volunteers   + Communications, including Volunteer’s Forum / newsletters   + Make a note of any key diary dates – forthcoming meetings and social events * Trust-wide, regional and local communications (to include telephone, the intranet and email system) * Explain how the administration function works and how stationery is obtained * Staff chart / working days * Telephone / internet / intranet use | Line Manager  Volunteer |  |
| **Role specific information:**   * About the department and its fit with property * Role summary / relevant work procedures * Limits of / boundaries to / risks involved in role * Volunteering hours / rota * Standards expected * Breaks * Arranging holidays | Line Manager / Buddy |  |
| **Schedule of brief one-to-ones with individual volunteers while others explore the property for themselves:**  Training Needs Assessment conducted – establish immediate training needs and schedule  Personal Development Plan created using the competency framework  Outstanding forms completed, including:   * + Equality Monitoring Form (if not already completed)   + Health Questionnaire(if not already completed)   + Copyright Agreement (if appropriate)   Agree volunteering rota  Agree date of volunteer’s first day   * Make a date for the review | Line Manager |  |
| **Training** (as per the role requirements):   * Initial tool training (Tool Talk ) * Other Health and Safety * Other Role-specific training | Line Manager / Buddy  H&S Officer  Department Staff / Volunteers |  |
| **Room Guide Training**   * Room Guide Workshop or training using Room Guide Booklet * Focus on Customers | Line Manager / Buddy  Department Staff / Volunteers |  |
| **Evaluation:**   * Issue Evaluation Form for completion | Line Manager |  |

Induction Completed:

I confirm that I took part in the induction activities listed above and I understand [and agree to abide by] the Trust’s volunteering policies and procedures [whilst volunteering] which have been explained to me.

Volunteer’s Signature: Date:

Volunteer’s comments:

Line Manager’s Signature: Date:

Line Manager’s comments:

|  |  |  |
| --- | --- | --- |
| **Ongoing support during first three months:**   * Set review date * Buddy supports the new volunteer for the first month and longer if necessary * Buddy reports to Line Manager on progress on ongoing basis * Line Manager visible and available during the first month especially | Line Manager / Buddy |  |
| **One-to-one to review**:   * Use the Volunteer Review Form to conduct the review | Line Manager |  |

*Taken from NT’s Selecting & Inducting Volunteers Guidance, 2009*

Induction checklist for volunteer teams / groups

This checklist serves as a reminder and a record of group induction tasks. It will be useful for short-term volunteering activities such as practical conservation volunteer groups or Working Holiday groups. It can be adapted to meet your needs.

Name of group …………………………………………………………………………

Name of manager ……………………………………………………………………..

Date(s) of Induction ……………………………………………………………………

* Suitable activity identified and planned for. Skill levels identified.
* Relevant risks identified and suitable risk assessment(s) for activities written.
* Group leader(s) briefed in advance. Objectives outlined.
* Site visit made with group leader(s) to plan tasks.
* Staff/volunteers briefed and prepared for group’s involvement.
* Meeting held with whole group to outline their part in the Trust’s work.
* Property orientation. Facilities. Property opening/visitor arrangements.
* Health and safety briefing held.
* Task introduction. Timetable (breaks/rest days etc). Social arrangements.
* Opportunity to ask questions.
* Briefings from key property staff/volunteers.
* Tool training undertaken.

*Taken from NT’s Selecting & Inducting Volunteers Guidance, 2009*

Volunteer Review Form

Name of volunteer: ……………………………………………………………………………….

Name of reviewer: ………………………………………………………………………………

Date: ………………………………………………………………………………………………

|  |  |
| --- | --- |
| **Volunteer role** – How does the volunteer feel they have fulfilled the requirements of the role as detailed in the role description? Have they encountered any problems? Refer to any previous discussions or incidents.  How do you feel the volunteer has performed? What comments – both positive and negative – about performance have others made, if relevant?  Does the volunteer have any comments about the role? | **Comments:** |
| **Ways of working** – Does the volunteer feel that they are now fully part of the team? Have they fitted in with other volunteers and staff? |  |
| **Conduct** – Has the volunteer’s general conduct and behaviour been consistent with the Trust’s standards and style? If not, what has been / can be done to remedy this? |  |
| **Attendance** – What has the volunteer’s record regarding absences and daily timekeeping been like? If it has been unsatisfactory, why and what has / can been done to correct the situation? Refer to any previous discussions. |  |
| **Training** – Does the volunteer feel that he or she has been fully trained during the settling-in period? Is there any outstanding training? Are there any areas where they don’t yet feel confident? What are the volunteer’s future training needs and how / when will they be met? Refer to the volunteer’s Training Needs Assessment. |  |
| **Development** – Does the volunteer have any particular personal development needs that the Trust can meet? Does the volunteer have any skills he or she feels are not utilised? Refer to the volunteer’s Personal Development Plan for the volunteer. |  |

|  |  |
| --- | --- |
| **Feedback on volunteering** – Ask the volunteer if they have any constructive comments to make about their experience during the first three months and how volunteering for the Trust might be improved – generally, and for them. |  |
| **End the meeting by writing up any comments and agreed actions, and set a date for the next feedback session.** |  |

Volunteer signature: …………………………………………………………………………….

Reviewer signature: ……………………………………………………………………………..

*Taken from NT’s Selecting & Inducting Volunteers Guidance, 2009*

## Improving your recruitment process

## Recruitment process evaluation questions

|  |
| --- |
| You should try and hold evaluation interviews no more than one month after recruitment. Interviews should be informal, conducted by a neutral interviewer, and can be conducted face-to-face, by telephone or in the form of a questionnaire.  Introduce yourself and ask if the volunteer can spare ten minutes to answer some questions about their experiences of the recruitment process. Tell the volunteer that the interview is anonymous and the feedback helps the Trust to improve the interview process. |

* What information did you receive about the application and interview process and what it would involve?
* Was it too much or too little information?
* Could we have sent you anything else that would have been useful?
* Did we ask for enough and the right information on the application form?
* How did you feel about being asked to complete the Equal Opportunities Monitoring Form?
* To what extent did the information you were sent in advance prepare you for your interview?
* To what extent did the interview match your expectations?
* Was the interview too long, too short or just about right?
* What could we have done better during the recruitment process?
* What do you think we did well during the recruitment process?
* Are you satisfied that you are in the right role?
* How would you rate your overall experience from first enquiry through to interview (1 to 5, 5 being the highest)?
* Do you have any other comments?

**Thank the volunteer for their time.**

*Taken from NT’s Selecting & Inducting Volunteers Guidance, 2009*

## Improving your recruitment process

## Induction evaluation form

We are always looking for ways to improve the experience our volunteers have with us. To this end we would be grateful if you would complete this short questionnaire about the induction process.

1. Did you find the induction process was too short, too long or just about right?
2. Did the induction answer all the questions you had?
3. Did the induction provide you with all the information you need to feel confident in your role?
4. What could we have done better during the induction?
5. What do you think we did well during the induction?
6. Do you have any other comments?

**Thank you for taking the time to complete this questionnaire.**

*Taken from NT’s Selecting & Inducting Volunteers Guidance, 2009*

## VVMs Recruiting, Selecting and Inducting other volunteers

### EXAMPLE VOLUNTEER ROLE DESCRIPTION

### Volunteer Volunteer Recruiter (Promotion)

**Anticipated time contribution:** ½ day once a fortnight Jan-Apr 2009

**Expenses:** Reimbursement of out-of-pocket travel costs between home and volunteering location, and other reasonable expenses agreed with the Community & Volunteering Officer

**Location:** Wallington

**Reporting to:** VVR Team Leader

**Other support:** House Steward, Community & Volunteering Officer

**Purpose of role**:

Promote all volunteer opportunities at the property, on and off-site

Be an ambassador for the National Trust, promoting volunteering in the wider community and enabling the property to be seen as part of the community

Help make the process of finding out information and becoming a volunteer an easy and welcoming experience

# Key elements:

1. Design and produce attractive on-site and off-site recruitment displays, following National Trust guidelines. Refresh recruitment literature, posters and information ensuring high standards of presentation
2. Host drop-in sessions at the property to welcome potential volunteers and enable them to get to know more about what interests them. Provide informal tours, encourage questions and provide an introduction to what each department offers visitors.
3. Support taster-days at the property for voluntary organisations, in order to showcase the property, enabling partner organisations to promote our opportunities to their members.
4. Support local community engagement, as central to volunteer recruitment, by placing the property in a wider community network, making best use of personal contacts and exploring other community links
5. Assist in events on and off site to ensure volunteer opportunities are accessible to all audiences.
6. Talk to other volunteers at the property about where and how they could promote volunteer properties in their community.
7. Take responsibility for managing personal data of potential volunteers

## VVMs Recruiting, Selecting and Inducting other volunteers

### WALLINGTON Volunteer Volunteer Recruiter Team – Meeting 1

**Aims of day**

By end of session VVR’s will know purpose of the group, LCE approach and practical application to recruitment messages (What, How, When)

**Need for group**

* ‘Challenge Wallington’ – the need to very actively promote/sell recruitment
* Need for local knowledge and advocacy - LCE
* Need for ideas and creativity – not ‘telling’. Support for ideas and why, not just what!

**Agenda**

|  |  |  |
| --- | --- | --- |
| **What** | **How** | **Time** |
| Introductions | Introducing pairs   * how long at Wallington and involvement * Summary of life outside Wallington | 10 mins |
| Purpose of Group | Present Need for group  Today time for discussion so common starting point  Approach of LCE and from viewpoint of new volunteers | 5 mins |
| Who are our potential volunteers? | Think of motivations   * personal * others | 5 mins |
| Barriers | Round table until out  Incl.  Lack of awareness  - promotion  Perceptions we need to overcome  - our ‘who volunteers’  - perceptions of NT  Role itself! | 5 mins |
| LCE | Model – approach to overcome some of barriers  Wallington in Community | 5 mins |
| On-site | Ensuring strong base for of recruitment for every person coming to Wallington – aware of opportunities + first impressions – professional   * High presentation – refreshing literature   + Incl pins, straight, etc * Shop – bag slips * Drop-in days – answering questions/inspiring and answering questions * Taster days * Events staffing – forthcoming rota – ideas! | 15mins |
| Off site | Press – members newsletter, local press  Your community network - what community groups/organisations/ activities are the team or their friends/relatives already part of?  Include indirect network based on perception/word of mouth  Geographic communities – PIN MAP  Categories - community hubs e.g. surgery  Divide portfolio by area  >>Recruitment poster, or follow-up/refresh, or personal, or indirect  Brainstorm events – dressing up- where?  e.g. Hexham, Morpeth etc **Web search** | 30mins |
| Walk round | Walk round display sites on the property | 20mins |
| Practical session | Printing (posters, stickers, slips)  Laminating  Make bookmarks, business cards  Recruitment packs with follow-up cards, for VVR + others!: Poster, clip/string+cards. Bluetack+pins  Brainstorm WallingtonFacts! – bag packing  [NEXT – talk to other staff and one quote each; plus capacity needed – Robert] | 20mins |
| Peer support | Tea room notice, harnessing enthusiasm of 100+ volunteers  E-mail to ALL contacts | 10mins |
| END | Pins?  Car stickers  GIBSIDE OPPORTUNITY – 22ND Jan  ROTA – Drop in sessions  Next meeting  LCE #DAY  Training for Drop-in Sessions  Feedback/coordination of current recruitment areas  COST | 5mins |

**The VVR checklist!**

|  |  |  |
| --- | --- | --- |
| **Area** | **Checks** | **Fresh Supplies** |
| **Reception** | Postards dry/replaced?  Pencils in place?  Poster condition good? | Large poster – JN  Postcards – Robert’s office |
| **WC’s**  **Courtyard = 3**  **Restaurant = 2** | * Recruitment messages need to be attractively presented. Laminated posters should be same styles, orientation and alignment. * Material is clean and not covered * Volunteer posters need to be in each cubicle, and above each urinal * Recruitment posters have clear printed contacted details on poster (rather than applied label) | Posters - Robert’s office  If posters blank, template for address printing will be located [tbc] |
| **Shops** | Supply of bags with slips | Print more slips |
| **Restaurant** | Table talkers has membership flyer, volunteer recruitment flyer and shop promotion |  |
| **House and Garden** | Wallington ‘Interested in volunteering’ postcards, rather than take-away literature, enable follow-up and box refreshed | If business cards or postcards running low:  Please ask Kay to print more postcards  Business cards are in my office at Scots Gap  Labels for cards are provided by Glynis Carr – Scots Gap |
|  |  |  |

**Definitions**

**VVR** = Volunteer Volunteer Recruiter

**Drop-in sessions**

Regular days when the property will be open for potential volunteers to come in for a no-obligation chat. They will have a chance to for an informal look round some of the house with a VVR, find out what it’s like to volunteer and be encouraged to ask questions. These are not structured sessions, you may have lots of people, or none. It is a chance for anyone with a glimmer of interest to find out more. It is also the first impression of the welcome they can expect as a volunteer and we want to provide an overview of all the property (not just the house, garden, shop etc). It would also be good to walk to some of the garden, coach house etc – whether you go with them may depend on the numbers/arrivals of other potentials. Even if they leave deciding they do not want to volunteer, they will take a good impression and pass that on to someone who might.

**Taster Day**

Bringing voluntary groups, council and community organisations to the property in January to showcase how great it is to volunteer at Wallington, with the aim that we build relationships with other groups and they will pass on a real awareness of volunteering here, and help us explore the community role of the property:

-          Opportunity to socialise in a rural area

-          Developing self-confidence and skills

-       Engaging with and through our volunteers enables the property to open to visitors from the local area

## VVMs Recruiting, Selecting and Inducting other volunteers

### VOLUNTEER ROLE DESCRIPTION

### Welcome Volunteer

**Anticipated time contribution:** Maximum of one half day a month on Thursdays or Fridays with the occasional Saturday.

**Expenses:** Re-imbursement of out-of-pocket travel costs between home and volunteering location, and other reasonable expenses agreed with the National Trust manager.

**Location:** Tyntesfield, Wraxall

**National Trust manager:** Community, Learning and Volunteering (CLV) Manager

**Purpose of role:** To deliver a friendly welcome and a comprehensive general induction to groups of new volunteers from all departments.

**Key elements:**

1. Provide an open and positive welcome to all in line with the Tyntesfield Vision.

2. With at least one other Welcome Volunteer, deliver a 2 hour (approximate) induction session to a small group of new volunteers. This session has been developed and piloted and combines DVD film and interactive elements. Training will be provided to enable Welcome Volunteers to deliver this session.

3. Make a commitment to understand the variety of volunteer roles at the property, the functions of different departments and the Tyntesfield Capital Works Programme in order to field or answer questions during the induction session.

4. Collect Welcome Packs and name badges from Head Gardener’s House and distribute at the session.

5. Set up audio-visual and presentation equipment prior to the session and dismantle and return at the end of the session.

6. Organise refreshments and ensure everything is cleared away at the end of the session.

7. Keep accurate records of attendance and forward to the Volunteer Recruitment Administrator to update database.

8. Take up relevant training and development opportunities in discussion with the CLV Manager.

9. Work in compliance with the Trust’s *Health and Safety Policy* at all times.

**All these arrangements are binding in honour only and not intended to be legally binding.**

**Person Specification**

**Volunteer Role: Welcome Volunteer**

|  |  |
| --- | --- |
| **Essential** | **Desirable** |
| Commitment to championing the Tyntesfield Vision of active participation and community involvement | Experience in delivering training sessions |
| Ability to welcome new volunteers and put them at ease | IT skills |
| Demonstrable active listening and facilitation skills |  |
| Excellent verbal communicator |  |
| Willingness to learn IT skills needed for the audio-visual presentation |  |
| Willingness to attend training sessions on ‘Equality and Diversity’ and ‘Focus on Customers’ to update skills and knowledge |  |

## VVMs Recruiting, Selecting and Inducting other volunteers

### VOLUNTEER ROLE DESCRIPTION

### Welcome Volunteer Co-ordinator

**Anticipated time contribution:** 1 or 2 days a week initially, reducing after time. Flexible days and volunteering from home is an option. The induction programme is planned to be delivered by March 08.

**Expenses:** Reimbursement of out-of-pocket travel costs between home and volunteering location, and other reasonable expenses agreed with the National Trust manager.

**Location:** Tyntesfield, Wraxall / Home

**National Trust manager:** Community, Learning and Volunteering (CLV) Manager

**Purpose of role:** To develop, co-ordinate and review the delivery of afriendly, welcome and comprehensive general induction to groups of new volunteers from all departments.

**Key elements:**

1. Develop a comprehensive induction package to ensure that new volunteers are inducted into key processes and messages about the National Trust and Tyntesfield.

2. Develop an effective system for delivering and recording the induction, including the collation and distribution of Welcome Packs, ensuring that the Volunteer Administrator and New Volunteer Administrator have agreed clear areas of responsibility to deliver the system.

3. Together with the New Volunteer Administrator, recruit Welcome Volunteers to deliver the induction (see Welcome Volunteer role profile).

4. Develop and provide ongoing training for Welcome Volunteers.

5. Take up relevant training and development opportunities in discussion with the CLV Manager.

6. Work in compliance with the Trust's *Health and Safety Policy* at all times.

**All these arrangements are binding in honour only and not intended to be legally binding**

## VVMs Recruiting, Selecting and Inducting other volunteers

Osterley have a Volunteer Coordinator who helps out with the recruitment by building links with local volunteer centres. She also takes opportunities to talk about volunteering and hand out leaflets to members of the public at our large events. This one to one contact with the public is great for letting local people know about volunteering, who may not have thought about it before. Another valuable role for the coordinator is doing follow-up calls with new volunteers a few months after starting, to get their feedback about how it’s going. This can vary from their experience about the process of starting, to whether they are enjoying the role they are doing – all of which is fed back to the Volunteer Forum and is valuable for making improvements to the process. A key learning point from this role is the value of having more than one person involved in this (as it was originally); to offer additional skills as well as the opportunity for the coordinator to bat ideas off each other. This will be an aim the near future. [Oct09]

Ham have recently set up a Volunteering Programme Team in order to take on the recruitment, induction, training and forward planning of volunteering at the property. The roles include a Volunteering Programme Manager, Volunteer Recruiter, Induction and Development Volunteer and a Volunteer Administrator. This team continues to find their feet and are currently planning how they can improve processes and give the property team a clear structure for the next few years. A structure like this requires the support and understanding of the staff team, as well as recognising that it takes considerable time develop. [Oct09]

Examples outside of NT

Samaritans are entirely organised by volunteers.

The main volunteer manager at the British Museum is a volunteer, however she recognises herself that the museum would need to pay someone to replace her post.

At both the Imperial War Museum and Kew Bridge Steam Museum, there are volunteers who assist the (staff) volunteer managers

## Voluntary Volunteer Management

### ACTIVITY

Look at your journey map again – where can you see more opportunities for involving volunteers? For delegating to volunteers?

Add new colour Post Its onto the ‘map’.

Some properties have Volunteer Recruiters; some have Induction and Development Volunteers.

* Could they design posters and distribute them?
* Could some do recruitment talks?
* Could one person or a small team take full responsibility for the recruitment stage?
  + Or the selection stage?
  + Or the induction stage?
* And how can you incorporate succession planning for these volunteers?
* How to bring on / train new vols to take over?

Start to add onto the map or make your own notes - what might be appropriate VVM roles to develop for your property / place of work?

## Other NT training & Training & Development resources that may supplement this course

Ontrack training:

Personal Development - Selection Interviewing

Awareness module - Disability Wise

Awareness module – Equality and Diversity

Training Directory courses:

CLV – Disability Wise Training for staff and volunteers

CLV – Equality and Diversity for Managers

Supporter Services – Focus on Customers - Diversity Matters

Find a good coach / mentor – someone working for the Trust who has been through the Coaching and Mentoring programme

## Books that may supplement this course:

*Recruiting Volunteers* by Fraser Dyer and Ursula Jost

*The Induction Toolkit* by Lesley Myland – has lots of good ideas for training Induction Trainers and training Induction Buddies; has targeted needs checklists for young people, ethnic minorities, people with disabilities; has ideas for induction methods [available through the NT T&D Resource Library – ref. no. MD88]

*Focus on Equality and Diversity* – NT publication available on the intranet or printed copies available

*Recruiting, Retaining and Developing Disabled Volunteers - Guidance for Volunteer Opportunity Providers* by Disability Rights Commission (now absorbed by the Equality and Human Rights Commission) [available from NT’s Head of Access for All]

## This module could contribute to NOS Performance Criteria:

B2.1 Promote volunteering to potential volunteers

C1 Advertise for volunteers

C2 & C3 Recruit and place volunteers

C4 & C5 Induct volunteers & Manage the induction of volunteers

## Action Planning Sheet

**BE REALISTIC!!**

|  |  |  |  |  |  |
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| Priority (no. 1 (high) – 4 (low)) | Action Specific, measurable & aligned with your property management plan [=KPI] | Timescale By when? | Information required | Required resources, including time & costs | Whose co-operation & support do I need? |
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